**SECTION 1-SERVICES, PUBLICITY AND MARKETING**

1. **INFORMATION & REFERRAL/CASE ASSISTANCE**

## Questions 1a and b- I&A Procedures and Publicity of Available Services

### Purpose:

To ensure there is a proper system in place to connect participants to local services

### Requirement:

**1a-** Center information and case assistance (I&A) procedures (marked in column B of question 3) must consist of 3 parts:

1. screening or assessment process to determine the consumer’s needs and capacities;
2. linking the consumer to the service;
3. providing follow-up.

**1b-** Center must have a way of informing its participants of all services provided onsite or through I&A.

### Documentation:

Timeframe: Current

* Question 1a: A copy of completed screening tool that includes client’s name, contact information, problem, action, and space for follow-up AND a sample of completed files where I&A was provided with identifying information redacted/concealed
* Question 1b: Fliers, posters, or other publicity for all services provided onsite or via I&A

## Question 2- I&R Regional and National

### Purpose:

To ensure there is a proper system in place to connect participants to regional and national services

### Requirement:

Center must provide information and referral (I&R) to another agency or provider for additional and regional or national services.

### Documentation:

Timeframe: Current

Notebook, computer bookmarks, or brochures of referral sources.

## SERVICES

## Question 3- Services Offered

### Purpose:

To provide older adults with access to important services

### Requirements:

At least 85% of all available services must be provided onsite or through information and case assistance. Services listed a, b, and c and any additional five services must be offered onsite. Services listed d and e must be available onsite or through I&A. A service is considered onsite if:

* an organization provides service at regularly scheduled intervals in the senior center or on the same campus; or
* service can be enrolled for at the center; or
* service is delivered to participants away from the center but is arranged and publicized by the center.

### Documentation:

Timeframe: Current

* Calendar, fliers, newsletters or sign-ups for services provided onsite, AND
* List of appropriate service providers, their contact information, and basic eligibility information for services provided via information and case assistance

## C. PUBLICITY FOR THE CENTER AND ITS PROGRAMS

## Question 4- Publicity for the Center

### Purpose:

To inform older adults in the community about the senior center and its programs

### Requirement:

Center must have two types of ongoing publicity.

### Documentation:

Timeframe: Current

* Copies of current publicity materials: i.e. brochure, newsletter, newspaper articles or advertisement, correspondence between center, radio or television station regarding announcement/programming

## MARKETING TO SPECIAL POPULATIONS AND THE COMMUNITY

## Question 5- Marketing to Special Populations

### Purpose:

To educate potentially/historically underserved people about the senior center and its programs and make it clear to them that they are welcome

### Requirement:

* Center must engage in marketing efforts aimed specifically at target populations to educate them about the senior center and encourage them to attend. The following are the target population groups:
  + Low-income
  + Minority
  + Physically or cognitively impaired (not included in 5% exemption)
  + Rural
  + Primary language not English
* Merit- must reach 3 of the populations including low-income and minority.
* Excellence- must reach all 5 groups that represent more than 5% of the senior population.
* One effort for each applicable group each year.

### Does NOT count:

* Publicity about a specific program the senior center is offering
* Special equipment (i.e. large print or audio books) or programs (i.e. Black History Month events)
* Publicity to populations that probably will not/cannot attend the center
* Advertisements in newspapers or other mass-marketing efforts

### Documentation:

Timeframe: Entire SCOPE period

* Outreach log explaining what was done, when, and what population was the target of the effort AND
* If an email distribution or mailing list is entered in the outreach log, either the list or the log entry must include a description of the population reached by each member of the list.

## Question 6 (Excellence Only)- Training for Nonelderly

### Purpose:

To educate the nonelderly about the needs, interests, or contributions of older adults

### Requirement:

* Center must provide training to people in the community who are younger than the center’s minimum age by teaching them skills or information they need to:
  + understand issues relevant to older adults; or
  + improve skills in working with older adults; or
  + prepare for their own aging.
* Initial- 2 instances
* Recertification- 10 instances, with at least 2 in most recent year

### Examples:

* Hosting a workshop to train social workers, nurses, emergency workers, or other professionals on how to communicate more effectively with older people
* Hosting interns from local colleges. Interns are counted one per semester, per school. Interns from separate schools/departments within the same university (i.e. one intern from the School of Nursing and one from the School of Social Work but both from the same university) count as separate instances.
* Making presentations about aging to elementary, middle, and high schools or college classes
* Holding a training for other senior centers, adult daycare centers, or assisted living facilities on developing activities and programs for older people
* Hosting an update on Medicare and Medicaid regulations for providers who need to understand them
* Presentations from seniors to younger adults or children about life in the past

### Does NOT count:

* Activities held as an event/activity for seniors at your center
* Training provided to other staff who regularly work with older adults at your own center or parent organization
* Responses to spontaneous requests for information

### Documentation:

Timeframe: Entire SCOPE period

* Publicity for events or trainer’s presentation notes or materials AND
* Something to show that the audience was primarily nonelderly if held during the regular hours

## SECTION 2-ACTIVITIES, VOLUNTEER OPPORTUNITIES, ADVOCACY AND TRANSPORTATION

1. **ACTIVITIES**

## Question 7- Regularly Scheduled Activities

### Purpose:

To ensure sufficient opportunity for consistent participation in senior center activities

### Requirement:

* Center must offer regularly scheduled group activities planned by center staff which are available to anyone.
  + Merit- 9 regularly scheduled activities per week
  + Excellence- 15 regularly scheduled activities per week
* Activities must be scheduled throughout center’s operating hours.

### Does NOT count:

* Services, except for fitness classes which also count for health promotion (3b)
* Offsite activities sponsored or planned by other parent agency staff (i.e. nutrition coordinator)
* Duplication of another activity offered at the same time, but different day, to the same group of people

### Documentation:

Timeframe: 3 consecutive months in last year

Calendars for each month in the 3-month period you selected AND fliers or other announcements if not listed on calendar

## Question 8- Special Events

### Purpose:

To provide special opportunities for senior center participation that are not routinely available

### Requirement:

* Center must offer scheduled events that happen less than monthly, such as one-time or quarterly events or short courses that last no more than 6 weeks (including evidence-based programs):
  + Merit- 6 in last year required for initial certification, 30 total for recertification with at least 5 in last year
  + Excellence- 10 in last year required for initial certification, 50 total for recertification with at least 8 in last year

### Documentation:

Timeframe: Entire SCOPE period

Fliers, calendars, or another form of publicity or attendance sheets

For recertification please list your activities in chronological order by year, even if the event repeats each year.

Please list up to 15 activities of your choosing per SCOPE year (we know you probably have way more!)

## Questions 7-8 Virtual Programming and Charging Fee Policy

### Purpose: To ensure the senior center connect and create an interactive experience for participants and older adults in the community to be engaged without having to be physically present to alleviate loneliness and address social isolation.

**Virtual Programming Requirement:**

DAAS expects all certified senior centers meet the following minimum requirement, respective of their certification status, for virtual programming.

* Excellence – 1 regularly scheduled weekly activity AND 1 monthly special event
* Merit - 1 monthly (regularly scheduled activity, special event, or other)

### Documentation:

Timeframe: Entire SCOPE period / Beginning January 1, 2021

* Copies of current publicity materials: i.e. brochure, newsletter, newspaper articles or advertisement, correspondence between center, radio or television station regarding announcement/programming

**Purpose:** To ensure that the senior center has a policy which allows participants the opportunity to participate in fee-based activities if unable or unwilling to pay a required fee and assures confidentiality and privacy.

**Charging Fees Requirement:**

A senior center policy for participants that addresses the opportunity to participate in fee-based activities if unable or unwilling to pay a required fee and which assures confidentiality and privacy.

### Documentation:

Timeframe: Entire SCOPE period

* Copies of current policy

## Question 9- Drop-in Activities

### Purpose:

To provide unscheduled, unstructured opportunities for senior center participation

### Requirement:

Center must offer informal activities and equipment that consumers can use that are not scheduled for a set period.

### Examples:

* Fitness center
* Computer lab
* Cards, jigsaw puzzles, and games (each counted separately)
* Walking trail
* Library

### Does NOT count:

Individual appliances (i.e. TV, coffee pot, scales) or pieces of furniture

### Documentation:

Timeframe: Current year

Observed onsite.

## Questions 7-9

### Purpose:

To ensure a variety of activities

### Requirement:

For questions 7-9 combined, center must offer at least two activities in each of the four activity types: social, educational, health promotion/wellness, and arts.

### Documentation:

Timeframe: Entire SCOPE period

Observed in documentation.

## Question 10- Diversity

### Purpose:

To ensure the senior center serves a diverse population of older adults

### Requirement:

Center must reach a diverse population of older adults.

### Documentation:

Timeframe: Current

Observed onsite.

## OPPORUTNITIES FOR VOLUNTEERS

## Question 11- Volunteer Census and Activities

### Purpose:

To provide older adults with volunteer opportunities that benefit the center and community

### Requirement:

Volunteers must be engaged in at least one activity that benefits the center and one that benefits the community.

### Documentation:

Timeframe: Current

Roster or mailing list/phone list of center volunteers

## Question 12- Volunteer Recognition

### Purpose:

To ensure all senior center volunteers receive recognition for their efforts and encourage their continued service

### Requirement:

All center volunteers must be recognized annually. You may acknowledge different groups of volunteers in different ways if all volunteers are recognized annually.

### Documentation:

Timeframe: Entire SCOPE period

Invitations, event program, pictures, fliers, newspaper article, correspondence, or attendance sheets

## Question 13 (Excellence Only)- Volunteer Plan

### Purpose:

To have a plan in place for staff to understand essential aspects of the center’s volunteer program

### Requirement:

Center must have a *single document* that addresses all four sections of this question:

* List volunteer opportunities at the center, how many people are needed, and descriptions for each type of opportunity.
* Describe procedures for orienting and training volunteers and keeping them involved. Describe volunteer manuals or other written materials used to train volunteers, along with any specifics about orientation or training policies, frequency of training, etc.
* Describe the ways in which the center informs the community about volunteer opportunities at the center (i.e. fliers, newspaper, newsletter, etc.).
* Describe the ways in which the center informs participants about opportunities in the community Include information about how you post external opportunities received from outside organizations and/or volunteer opportunities that take place at the center but benefit people outside the center (i.e., making lap robes for people in nursing homes or delivering meals).

### Does NOT count:

Volunteer manual intended for volunteers

### Documentation:

Timeframe: Current

* Single-document volunteer plan containing all four required sections
* Evidence that what is described in sections (c) and (d) of the plan is occurring as described

## C. ADVOCACY

## Question 14- Advocacy

### Purpose:

To protect the rights of older adults and empower them to stand up for their own rights

### Requirements:

* Must demonstrate action initiated by center staff to:
  + Lead older adults to advocate for themselves; or
  + Fight system to remedy injustice; or
  + Act on behalf of older adult(s), beyond normal case assistance, to change situation or policy.
* Initial- 3 instances
* Recertification- 15 instances with at least 3 in most recent year

### Examples:

* Senior Tar Heel Legislative delegate or alternate speaking and *soliciting input* from participants
* Candidates forum with question and answer period
* Voter registration
* Serving on a non-aging related committee to advocate for older adults
* Phone calls, letters, email, visits on behalf of a cause
* Class about advocacy skills- *must involve practice or role playing*

### Does NOT count:

* Normal case-assistance
* Information-only presentation or event
* Regular job responsibilities (i.e. funding request to county commissioners)
* Activity by some of your seniors that did not have center’s involvement
* Bulletin board or advocacy corner of information without resulting action
* Advocacy skills class without practice or role playing
* Duplication of effort toward a single issue within a single year
* Medicare Part D annual open enrollment or scam events after January 1, 2016
* Advocacy efforts sent to grant providers rather than elected officials or local representatives

### Documentation:

Timeframe: Entire SCOPE period

Copies of letters sent, written attestation statements verifying phone calls made by participants, screenshots of emails sent, advocacy class training materials, fliers or other publicity announcing elected official/STHL delegate visit with the opportunity to give input or express concerns

## Question 15- Elder Abuse Policy

### Purpose:

To be prepared to handle suspected cases of elder neglect, abuse, or exploitation

### Requirement:

Must have a written procedure for reporting suspected elder neglect, abuse, or exploitation.

### Documentation:

Timeframe: Current

Copy of policy

## D. TRANSPORTATION TO THE CENTER

## Question 16- Transportation to the Center

### Purpose:

To encourage the participation of seniors who do not drive

### Requirement:

Must have at least one means of transportation to the center must be available for those that do not drive.

### Documentation:

Timeframe: Current

None needed if observed onsite

SECTION 3-PLANNING, EVALUATION AND INPUT FROM OLDER ADULTS

## GOVERNANCE

## Question 17- Mission Statement

### Purpose:

To have principles that provide guidance for center planning

### Requirement:

Center must have a mission statement. If a center is under an umbrella organization, center should come up with its own mission statement or statement of purpose.

### Documentation:

Timeframe: Current

Observe mission statement posted AND in center publications as described.

## Questions 18a and b- Advisory Committee and Orientation

### Purpose:

To broaden the spectrum of programming ideas and ensure older adults are represented when making programmatic decisions

### Requirements:

**18a-** The center must have an advisory committee recruited from the center and the community who advise the director in planning the center’s services, programs, and activities to meet the needs of the community. 60% of members must be older adults.

**18b-** Members beginning service within the SCOPE period must be oriented within two months of their first meeting.

### Documentation:

Timeframe: 18a: current; 18b: entire SCOPE period

**18a**- Roster, meeting minutes with names of those present and absent, or mailing list

**18b**- Minutes showing who attended the orientation sessions or attestations confirming orientation with dated signatures from any advisory members who joined the committee within the SCOPE period

## Question 19- Advisory Orientation Content

### Purpose:

To provide advisory committee members with a thorough understanding of operations of the senior center

### Requirement:

Centers must offer at least two hours of orientation to advisory committee members. Topics must include:

* the philosophy of the center (i.e. discussion of the mission and purpose of the center);
* legal issues (i.e. liability, confidentiality);
* policy (i.e. advisory body by-laws, center’s handbook);
* the political environment in which the center operates (i.e. how center fits into community, relationships with other governing boards, chain of command for decision-making); and
* the financial environment in which the center operates (i.e. authorization, funding).

### Documentation:

Timeframe: Current

* Orientation agenda AND
* Supporting materials (handouts, notebooks, presentations) or a detailed description/speaker notes of information covered in the orientation

## INPUT FROM OLDER ADULTS

## Questions 20a, b, and c- Input from Older Adults

### Purpose:

To ensure the center programs meet the needs and interests of current participants and other older adults in the community

### Requirements:

**20a-** Center must gather input from a representative, broad cross-section of its *participants* each year using a survey that is available to all center participants and captures two types of information:

* Participants’ overall satisfaction with the center AND
* Participants’ service needs and activity preferences to be used for planning.

**20b-** (For Excellence Only) Center must have a *second measure of participant input* each year. This second method can be less formal and less representative, but it must be made *available* to all center participants. If activities from satellites are included in the SCOPE tool, this second measure should also be available and advertised to satellite participants.

### Examples:

* Food with the director event to discuss center programs and participant preferences.
* Focus groups that include open-ended questions asked the same way to all groups.
* Suggestions boxes or conversations with participants. Efforts by governing bodies, parent organizations, or area planning groups to obtain information from seniors in the community, if information is gathered that is useful for planning services and activities for the center and it is used for senior center planning.

**20c-** (For Excellence Only) Center must have at least one of the following two types of information gathered from older adults who do NOT attend the senior center *(nonparticipants)* each year:

(For Merit Only)Center must have at least one of the following two types of information gathered from older adults who do NOT attend the senior center *(nonparticipants)* every 3 years:

* Reasons for not attending
* Activities and/or services that would attract them to the center

If the same survey is used multiple times in a single year, it counts as one survey.

You can use the same survey for participants and nonparticipants if you include question that will allow you to separate the answers and analyze the results separately. Make sure that nonparticipants are clearly directed to skip to only those questions relevant to them.

### Does NOT count:

* Surveys about specific programs rather than the entire center
* Participant surveys which are only administered at satellites, to select groups (i.e. nutrition program participants), or a few individual classes rather than to a representative sample of all center participants
* Suggestion boxes with no or little usage after one year
* Non-participant surveys should be used on those individuals that can feasibly attend the center

### Documentation:

Timeframe: Entire SCOPE period

**20a-** a final summary report for each survey used. Must include:

* Date(s) administered
* Number given out
* Number of people who responded
* Tally of responses for each question
* What you learned
* What action was taken

If the same survey was administered at separate sites (satellites, nutrition sites, or other centers under the same parent organization), the reports should separate out the tally and results for each.

**20b-**

* If a second survey is used, the documentation requirements are as listed in 20a.
* Oral suggestions/food with director/suggestion box: include an ongoing record of input received from center and satellite participants (if applicable) and brief notes about the center’s response to input, if not clearly described on the SCOPE tool.

**20c-** Appropriate documentation based on method used, as listed above. If the same method was used for participants and nonparticipants, the results for each group must be analyzed separately.

## Question 21 (Excellence Only)- Input from Other Sources

### Purpose:

To encourage staff to utilize a wide variety of input for planning

### Requirement:

Center must describe input used for planning that does *not* come directly from older adults.

### Examples:

* Input received from attending other aging service provider meetings about community needs
* Input from surveys or focus groups of allied service providers about the center’s services/programs
* Attendance data for classes and events
* Formal or informal suggestions from your staff, members of your parent organization, or the regional or state level
* Suggestions received from training

### Documentation:

Timeframe: Current year

Records that correspond with response in SCOPE tool

## PLANNING

## Question 22 (Excellence Only)- Planning Process

### Purpose:

To encourage thoughtful and deliberate planning

### Requirement:

Center must describe planning process and how goals for the center are set.

### Documentation:

Timeframe: Current

No documentation required if description is adequate.

## Question 23 (Excellence Only)- Goals

### Requirement:

Center must have goals for the center that are currently in effect and, if applicable, consistent with goals submitted to the parent organization, funding organization, or other bodies requiring the center to set goals.

### Documentation:

Timeframe: Current

Minutes of meetings in which the goals were established, or in which staff gave reports on progress toward goals, or director/staff log of progress on work toward meeting goals

SECTION 4-STAFF

## GENERAL PERSONNEL PRACTICES

## Question 24- Personnel Policy

### Purpose:

To ensure a professional work environment with clear policies and procedures

### Requirement:

Center must have a clear organization chart and a written personnel policy that includes such information as leave, retirement, and benefits. Each employee must be provided with a copy or have an opportunity to read the policy.

### Documentation:

Timeframe: Current

* Copy of the center’s organization chart AND
* Personnel policy in the form in which it is distributed to employees (i.e. handbook, policy manual)

## INDIVIDUAL TRAINING AND PROFESSIONAL DEVELOMENT PLANNING

## Question 25- Staff Training Records

### Purpose:

To ensure appropriate professional development for senior center staff

### Requirements:

* Center director must have 15 hours of training for initial certification and 75 hours of training for recertification with 12 hours in the most recent year. If full time is 37.5 hours/week, the requirement remains 15 hours per year.
* Center director or manager must begin the Ann Johnson Institute for Senior Center Management during the first year of employment and must attend a minimum of one module per year until completed.
* Full time staff who work for more than 3 months, who interact with center participants, and who the director recruits, hires, trains, and supervises must receive an average of 15 hours of training per year and 75 hours total with 12 hours in the most recent year. Title V employees and parent agency employees who do not work at the center or one of its satellites are exempt from training requirements.
* Executive staff who actively participate in the running of the senior center should have relevant amount of training prorated by the number of hours allotted to the senior center.
* Part and partial time employees who meet the criteria listed above for full time staff and work more than 8 hours per week for more than 3 months must receive a prorated amount of 15 hours of training. See below for more guidance. Employees who work less than 8 hours per work or less than 3 months are exempt from training requirements.
  + Part-time: multiply the number of hours per week by 15, then divide the product by 40.
  + Partial time: multiply the number of months worked by 15, then divide the product by 12.
* Training content must cover one of three topics:
  + Aging issues
  + Job related topics
  + Safety

For initial certification or first year employees, staff must receive training in 2 of these areas within the past year. For recertification, employees must receive training in all 3 areas if they worked more than one year.

* Training method must be specified.
* Training received from participating on a SCOPE site team will count as 5 hours of training on “job related topics” unless you have documentation from DAAS showing the site visit lasted longer.

### Examples:

* An employee who works 20 hours per week needs (20 X 15)/40 or 7.5 hours of training each year.
* A full-time employee who only worked for 9 months would need (9 X 15)/12 or 11.25 hours.
* A part-time, recently hired employee who worked 15 hours/week for only 6 months would need (15 X 15)/40 hours or 5.625 of training per year and therefore (6 X 5.625)/12 or 2.8 hours for 6 months.

### Documentation:

Timeframe: Entire SCOPE period

Certificates of attendance, training materials, agendas, notes taken, or site visit letters for all employees employed at least 8 hours a week for 3 or more months during certification period, regardless of whether they are currently employed

## SECTION 5-OTHER OPERATIONAL ISSUES

## Question 27- Collaborations

### Purpose:

To maximize senior center capacity through well-defined collaborations

### Requirement:

* Merit- centers must have ongoing or specific collaborations within the most current SCOPE year (initial) or past 5 years (recertification) with at least 3 other organizations per year. This does not include contracts with other entities involving payment for products or services.
* Excellence- there must be 3 or more annual collaborations with signed and dated Memoranda of Understanding or letters of agreement between the collaborating organizations which explain the roles and expectations of both parties. If center has ongoing, multiyear agreement with an organization, it can count as *one agreement* *per year* if inclusive years are listed in agreement.

### Does NOT count:

* Contracts (Note- If center has a contract with an agency but has a separate collaboration that is not for pay, it can count. For example, a center cannot count a contract with a local college to provide an instructor but *can* count a collaboration with the same college for intern placement.)
* Partnerships within own agency or network (DAAS, AAA, other senior centers)
* Partnerships involving payment or funding for service (i.e.- if center receives SHIIP funding, it *may not* count SHIIP as a partner in this question; but if a center provides SHIIP counseling, and *does not* receive SHIIP funding, it *can* count the collaboration.)
* Facility use agreements without clear, nonfinancial benefit to the center

### Documentation:

Timeframe: Entire SCOPE period

* Merit: informal documentation such as a flier for an event that shows co-sponsorship, an email exchange discussing partnered event, or a calendar listing that mentions an outside provider
* Excellence: formal memoranda of understanding (MOUs) or letters outlining the responsibilities and agreement from both parties and signed and dated by both. Agreements may cover multiple years, but the time span covered by the agreement should appear explicitly in the text of the document.

## Question 28- Hours of Operation

### Purpose:

To ensure minimum senior center operations standards are met and to maximize the opportunity for participation.

### Requirement:

Center must be open full-time, and hours must be posted so they may be seen from outside of the main entrance.

### Documentation:

Timeframe: Current

Hours posted onsite

## Question 29 (Excellence only)- Extended Hours

### Purpose:

To provide participation opportunity for those who may have other obligations during traditional hours

### Requirement:

Center must offer extended hours or have plans to do so in the future or demonstrate a failed attempt to offer additional hours within the SCOPE period.

### Documentation:

Timeframe: Current

* Regular extended hours posted on door as listed above
* Schedules, newsletters, fliers showing after-hour events
* Copies of memos or other materials showing efforts if there is a plan to extend hours
* Attendance data demonstrating lack of success if center tried extended hours within the SCOPE time frame and did not receive response enough to warrant continued efforts
* Copies of correspondence, policy manual, or relevant statute if city/county owns building and does not permit additional hours or there are other insurmountable obstacles

## 

## Question 30- Compliance with Local Code

### Purpose:

To ensure general safety inside the senior center

### Requirement:

Centers must be in compliance with local codes.

### Documentation:

Timeframe: Current

Current sanitation certificate, fire inspection report, elevator inspection (if applicable)

## Questions 31 and 32- Upkeep and Accessibility

### Purpose:

To ensure a well-maintained senior center facility

### Requirements:

Center must have a plan for the upkeep of the center and grounds to assure safety and neat appearance as well as features that make it accessible to people with disabilities.

### Documentation:

Timeframe: Current

No documentation required.

## Question 33 - Center Space

### Purpose:

To ensure minimum senior center operations standards are met

### Requirements:

Center must be a minimum of 4000 square feet, of which 3200 must be used for center programming. See Policies & Procedures for more information about how to count offsite space for meeting the space requirement.

### Documentation:

Timeframe: Current

* Initial- blue prints, letter from building inspector, deed, mortgage/rental agreement, or drawing with measurements shown for each dimension.
* Recertification- none needed if situation has not changed since last certification.

**Question 34- Signage**

### Purpose:

To inform older adults in the community about the senior center and to make it easy to find

### Requirement:

Center must have a sign identifying it by name that is visible from the nearest road.

### Documentation:

Timeframe: Current

Observed onsite.

## Questions 35a and b- Fundraisers and Grants

### Purpose:

To expand the capacity of the senior center by expanding its sources of revenue.

### Requirements:

* Initial certification- centers must engage in at least 2 fundraising and/or grant activities in the last year. In-kind donations which were actively solicited by staff counts as a type of fundraiser. Submitting a grant application counts toward this requirement even if it was not funded.
* Recertification- centers must engage in at least 10 fundraising and/or grant activities with at least 1 in the last year.
* Fundraisers and grants must benefit programs that are *provided by the senior center* rather than another agency, including the parent agency. Funds raised may be divided between multiple centers within your agency or between the parent organization and the center.
* If a center is part of government or agency with policies against fundraising, the center should show evidence of working to expand funding in permitted ways.

### Does NOT count:

Routine, noncompetitive funding, even if you are required to fill out an application for it

### Documentation:

Timeframe: Entire SCOPE period

Copies of grant proposals, letters from funders, advertisement for fundraisers, financial reports, copies of checks or receipts

## Questions 36 and 37 (Excellence Only)- Financial Reporting

### Purpose:

To protect against financial mismanagement

### Requirements:

1. Centers must produce an annual financial report and an audit (if applicable) or be included in the annual financial report of the parent organization’s or local government’s financial report.
2. Centers must have a means of letting participants know how access to the center’s annual financial report or audit and the ability to provide a copy of the report at the center if requested.

### Documentation:

Timeframe: Current

**36-** Copy of annual financial statement, fiscal report, and audit report if applicable

**37-** Materials publicizing statement availability, observed onsite if publicized on a bulletin board

SECTION 6-THE EXTRA MILE (EXCELLENCE ONLY)

## Questions 38- Special Projects

### Purpose:

To encourage centers staff to exceed certification requirements in unique and innovative ways

### Requirements:

Centers must actively engage in special projects throughout certification period.

### Documentation:

Timeframe: Entire SCOPE period

Corresponding pictures, publicity documents, correspondence, sign-up lists, and/or agreements with project collaborators

## Question 39- Mentoring

### Purpose:

To encourage centers staff to share knowledge and ideas with other NC senior center professionals

### Requirements:

Center staff must mentor other senior center professionals from outside their own agency.

### Documentation:

Timeframe: Entire SCOPE period

Thank-you letters, site visit confirmation letters, listserv correspondence

## Question 40- Summary Statement

### Purpose:

To give staff the opportunity to summarize why the center should be center a Center of Excellence.

### Requirements:

Center should provide a statement demonstrating the pursuit of Excellence in efforts to fulfill its mission.

### Documentation:

Timeframe: Current

No documentation required