

## 5-Year Checklist for Senior Center Certification Standards

SCOPE Question (examples of valid documentation)	Year Since Certification				
	1	2	3	4	5
Center is addressing all recommendations made in the most recent DAAS certification letter.					
<b>Section 1: Information &amp; Referral, Assistance, Publicity and Marketing</b>					
Q1a. 85% of services are provided. (examples of publicity for these services)					
Q1b. I&R or better available for all services listed except those not provided locally. (may be documented with same information as Q3, but documentation should include information on each service listed in the SCOPE tool )					
Q1c. Services a.-e. provided on site. (may be documented with Q1a)					
Q1d. <i>Excellence only:</i> The center informs people about services in Columns A and B. (may be documented with Q5)					
Q1e. <i>Excellence only:</i> The center is offering services on site each year from at least 3 of the 9 categories listed in the SCOPE scoring section for Excellence. (same documentation used for Q1a)					
Q2. Center regularly uses a case assistance tool. (examples with identifying personal data obscured)					
Q3. Center has an on-going method for providing I&R. (explain how it is provided and be prepared to show the database, directory, or other resource used for I&R)					
Q4. Center has an ongoing method for providing I&R for state or national services. (same type of documentation as Q3)					
Q5. Center has at least two of the marketing products listed in the SCOPE. (samples of each)					
Q6. Special marketing, ongoing or at least once a year, to required populations present in the area (5% or more). (There is no minimum percentage for people with disabilities.) Merit: low income, minority, and one other Excellence: all 5 groups [documentation: for each group, describe or include a sample of the marketing method(s) such as posting fliers, distributing newsletters, making presentations, etc., and list locations for each (such as churches, elderly housing, regional deaf and hard of hearing office, etc.) ]					
Q7. <i>Excellence only:</i> Training on aging issues for non-elderly audiences, averaging 2 per year. (dated fliers, advertisements, e-mail notices, Memorandums of Understanding for university or college classes, letter from a school verifying placement of student intern at the center, etc.)					
Q8. <i>Excellence only:</i> At least one other publicity or marketing activity is occurring. Could include presentations, booths at local					

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fairs, etc. (meeting agenda including the presentation, fair publicity including mention of senior center booth, etc.)					
<b>Section 2: Activities, Volunteer Opportunities, Advocacy, and Transportation</b>					
Q9. Regularly scheduled activities <i>For Merit: 9</i> <i>For Excellence: 15</i> (over a 3-month period in the last of the 5 years. For centers certified at merit wishing to be considered for excellence, the increase to 15 must be documented for 1 year preceding the site visit. Published calendars are good documentation.)					
Q10. Special activities <i>For Merit: Averaging 6 per year</i> <i>For Excellence: Averaging 10 per year</i> (For centers certified at merit wishing to be considered for excellence, the increase to 10 must be documented for 1 year preceding the site visit.)					
Q11. Drop-in activities (Document 3 each year that together are used by at least 10% of the average daily attendance. May be documented with sign-in sheets for one week.)					
9, 10, and 11. Documented activities in each category (regular, special, drop-in) should include at least 2 for each of 4 categories: Social, Educational, HPDP, Arts.					
Q12. The question should review and explain how activities are planned for diverse audiences.					
Q13. The center should offer at least one volunteer activity that benefits the center and at least one that benefits the community. (may be documented with fliers, newspaper ads or other publicity for these opportunities, by volunteer registration forms with a description of the activity, by letters from volunteers themselves that describe what they did or by the center's volunteer plan)					
Q14. A volunteer recognition activity for each year. (events may be documented in Q9; other forms of recognition may be documented in other ways, such as annual thank-you note or other token and list of recipients)					
Q15. <i>For Excellence:</i> Centers must document a written plan for the use of volunteers that includes a description of the opportunities; procedure for recruitment, orientation, training, and retention; method by which volunteers were recruited; and method by which volunteers were informed of activities outside the center. (the written plan for each of the 4 areas; examples of publicity announcing the need for volunteers at the center and in the community)					
Q16. Centers must document an average of 3 advocacy activities per year. (varies by type of activity)					

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Q17. Centers must document the availability of transportation to the center for participants who do not drive.					
Q18. <i>For Excellence:</i> Centers must document collaboration with CTIP or the local transportation planning group. (membership roster, sample meeting minutes)					
<b>Section 3: Planning, Evaluation and Input from Older Adults</b>					
Q19. The center ensures that employees, volunteers, and participants know the mission statement. (mission statement posted in center, present on regular marketing materials, in orientation materials for staff and volunteers)					
Q20. Sixty percent of the center's advisory body meets the center's definition of older adult. (roster of advisory body members with indication of their age)					
Q21a. New advisory group members are oriented within 2 months of beginning service. (dated agenda from orientation meeting, sign-in sheet or statement signed and dated by group members)					
Q21b. Orientation materials cover the required areas. (orientation packet; dated agendas from orientation meetings)					
Q22. Input from older adults <i>For Merit:</i> 1 annual satisfaction measure for participants; 1 method of getting input from nonparticipants at a minimum of every 3 years. <i>For Excellence:</i> 1 annual satisfaction measure for participants 1 other annual method of gaining information from participants 1 annual method of gaining information from nonparticipants For centers certified at merit wishing to qualify at excellence, the standard for excellence must be met for the final year of the certification period.					
Q23. <i>For Excellence:</i> 1 annual method of gathering information for planning other than input from older adults. For centers certified at merit wishing to qualify at excellence, the standard for excellence must be met for the final 1 year of the certification period.					
Q24. <i>For Excellence:</i> Centers must demonstrate a clear planning procedure that includes short- and long-term goals. Goals should be specific, measurable, attainable, realistic, and time-limited.					
<b>Section 4: Staff</b>					
Q26. Personnel receive or have the opportunity to review a written statement of personnel policy. (copy of the policy, signed acknowledgment that new hires have reviewed it)					
Q27. There is a paid, full-time director for the whole recertification period.					
Q28a. There is a training record for each person employed during the certification period, whether or not he/she is employed at the time of the recertification visit.					

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Q28b. Each employee is receiving 15 hours of training annually. (prorated by length of service and part-time status)					
Q28c. During the certification period, each employee will have training in all three topic areas: aging, safety, job-specific.					
Q28d. A director hired in the past 3 years (for initial certification) or 5 years (for recertification) participated in at least one module of the Ann Johnson Institute or has it in his/her training plan.					
Q29. <i>For Excellence</i> : Each employee has a written training plan for each year of certification and one for the coming year—6 plans. (copy of training plans for years indicated above)					
<b>Section 5: Other Operational Issues</b>					
Q30. Collaboration with other organizations <i>For Merit</i> : Documented collaboration with 3 organizations per year. (dated fliers for events with sponsors mentioned) <i>For Excellence</i> : Collaboration documented with memoranda of understanding (MOU) or agreement: 3 organizations per year. Ongoing collaboration with an organization over the 5-year period is o.k., but the MOUs should include the timeframe for which they are in effect.					
Q31. Center has been open 40 hrs/week during the recertification period.					
Q32. <i>For Excellence</i> : Center has offered extended hours throughout the recertification period or can document why not.					
Q33. The center has documented compliance with relevant local codes. (inspection certificates)					
Q34. The center has a plan for regular upkeep.					
Q35. The center is accessible to people with disabilities.					
Q36 and Q37. The center meets the square footage requirements, overall and for participants' use.					
Q38 and 39. The center has a sign or has requested directional signs on local streets, has posted regular and extended hours that are visible from outside the entrance.					
Q40. The center has engaged in 2 fundraising activities each year.					
Q 41. through 43. <i>For Excellence</i> . The center has produced an annual financial report, advertised it, and made it available to participants.(show where its availability is publicized)					
<b>Section 6: The Extra Mile (For Excellence Only)</b>					
Q44. and Q45. The center can document at least one innovative project or mentorship it has provided during the 5-year period.					
Q 46. The answer should describe clearly the value of the center to the community and why it should be considered a center of excellence.					