MCOA Certification Pilot Program

Certification Committee

Joanne Moore, Duxbury COA – Co Chair

Annmary Connor, Andover COA – Co Chair

Barbara Farnsworth, Hingham COA

Maureen O'Leary, NISC

Kathleen Bowler, MCOA staff

Contents

For additional information, contact Kathy Bowler at MCOA kathy@mcoaonline.com

MCOA Certification Retooling Project

The intent of Certification, a project established in 2000, is to provide a statewide standard that can be used as a measure of professionalism by interested program staff and directors of Councils on Aging and Senior Centers. It is further intended that certification will encourage the continuing professional growth and development of certified Council on Aging personnel. Certification is administered and awarded by the Massachusetts Association of Councils on Aging and Senior Center Directors.

The purpose of certification is threefold:
- to promote professional credibility and visibility
- to identify to the public, those colleagues, Directors and Program Staff who have met specific professional standards as set by MCOA, and
- to encourage the continued professional growth and development of the MCOA membership.

MCOA has worked with NCOA's National Institute of Senior Center (NCOA/NISC) Staff to align the MCOA process with National Accreditation. NCOA/NISC has shared the national senior center standards principles to add to the educational content and to align elements of the state program and national program.

Proposed Elements of Retooled Certification
- Senior Center/Community Profile
- Mission
- Values
- Vision
- Action Plan
- Marketing Plan
- Evaluation Plan
- Fiscal Information

About MCOA
The Massachusetts Association of Councils on Aging and Senior Center Directors (MCOA) is a non-profit membership organization comprised of municipal Councils on Aging. Our mission is building strategic partnerships to advocate educate and empower older adults.

Established in 1979, the organization was formed to
- Improve the quality of services provided to older adults of the Commonwealth of Massachusetts by the Councils on Aging, Senior Centers, and other social service providers within the Commonwealth.
- Educate and otherwise improve the skills of the staff of Councils on Aging and Senior Centers of cities and towns of the Commonwealth.
- Encourage and promote the development of new Senior Centers in the Commonwealth and the expansion of existing ones.
- To do and perform and all acts and services that may be incidental or necessary to carry out the above purposes.
- More information at www.mcoaonline.com

About National Institute of Senior Centers
NCOA's National Institute of Senior Centers (NISC) supports a national network of over 3,000 senior center professionals dedicated to helping older adults remain active, engaged, and independent in their communities. NISC is setting the standard for the future of senior centers by promoting research, promising practices, professional development, and advocacy. NISC also offers the nation's only National Senior Center Accreditation Program. Learn more at ncoa.org/NISC.

Senior Center Profile
- Create an online document where all information for the certification can be input.
  - https://www.surveymonkey.com/r/MCOANISCProfile2017

Senior Center Profile: Applicant will provide:
- In 500 words or less create a visual image of the senior center including location in state, demographics of the community, facility, staffing and programming.
- EOEA Annual Report and Community Annual Report (if done)

- To comply with National Senior Center Description include:

  - Community Context (is the center found in an urban, rural, suburban setting?)
  - Participant demographics
  - Size of membership, average daily attendance
  - Primary funding sources
  - Community partnerships (list a few of your main partners (show 5 min.).)
  - Administrative structure (private, non-profit, operated by municipality)
  - Number of years in operation
  - Staffing, including volunteers, student interns, senior aides
  - Diversity

Participants to include: government, partners, staff, board

MCOA - Mission Statement

The mission statement articulates the company's purpose both for those in the organization and for the public.

Mission statements are as varied as the companies they describe, as you will see from the examples given below. However, all mission statements will "broadly describe an organization's present capabilities, customer focus, activities, and business makeup" (Glossary, *Strategic Management: Concepts and Cases* by Fred David).

NCOA/NISC National Standards

An organization's mission statement provides its reason to be, the social justification for its existence and its purpose. It is the "who, what, where and why" of an organization. It is usually short, frequently inspiring, and is used to establish the scope and character of an organization's services and activities. The stakeholders of an organization should review the mission statement at least every five (5) years.

Mission Statement Criteria
1. A senior center shall have a written statement that expresses its basic mission. The mission statement is:
    a. Consistent with senior center philosophy;
    b. Developed by participation from governing structure, paid and unpaid staff, participants and community representatives;
    c. Description of the who, what, where and why of the organization;
    d. Written in concise, clear and understandable language;
    e. Physically visible in the center and on publications;
    f. Reviewed regularly, every 3 to 5 years; and
    g. Used as the test for new projects and activities.

Action Items

MCOA will:

- Provide a worksheet to assist the senior center to develop a mission statement (template to be found on line)
- Create an online document where all information for the certification can be input.
- Create a field that enables the senior center to indicate Old mission (or no mission)

Mission Statement - Applicant will provide:
- New updated mission
- List who reviewed and developed the mission
- Include date that mission was reviewed

MCOA Vision Statement

The difference between a mission statement and a <u>vision statement</u> is that a mission statement focuses on a company's present state while a vision statement focuses on a company's future.

Think of it this way; a mission statement answers the question "Who are we?" and the vision statement answers the question "Where are we going?"

Action Items:

MCOA will:

- Create an online document where all information for the certification can be input.
- Create a field that enables the senior center to indicate Old vision statement or indicate there was not vision statement

Vision Statement - Applicant will provide:
- New updated vision statement
- List who reviewed and developed the vision statement
- Include date that mission was reviewed

Additional Resources:
- http://www.jeffersonawards.org/wp-content/uploads/2016/10/Mission-Statement-Exercise.pdf
- https://topnonprofits.com/wp-content/uploads/2012/09/Mission-Vision-Worksheet.pdf

National Standards- Purpose and Planning Standard

The strategic plan and the mission statement are the basis for development of goals and objectives, which serve as the guidelines for the senior center's work. Goals are broad statements and objectives are how those goals will be achieved. The same goals may stand for several years, but how they are achieved may change. The goals should reflect the needs and interests of older adults and acknowledge the availability of resources in the community, as well as, the skills and talents of the participants.

Objectives are the method to meet the goals. Objectives express, in specific and measurable terms, what the senior center wishes to accomplish within a specified time period. Regular reporting on the progress of attaining these objectives helps keep everyone on target.

An action plan explains how the individuals within a center work together to accomplish the objectives. Action plans list the specific activities that must be carried out to accomplish the objectives.

An action plan explains how the individuals within a center work together to accomplish the objectives. Action plans list the specific activities that must be carried out to accomplish the objectives. They answer the questions: What? Who? When? The action plan is the vehicle to carry out the goals and objectives and ultimately the mission. The goals, objectives and action plan make up the planning document.

The development process for the mission statement, goals, objectives and action plans should involve participants, paid and unpaid staff, advisory committees, community leaders and other stakeholders. Formal and informal involvement of a broad segment of stakeholders helps assure that the senior center's plans are realistic and have the support of those needed for accomplishment. Involving a broad segment of people affirms the central theme of the senior center philosophy – to be a focal point in the community. By involving the community in planning, the senior center becomes part of community-wide planning and policy making.

The final responsibility for the development and review of these statements rests with the senior center's staff and boards. Organizations should recognize the

National Action Plan Criteria:

Goal and Objectives
1. A senior center shall have written statements of goals.
    a. Goals carry out the mission;
    b. Goals are developed through strategic planning process;
    c. Goals identify major accomplishments that a center seeks to achieve; and
    d. Goals are broad enough to be viable for 3-to-5 years.
2. A senior center shall have objectives that are developed as the way to accomplish goals. Objectives should have these characteristics:
    a. Developed by the individuals responsible for carrying them out;
    b. Measurable;
    c. Reviewed annually by governing structure, advisory committees, paid and unpaid staff;

d. May change each year or be static for several years;
e. Available to the public, as needed;
e. The basis for reports prepared and distributed to governing and advisory boards at least quarterly that describe the progress in meeting the objectives.

Action Plan Criteria

1. A senior center shall have an action plan that details the activities to be carried out to achieve the objectives.
2. An action plan shall:
    a. Be developed by those involved in carrying it out, including paid and unpaid staff;
    b. Consist of the steps that paid and unpaid staff perform to achieve an objective;
    c. Be adjusted by staff to meet new circumstances or opportunities;
    d. Be available to those involved in carrying it out.

    MCOA will:

- Develop and set up workshops where COA staff can work to create an action plan with goals and objectives
- Create an online document where all information for the certification can be input.
- Create a field that enables the senior center to indicate action plan information (standardized document)

Action Plan - Applicant will provide:

- Involve staff, community partners, government, board, constituents
- Complete SWOT analysis or similar analysis
- Develop Broad Goals
- Develop one year action plan. MCOA will provide a template.
- Documentation of process as narrative – 500 word summary
- Submit written plan

National Standards - Community Connections

PRINCIPLE
A senior center shall serve as a focal point in the community by participating in cooperative community planning, establishing cooperative service delivery systems and providing information and referral services. Providing information and connecting older adults to resources in the community is an important service of a senior center. Educating the community, public officials, other professionals and students about the richness and diversity of the senior population as well as its needs is one of the purposes of senior centers.

RATIONALE
A senior center is a vital social institution closely related to and involved with its community. It works with other organizations to establish collaborative and cooperative guidelines for the delivery of service to older adults in the community. Through community linkages, a senior center coordinates service delivery with other agencies, mobilizes resources and develops ways to expand services and activities. Senior centers work with many organizations, on both a formal and informal basis.

Cooperative planning among community service agencies provides a framework to deliver effective programs and stretches limited resources. For many senior centers, the area agency on aging is a principal partner in the service planning process for the community. Designated as regional planning bodies, area agencies can be units of county, city, or town government, or a private nonprofit organization. They are responsible for assessing the needs of older adults in the area; setting priorities for service; funding services through contractual and other arrangements; planning and coordinating existing services; acting as advocates for older adults and offering technical assistance and training to service providers.

A senior center improves the community's delivery of services to older adults by providing information about and referrals to aging services. Through community outreach efforts a senior center may improve access to these services by providing information where seniors live, gather socially or worship. These outreach resources and an avenue to educate older adults. Outreach services may enable the senior center to identify and link low income or socially isolated people to services. By conducting presentations where older adults gather, the reach of the senior center is extended outside its walls and provides an opportunity to educate and identify people in need of service or a referral.

COMMUNITY CONNECTIONS STANDARD
CRITERIA
A. Community Collaborations
1. A senior center shall function as a focal point for service delivery to older adults by making services more accessible. This is accomplished in many ways.
   a. Partner with agencies or organizations that could or do offer services to older adults.
   b. Develop appropriate arrangements for mutual referrals and cooperative service provisions that contain clear statements of each agency's responsibility and appropriate follow up mechanism.
   c. Encourage providers, where appropriate, to deliver their services at the senior center in order to make services more accessible to the community's older population

d. Arrange for the senior center to use the facilities of other organizations to deliver services.

e. Partner with other agencies to deliver services in the community. These organizations may include:
- Other senior centers,
- Area agencies on aging,
- United Way,
- Social service providers,
- Recreation and parks departments,
- Religious organizations,
- Hospitals,
- For profit service delivery entities,
- Local businesses,
- Schools,
- Colleges and universities,
- Libraries and
- Others who wish to serve the older population

Strategic Partners - Applicant will provide:
- List of strategic partners

Item for National Accreditation
List of collaborative community partners.

National Standard

Collaborate with at least five (5) community partners to offer services at the senior center.

National Standard – Community Connections

A senior center uses marketing techniques to inform the community and participants about the scope of their services and activities. It should create a marketing plan focused on promoting current and potential products, programs, activities and services to the public. Successful marketing will create an identity that will gain community support, attract resources and help increase participation in the senior center.

Marketing materials should be directed at current and future participants. A senior center should use a variety of marketing techniques to educate the community on aging issues, publicize its mission, promote its activities and programs, and enhance the image of older adults. Frequently cooperative relationships with educational institutions or businesses can result in low cost ways to market a center.

A senior center knows first-hand the challenges that seniors face. Therefore, senior centers can advocate for seniors' needs, as well as educate seniors on how to advocate for themselves. They can bring large numbers of people together on an issue. Senior centers should not support one party or public official, but provide a forum for people to be informed on the issues and to meet those who want to represent the public.

Marketing Criteria

1. In creating a marketing plan a senior center shall do the following:
    a. Assess current marketing techniques;
    b. Identify target audiences;
    c. Develop communication that has a consistent message;
    d. Establish a time line;
    e. Communicate visually as well as verbally – use words and pictures;
    f. Use different media;
    g. Use message repetition – a tag line repeated over and over is better than many messages repeated regularly;
    h. Use many methods to deliver the message;
    i. Include the use of technology whenever possible;
    j. Assign responsibility for tasks; and
    k. Measure and evaluate on a regular basis.

2. Marketing materials should do the following:
    a. Publicize the senior center's mission;
    b. Educate the community on its programs and services;
    c. Enhance the image of older adults;
    d. Promote a positive understanding of aging in the community;
    e. Be representative of the community residents; and
    f. Provide the private sector an opportunity to support programs and services.

3. A senior center should use a variety of ways to educate the community and advocate for senior needs.

These may include:

     a. Sponsorship of community events;
     b. Development and distribution of fact sheets;
     c. Newspapers articles
     d. Radio and television shows or spots
     e. Maintenance of a social media presence within municipal guidelines
     f. Sponsoring events that educate the public, i.e., expos, health

MCOA will:

     a. Develop and set up workshops where COA staff can work to create a marketing plan
     b. Create an online document where all information for the certification can be input. (standardized document)

Community Connections - Applicant will provide:

     c. Certification will be granted if the can identify two ways that programs are currently marketed
     d. And by completing marketing planning document in MCOA Marketing binder

National Standards- Human Resources

PRINCIPLE

A senior center shall have clear administrative and human resource policies and procedures that contribute to the effective management of its operation. It shall be staffed by qualified personnel, paid and unpaid, capable of implementing its programs and services for its participants.

RATIONALE

Effective management requires clearly defined areas of administrative responsibility, lines of supervision and communication. The chief administrator is accountable to the senior center's governing structure and is usually given complete control over day-to-day senior center management. The administrator, in most cases, carries primary responsibility for dealing with agency interactions, funders, and community resources and collaborations. He/she also plays a leadership role with the center's governing structure, paid and unpaid staff, participants and advisory groups. An effective administrator recruits and retains competent staff members to accomplish senior center goals and objectives.

Senior center staff, paid and unpaid, should have the opportunity and be encouraged to learn new skills and take on responsibilities that promote personal growth. Staff should be encouraged to increase their knowledge through ongoing education, in-service training, and membership and participation in professional organizations. Training and professional growth should be a budgeted item in a senior center's budget.

Periodic review and updating of the human resource policies and practices manual ensures policies are up-to-date and in sync with actual practices. New policies and practices arise out of staff needs, changes in laws and expectations of the community. Sound policies and practices provide objectivity and fairness. They give staff an understanding of the organization's environment and clarify work expectations. Consistent, fair human resource management enhances staff morale and promotes cooperative effort. Personnel policies should reflect the needs of the employees and also the goals of the organization. A senior center's staffing pattern may look different when it is part of a larger organization, e.g. government or multi-service non-profit. The makeup of the parent organization and the services it provides may affect staffing patterns and policies in place.

Government organizations may have policies governed by unions or other procedures common to government groups. Compensation packages will also vary based on resources available, community practices and expectations. However, fairness and equality to all individuals are essential.

Unpaid staff and stipend individuals from federal or other programs are an essential part of senior centers' operations. They are an invaluable source of knowledge, experience and skills. Their role should not be seen as subordinate to paid staff rather on the same level. They can play a role in building the capacity of a senior center, particularly in the age of dwindling government support.

Good volunteer management practices for unpaid staff mirror good management practices for paid staff. Therefore, written personnel policies, equipment and appropriate space to accomplish assignments, compensation in the form of recognition and communication with a supervisor are all essential components. The volunteer's knowledge and experience should be respected and utilized in the same way as a paid employee.

Much is being written about the "Boomers" and what they can contribute to an organization's capacity to meet its mission. They will also redefine the role of the unpaid staff person in an organization. A senior center needs to recognize that adaptations will need to be made in how to engage unpaid staff. Good management practices will be very important. However, the rewards in increased human resources will be evident not only from the Boomer generation, but others who will gain from the new perspective of working side by side with paid staff.

The following shaded information is related to National Standards and is not required for certification.

ADMINISTRATION & HUMAN RESOURCE STANDARDS CRITERIA

A. Administrative Responsibilities
1. The governing organization or sponsoring organization of a senior center shall designate a chief administrator and delegate responsibility for the overall management of the senior center's operation and program.
2. Through a combination of education and experience, the chief administrator shall possess the ability to perform the necessary duties.
3. A senior center's chief administrator's roles and responsibilities shall be clearly defined.
4. The chief administrator has the ultimate responsibility, but may delegate or share many of the following duties:
   a. Development of the center's overall work plan;
   b. Assessment of community needs;
   c. Planning and implementation of programs and services to meet community needs;
   d. Evaluation of programs and operations;
   e. Resource development;
   f. Day-to-day operations;
   g. Development and nurturing of community relations;
   h. Human Resource management;
   i. Staff development;
   j. Reporting to boards; community, funders and others regarding program accomplishments and needs; and/or
   k. Financial and risk management.

5. For a senior center that is part of a larger agency, the senior center's administrator shall have a defined relationship with the larger agency regarding:
   a. Governing structure;
   b. Administrative staff;
   c. Relevant committees; and
   d. Shared space or co-located organizations.
6. In a multi-site operation, there shall be a staff person on-site with clearly defined responsibilities and the ability to carry out day-to-day operations. There shall be a clearly defined relationship between this on-site person and other administrators and governing structure.

B. Personnel
1. A sufficient number of competent and qualified personnel, paid and unpaid, are needed to implement the activities and services to meet the senior center's goals and objectives.
2. Supervisors shall ensure that individuals have the skills, knowledge and information needed to complete tasks and provide the autonomy to accomplish them.

3. A senior center shall have a staffing pattern that clearly defines the positions and the relationships necessary to implement the center's goals and objectives.
4. A senior center shall use resources in the community to increase its capacity to accomplish goals.
5. The ethnic and racial makeup of senior center staff should reflect the ethnic and racial makeup of the older adults in the community
6. At all times, staff shall show respect and encourage personal growth of senior participants by:
    a. Respecting individual needs, interests, rights and value;
    b. Developing relationships that respect the individuality of each person;
    c. Encouraging responsibility for making one's own decisions;
    d. Providing the resources to aid people to develop coping skills and solve personal problems; and
    e. Supporting the individual's involvement in senior center decision making.
7. Each staff person shall have a written job description, which minimally would include:
    a. Position title and classification (if applicable);
    b. Qualifications;
    c. Essential duties and responsibilities;
    d. Lines of communication for supervision and reporting; and
    e. Salary range and benefits.

C. Staff Supervision and Training
1. A senior center shall ensure that hiring practices, staff compensation, classification and benefits are consistent with requirement of government laws and regulations.
2. A senior center shall have a formal system of staff supervision for paid and unpaid staff to:
    a. Provide feedback on the accomplishments of the individual;
    b. Establish goals to help individuals grow in their responsibilities;
    c. Indicate ways to improve one's performance;
    d. Identify ways to help individual improve or gain skills; and
    e. Review job description to ensure that it is still appropriate.
3. Performance evaluations should include:
    a. A written performance evaluation based on objectives and job-related criteria;
    b. Review of the evaluation in a face-to-face interview; and
    c. An opportunity for written dissent to be part of the personnel record.
    4. A senior center shall examine all types of opportunities for continued education of staff. Ways to use technology should be explored as it now provides many low-cost means to stay abreast of developments in the field.
    5.
D. Human Resources Management
1. Policies governing paid personnel shall be established by the governing structure, reviewed periodically, maintained as an official document and made available to each individual.
2. Personnel policies should outline how all personnel issues are handled. What is written in the policy and what is carried out should never differ.
3. A personnel policy should include the following topics:
    a. Terms of hiring and training periods;
    b. Compensation and benefits;
    c. Various types of leaves from work;
    d. Savings programs;
    e. Performance appraisal;
    f. Job posting and promotions;
    g. Communication channels, grievance and disciplinary actions;
    h. Staff development, training and reimbursement of such;

    i.   Family leave;

    j.   Protection from discrimination based on: sex, age, race/ethnicity, sexual orientation, disability and religious preference;
    k. Policy on prescription drugs, illegal substances and drug testing;
    l.   Confidentiality statement;
    m. Technology use and abuse.

4. Issues often emerge that may necessitate the development of new policies or guidelines. For this reason, someone knowledgeable in the field of Human Resource Management should review the policies at least every two (2) to three (3) years.

5. An employee record should be maintained for each paid employee containing at the minimum:
    a. Application for employment;
    b. Resume (if applicable);
    c. Job description;
    d. Letter of employment;
    e. Record of compensation, promotion and salary adjustments;
    f. Annual performance evaluations;
    g. Commendations;
    h. Disciplinary actions; and
    i. Correspondence.

E. Unpaid staff (volunteers, interns or stipend paid individuals)
1. A senior center shall engage individuals of all ages to assist with the delivery of programs and services in unpaid or stipend positions.

2. There should be a Volunteer Administrator who handles management of these individuals, which is frequently referred to as Volunteer Management.
3. These unpaid or stipend staff should be treated in the same professional manner as paid staff. Refer to the above sections to clarify what these are. (See C 2, 3, and 4)
4. A Volunteer Manual should be provided to all unpaid staff. At the minimum it should contain the following:
    a. Organization's mission statement;
    b. Orientation information about senior center;
    c. Opportunities for sharing skills;
    d. Communication channels, grievance and disciplinary actions;
    e. Protection from discrimination based on sex, age, race/ethnicity, sexual orientation disability and religious preference;
    f. Process of evaluation for appropriate placement and job satisfaction;
    g. Confidentiality statement; and/or
    h. Recognition of contributions.
5. This will be especially important for the volunteers that help build the capacity of the organization by carrying out functions that in other instances might be completed by paid staff.
6. The following techniques will be important in working with Boomers and highly skilled unpaid staff who can work independently:
    a. *Job sculpting* – designing a job that will allow the person to use skills and knowledge already gained.
    b. *Flexible scheduling* – understanding the person's availability and designing a schedule to fit their need.

    c. *Self-directed teams* –Teams that work without a designated leader.

7. An unpaid staff person will feel connected to an organization when he/she understands the mission of the organization and how their role fits into meeting that mission.
8. When an unpaid staff person is provided the tools necessary to accomplish their task (telephone, computer, appropriate information etc.), they are more likely to continue to assist the organization.
9. Compensation for unpaid staff may come in the form of recognition, tokens of appreciation, notes of thanks and other expressions of gratitude.
10. A stipend-paid position may receive reimbursement for expenses and payment for the job that would be below market rate.
11. People who have a positive experience helping a senior center are the best people to recruit additional people. They are also the ones who will support the center financially and in other ways.

HR & Administration - Applicant will provide:

- Resume of Administrator
- Job Description for paid staff (samples of job descriptions are available on MCOA website)
- Organizational chart
- Write a narrative on how you recruit, retain and evaluation volunteers – 500 word limit

National Standard - Program Development and Implementation

PRINCIPLE
A senior center's program shall provide a broad range of group and individual activities and services that respond to the needs and interests of older adults, their families and caregivers in the community or service area.

RATIONALE
A senior center seeks to fulfill its mission and achieve its goals and objectives through its program. A senior center's program encompasses all activities and services offered by the senior center and also those it makes accessible and available to participants through linkages with other agencies. The participants of a senior center should be in the forefront of the program development. Programs at a senior center are implemented by and with, **not for**, its participants. Effective program planning and development begin with specific identification of the needs of the population in the geographic area to be served.

Planning should take into account suggestions and information gathered from participants, prospective participants, paid and unpaid staff, other service providers, community agency leaders and the latest best practice models and gerontology research. Planning should also take into account the changing characteristics and needs of participants, availability and demand for services and the human and fiscal resource of the senior center and the community.

Strategic planning produces fundamental decisions and actions that shape and guide an organization. This process was discussed in the Purpose Standard. In the process of program planning and development the following should be considered:
- The fit of the plan into the center's mission statement;
- The populations and geographic area identified;
- An examination of the needs and interests of the population;
- A resolution that the services and activities will address the needs of the community;
- A determination of resources needed and their availability; and
- Program evaluation to help determine courses of action. (Program Evaluation is outlined in the Evaluation Standard.)

As senior centers prepare for program implementation, they face the challenge of providing a wide spectrum f services and activities that respond to the characteristics of their diverse groups of participants. The phenomenon of aging well has resulted in many senior centers serving two (2) or even three (3) generations at the same time. The characteristics and needs we may have once attributed to a certain age are no longer holding true. Ninety-year olds are using computers alongside the fifty-five year olds. Exercise classes and fitness centers have participants of all ages. The activity may be slightly different, but the goal is the same.
Providing the services and activities for a diverse group of people is one of the greatest challenges for senior centers in the twenty-first century.

Older adults not only want to remain physically healthy and active into later years, but they additionally are concerned about their mental health and cognitive ability. It is easy to recognize activities that stimulate our thinking processes; however these are not the only activities that stimulate good brain health.

Research shows that the brain can increase in capacity, as well as maintain cognitive skills through a variety of physical and social activities. The studies of noted neuropsychologist Dr. Paul Nussbaum, of the
University of Pittsburgh, have shown that physical activity, socialization, spirituality and good nutrition are equally important.

Age diversity is only one challenge that senior centers face. A center may serve people with varying income levels. There may be individuals who have recently immigrated to this country, or who have been here many years but still practice traditions from their homeland. There will be participants with varying abilities due to chronic illness or a life threatening event. Transportation and access to service may be a major challenge for participants who want to attend a senior center.

A senior center should offer information and support in a way that empowers participants to understand how to solve their own problems and make their own choices about services and activities. All programs should operate with a positive view and expectation of the older adult.

Many older adults are isolated because of geographic conditions, socio-economic barriers or health-related hardships. Finding these isolated or hard-to-reach members of the community, identifying their needs and linking them with available services may take extra efforts but should be part of the mission of the senior center. Many times grants or special funds are available to reach these individuals if a senior center takes the time for research.

Private funders and government granters are realizing that providing services to the isolated older adult can often save costs in the future. Most importantly, the participants, program planning committees, paid and unpaid staff should be representative of the community. Senior Centers should make special effort to ensure that no group is overtly or covertly excluded from program participation. A review of formal and informal procedures should be carried out regularly to ensure that no barriers have been established.

Frequently ethical and procedural questions may be raised when planning and implementing activities or services. If the following questions are considered and a procedure is in place it may eliminate confusion and embarrassment. Some of these questions are:

- Is there a need to set criteria for a person to participate?
- Is special consent needed from the participant?
- Are there risks associated with participating that individuals should be informed about?
- Is there a need for more information on a participant than already is recorded?
- Is confidentiality of information being maintained?
- Do instructors or service providers have necessary credentials and insurance?

Program Development - Applicant will provide:

- List of Services
- Hours of operation
- There is not a minimum number of hours of service required to be open. (National Accreditation requires 30 hours per week).
- Highlight program you are most proud of or is especially significant. Include these items:
  1. Please describe your program in 250 words or less.
  2. Include narrative of why this program is especially significant. 100 words or less.
  3. What are the outcomes of this program? (How did your participants benefit? How did your organization benefit?)

4. What were the tools, observable measures or indicators that you used to measure the success of the program?
5. Number of Staff/Volunteers required to run program.
6. Expenses:
7. Revenue:
8. Net Profit or Loss:

- Describe a program that you discontinued. Describe why and include lessons learned – 100 word limit

National Standards- Evaluation

PRINCIPLE
A senior center shall have appropriate and adequate arrangements to evaluate its programs, services and their delivery. Evaluation is the catalyst for change and growth.

RATIONALE
Evaluation is carefully collecting information in order to make necessary decisions about a program or service. It is an essential component of the planning cycle and should be sufficiently funded in order to accomplish its purposes. The type of evaluation chosen depends upon what one wants to learn about the program/service. An evaluation plan should be developed and reviewed annually.

The results of evaluation are extremely useful to a senior center in strengthening its relationship with the community and funding sources. When evaluation is an ongoing process, built into all phases of the center's operation, it becomes part of the planning process.

An evaluation committee can assist with the process. There may be senior center participants, community volunteers or faculty from local colleges who could be part of this committee. An evaluation consultant could be hired. Computer technology can make gathering, compiling and analyzing information much easier and should be used whenever possible. Ultimate responsibility for evaluation rests with the senior center's administrator and governing structure. This ensures evaluations are completed on a regular basis, appropriate individuals are involved, and reports are prepared and distributed to the suitable groups, and results are used in planning.

The results of evaluations should be readily available to the senior center's participants, paid and unpaid staff, and sponsors, funding sources, boards and committees. The evaluator, staff or an evaluation committee should prepare comprehensive reports that include the evaluation instrument, a summary of findings, compilation of all answers, and recommendations from the information gathered. Evaluation of program use can help decide whether to implement, continue, expand or end a particular service or activity.

Evaluation can improve delivery mechanisms so that they become more efficient and less costly. Over time, programs and their delivery can become a collection of activities. Evaluations can identify activity strength or weakness that will lead to improvement in its delivery and impact. Program evaluation can serve a variety of purposes. An evaluation can gauge satisfaction with program content or implementation.
Measurements would be in terms of whether expectations were met; participants were satisfied; participants would repeat the experience or tell friends about it. The center may want to explore whether the delivery is appropriate for the audience. They might want to know whether the scheduled time of the activity, quality of instruction, content of information or physical space meets the needs of the participant.

A needs assessment examines the nature of a problem and solutions. It can help determine the need for an activity or service. It can also study the services or activities that address this need and whether they are available and being utilized.

Program evaluation can also look at quantitative measurement. This type of evaluation measures the number of participants, number of unduplicated people or number of service units. It can measure the amount of service in different ways. A program's impact on participants is a growing concern of funders. They want to know "Are people better off because of your efforts?" and often make funding contingent upon evidence showing how participants are benefiting from senior center programs and services.

Today, when public and government funds are decreasing and community needs increasing, funding organizations and individuals want to know that their dollars are being put to good use. Outcome evaluations are used to gather this type of information. Outcome evaluations are used to document short- or long-term results. Implementing outcome based evaluations should be part of a center's evaluation plans. There are many reasons why there is more emphasis on outcome based evaluation:
- Public and government funds are decreasing.
- Community needs are increasing.
- More emphasis is being placed on whether a program is making a difference.
- Funders (organizations and individuals)

They want to know the impact of their dollars. The first step in outcome based evaluation is to identify the outcomes you want to examine. Then for each outcome, specify what observable measures or indicators will suggest that you have achieved it.

MCOA will:

- Develop a workshop to teach COA staff how and what to evaluation and various evaluation tools available to them
- Create an online document where all information for the certification can be input. (standardized document)

Evaluation plan - Applicant will provide:
- Provide a list of evaluation tools, i.e., survey focus groups, etc.
- Write a narrative about two programs that are evaluated and the evaluation tool used.
- Note: **Use Florida Evaluation Tool as Standard

National Standard - Fiscal And Asset Responsibility
PRINCIPLE
A senior center shall practice sound fiscal planning, management of assets and maintenance of information. The community expects transparency in actions and responsibility to all constituents.

RATIONALE
A senior center's financial operation should be based on efficient fiscal planning, sound resource management and a transparent system of fiscal management. This need has increased due in part to what happened in the corporate world prompting the passage of The Sarbanes-Oxley Act (The American Competitiveness and corporate Accountability Act of 2002), which is referred to in the Governance Section. There is pressure on nonprofits and government groups who depend upon public and community funding to adhere to pertinent sections of the Sarbanes-Oxley Act, and to use it as a standard for their financial practices. One aspect of Sarbanes-Oxley that is most relevant to senior centers has to do with the establishment of an audit committee whose membership includes at least one person who is considered a financial expert.

The senior center's operating budget is the basis of a center's fiscal planning for a specified time period, usually twelve (12) months. Fiscal responsibility starts with a well thought out, realistic budget. The senior center staff and governing body should be involved in the budget planning process. The budget is developed by taking into consideration cost to deliver ongoing programs and services and any expanded services. The senior center must also estimate the revenue streams for the fiscal period, seeking to diversify funding as much as possible. The governing body of the senior center should approve the budget. The senior center may also develop a capital budget for construction or renovation projects which may be funded outside the operating budget.

Communities expect senior centers to utilize funds properly and efficiently. Accepted standards for budgeting, accounting, and financial reporting should be the norm. The senior center's accounting system should enable staff, governing body, participants, funders and other interested parties to obtain clear and complete information regarding its financial affairs. Financial reports should be prepared monthly and presented to administration and governing board. A senior center's financial operation should conform to all applicable legal and administrative requirements. Appropriate staff should be trained in fiscal management and be familiar with applicable local, state, and federal regulations.

An internal control system that provides checks and balances to ensure fiscal propriety is a necessity. Since establishing and maintaining a responsible fiscal system can be a complicated task, it is advisable to seek an accountant's assistance in implementing procedures.

Procedures should be maintained in written format accessible to all staff and governing body. A senior center needs to have basic insurance coverage to protect its physical operation and the individuals involved in it. When purchasing insurance, an experienced and trustworthy agent or broker who understands the senior center's business is essential. Liability insurance protects the organization from claims alleging negligent conduct, which is failing to do what an ordinarily prudent person would do. We cannot prevent people from bringing suits, but a center can act prudently. Examining risks involved with activities and making provisions
to avoid these risks is a way to show good judgment.
A senior center also needs a disaster recovery or business continuity plan in the face of a crisis. A disaster recovery plan is the process by which you resume services after a disruptive event. Business

continuity planning suggests a more comprehensive approach to keeping an organization in existence after small or large disruptions. The plan needs to be written by the people involved in the day-to-day work of the senior center. In recent years we have seen disasters bring many organizations to a standstill. Since many times the services offered by the senior center are for the most frail in the community, it is imperative to continue some operations.

Fiscal - Applicant will provide:

- Senior Center budget
- Copy of monthly financial statements
- Disaster Recovery Plan

Documents Needed List

1. Senior Center Profile

Senior Center Profile: Applicant will provide:

In 500 words or less create a visual image of the senior center including location in state, demographics of the community, facility, staffing and programming.

To comply with National Senior Center Description include:

- Community Context (is the center found in an urban, rural, suburban setting?)
- Participant demographics
- Size of membership, average daily attendance
- Primary funding sources
- Community partnerships (list a few of your main partners (show 5 min.).)
- Administrative structure (private, non-profit, operated by municipality)
- Number of years in operation
- Staffing Description including volunteers, student interns, senior aides
- Diversity

2. Mission Statement:
- New updated mission
- List who reviewed and developed the mission
- Include date that mission was reviewed

3. Vision Statement:
- New updated vision statement
- List who reviewed and developed the vision statement
- Include date that mission was reviewed

4. Action Plan
- Note: Full accreditation will be given to those who complete an full strategic action plan process.
- Involve staff, community partners, government, board, constituents
- Complete SWOT analysis or similar analysis
- Develop Broad Goals
- Develop one year action plan. MCOA will provide a template.
- Documentation of process as narrative
- Submit written plan

5. **Strategic Partners**
- List of strategic partners

6. **Community Connections**
- Certification will be granted if the can identify two ways that programs are currently marketed
- Completing marketing planning document in MCOA marketing binder

7. **HR & Administration**
- Resume of Administrator
- Job Description for paid staff (include samples of what should be included in a job description)
- Organizational chart
- Write a narrative on how you recruit, retain and evaluation volunteers

8. **Program Development**
- List of Services
- Hours of operation
- There is not a minimum number of hours of service required to be open. (National Accreditation requires 30 hours per week).
- Highlight program you are most proud of or is especially significant. Include these items:
  - Please describe your program in 250 words or less.
  - Include narrative of why this program is especially significant. 100 words or less.
  - What are the outcomes of this program? (How did your participants benefit? How did your organization benefit?)
  - What were the tools, observable measures or indicators that you used to measure the success of the program?
  - Number of Staff/Volunteers required to run program.
  - Expenses:
  - Revenue:
  - Net Profit or Loss:

Describe a program that you discontinued. Describe why and include lessons learned (100 word limit)

9. **Evaluation plan**
- Provide a list of evaluation tools, i.e., survey focus groups, etc.
- Write a narrative about two programs that are evaluated and the evaluation tool used.
- Note: **Use Florida Evaluation Tool as Standard

10. **Fiscal:**
- Senior Center budget
- Copy of monthly financial statements
- Disaster Recovery Plan