

Senior Center Operations and Program Evaluation (7-09)

5 YEAR

Name of Center: Date opened full time:	Name of Director:	Date Tool Submitted: Time frame covered in the SCOPE: from (date) _____ to (date) _____
Town:	County:	AAA Region:
<input type="checkbox"/> Initial Certification <input type="checkbox"/> Recertification		What is your center's definition of senior? <input type="checkbox"/> 60+ <input type="checkbox"/> 55+ <input type="checkbox"/> Other _____
What is your average number of participants per day, including satellites? _____		Name of governing body/umbrella agency (if applicable)?
(Initial certification only): Has someone currently on your staff taken the senior center certification training within the last three years? If so, who? On what date?		
I have reviewed the completed version of this tool according to the gray scoring sections and the corresponding documentation. I have also reviewed the "Instructions for Completing the SCOPE and the Documentation."		
Senior Center Director		AAA Representative

If your center has satellites, please list them here and complete the table. (See "Policies and Procedures for Senior Center Certification" for the definition of a satellite center.)

Name of Satellite	Hours Open (days of the week and hours per day)	How many staff members?	How many FTEs*?	Purpose of the satellite (e.g., to serve an isolated community, a special population, or some other reason; please give a brief rationale)

*FTE (Full-time equivalent). For example, one full-time worker is 1 FTE (37.5 hrs/wk minimum). Two 3/4 time workers make 1.5 FTE (.75 FTE + .75 FTE).

For Centers Applying for Recertification

If the center is applying for recertification, please list any recommendations that were included in the letter accompanying the certificate, and indicate what the center has done to address each one (*required* for recertification).

Recommendation	How we addressed it

1. Information & Referral, Assistance, Publicity, and Marketing

A. Services

1. All centers should provide some type of access to the following services unless they are not available in your area. For each service area listed here, check the most appropriate box. For those items checked in Columns A or B please describe *briefly* in Column E how each is provided and how older adults are informed of their availability. Although the expectation is that services have been on-going throughout the certification or recertification period, it is not necessary to document every month or year the service was offered. Services for which participants can enroll at the center or those sponsored or co-sponsored by the center in a different location may be listed in Column A under most circumstances. Please see “Instructions for Completing the SCOPE and Documentation” for more information and examples.

	A	B	C	D	E
Services	Center, parent org., or other org. provides on site (see exceptions in scoring and Instructions)	Center provides assistance when needed (i.e., screening, help with contact, follow-up)	Center provides I&R only	Not available in area	For all services listed in columns A or B describe how participants are informed about them, when they are available, and how to access them. Use this space to add any other clarifying information as needed. Please be brief. If you are publicizing many services in the same way, please explain for the first one that appears in this list and put a note to see that explanation in this space for the others.
<i>Required of all centers (Column A)</i>					
a. Health screenings					
b. Fitness and health promotion					
c. Insurance counseling					
d. Tax preparation/counseling					
e. Legal services					
<i>Required for Excellence (some are either/or; see scoring section, p. 8, for explanation)</i>					
f. General transportation					
g. Medical transportation					

	A	B	C	D	E
Services	Center, parent org., or other org. provides on site (see exceptions in scoring and Instructions	Center provides assistance when needed (i.e., screening, help with contact, follow-up)	Center provides I&R only	Not available in area	For all services listed in columns A or B describe how participants are informed about them, when they are available, and how to access them. Use this space to add any other clarifying information as needed. <i>Please be brief. If you are publicizing many services in the same way, please explain for the first one that appears in this list and put a note to see that explanation in this space for the others.</i>
h. Support groups or classes for caregivers or others facing challenges					
i. Housing assistance					
j. Reverse mortgage counseling					
k. Home repair/modification					
l. Home health services					
m. In-home aide services					
n. Medicaid benefits					
o. Medicare Parts A & B					
p. Medicare Part D					
q. Social Security benefits					
r. Job training					
s. Job placement					
<i>Other services</i>					
t. Congregate meals					
u. Home-delivered meals					

	A	B	C	D	E
Services	Center, parent org., or other org. provides on site (see exceptions in scoring and Instructions)	Center provides assistance when needed (i.e., screening, help with contact, follow-up)	Center provides I&R only	Not available in area	For all services listed in columns A or B describe how participants are informed about them, when they are available, and how to access them. Use this space to add any other clarifying information as needed. <i>Please be brief. If you are publicizing many services in the same way, please explain for the first one that appears in this list and put a note to see that explanation in this space for the others.</i>
v. Adult day care/day health					
w. Mental health					
x. Disaster preparedness, planning or response					
y. Durable medical equipment/assistive devices					
z. Hospice care					
aa. Long-term care facilities					
bb. Rehabilitation services					
cc. Report suspected abuse, neglect, or exploitation					
dd. Respite					
ee. Senior Games					
ff. Telephone reassurance					
gg. Energy assistance					
hh. Food distribution (e.g., commodities)					
Total in each column					

Total Services in Columns A and B: _____ *If all the services are available to people living in your area, your total should be 29 (85%) or higher.*

B. Information and Referral/Case Assistance

2. What tool(s)—software packages or pen and paper instruments—do you use to document and support the case assistance you provide? (e.g., IRis Software; on-line tools; log sheets. Tool should include client’s name, contact information, problem, action, and follow-up.)

3. How is I&R information maintained?

- Computer database searchable by participant or staff members/volunteers
- Computer database searchable by I&R staff members/volunteers but not by participants
- Notebooks or files available for participants or staff members/volunteers
- Notebooks or files available for staff members/volunteers but not to participants
- Other. Specify _____

4. Do you keep any referral information about regional or national services especially those for which there is no equivalent local service?

- Yes
- No

If yes, please briefly describe the services and the way you keep this information. (For example, if there is no local program for people who need durable medical or adaptive equipment, you might keep a brochure in a notebook or have a website bookmarked on your computer with information where to find these items.)

C. Publicity for the Center and Its Services and Activities

5. Which of these things do you use regularly to publicize the center? Where applicable, describe how, when, and where you have used them in the past 1 year (initial certification) or 5 years (recertification). Please include samples of each one you check in your documentation.

Publicity Type	How, When, and Where We Have Used It
<input type="checkbox"/> Brochure	

<input type="checkbox"/> Calendar of events that is circulated rather than only posted in the center. <i>If the calendar is distributed only in the newsletter, this should count as only one product/activity.</i>	
<input type="checkbox"/> Newsletter	
<input type="checkbox"/> Advertisements/notices in local or regional papers (including supplements)	
<input type="checkbox"/> Stories in local or regional papers	
<input type="checkbox"/> Spots or interviews on local TV or radio	
<input type="checkbox"/> Web page	
<input type="checkbox"/> Other (please specify)	

D. Marketing to Special Populations and the Community

6. Please indicate how you market the center to people in the following groups. This should describe ways in which you target these special population groups to market the center as a whole—*not special activities planned for a particular group*. Except for people with disabilities, you are not required to market the center to groups that represent 5% or less of the older adults in the area served by your center.

Older Adults	Targeted Marketing Efforts	None or few in community
<input type="checkbox"/> with low income		
<input type="checkbox"/> in rural areas		
<input type="checkbox"/> from ethnic minority groups (which ones?)		
<input type="checkbox"/> with physical or cognitive impairments (which ones?)		
<input type="checkbox"/> whose primary language is not English (which ones?)		
<i>EXAMPLE: Older people from</i>		

Older Adults	Targeted Marketing Efforts	None or few in community
<i>ethnic minority groups</i> <i>1. African Americans</i>	<i>We distributed senior center newsletters and calendars each month at all nine of the African American churches in the community.</i>	

7. **(Required for Excellence Only.)** Please list any training within the past 1 year (initial) or 5 years (recertification) designed to educate some portion of the nonelderly community about the needs, interests, or contributions of older adults. This includes, but is not limited to, *aging-related training* to professionals in other agencies (excluding your own), service providers, caregivers, or other nonelderly groups. Speaking to public groups about the center and what the center does should be listed in Question 6 (marketing). It does not count as training for this question. Training that is part of the center’s programming for older adults does not count for this question, even if nonelderly audiences are invited.

Type of Training/ Your Center’s Role	When (mm/yy)	To What Group? (other than seniors)	How did you publicize the activity to that group?
<i>EXAMPLE: Getting ready for retirement (We provided space, publicity, and volunteers to work the registration table. The trainers came from Cooperative Extension.)</i>	<i>1/07</i>	<i>Baby Boomers</i>	<i>We worked through the human resources department of the three largest employers in town to encourage participation by people who will retire in the next 15 years. Notices on the bulletin boards of the local home improvement stores and farmers’ market.</i>

8. **(For Excellence Only.)** Please list and describe briefly any publicity and marketing activities not covered in questions 5 through 7 (for example, having a booth at the county fair, visiting in neighborhoods, speaking to church or civic groups, website).

Scoring for Section 1	For Merit	For Excellence	Comments
Question 1			
<p>These three things are required for both Merit and Excellence: Information and Referral or better (Columns A, B and C) must be available for all services listed except those not available in the area.</p>			
<p>Assistance or better (Columns A and B) must be available for 85% of the services available to people in the center's area. If all services are available, 85% is 29 services.</p>			
<p>These five services must be provided on site (column A must be checked)*.</p> <ul style="list-style-type: none"> a. Health screenings b. Fitness and health promotion c. Insurance counseling d. Tax preparation/counseling e. Legal services <p>*In some cases in which it is not feasible for the service to be provided on site, the team may accept a combination of case assistance and making transportation to the site of the service available, if needed. This is most often true of legal services and tax preparation. Centers in this position should consult with the DAAS staff.</p> <p>Remember that in most circumstances services for which participants can enroll at the center, or those provided by the center in other locations can be listed in column A.</p>			
<p>(For Excellence Only) Is it clear how participants are informed about services in columns A and B?</p>			
<p>(For Excellence Only) Centers must offer one or more services (or enrollment for services) on site (column A) from at least 3 of the following categories:</p> <ul style="list-style-type: none"> <input type="checkbox"/> General transportation or Medical transportation (f. or g.) <input type="checkbox"/> Support groups for caregivers or others facing challenges (h.) <input type="checkbox"/> Housing assistance or Reverse mortgage counseling or Home repair 			

Scoring for Section 1	For Merit	For Excellence	Comments
(i., j., or k.) <input type="checkbox"/> Home health or In-home aide services (l. or m.) <input type="checkbox"/> Medicaid benefits (n.) <input type="checkbox"/> Medicare benefits, Parts A and B (o.) <input type="checkbox"/> Medicare benefits, Part D (p.) <input type="checkbox"/> Social Security benefits (q.) <input type="checkbox"/> Job training or Job placement (r. or s.)			
Question 2			
The center should be using some sort of case assistance tool for services that includes client's name, contact information, problem, action, and follow-up.			
Question 3			
The center should have an organized system for maintaining I&R information.			
Question 4			
There should be a way of providing information and referral for regional, state, and/or national resources, particularly if there are missing services in Question 1.			
Question 5			
Centers should have at least two of these marketing products/activities: <input type="checkbox"/> a brochure <input type="checkbox"/> a calendar of events that is circulated rather than only posted in the center. <i>If the calendar is distributed only in the newsletter, this should count as only one product/activity.</i> <input type="checkbox"/> a newsletter that is available in some way besides paid subscriptions <input type="checkbox"/> advertisements/notices in local or regional papers (including supplements) <input type="checkbox"/> stories in local or regional papers <input type="checkbox"/> spots or interviews on local TV or radio <input type="checkbox"/> a Web page			

Scoring for Section 1	For Merit	For Excellence	Comments
Question 6			
<p>To which of the following categories of older adults has the center has made special efforts to market itself?</p> <p><input type="checkbox"/> with low income <input type="checkbox"/> from ethnic minority groups (which ones?) <input type="checkbox"/> in rural areas <input type="checkbox"/> with physical or cognitive impairments (which ones?) <input type="checkbox"/> whose primary language is not English (which ones?)</p> <p>All centers must make special efforts to reach people with low income and minority elders.</p> <p>For Merit, centers must make special efforts to reach low-income elders, minority elders (unless they represent less than 5% of older adults in the community), and one other group listed above.</p> <p>For Excellence, centers must make special efforts to reach low-income elders, minority elders (unless they represent less than 5% of older adults in the community) and all three remaining groups listed above (unless the center is in an urban area and unless those whose primary language isn't English represent less than 5% of older adults in the community).</p> <p>Ongoing efforts are preferable, but single efforts must occur at least once a year.</p>			
Question 7 (For Excellence Only)			
<p>For initial certification, there should be 2 instances in the previous 12 months of training on aging issues for a nonelderly audience.</p> <p>For recertification, there should be 10 instances of training, 2 of which should have taken place in the preceding 12 months.</p>			
Question 8 (For Excellence Only)			
<p>Some additional publicity or marketing activity should be described (not counting newspapers, newsletters, calendars, or brochures). If the targeting</p>			

Scoring for Section 1	For Merit	For Excellence	Comments
activities listed in Question 6 are extensive, this requirement may be waived.			
Please see the Site Visit Activities section following Section 6 at the back of this SCOPE tool for items to be checked on site.			

Section 1.	Commendations, Recommendations, and Suggestions
<input type="checkbox"/> Passes at the Level of Excellence	
<input type="checkbox"/> Passes at the Level of Merit	
<input type="checkbox"/> Fails	

12. **(For Excellence Only).** Describe how the activities and facilities described in Questions 9, 10, and 11 meet the needs of a diverse group of seniors (for example, both men and women, people of different ethnic groups, different educational levels, and different abilities). (The blank will expand to accommodate your answer.)

B. Opportunities for Volunteers

13. How many volunteers age 60 and older are currently working at the center or in center activities (such as delivering meals or as senior companions)?
 _____ total volunteers

For each of the activities below, please check whether or not you have volunteers age 60 and older serving in this capacity. For Merit and Excellence, volunteers must be engaged in at least one activity from each column.

Volunteering at the center	Yes	No	Volunteering in the community	Yes	No
a. Office work (e.g., typing/computer use, filing, keeping books)			i. Delivering home-delivered meals		
b. Planning/coordinating special events			j. Friendly visiting		
c. Reception/welcome desk			k. Providing respite/sitter services		
d. Serving congregate meals			l. Telephone reassurance		
e. Setting up rooms/equipment for classes and events			m. Transportation		
f. Speaking to groups about the center (marketing)			Other (specify):		
g. Teaching classes					
h. Working on the newsletter					
Other (specify):					

14. Please list and describe how you recognized all the center’s volunteers in the past 1 year (initial) or 5 years (recertification). (These could include events, sending them thank-you cards or some other token, or acknowledging them in the newspaper, for example. Indicate how many were honored.)

Activity	Date	Comments/Description	How many?
<i>Example: Volunteer Dinner</i>	<i>April 1, 2007</i>	<i>Annual volunteer recognition held at Southstreet Station with entertainment and</i>	<i>200</i>

		<i>dinner and awards recognizing outstanding contributions.</i>	
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15. **For Excellence Only.** Do you have a written volunteer plan or other document(s) that cover the following material? (See the “Instructions for Completing the SCOPE and Documentation”).

	Yes	No
a. needs of the center or tasks for which volunteers are desired, and the number of volunteers needed for each		
b. procedure for recruiting, orienting, training, and keeping them involved		
c. a way of informing people in the community of volunteer opportunities at the center		
d. a way to notify people in the center of volunteer opportunities in the community		

C. Advocacy

16. List instances in the past 1 year (initial) or 5 years (recertification) in which the center has advocated for rights for older adults (individually or as a group) and/or facilitated individual self-advocacy or self-advocacy by groups of older adults. Add boxes (electronic) or use additional sheets (hard copy) as needed. There is a definition of advocacy in the “Instructions for Completing the SCOPE and Documentation.”

Date	Name and description of advocacy activity and how the senior center was involved	Who was involved? (e.g., older adults, center manager, etc.)	Purpose	What group or individual benefited?
<i>Example: 2/2007</i>	<i>Meet your legislators day at the center. Center coordinated the event, provided space, publicized the activity</i>	<i>Older adults, center manager, other center staff</i>	<i>To give individuals and groups of elders a chance to ask questions and express their concerns and interests to their representatives.</i>	<i>The seniors in the county</i>

Date	Name and description of advocacy activity and how the senior center was involved	Who was involved? (e.g., older adults, center manager, etc.)	Purpose	What group or individual benefited?
	<i>and facilitated the meeting.</i>			

D. Transportation to the Center

17. Please check all the forms of transportation used to **bring participants to your center** for activities, and provide a brief description of each (e.g., cost to consumers, who provides it, number of vans, number of days/week or number of trips/day). **This does not include transportation for special trips.**

Type of Service	Description
<input type="checkbox"/> Van service provided by the center	
<input type="checkbox"/> Shared van service/county van	
<input type="checkbox"/> Public transit stop at/near center	
<input type="checkbox"/> Car pool sign-up at center	
<input type="checkbox"/> Other (describe all)	

18. **(For Excellence Only.)** Describe how your center is working with the County Transportation Improvement Plan (CTIP), the Human Services Transit System, or any other efforts to improve transportation for older adults in your county.

Scoring for Section 2	For Merit	For Excellence	Comments
Question 9			
<p>For Merit, centers should have at least 9 regular group activities.</p> <p>For Excellence, centers should have at least 15 group activities.</p> <p>Activities at satellite centers or those regularly scheduled at locations away from the center may be counted.</p>			
Question 10			
<p>For Merit, centers should offer at least 6 special events annually. For recertification there should be 30 total events, at least 5 of which have taken place in the past year.</p> <p>For Excellence, centers should offer at least 10 special events annually. For recertification there should be a total of 50 events, at least 8 of which took place in the past year.</p> <p>Activities at satellite centers or at locations away from the center may be counted.</p>			
Question 11			
<p>For Merit and Excellence, centers should offer at least 3 drop-in activities that together are used by 10% or more of the average number of daily participants.</p> <p>Activities at satellite centers or at locations away from the center may be counted.</p>			
Questions 9, 10, and 11			
<p>For Merit and Excellence, centers should offer at least two activities in each of the four activity types:</p> <ul style="list-style-type: none"> a. Recreation/social stimulation (Social) b. Education/intellectual stimulation (Educ.) 			

Scoring for Section 2	For Merit	For Excellence	Comments
c. Health promotion/wellness (HP/DP) d. Culture/creativity (Arts)			
Question 12			
For Merit and Excellence, the description should illustrate how activities and facilities are planned meet the needs of a diverse group of seniors.			
Question 13			
For Merit and Excellence, volunteers should be engaged in at least one activity that benefits the center (a. through h. and “Other”) and one that benefits the community (i. through m. and “Other”).			
Question 14			
For Merit and Excellence, all the center’s volunteers should be recognized in some way at least once each year. (See the “Instructions for Completing the SCOPE and Documentation” for more detail.)			
Question 15 (For Excellence Only)			
<p>The center should have planning documents that cover all four things:</p> <ul style="list-style-type: none"> <input type="checkbox"/> a. a listing or description of the volunteer opportunities at the center and how many people are needed <input type="checkbox"/> b. a procedure for recruitment, orientation, training, and retention <input type="checkbox"/> c. how volunteers are solicited for the center <input type="checkbox"/> d. how center participants are made aware of volunteer opportunities in the community. 			
Question 16			
For initial certification, for Merit and Excellence, centers must engage in at least 3 advocacy activities in the 12 months preceding the date of submission of			

Scoring for Section 2	For Merit	For Excellence	Comments
<p>the SCOPE.</p> <p>For recertification, for Merit and Excellence, there should be at least 15 advocacy activities in the past 5 years, at least 3 of which have occurred in the 12 months preceding the date of submission of the SCOPE.</p>			
Question 17			
<p>At least 1 means of transportation to the center must be available to people who do not drive their own cars.</p>			
Question 18 (For Excellence Only)			
<p>The center (or its parent organization) should be working with the CTIP, Human Services Transit system or otherwise participating in planning for transportation for seniors in their area.</p>			
<p>Please see the Site Visit Activities section following Section 6 at the back of this SCOPE tool for items to be checked on site.</p>			

Section 2.	Commendations, Recommendations, and Suggestions
<input type="checkbox"/> Passes at the Level of Excellence	
<input type="checkbox"/> Passes at the Level of Merit	
<input type="checkbox"/> Fails	

3. Planning, Evaluation, and Input from Older Adults

A. Governance

19. *Please attach a copy of your mission statement or write it in the box below. Also* briefly describe below how you assure that employees, volunteers, and center participants know the mission statement.

Consult the “Instructions for Completing the SCOPE and Documentation” for clarification about senior center advisory bodies. In the questions that follow, such bodies will be called “planning/advisory bodies,” but yours may have a different name. If your parent organization has a board over which your center has no control, do *not* include its members here.

20. Please list the members of your senior center advisory body in the grid below. Mark which ones meet your center’s definition of “older adult” (55+, 60+, other, as you have indicated on the first page of this tool), when they began their term of service, and when they received orientation.

	Meets center definition of older adult?		Date member began term of service	Date of first orientation
	Yes	No		
<i>Name of group:</i>				
	<i>Reminder to Site Visit Team: This center’s definition of “older adult” is</i> <input type="checkbox"/> 55+ <input type="checkbox"/> 60+ <input type="checkbox"/> Other _____			
Member’s name			mm/yy	mm/yy
			__/__	__/__
			__/__	__/__
			__/__	__/__
			__/__	__/__
			__/__	__/__
			__/__	__/__
			__/__	__/__
			__/__	__/__

	Meets center definition of older adult? <i>Reminder to Site Visit Team: This center's definition of "older adult" is</i> <input type="checkbox"/> 55+ <input type="checkbox"/> 60+ <input type="checkbox"/> Other ____		Date member began term of service	Date of first orientation
<i>Name of group:</i>				
Member's name	Yes	No	mm/yy	mm/yy
			__/__	__/__
			__/__	__/__
			__/__	__/__
			__/__	__/__
			__/__	__/__

21. Centers must offer at least two hours of orientation to advisory committee members *within two months of beginning service*. This orientation can be tailored to the needs and functions of this group, but topics must include:

- the philosophy of the center (e.g., discussion of the mission and purpose of the center)
- legal issues (e.g., liability, confidentiality)
- policy (e.g., by-laws for the board, center's handbook)
- the political environment in which the center operates (e.g., how the center as an organization fits in the community, relationships with other governing boards, chain of command for decision making)
- financial environment in which it operates (e.g., authorization, funding)

Please have available for the site team a copy of the orientation agenda materials such as handouts, PowerPoint presentations, and/or a detailed description of the material covered in the orientation.

B. Input from Older Adults

22. Indicate the method(s) you have used to learn the *service and activities needs of older adults (participants and non-participants) and to assess the satisfaction level of participants*. See “Instructions for Completing the SCOPE and Documentation” for further information on how to complete this section and a sample survey questionnaire.

Activity	For Participants	For Non-participants	Date(s)	Method (number of respondents, procedures followed)	How often?	What did you learn? How do you use the information in your planning?
[] Annual survey or other measure of satisfaction with the senior center (participants only)						
[] Other written survey						
[] Telephone survey						
[] Public meeting/hearing						
[] Focus group						
[] Suggestion box (See guidelines in “Instructions for Completing the SCOPE and Documentation”)						
[] Other						

Activity	For Participants	For Non-participants	Date(s)	Method (number of respondents, procedures followed)	How often?	What did you learn? How do you use the information in your planning?
EXAMPLES:						
<i>[X] Annual Satisfaction Survey (Participants only)</i>	X		<i>Feb. 14, 2007</i>	<i>Every year, we distribute written questionnaires to all participants who come to our Valentine's Day Lunch, usually about 100 people. We ask them to tell us how they feel the center is doing at providing activities and services, what they like best, and what we could change about services, activities, and the center itself.</i>	<i>Annual</i>	<i>Of the 100 people who attended the lunch, 80 completed all or part of the questionnaire. Almost all rated the center very good or excellent in all categories. Several suggested adding another Tai Chi class in the morning. Several people said they had difficulty opening the front doors because the doors are so heavy. We used the information to ask the county commissioners to allocate additional money for automatic doors.</i>
EXAMPLE: <i>[X]Telephone Survey(s)</i>	X	X	<i>June-August 2006</i>	<i>A list of all the residents 60+ was obtained at City Hall from voter registration rolls. We consulted Prof. Jones at the community college, and she helped us draw a sample of 500 people to call and helped us develop a questionnaire. Trained students in Prof. J's class called the people in our sample.</i>	<i>Once a year</i>	<i>About half of the people we called agreed to answer the questionnaire. Of those, about 20% already attend the center regularly, another 10% have visited once, and the rest have not visited. The people who already attend were pleased with what the center offered. The majority of those who did not come to the center said that transportation was an issue, while others said they didn't know what activities and services we offer. We will use this information to try to enhance transportation services, and we are planning better ways to market the center in the local media.</i>

23. **(For Excellence Only)** Describe any methods **other than input from older adults** that you use to make decisions about planning for your center (such as input from other agencies, your staff or parent agency, or by reviewing your administrative data). (Attach additional sheets as necessary.)

C. Planning

24. **(For Excellence Only)** Describe the planning process. For example, who develops your plans; who approves them; and what information, materials, and sources of ideas are used to develop them?

25. **(For Excellence Only)** List the principal short- and long-term goals toward which you are currently working.

Goal: What will change?	On what basis was this goal selected?	How much change will you see? How will you measure it?	Who will work on this goal?	When did you begin work? When will you evaluate it?
<i>Example: More African American seniors will participate in senior center</i>	<i>20% of the seniors in the area around the center are African</i>	<i>We would like at least 15% of participants to be African American. We will select a day</i>	<i>Center volunteers will collect the data and tabulate it, and the director</i>	<i>Began 6/08 Evaluate 6/09</i>

Goal: What will change?	On what basis was this goal selected?	How much change will you see? How will you measure it?	Who will work on this goal?	When did you begin work? When will you evaluate it?
<i>activities</i>	<i>American yet only 12% of our participants are.</i>	<i>at random for each month for the next year, count participants in our programs and activities, and note their race and gender.</i>	<i>will review it.</i>	

Scoring for Section 3	For Merit	For Excellence	Comments
Question 19			
For Merit and Excellence, is there a mechanism for ensuring that employees, volunteers, and participants know the center's mission?			
Question 20			
For Merit and Excellence, do at least 60% of the advisory body members meet the definition for older adult?			
Question 21			
For Merit and Excellence, have all of the advisory body members been oriented within two months of beginning service.			
For Merit and Excellence, do the orientation materials cover the topics below? <input type="checkbox"/> the philosophy of the center (e.g., discussion of the mission and purpose of the center) <input type="checkbox"/> legal issues (e.g., liability, confidentiality) <input type="checkbox"/> policy (e.g., by-laws for the board, center's handbook) <input type="checkbox"/> the political environment in which the center operates (e.g., how the center as an organization fits in the community, relationships with other governing boards, chain of command for decision making) <input type="checkbox"/> financial environment in which it operates (e.g., authorization, funding)			

Scoring for Section 3	For Merit	For Excellence	Comments
Does the agenda for the orientation seem sufficient to cover the materials?			
Question 22			
<p><i>For initial certification:</i></p> <p>For <i>Merit</i>, centers must have</p> <ul style="list-style-type: none"> <input type="checkbox"/> One annual measure of participants' satisfaction (this can be a written survey, telephone survey, or focus group) <input type="checkbox"/> One source of input during the past 3 years* from older adults who do not participate at the center <p>* with exception of 5 year planning cycle by parent organization</p>			
<p>For <i>Excellence</i>, centers must have</p> <ul style="list-style-type: none"> <input type="checkbox"/> One annual measure of participants' satisfaction (written survey, telephone survey, or focus group) <input type="checkbox"/> One other annual method of getting input from participants. <input type="checkbox"/> One annual source of input during the past year from older adults who do not participate at the center. 			

For recertification:

For *Merit*, centers must have

- One annual measure of participants' satisfaction Year 1
 Year 2
 Year 3
 Year 4
 Year 5

One method of gaining information from nonparticipants at least every 3 years*(this means that the center will need to conduct a survey or use another method only once in some 5 yr. recertification periods, but will have to do so twice in others.) Centers should provide the date of the most recent collection in the *previous* certification period

Date of last survey in previous certification period: _____

Years in which efforts are needed: _____, _____

Years in which efforts were conducted: _____, _____

(5 measures for participants and 1-2 measures for nonparticipants.)

For *Excellence*, centers must have

- One annual measure of participants' satisfaction Year 1
 Year 2
 Year 3
 Year 4
 Year 5

One other annual method of gaining information from participants Year 1
 Year 2
 Year 3
 Year 4
 Year 5

One annual method of gaining information from nonparticipants Year 1
 Year 2

<input type="checkbox"/> Year 3 <input type="checkbox"/> Year 4 <input type="checkbox"/> Year 5 (10 total measures for participants and 5 total measures for nonparticipants.)			
Question 23 (For Excellence Only)			
Centers should have at least one other method of gaining information for planning other than feedback from any group of older adults. It may include analysis of program usage data (attendance sheets, waiting lists, etc.).			
Question 24 (For Excellence Only)			
Centers should have a clear procedure by which planning is done.			
Question 25 (For Excellence Only)			
Review the list of goals. Are they specific, measurable, attainable, realistic, and time-limited?			
Please see the Site Visit Activities section following Section 6 at the back of this SCOPE tool for items to be checked on site.			

Section 3	Commendations, Suggestions, Recommendations
<input type="checkbox"/> Passes at the Level of Excellence	
<input type="checkbox"/> Passes at the Level of Merit	
<input type="checkbox"/> Fails	

4. Staff

A. General Personnel Practices

26. Each center (or its parent organization) must have a written personnel policy that includes such information as leave, retirement, and benefits. Each employee must be provided with a copy (either as a separate document or as part of an employee handbook or guide) or otherwise have an opportunity to read and understand the policy. Briefly describe here how this is done at your center and how you document that it has been done. Include copies of orientation materials for new employees in your documentation.

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27. Has the center had a paid full-time director/manager for the full certification period? (This position must be full-time at the center being certified and may not be shared by two or more part-time employees) [] Yes [] No (If no, the center can't be certified at this time.)

B. Individual Training and Professional Development Planning

Please attach your center's organizational chart for the site team to use in reviewing this section. For guidelines about who "your employees" are, see the "Instructions for Completing the SCOPE and Documentation."

List all of your center's paid employees here, but do not include Title V or Senior Aide employees. For recertification, include people employed at the center in the past five years, whether or not they are current employees. Please see "Instructions for Completing the SCOPE and Documentation" for exemptions to the staff training requirements.

Name	Position
<i>Example: Jane Doe</i>	<i>Director</i>

Complete Question 28 for each paid employee who worked during this certification period, including those who are no longer employed. Either the employee or someone who handles personnel records should complete the information to reflect his/her individual training. Please list all the training (with month and year) taken in the past 12 months (initial certification) or 60 months (recertification). Fill in the type of training (i.e., in-service, workshop, conference, professional association meeting, college/university classes, etc.), training requirement met by the event (topic on aging, job-specific, safety), and the contact hours (hours actually in sessions/classes). Add rows electronically or use additional sheets as necessary. For recording training for recertification, please list events by year, from earliest to most recent.

Scoring for Section 4	For Merit	For Excellence	Comments
Question 26			
For Merit and Excellence, there should be a mechanism for ensuring that employees receive and have an opportunity to review a written personnel policy containing information on leave, benefits, retirement, and other issues relating to employment.			
Question 27			
Each center must have a paid full-time director/manager.			
Question 28			
<p>a. There should be a completed form for each paid employee. <i>(Please see "Instructions" for exemptions.)</i></p> <p>b. Full-time employees must have 15 hours of training each year. Required training hours may be prorated by length of service and/or part-time status.</p> <p>c. For initial certification or for employees with a year or less of service, training must fall into two of the three categories: Topics on Aging, Job-Specific, or Safety Issues. For recertification, employees must have training in all three categories.</p> <p>d. If the director was hired in the past 3 years (new certification) or 5 years (recertification), he or she must have participated in at least one module of the Ann Johnson Institute for Senior Center Management offered by the NC DAAS, and participation in future modules should appear in his or her training plan. If the center is unable to meet this requirement, please contact DAAS to discuss.</p>			
Question 29 (For Excellence Only)			
Each employee must have a written training plan for the previous 1 year (initial) or 5 years (recertification) and for the year to come. This plan should be signed by the employee and supervisor. <i>Note to site team members:</i> Take into account the planning schedule of the agency and the date of the visit. The aim of this requirement is that employees participate in an ongoing annual process of planning continuing professional training.			

Section 4.	Commendations, Suggestions, Recommendations:
<input type="checkbox"/> Passes at the Level of Excellence	
<input type="checkbox"/> Passes at the Level of Merit	

5. Other Operational Issues

30. Please describe your collaborations with other agencies and organizations in your community in the past year or five years. Evidence of collaboration should be shown for Merit. Formal documentation (Memoranda of Understanding, contracts, letters outlining the responsibilities of both parties) must be shown for Excellence.

Agency	Purpose/Nature of Collaboration	Time Period	Site Team Only (Scoring)

31. Please list your regularly scheduled days and hours. If you have a day or days with longer or shorter hours, list it on the second line. Count only the hours the center is open for center-sponsored activities, not those for events sponsored by other groups using the center's facilities. A minimum of 40 hours per week is required.

Days of the Week	Hours
<i>Example: Monday to Friday</i>	<i>9:00 am to 4:30 pm</i>
<i>Saturday</i>	<i>9:00 am to noon</i>

32. **(For Excellence Only)** If your hours do not include any evenings after 5:30 p.m., weekend hours, or other special extended hours, does your center have current plans for experimenting with center-sponsored activities (excluding special trips) during special extended hours?

<input type="checkbox"/> N/A. We already have some special extended hours for center-sponsored activities (excluding special trips).	<input type="checkbox"/> No (Please explain why not.)	<input type="checkbox"/> Yes (Please describe your plan here.)
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33. Please be prepared to show the site visitors posted indicators or documentation of your **current compliance** with all local codes such as current fire inspection, elevator inspection, and sanitation (if food is served).

34. Describe the plan for the upkeep of the center and grounds to assure safety and neat appearance.

35. Describe the features that make your center accessible to people with disabilities (e.g., ramps, parking, bathrooms, width of doorways and halls).

36. What is the size of the center? _____ square feet

37. How much space does the center use for programs and activities? Auxiliary facilities such as bathrooms and storage that are used primarily by center participants count, while such facilities that are used only or primarily by staff do not. Kitchens and nutrition facilities may be included if they are also used for center activities. Square footage may be counted where off-site programming is conducted. (For more information about square footage see “Instructions for Completing the SCOPE and Documentation.”)

_____ Square feet at the senior center

_____ Square feet for off-site programming at (list sites) _____

_____ Total square footage for programs and activities

38. Please describe the primary sign(s) identifying the center. Include the dimensions, location, position, lighting, and other relevant features. (You may submit a photograph in lieu of a description, if desired. However, the scale of the sign must be obvious from the photo.) Also describe how the center's hours (including extended hours for Excellence) are posted on the sign and/or are visible from outside the building's entrance.

Example: There is a four by six foot sign on the lawn between the road and the center driveway sitting perpendicular to the center. It is lettered on both sides in 8-inch tall, black letters on a white signboard. The name of the center and center hours are also painted in 3-inch black letters on the glass of the main entrance.

39. Please describe the number and location of signs along local roads giving directions to the center. If there are none, please describe any efforts to obtain them and the results of those efforts.

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40. Please describe your activities to raise additional funds for the center. List any fundraisers you have held or grant proposals you have submitted in the past year (initial) or 5 years (recertification). Note that Home and Community Block Grant (HCCBG), state funding, and routine requests for local funding (to the town or county commissioners, for example) should not be listed here. Create additional rows as needed.

Date	Fundraiser (F) or Grant (G)	Purpose	Potential Funder	Funded?

See *“Instructions for Completing the SCOPE and Documentation”* for more information about financial reports and audits.

41. **(For Excellence Only.)** Do you or your parent organization produce an annual financial report? [] Yes [] No
42. **(For Excellence Only.)** Does your report include (or stem from) an independent audit (see “Instructions for Completing the SCOPE and Documentation” for exemptions)?
 [] Yes [] No
43. **(For Excellence Only.)** How do you notify center consumers that your financial report is available and how they can access it?

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Scoring for Section 5	For Merit	For Excellence	Comments
Question 30			
For Merit, there should be ongoing collaboration or specific collaboration within the past 12 months with at least 3 other organizations. For each there must be an identified purpose/set of activities (e.g., planning together, staffing cases, or providing services), not just a vague statement about collaborating			

Scoring for Section 5	For Merit	For Excellence	Comments
<p>to improve the lives of older adults.</p> <p>For Excellence, there should be at least 3 <i>examples per year</i> of signed Memoranda of Understanding, contracts or letters of agreement between the collaborating organizations. These should spell out the roles and expectations of both parties. If the center has an on-going, multi-year agreement with the same organization, this can count as one agreement per year as long as the inclusive years are spelled out in the agreement (e.g., “this agreement is valid from January 2008 through December 2011 at which time it may be re-evaluated and renewed.”)</p>			
Question 31			
<p>For Merit and Excellence, the center must be open at least 40 hours per week.</p>			
Question 32 (For Excellence Only)			
<p>Centers should have extended hours (early or late on weekdays, weekend hours) unless they are prevented from offering them because of the rules of the facility where they are located, inadequate staff to cover the hours, or <i>evidence</i> of lack of interest on the part of participants.</p>			
Question 33			
<p>For Merit and Excellence, under most circumstances centers must be able to show current compliance with local codes (fire inspection, elevator inspection, and sanitation if food is served). On a case-by-case basis, centers may be given a waiver if they have done everything possible to resolve a problem and there is no threat to the health and safety of older adults using the facilities.</p>			
Question 34			
<p>For Merit and Excellence, there should be a plan for how to finance upkeep, how often specific upkeep activities (such as painting or gutter work) will occur, and how work will be done (e.g., collect bids, provided by county, done by</p>			

Scoring for Section 5	For Merit	For Excellence	Comments
volunteers).			
Question 35			
For Merit and Excellence, this should describe an accessible center with parking, ramps, and all space designed or adapted to meet the needs of people with disabilities and the normal changes that may come with aging.			
Question 36			
All centers must be at least 4,000 square feet, unless the Division of Aging and Adult Services has granted a waiver. (See Certification Policies and Procedures and “Instructions for Completing the SCOPE and Documentation”.)			
Question 37			
All centers must make at least 3,200 feet available for center activities (i.e., not used as office space).			
Question 38			
<p>For Merit and Excellence, the center should be clearly marked and have adequate directional signs to help people in the community find it. Documentation of a good faith effort to get signs is acceptable, if it has not been possible.</p> <p>Hours should be posted on the sign and/or visible from outside the building's entrance, unless this conflicts with the rules governing the use of the building.</p>			
Question 39			
For Merit and Excellence, to the extent possible, centers should request directional signs on local roads or highways. Documentation can include the signs themselves or correspondence with local officials or the NC			

Scoring for Section 5	For Merit	For Excellence	Comments
Department of Transportation denying the request.			
Question 40			
For Merit and Excellence, centers must engage in at least 2 fundraising activities per year. Submitting a grant application counts toward this requirement even if it was not funded. If a center is part of county government and the county policy does not allow it to have fundraising projects per se, the center should show evidence of working to improve funding in permitted ways, such as petitions to the board and seeking in-kind contributions in the community.			
Questions 41, 42, and 43 (For Excellence Only)			
Centers must produce an annual financial report or be included in the annual financial report of the parent organizations. (Centers that are a part of county government may be included in the county financial report.) If the center is not exempt from having to undergo an audit (see “Instructions for Completing the SCOPE and Documentation” for guidelines), this financial report should be based on an independent audit, which is usually accompanied by a letter from the auditor.) Centers must also have a means of letting participants know how to get access to the center’s annual financial report (not necessarily the audit), and whenever possible, make a copy of the report available at the center. There should be a clear plan for providing a copy to those that request it.			
Please see the Site Visit Activities section following Section 6 at the back of this SCOPE tool for items to be checked on site.			

Section 5	Commendations, Suggestions, and Recommendations
<input type="checkbox"/> Passes at the Level of Excellence	
<input type="checkbox"/> Passes at the Level of Merit	
<input type="checkbox"/> Fails	

6. The Extra Mile (additional questions required for Centers of Excellence)

44. Describe any special projects your center has undertaken in the past five years (initial and recertification). For example, these might include research projects, innovations your center has undertaken, intergenerational programming, disaster preparedness and planning, special efforts to make the center and its programs accessible to people with disabilities, or evidence-based programming, to name just a few. See “Instructions for Completing the SCOPE and Documentation” for more information.

45. Describe any mentoring/technical assistance your center has provided to another center in the past five years (initial and recertification), including serving on a certification site visit team.

46. Briefly describe the strongest reasons that you believe your center should be considered a Center of Excellence.

Scoring for Section 6 (For Excellence Only)	For Merit	For Excellence	Comments
Questions 44 and 45 (For Excellence Only)			
There must be at least one appropriate activity/project described in one of these two questions.			
Question 46 (For Excellence Only)			
The answer to this question should highlight the value of the senior center within the community.			

Section 6	Commendations, Suggestions, and Recommendations
<input type="checkbox"/> Passes at the Level of Excellence	
<input type="checkbox"/> Fails	

Site Visit Activities

Site Visit Activities for Section 1	Meets	Does Not Meet
<i>For Merit and Excellence</i>		
<ul style="list-style-type: none"> • Check for posting of services available on site or off-site with assistance (Columns A, B, and C), as listed in Question 1. 		
Site Visit Activities for Section 2		
<i>For Excellence</i>		
<ul style="list-style-type: none"> • Observe whether the group in the center at the time of the visit appears diverse. (Question 12) 		
<ul style="list-style-type: none"> • If possible, observe the transportation (e.g., arrival of vans, public transit, etc.). Is it as described? (Question 17) 		
Site Visit Activities for Section 3		
<i>For Merit and Excellence</i>		
Check that the mission statement is displayed in prominent places in the center or other mechanisms are in place to make visitors and participants aware of the mission, as described in Question 19.		
Site Visit Activities for Section 5		
<i>For Merit and Excellence</i>		
<ul style="list-style-type: none"> • Check for current compliance with state and local codes (fire, health, sanitation), as appropriate (Question 33). • Do the center and grounds appear well maintained? (Question 34) • Check for accessibility features described in Question 35. Major walkways should be at least 6 feet wide. Outdoor walkways should be sufficiently wide for people with wheelchairs, walkers, etc. Check for adequate lighting and nonslip surfaces. Check for clearly marked drop-off points, adequate parking, wheelchair access from bus stop/shelter to center. • Check that signs at the center and approaching the center are consistent with the description in Questions 38 and 39. 		