

Wednesday, July 16, 2025**8:30 AM****McFarland Municipal Center**
5915 Milwaukee St, McFarland
Conference Room A

AGENDA

1. CALL TO ORDER, ROLL CALL.
2. PUBLIC APPEARANCES.
 - a. This is an opportunity for members of the public to address the Senior Outreach Services Committee. Members of the public who wish to address the Committee should fill out a public comment form and turn into the meeting chairperson. Members of the public may speak during public appearances or during their selected agenda item as they designate on the public comment form. Please adhere to the 3-minute time limit. Additionally, you may send your public comments to senior.outreach@mcfarland.wi.us to be included as part of the meeting.
3. APPROVAL OF MINUTES.
 - a. Motion to approve the minutes of the May 21, 2025 meeting.
4. BUSINESS.
 - a. Discussion and action regarding the formation of a McFarland Dementia-Friendly Community Group and request that the Village of McFarland government become the first community entity to pursue the certification of "Dementia-Friendly" by directing all municipal departments to engage in the required training and education.
 - b. Discuss the foundational values and purpose of senior centers and review information about accreditation standards from the National Institute of Senior Centers and Wisconsin Association of Senior Centers to clarify elements that define and differentiate senior centers from other public spaces.
 - c. Discuss progress and preliminary reporting from research about and visits to other Dane County senior centers.
 - d. Director will share upcoming programming and events.
5. SCHEDULE NEXT MEETING DATE.
 - a. Next meeting scheduled for September 17, 2025 at 8:30am. Discuss increasing frequency of SOS meetings to occur monthly.
6. ADJOURNMENT.

Any person who has a qualifying disability as defined by the Americans with Disabilities Act that requires the meeting or materials at the meeting to be in an accessible location or format should contact the McFarland Municipal Center at (608)838-3153, 5915 Milwaukee Street, McFarland, Wisconsin, or village.clerk@mcfarland.wi.us by 2:00 p.m. at least 5 business days prior to the meeting so that any necessary arrangements can be made to accommodate each request. If the meeting or request is less than 5 business days from the meeting, requests for accommodations may still be made and reasonable efforts will be made to accommodate each request.

VILLAGE OF MCFARLAND

Senior Outreach Services Committee Minutes

Wednesday, May 21, 2025 - 8:30 AM

1. CALL TO ORDER, ROLL CALL.

Village Trustee Prill called the regular meeting of the McFarland Senior Outreach Services Committee to order at 8:30 am in Conference Room A of the McFarland Municipal Center.

Members present: Lowell J. Prill, Ken Boyd, Jerry Adrian, Colleen McCormick, Barb Vander Werff (Village Board President Stephanie Brassington in attendance as observer only)

Members not present: Vito Griseta, Diane Mikelbank

Staff Present: Katie Gletty-Syoen, Matt Schuenke, Dawn Wallace

2. PUBLIC APPEARANCES.

- a. *This is an opportunity for members of the public to address the Senior Outreach Services Committee. Members of the public who wish to address the Committee should fill out a public comment form and turn into the meeting chairperson. Members of the public may speak during public appearances or during their selected agenda item as they designate on the public comment form. Please adhere to the 3-minute time limit. Additionally, you may send your public comments to senior.outreach@mcfarland.wi.us to be included as part of the meeting.*

No public appearances.

3. APPROVAL OF MINUTES.

- a. *Motion to approve the minutes of the March 19, 2025 meeting.*

Motion by Jerry Adrian, second by Barb Vanderwerff, to approve the minutes of the March 19, 2025 meeting. Motion carries 5 - 0 - 0 by acclamation.

4. BUSINESS.

- a. *Older American's Month Proclamation.*

Katie Gletty-Syoen reported that she read the Older Americans Month proclamation at the last Village Board meeting.

- b. *Dementia Friendly Initiative*

Katie Gletty-Syoen listed the three main initiatives that the Senior Outreach Services Department will concentrate on: 1) Falls prevention, 2) Social isolation; and 3) Dementia awareness (by providing education, increasing awareness and by taking action in our community). She presented a packet of information regarding "Building Dementia-Friendly Communities." She noted that McFarland had started this process in the past, but it was not supported sufficiently to keep it going. She would like to re-start the process of getting committee and/or community members trained who then go to area businesses (Village staff members, banks, schools, churches, etc.) to train employees. It was noted that trainers are volunteers and not staff. Jerry Adrian recommended bringing this idea to the Lions Club (by himself or Katie), Colleen McCormick will bring it to the Lioness group and Barb Vanderwerff to the exercise classes she attends. A few ways we can increase awareness is through the Senior

Outreach booth at the McFarland Community Festival, and by forming a team for the fall Alzheimer's Association fundraising walk.

Matt Schuenke recommended that this be made an agenda item for the next SOS committee meeting so that the group can vote on whether to propose this idea to the Village Board. If adopted, the next step would be to recruit volunteers.

c. Review Senior Services Planning Document

Matt Schuenke reviewed the planning document created by this committee in 2020-2021. The design work was halted by the Village Board in 2024 and we are now "taking a step back" and looking at how things have changed and what we need going forward. Jerry Adrian shared the history of the planning of the senior services portion of this project (going back many years). He noted that having a dedicated Senior Center was a priority then, which seems to have been lost. It was decided that this committee needs to be proactive in bringing plans and recommendations to the Village Board and emphasizing what focal points for towns of similar size are doing in our area. Katie Gletty-Syoen will meet with the focal point directors in Oregon, Fitchburg, Stoughton and Deforest and compile data for the committee to consider (staffing, volunteers, programs, etc.)

d. Update on programs and services.

Katie Gletty-Syoen presented updates to 2025 Senior Outreach programs and events. One event that is potentially being added (in partnership with the library) is a Wisconsin author's talk and book signing (the subject of the book is the author's personal experience of his wife's dementia).

Katie encouraged everyone to attend Senior Outreach events as representatives of this committee. She reviewed the event calendar for June, July and August.

5. SCHEDULE NEXT MEETING DATE.

a. Wednesday, July 16, 2025 at 8:30a.m.

6. ADJOURNMENT.

Motion by Colleen McCormick, second by Barb Vanderwerff, to adjourn at 9:50am.

Pursuant to law, written notice of this meeting was given to the public and posted on the public bulletin board in accordance with Open Meetings Law.

Respectfully submitted,
Dawn Wallace
Nutrition Manager


VILLAGE OF
McFarland
SUMMARY SHEET

MEETING DATE: Wednesday, July 16, 2025

SECTION: Business

DEPARTMENT: Outreach

CONTACT:

AGENDA ITEM: Discussion and action regarding the formation of a McFarland Dementia-Friendly Community Group and request that the Village of McFarland government become the first community entity to pursue the certification of "Dementia-Friendly" by directing all municipal departments to engage in the required training and education.

PREVIOUS ACTION:

ISSUE SUMMARY:

FINANCIAL/BUDGET IMPACT:

VILLAGE PLAN REFERENCE:

ORDINANCE REFERENCE:

BOARD, COMMISSION OR COMMITTEE RECOMMENDATION:

ATTACHMENTS:

None


VILLAGE OF
McFarland
SUMMARY SHEET

MEETING DATE: Wednesday, July 16, 2025

SECTION: Business

DEPARTMENT: Outreach

CONTACT:

AGENDA ITEM: Discuss the foundational values and purpose of senior centers and review information about accreditation standards from the National Institute of Senior Centers and Wisconsin Association of Senior Centers to clarify elements that define and differentiate senior centers from other public spaces.

PREVIOUS ACTION:

ISSUE SUMMARY:

FINANCIAL/BUDGET IMPACT:

VILLAGE PLAN REFERENCE:

ORDINANCE REFERENCE:

BOARD, COMMISSION OR COMMITTEE RECOMMENDATION:

ATTACHMENTS:

1. NCOA Senior Center Facts
2. WASC Accreditation Standards
3. NCOA NISC Building Excellence 2023

AGING IN AMERICA

Get the Facts on Senior Centers

Aug 15, 2024 3 min read

KEY TAKEAWAYS

Recognized by the Older Americans Act (OAA) as a community focal point, senior centers have become one of the most widely used services among America’s older adults.

Senior centers serve as a gateway to the nation’s aging network—connecting 1 million older adults to vital community services.

Senior centers work in partnership with other community agencies and organizations and businesses to provide access to an array of opportunities for older adults to stay safe, active, and healthy.



Senior centers, recognized by [the Older Americans Act \(OAA\)](#) as a community focal point, are one of the most widely used services among America's older adults. Today, more than 11,000 senior centers serve more than 1 million older adults every day in their communities and neighborhoods.¹

Benefits of senior centers

- Older adults who participate in senior center programs experience better psychological well-being across several measures compared to non-participants, including:
 - Higher levels of health
 - Increased social interaction
 - Greater life satisfaction²
- Seventy-five percent of participants visit their center 1 to 3 times per week and spend an average of 3.3 hours per visit.³
- Research shows older adults who participate in senior center programs can learn to manage and delay the onset of [chronic disease](#) and experience measurable improvements in their physical, social, spiritual, emotional, mental, and economic well-being.

Senior center services

- Senior centers connect older adults to vital [community services](#) that can help them stay healthy and independent.
- More than 60% of senior centers are designated focal points for delivery of OAA services—allowing older adults to access multiple services in one place.⁴

- Senior centers work in partnership with other community agencies and organizations and businesses to provide access to an array of opportunities for older adults to stay safe, active, and healthy.
- Senior centers frequently serve as part of emergency response. During the pandemic, seniors centers were [a lifeline for older adults and their communities](#).
- Senior centers offer a wide variety of programs and services, including:
 - Meal and nutrition programs
 - Information and assistance
 - Health, fitness, and wellness programs
 - Transportation services
 - Public benefits counseling
 - Employment assistance
 - Volunteer and civic engagement opportunities
 - Social and recreational activities
 - Educational and arts programs
 - Intergenerational programs

Senior center funding

To maintain operations, senior centers must leverage resources from a variety of sources. Primary funding sources are often local (municipal or county government tax dollars). Other sources include: [federal](#) and state governments; fundraising

events; public and private grants; businesses; bequests; participant contributions; in-kind donations; and volunteer hours. Most centers rely on three to eight different funding sources.

The future of senior centers

Today's [senior centers are reinventing themselves](#) to meet the needs and desires of three generations of older adults. Baby Boomers now constitute more than two-thirds of the 50+ population. Senior centers are developing new programs and opportunities for this dynamic generation of older adults and have an eye towards the future with the leading age of Generation X turning 60 in 2025.

NCOA's role

NCOA supports the aging services network through the following:

The National Institute of Senior Centers (NISC)

[The National Institute of Senior Centers \(NISC\)](#) is the largest national membership organization dedicated to serving senior center professionals. [Free to join](#), NISC supports senior centers with best practices and innovations in programming, as well as networking and training opportunities. NISC is setting the standard for the future of senior centers by promoting cutting-edge research, promising practices, professional development, and [advocacy](#). NISC also offers the nation's only [National Senior Center Standards of Excellence Program](#).

Modernizing Senior Centers Resource Center

Through a cooperative agreement with the U.S. Administration for Community Living (ACL), NCOA has established a national [Modernizing Senior Centers Resource Center](#) to provide leadership, training, technical assistance, and a clearinghouse of innovative programs and strategies. These resources help ensure senior centers have the capacity, tools, and support needed to meet the current and future needs of diverse older adults across the U.S.

Sources

1. Grants.gov. HHS-2021-ACL-AOA-PPSC-0080, Modernizing Senior Centers Resource Center, Department of Health and Human Services, Administration for Community Living. May 27, 2021. Found on the internet at <https://www.grants.gov/web/grants/view-opportunity.html?oppld=331088>
2. Hernandez, S. WebMD. What to Know About Senior Centers. Found on the internet at <https://www.webmd.com/healthy-aging/what-to-know-about-senior-centers>
3. Manoj Pardasani and Cathy Berkman. New York City Senior Centers: Who Participates and Why? Journal of Applied Gerontology. September 2021. Found on the internet at <https://journals.sagepub.com/doi/abs/10.1177/0733464820917304>
4. Administration for Community Living. Older Americans Act Title III Programs. 2020 Program Results. Found on the internet at https://acl.gov/sites/default/files/news%202022-09/OAA%20Report_Module%20I_Title%20III_8-26-22%20FINAL_508.pdf



Share Your Senior Center Story

Help us learn from one another by sharing your story of how your senior center is improving the lives of older adults in your community.

**Wisconsin Association
of Senior Centers**

Accreditation Standards

for

Multi-Purpose Senior Centers

Revised 02-03-05

MISSION/PURPOSE STATEMENT

***PURPOSE DEFINITION:** Mission/purpose statement is a brief statement describing the reason for a Senior Center's existence.*

1. A Senior Center shall have written statements that express its basic purposes and mission.
2. Purpose statements shall be developed by board, staff, and participants.
 - *Attach a copy of the Center's mission/purpose statement.*

GOALS AND OBJECTIVES

***PURPOSE/DEFINITION:** Goals are the purpose toward which an endeavor is directed. Objectives are measurable steps taken to meet these goals.*

1. A Senior Center shall have written goals and objectives (a minimum of 4). These shall be:
 - a. Established as a part of the Center's planning process for achievement in the current program year, and for long range development.
 - b. Defined, so that progress can be measured.
2. Goal statements shall be derived from a Senior Center's purposes and based on the needs and interests of senior adults.
3. The goal statement shall reflect the commitment of the Senior Center to work with other community agencies.
4. Goal statements shall be developed by the governing body, staff, and participants.
 - *Attach a copy of the Center's goals and objectives, including a time-line for completion.*

GOVERNING DOCUMENTS

PURPOSE: This documentation provides the history of how the Senior Center came to be.

1. If the Senior Center is incorporated, or non-profit, proof of by-laws and constitution is required; attach a copy.

~~2.~~ 2. If the Senior Center is a governmental unit, a copy of the document establishing the Center is required; attach a copy.

3. Describe the Senior Centers history, and how it was created.

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ORGANIZATIONAL STRUCTURE

Purpose: *organizational or flow charts which illustrate the Center's structure and communication channels for operation.*

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1. A Senior Center shall have written public statements and organizational charts explaining the Center's organizational structure and communication channels.
 - a. The Center's organizational structure shall describe the relationships between all Center components—staff, governing body, advisory committees, etc.
 - b. If a Senior Center is a program or unit of a larger organization, its relationship to the parent body shall be defined.
 - c. If a Senior Center is a part of a network of Centers, its relationship to the other Centers in the network, and to the network administration, shall be defined.
2. These statements and charts shall be available to the governing body, staff, participants, and concerned persons in the community, and utilized in the on-going Center operation.

~~• Attach copies of organizational or flow charts which illustrate the Center's structure and communication channels for operation. These need to clearly delineate inter-relationships and chain of command.~~

GOVERNING BODY

PURPOSE/DEFINITION: The term “governing body” in this context refers to the whole system of boards and advisory committees which play a part in the decision-making process for the Senior Center. Each board or committee does not have to fulfill all of the specific requirements; however, it is necessary for all of them to be met by at least one of the components of the governing body. For example, a Center participant does not have to be on each committee, but participants clearly must be represented in the decision-making process.

1. A Senior Center’s governing body shall be of adequate size and appropriate structure to operate effectively and efficiently. Each board or committee does not have to fulfill all of the specific requirements; however, it is necessary for all of them to be met by at least one of the components of the governing body. For example, a Center participant does not have to be on each committee, but participants clearly must be represented in the decision-making process.

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2. The governing body shall be composed of Center participants and individuals from the community who are knowledgeable about the needs and interests of senior adults and about community resources, and who have the skills and expertise necessary for guiding the Center.

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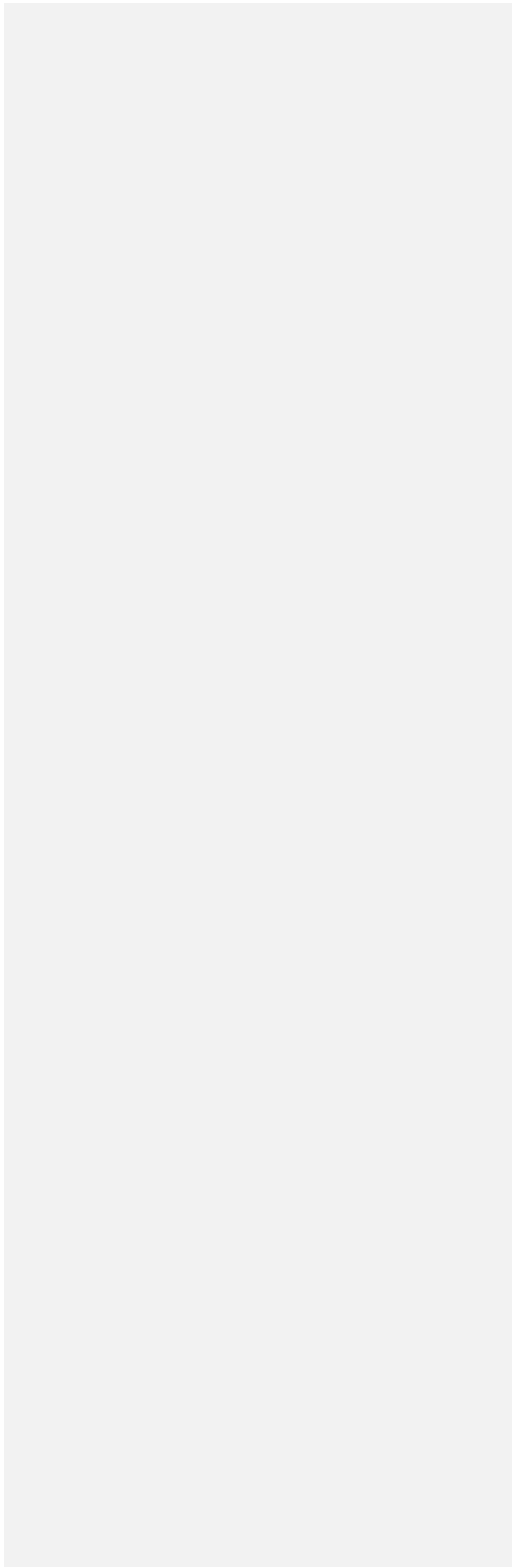
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- *Attach a list of the members, and who they represent, for the various units of the governing body of the Center.*

3. The governing body shall have written by-laws that define and establish procedures for the following:

- a. Qualifications for membership
- b. Election and tenure of office
- c. Specifications of officer’s duties
- d. Regular and special meetings
- e. Committees
- f. Parliamentary procedures for the conduct of meetings
- g. Quorum

- h. Recording of minutes
 - i. Provision for dissolution of the organization such that no residual assets can accrue to the benefit of any individual
 - j. Procedures for amending by-laws
4. Committees of the governing body shall have clearly defined membership and responsibilities.
- *Attach a copy of the by-laws and procedures or job descriptions for the various units.*
5. The governing body shall have the following responsibilities:
- a. Hold regular meetings and make the minutes available.
 - b. Formulate and annually review Center purposes and goals.
 - c. Establish policies and procedures that maintain high standards of operation.
 - d. Undertake an annual evaluation of Center activities, services, and general operation.
 - e. Advocate with other agencies to meet the needs of senior adults.
 - f. Plan and implement public relations activities.
 - g. Seek participant input into Center operations.
- *Provide a copy of the Center policy manual.*
 - *How are minutes made available to the public?*
 - *How are goals and objectives annually reviewed?*
 - *How is the advocacy responsibility fulfilled?*
 - *How is participant input sought?*
 - *How is input acquired from seniors who do not participate at the Center?*



ADVISORY BOARD

1. The advisory board shall be composed of Senior Center participants. (Individuals from the community possessing needed skills or expertise may also be members.)
2. The advisory board shall cooperate with the Senior Center director to establish effective programming responsive to senior adults' needs.
 - *Does the Center have an advisory committee? If not, please explain.*

LINKAGES TO COMMUNITY SERVICES AND RESOURCES

1. A Senior Center shall function as a focal point in order to make community services more easily accessible to senior adults by forming linkages with other agencies and organizations.
 2. Senior Centers shall encourage providers, where appropriate, to use Center facilities in order to make services more accessible.
 3. A Senior Center shall facilitate senior adults' relationships with the community services agencies. To accomplish this, a Center shall:
 - a. Facilitate the provision of information and referral about available resources and services.
 - b. Assist senior adults in their contacts with other agencies and organizations.
 - c. Make appropriate follow-ups.
 - d. Promote the services and activities available through these linkages.
- *What linkages does the Center have with other community services and organizations? List examples.*

PUBLIC INFORMATION

1. A Senior Center shall provide information on the Center's program and other resources for senior adults through the broad use of available media.
2. A Senior Center shall help promote a positive image and understanding of the aging process.
 - *Explain how information is disseminated.*

COMMUNITY PLANNING

1. A Senior Center shall participate in (or initiate, if necessary) interagency and community planning and coordinating of activities, directing their attention to needs and interests of senior adults, identifying gaps or fragmentation in services, and working with these planning groups to address these needs. Particular attention should be paid to the needs of minorities, the frail, the disabled, and those in greatest social and economic need.
2. Participants, staff, and governing body members shall serve on boards, committees, and task forces of other community service organizations.
3. A Senior Center shall provide information and assistance to local, state, and national policy-making bodies and agencies in order to positively influence policies affecting senior adults.
 - *In what ways does the Center participate in the community planning process?*
 - *On which boards, committees, and task forces do representatives of the Center serve?*

PROGRAMS

1. A Senior Center shall offer a broad range of services and activities both within the Center and at other appropriate locations.

2.3. Senior Centers shall offer cooperative programming with other agencies.

- *Attach a copy of the current programming offered by the Center (can be a copy of a monthly calendar or newsletter).*
- *Are activities offered both at the Center and in other appropriate locations? If so, list examples. If not, please explain.*
- *What are some cooperative programs with other agencies?*

3.4. Senior Center activities and services shall promote personal growth, develop leadership potential, and improve the self-image of senior adults.

- *List programs which promote personal growth.*
- *How does the Center programming develop leadership potential?*
- *How does Center programming improve the self-image of senior adults?*

4. A Senior Center's programming shall respond to individual differences such as lifestyle, ethnicity, values, experiences, age, and health status by providing opportunities for a variety of types and levels of involvement, including:

- a. Small and large group activities
 - b. Active and spectator participation
 - c. Intergenerational programming
 - d. Involvement in the general community
 - e. Services to individuals
- *In what ways does the Center's program reflect the diversity of their local senior adult population?*
 - *Are both small and large group activities offered?*
 - *Are both active and passive programming opportunities offered?*

- *How does the Center promote involvement in the general community through its programming or in publicizing other community activities?*
 - *What kinds of services are offered to individuals?*
5. A Senior Center's program shall include outreach to:
- a. Inform senior adults about available services and activities.
 - b. Encourage senior adults in its service area to participate in its programs.
 - c. Extend activities and services to those who cannot come to the Center.
 - d. Undertake special outreach efforts to minorities and those who are physically or sensorial impaired.
- *Where and how are outreach efforts directed?*
 - *What special outreach activities are conducted by the Center to expand awareness of its program to persons with disabilities and hard-to-reach populations?*
6. A Senior Center shall provide intergenerational activities as a regular part of the Center's programming.
- *What intergenerational activities are offered by the Center?*

EVALUATION

1. A Senior Center shall make appropriate and adequate arrangements to evaluate and report on its operation and programming.
 - a. Ongoing monitoring and assessment of activities and services shall be conducted as part of the program planning process, program development, and improvement of operations.
 - b. Responsibility for ongoing formal and informal assessment of activities and services lies with the Center director and the governing body.
 - c. A formal evaluation of the Center's operation and program shall be a part of the application process for accreditation or for renewal of accreditation.
 - d. Participants, staff, and the governing body shall have access to the evaluation results.

2. Tools of evaluation:
 - a. A Senior Center shall use the accreditation materials provided by the Wisconsin Association of Senior Centers.
 - b. A good treatment of evaluation standards is included in the "Senior Center Standards and Self Assessment Workbook" from the National Council on the Aging, (pp. 89-101).
 - c. An annual hearing is recommended as part of the evaluation process for the total Senior Center program.
 - *What is the evaluation process for the Center? Attach copies of the evaluation materials used.*

 - *Does the Center have an annual hearing?*

ADMINISTRATION

1. The roles and responsibilities for the administration of the Center shall be clearly defined.
2. The governing body of the Senior Center shall designate a director responsible for the overall management of the Center's operation and program.
3. In a Senior Center that is a part of a larger agency, the director shall have a defined relationship with:
 - a. The larger agency's governing body.
 - b. The larger agency's administrative staff.
 - *Attach a copy of the job description for the Center director.*

 - *How does the director report to the governing body?*

PERSONNEL POLICIES, PRACTICES AND PROCEDURES

1. Personnel policies governing administration, rights, and responsibilities shall be established and maintained as a matter of official record.
2. Personnel policies shall be written in a handbook or other suitable form and provided to the staff.
3. Personnel procedures and criteria covering the following areas shall be included:
 - a. Recruitment, hiring, probation, and dismissal
 - b. Retirement
 - c. Insurance
 - d. Leave, vacation, holidays, and other benefits
 - e. Grievances and disciplinary actions
 - f. Performance, appraisal, and promotion
 - g. Protection from sexual harassment
 - h. Protection from discrimination based on age, race, sex, sexual preference, disability, and religious preference
4. Wages, salary, and hiring practices shall be consistent with requirements of funding sources and all governmental laws and regulations.
 - *Who sets personnel policy? (If the Center has its own policies, they must meet the criteria from #3 above.)*
 - *If the Center is a part of a civil service or governmental system, examine that policy manual.*
 - *How and when are employee performances evaluated? Attach copies of evaluation tools.*

Job Descriptions

1. There shall be a written job description for each staff position (paid and volunteer).
2. Each job description shall state as a minimum:
 - a. Position title
 - b. Position classification, if applicable
 - c. Qualifications
 - d. Duties and responsibilities
3. Each staff member shall be given a copy of his or her own job description and it shall be discussed at the time of employment.
4. Management shall periodically review each job description with the staff and make revisions as appropriate.
 - *How many staff positions does the Center fill?*
 - *List the titles and number of positions.*
 - *Attach job descriptions for all staff members.*

Staff Training

A Senior Center shall have a program of training and development for paid and volunteer staff to encourage participation in educational and training opportunities which will enhance the skills and job performance capacity of personnel.

- *List training provided to staff over the past year.*

Volunteers

1. Volunteers shall be an integral part of the Senior Center's operation.

2. A Senior Center shall develop a volunteer program to involve senior adults in the Center's operation and programming.
3. Guidelines and procedures governing volunteers shall include:
 - a. A clear definition of responsibilities
 - b. A system for recruitment
 - c. Orientation, training, supervision, and evaluation
 - d. A channel for volunteer input into Senior Center planning and operation
 - e. Ongoing formal and informal recognition
 - f. A method of formal termination
 - *In what ways does the Center regularly utilize volunteers?*
 - *What kind of training is provided to volunteers, and how often?*
 - *Attach job descriptions for volunteers.*

Volunteer and Employment Opportunities

1. A Senior Center shall work with other agencies and organizations to promote volunteer opportunities in the community for senior adults.
2. A Senior Center shall promote employment opportunities for senior adults within the Center and with other organizations and agencies.
 - *What is the Center's involvement in facilitating volunteer and employment opportunities for senior adults?*

EMERGENCY ARRANGEMENTS

NOTE: *Special consideration must be given to escape routes from Senior Center facilities located in basements and/or upper floors, and multi-story facilities.*

1. Policies shall be written for handling illness and accidents.
2. A written record of all incidents shall be filed whether or not there is apparent injury or property damage.
3. Written plans shall be posted in conspicuous locations throughout the Senior Center for evacuation in case of fire or tornado.
4. Periodic drill shall be scheduled and carried out in cooperation with the fire department.
5. Telephone numbers for fire department, police, and ambulance shall be posted.
6. A body fluid management policy must be established.
7. Paid and volunteer staff must be trained for all emergency procedures.
 - *Attach a copy of the personal emergency incident report form.*
 - *Are emergency fire and tornado procedures planned?*
 - *Have they been approved by the fire department? Attach a copy of signed approval.*
 - *Are escape routes clearly marked?*
 - *Describe the Center's tornado and fire drill procedures.*

- *Are escape drills, both fire and tornado, held? How often?*
- *When was the last fire drill?*
- *Are emergency evacuation directions posted?*
- *Where are the first aid kits located?*
- *Attach a copy of the body fluid management policy.*
- *Where are the emergency numbers posted?*
- *How frequently does the staff review the procedures to remain familiar with them?*
- *What proof is there of a review?*

BUDGET

DEFINITION: Contributions can include cash, materials, supplies, and volunteer hours calculated at an hourly rate, and in-kind donations such as free rent or services.

1. Budget preparation should be part of the annual planning process.
2. The budget shall be prepared by the director with input from the staff and governing body before submission to the appropriate funding source.
 - *What is the budgetary process for the Center?*

Fiscal Requirements

1. If the Senior Center's budget is administered by a governmental unit, the financial operations shall conform to legal and administrative requirements.
2. If the Senior Center is incorporated, the financial operations shall conform to an appropriate and accepted accounting standard.
 - *Who established the standards for the accounting procedures? (For example, governmental regulations or other funding source guidelines, etc.) Please explain.*

Fiscal Management Procedures–Bookkeeping

(For any cash handled directly by the Senior Center.)

1. The Senior Center shall maintain accurate and complete bookkeeping records.
2. The Senior Center shall have written procedures for centralized cash control including:
 - a. Recording cash receipts and expenditures.
 - b. Depositing cash.
 - c. Separation of cash handling from record keeping in order to avoid questions of conflict in accountability.
 - d. Annual audit of petty cash and other cash funds.

- *Review the bookkeeping system.*

 - *Attach copies of all cash handling and fiscal policies.*

 - *Explain the Center procedures for:*
 - a. *Recording cash receipts and expenditures*
 - b. *Depositing cash*
 - c. *Separation of cash handling from record-keeping*

 - *Is there a second person who regularly records cash transactions and assists in the annual audit?*
3. The Senior Center shall have a written purchasing procedure including:
- a. A system which accounts for receipt and payment of all purchases.
 - b. Names of persons authorized to contract or purchase for the Senior Center.
4. A Senior Center shall have a documented system of inventory for capital items.
5. A Senior Center shall prepare year-end fiscal reports disclosing its full financial condition. (If it is not part of a governmental unit, one must be prepared for all cash handled directly by the Senior Center.)
- *Explain the purchasing procedure.*

 - *Is there an inventory system for capital items?*

 - *How and when is it updated?*

 - *Provide a copy of the inventory listing.*

- *How are year-end fiscal reports prepared?*

Fiscal Accountability and Reporting

1. A full audit shall be performed annually.
2. Records of income raised for special projects shall be maintained by at least two people in order to keep high standards of accountability.
3. All contributions shall be recorded and documented.
 - *Is an annual audit performed?*
 - *How are extra-budgetary funds documented?*
 - *How are contributions documented?*

RISK PROTECTION

1. A Senior Center shall have a risk protection program (insurance coverage) that meets legal requirements and is adequate to preserve the Center's assets.
2. A Senior Center shall have a risk protection program that compensates claimants for reasonable claims and covers the Center, its staff (paid and volunteer), participants, and governing body members for claims for which they are liable.
 - *Does the Center have risk protection insurance? Explain the coverage.*
 - *Attach documentation for risk protection.*

RECORDS/REPORTS

1. Participant records and reports:
 - a. A Senior Center shall establish and maintain appropriate participant records.
 - b. Participant records must be kept confidential.

2. Program records and reports:

A Senior Center shall keep a system of records for its services and activities in order to document current operations, meet funding requirements, promote community support, and guide future planning. These records should include the following:

 - a. Description of services and activities provided.
 - b. Rosters of persons served.
 - c. Numbers of persons served by a type of service and activity (unduplicated count).
 - d. Number of service and activity units (optional).
 - *Explain the Center's system to record attendance and other participant records; attach sample documents.*

 - *How are programming records kept? Attach examples of documents.*

CONFIDENTIALITY

***NOTE:** Each Senior Center should consult their City or County, or private attorney to establish the policies for that Center. What information can or must be released needs to be documented. The process to gain access to information must be established for each Center.*

1. Each Senior Center shall have a written confidentiality policy which conforms to state statutes.
2. All staff and volunteer workers must be informed of the confidentiality procedures and requirements and agree to abide by them.
3. A policy stating how information may be obtained from a Senior Center must be clearly outlined.
4. If some information can only be released upon obtaining participant consent, a release of information form must be developed.
5. Secure storage of confidential records shall be maintained.
 - *Attach a copy of the Center's confidentiality policy.*
 - *Attach a copy of the Center's release of information form.*
 - *Attach a copy of the release information procedure.*
 - *Attach a copy of the staff and volunteers confidentiality agreement*

FACILITY

NOTE: Senior Centers already developed may not meet all of the facility criteria, but should strive to meet as many as possible. It is essential these criteria be included in the planning process for new construction or major renovation.

Facility Responsibility

1. Senior adults and staff shall be involved in the design of facilities and the selection of equipment and furnishings for the Senior Center.
2. Senior Centers shall seek the advice of individuals with expertise in designing facilities and selecting equipment for use by senior adults with particular attention paid to designing a facility so that it is accessible to people with special needs.
3. When the Senior Center rents or shares a facility in a building that it does not own, there must be written agreements concerning:
 - a. Time of use
 - b. Maintenance and repairs
 - c. Equipment use
 - d. Security and safety
 - e. Liability insurance
 - f. Facility and staff supervision
 - *Does the Center's facility appear to be well-maintained?*
 - *Who is responsible for the facility upkeep?*
 - *Is there a signed agreement between the Center and the building's owners, if the facility is not owned by the Center? Provide a copy of the agreement or contract.*
4. When the Senior Center permits another group to rent or share space in its facility, there shall be written agreements concerning:

- a. Time of use
 - b. Maintenance and repairs
 - c. Equipment use
 - d. Security and safety
 - e. Liability insurance
 - f. Facility and staff supervision
- *Is the Center available for use by other groups or individuals? If so, attach a copy of use policies. If not, please explain.*

Facility Visibility

1. A Senior Center facility shall be easily identifiable by senior adults.
2. The Senior Center's external appearance shall be attractive and appropriate to its use.
 - *Is the Center easily identifiable?*

 - *Is the exterior of the Center attractive?*

Facility Location

The following factors should be given consideration in choosing a Senior Center site:

- a. Demographic information and projections.
- b. Accessibility to the maximum number of senior adults.
- c. Proximity to other services and facilities.
- d. Convenience to public and private transportation, or within comfortable walking distance for participants.
- e. Avoidance of structural barriers or difficult terrain.
- f. Safety and security of participants and staff.

Facility Accessibility

A Senior Center shall take the necessary actions to create barrier-free access and movement within the facility for senior adults with disabilities and comply with the Americans with Disabilities Act requirements.

- *Is the Center located close to concentrations of senior adults?*
- *Is the Center near other services for senior adults?*
- *Is there a drop-off zone for those arriving by motor vehicle?*
- *Is public transportation near by?*
- *Is there an absence of structural barriers?*
- *Are walkways paved?*
- *Are there safe approaches to the building for those who walk?*
- *Is the Center located in a relatively safe neighborhood?*
- *Are stairs and ramps equipped with handrails?*
- *Are the restrooms equipped with safety features?*
- *Is the Center barrier-free for full access by senior adults with disabilities? If not, what plans are being developed to make the Center more accessible?*

- *What are the long-range plans for the facility?*

Facility Design

The facility design shall be adequate in size and designed to carry out Senior Center activities and services.

1. Spaces for group activities shall be large enough to avoid crowding and shall be located and designed so meetings and other programs may be conducted without too much undue interruption.
2. Areas for counseling and other individual services shall be designed to provide privacy.
3. There shall be adequate storage for program and operating supplies.
4. There shall be sufficient private office space to permit staff to work effectively and without undue interruption.
5. The facility shall include sufficient toilet facilities and be handicapped accessible.
6. The design shall facilitate participants' movement throughout the Center and involvement in activities and services.

- *Is there sufficient space to carry out Center activities?*

- *Is there space for private consultation?*

- *Is the office space adequate?*

- *Is the storage space adequate?*

- *Are the restrooms handicapped accessible?*

- *Can participants move easily from one area of the Center to another?*

Facility Furnishings and Equipment

1. Furniture and equipment to be used by participants shall be selected for comfort and safety and shall help to compensate for visual and mobility limitations and other physical disabilities.
2. Furniture arrangement shall promote interaction, permit private conversation, and facilities observation of activities.
3. The facility shall be decorated and furnished in an appealing manner.
 - *Are the furnishings appropriate for senior adults?*
 - *Are some of the furnishings selected to meet special needs of the participants?*
 - *Is the furniture arranged to meet a variety of conversational groupings?*
 - *Are there chairs adjacent to activity areas to permit participants to rest and others to observe?*
 - *Are there clear pathways for moving around the furniture groupings?*
 - *Are the furnishings visually appealing?*

Safety

1. The facility shall be designed, constructed, and maintained in compliance with

all applicable federal, state, and local building safety and fire codes, including the Occupational Safety and Health Act.

2. The facility shall be free of hazards such as, high steps, steep grades, etc. Where necessary, arrangements shall be made with local authorities to provide safety zones for those arriving by motor vehicle and adequate signals for pedestrian crossings.
3. The exterior and interior of the facility shall be safe and secure, with well-lighted areas, paved exterior walkways, and all stairs and ramps equipped with handrails.
4. Bathrooms and kitchens shall include safety features appropriate to their special uses (such as non-skid floors and grab bars).
 - *How often is the facility inspected? Attach a copy of the last satisfactory building and safety inspection.*
 - *Are the stairs and ramps equipped with handrails?*
 - *Are the restrooms equipped with safety features?*
 - *Are kitchen and other serving areas equipped with proper safety features?*

I understand information obtained through the WASC accreditation process, including all sample documents, may be shared with other Senior Centers to aid them in their development, and I agree to offer my support, encouragement and expertise to any other Senior Center Director undertaking accreditation.

Name

Date

Senior Center

BUILDING EXCELLENCE:

National Council On Aging/National Institute of Senior Centers -*The National Senior Center Self-Assessment Process*

*“This manual is dedicated to all the senior centers that were first,
To all the senior centers that are now,
To all the senior centers that will be
...And especially to all the creative people who make them work.”*

National Council on Aging

Improving the health and economic security of 10 million older adults by 2020

National Institute of Senior Centers - NISC

251 18th Street South, Suite 500

Arlington, VA 22202

membership@ncoa.org

1-800-373-4906

www.ncoa.org/nisc

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Preface

The National Institute of Senior Centers (NISC) celebrates senior centers, a tested and customer-focused service model for older people. Senior centers have grown from the first, established in New York in 1943, to an estimated 10,000 senior centers, serving 10 million older adults.

Senior centers, located in most of America, are rural and urban, public and private, and single or multiple sites. They serve a diverse and growing population of older adults with many new facilities developing annually. Each senior center is a unique operation with a direction and focus determined by its community, older people, and their families.

Senior centers are an accessible focal point and a gateway to an important system of home and community-based services. Senior centers serve people from those thinking ahead to retirement to those who are struggling with the vicissitudes of advanced years. They strengthen and support the integration of older people into community life by offering intergenerational activities, volunteer services, life-long learning, and leadership opportunities. They invigorate the older person by encouraging healthy behaviors, and thereby, discouraging disability and disease. Senior centers also support the family and community by providing information and referral to a myriad of social service resources including caregiving and long-term support and services.

Although each is unique, NISC member senior centers operate effectively from a common philosophy and with adherence to established standards of excellence. This manual is an important tool, developed to help review and strengthen key operations and programs. Senior centers have benefited in many ways from the self-assessment process by:

- updating or developing new policies and procedures,
- developing future goals and strategies,
- increasing community involvement and knowledge of the center and
- improving organizational and infrastructure at your center.

The National Institute of Senior Centers (NISC) is to be congratulated on its initiatives with national senior center standards and the self-assessment process.

Senior centers create a better future for all of us.

NCOA/NISC SELF-ASSESSMENT MANUAL

Welcome Letter

Dear Colleague:

Congratulations! You, the senior center and community are embarking on an exciting path. The senior center self-assessment process is an important step in the quality improvement of your senior center. This letter gives you an overview of the self-assessment process and includes helpful tips for successful completion.

The entire manual consists of three documents:

1. Introduction - General Information with a Checklist to acknowledge items you've completed and develop steps for the future.
2. National Senior Center Standards - Criteria for the Nine Standards
3. Self-Assessment Forms for First Time or Subsequent Self-Assessments

The Introduction/General Information section will provide background information and hints for carrying out the self-assessment process. The National Standard section will spell out the criteria by which the senior center will evaluate itself. These criteria along with the Checklist (found in the Introduction) are the measuring sticks that the self-assessment committee will use in gauging whether the senior center meets the standard. They will also discover what needs to be updated and what they can include with their plans for the future.

If you're a current NISC Affiliate Member, you can gain access to *Building Excellence*, the national standards manual for senior centers, by emailing the NISC Membership Team at membership@ncoa.org. If you aren't an Affiliate Member, NISC is free to join. [Become a member of NISC today](#) and get connected to a national network of support.

Please know that there are many people who want to help make this a worthwhile experience for you and your community's senior center. The forthcoming pages will help you start down the road to examine your senior center and prepare to plan for the future.

Good luck. You will be glad that you decided to take this journey.

Sincerely,

NCOA's NISC Executive Committee

Benefits and Process of Self-Assessment

WHO'S WHO

The Self-Assessment Business office is led by NCOA/NISC staff. They can quickly answer questions via phone calls or emails.

BENEFITS OF SELF-ASSESSMENT PROCESS

By conducting the Senior Center Self-Assessment community process, several accomplishments can be realized:

- It establishes a community-wide process that increases awareness of the senior center's contribution in the lives of older adults and their families.
- It creates a forum in which the community and a center's participants can ask questions, raise concerns and advocate for their needs.
- It serves as a catalyst for opening a dialogue between community leaders and service providers to better understand senior centers' significant role in the aging population and the local community.
- Working together with community leaders in a structured evaluation often leads to a clearer understanding of why additional resources are needed to expand your facility, programming, and staffing.
- It documents the senior center as an accountable, reliable, and fundable program with capacity to provide services that lead to substantive outcomes.
- It leads to a sense of pride and empowerment for senior center staff, participants, volunteers, and members of the community.

PURPOSE OF THE SELF-ASSESSMENT PROCESS

The purpose of the self-assessment is to evaluate how well the senior center meets the standard criteria as indicated within each of the nine (9) standards. The senior center measures itself against the information contained in the standards section of the manual. The standard criteria are used to examine the senior center's total operation in relation to the expectation set out in each standard. The senior center will recognize what it is doing well. It will identify ways in which the program and services can be expanded or strengthened. Many times, a senior center is able to strengthen its collaborative role with other community agencies. The standards provide an excellent review of management and operating procedures and policies. The ability of the senior center to evaluate its programs and services is examined. It scrutinizes procedures regarding financial and facility management. The programs and the needs of the community are examined to see if the senior center is meeting those needs. A schedule is developed to meet the criteria as set forth in the standards.

WHO DOES THE SELF-ASSESSMENT?

A committee representative of the community should be appointed to conduct the self-assessment. The committee should be composed of senior center participants, staff, volunteers, individuals from the governing structure, community, corporate and government leaders, other organizations who serve the older population, institutions of higher education and other interested individuals. The perspectives and ideas offered by a diverse committee are essential for a complete assessment and for recognizing what the senior center is doing well and what needs to be done to strengthen its operations and programs. A committee may have 20 to 30 members that break down into smaller work groups.

Senior center participants and those not participating but eligible are important to be included. Their view of how the senior center meets the needs and interests of older people in the community is a critical measure of its responsiveness. It is important to look at what might be missing in the program and service offerings.

HOW IS IT DONE?

After the committee is chosen, it needs to receive orientation. Information contained in the previous pages can be used for an orientation. Each standard is divided into four (4) parts. The *Principle* is a statement about what the standard accomplishes. The *Rationale* gives a discussion as to why and sometimes how the standard should be met. The *Standard Criteria* spells out in more detail what is expected in each standard. The *Workbook* section uses questions to help the committee examine how well the senior center satisfies the criteria.

The committee decides its schedule of work, who and how it will accomplish its review. The leader of the process can be the director of the senior center, another staff person, someone from the governing body, or an interested community leader. In many instances the staff is involved in gathering the information needed to evaluate each standard.

After the standards are read and understood, the Workbook section can provide guidance in evaluating whether the senior center meets the criteria in that standard. Notice needs to be given to the proper staff in instances where the senior center does not meet the criteria. The appropriate staff person and, if needed, committee members can plan what needs to be done to meet the criteria. A report for each standard indicating good practices and areas for improvement would be helpful to the senior center.

DEMONSTRATE YOUR IMPORTANCE

By working together to strengthen senior centers, and engage the community, we demonstrate that senior centers are the gateway to a broad array of services and opportunities for senior adults of all ages, needs and abilities. Senior center professionals and governing bodies will find the Self – Assessment Process to be the most important step they will take in analyzing the structure of their organization.

Steps to Complete Self-Assessment

1. **Preview the material:** If you're a current NISC Affiliate Member, you can gain access to *Building Excellence*, the national standards manual for senior centers, by emailing the NISC Membership Team at membership@ncoa.org. If you aren't an Affiliate Member, NISC is free to join. [Become a member of NISC today](#) and get connected to a national network of support.
 1. Become familiar with the parts of the Manual and the Self-Assessment Process. *The National Institute of Senior Center's Self-Assessment Manual* is delivered in 3 separate documents, they include: the Introduction with Checklist, the National Senior Center Standards (The Senior Center Self-Assessment Manual contains the nine (9) Standards; and the Workbook pages for First Time or Subsequent Self-Assessments. This content is your framework to hold a comprehensive quality improvement review process.
 2. **Form a Self-Assessment Committee.** The center forms a committee that works with staff to complete the self-assessment process.
 3. **Evaluate your center.** The self-assessment committee evaluates its level of compliance with the nine national standards and completes any tasks needed to improve its compliance. These criteria will help you recognize the things the senior center is doing well and the areas that may need improvement.
 4. **Use the Checklist.** The Standards Checklist, found in the introduction, will help you assess your current status, identify areas for improvement, and generate ideas for future planning. Items marked in bold are considered essential or are highly recommended to be included in a center's operating policies and procedures.
 5. **Report on your findings & plan.** Report on your process developed, those involved, updates made after the self-assessment and plans for the future.
- All documents gathered and questions answered, in the worksheets, can be kept in an online folder to inform current staff and board members and to educate incoming staff.
6. **Celebrate your committee.** Celebrate the work of your team, highlight their progress and commitment to your center.

Self-Assessment Committee

The NISC Leadership believes that one of the benefits of the Self-Assessment process is a Self-Assessment Committee whose members represent many organizations and groups within the community. This committee will tap into the resources of the community and help the Senior Center develop and strengthen ties to the community. In order to be able to gauge how effectively this has been done, one of the measurements in the Community Connections Standard is the manner in which the process has been carried out.

Self-Assessment Process

A senior center self-assessment committee shall be made up of a wide variety of community people.

The committee should:

1. Represent the diversity of the community.
2. Include community leaders:
 - Include paid and unpaid staff and board of directors or advisory board members.
 - Include people familiar with the Center as well as people who are not familiar with the center.

The committee could include the following people or groups:

1. Elected officials.
1. Town officials
2. Marketing professionals
3. Higher education personnel
4. Members of fire or police department
5. Nonprofits or for profits who serve the 50+ population.
6. Housing authority and other housing options for those 50+
7. Religious organizations
8. Funding organizations
9. Medical professionals
10. Leaders in the business community
11. Staff, paid and unpaid.
12. Board and Advisory Council members
13. Center participants/members/clients
14. Other

There should be an orientation meeting followed by meetings to review individual standards.

Each standards' review should include a report on items needed to be updated immediately and items that are more appropriate for long range planning.

The process ideally should be accomplished in 6 to 12 months.

Document Checklist

DOCUMENTATION REVIEW NOTEBOOK

Senior Center Description and Process. Develop these one-to-two-page descriptions, that include all bulleted items, for inclusion in your self-assessment notebook.

1.1 Senior Center Description - Provide a comprehensive written description of the senior center in terms of the following elements. Limit to two (2) pages.

- Community Context (urban, rural, suburban)
- Participant demographics
- Size of membership, average daily attendance
- Primary funding sources
- Community partnerships
- Administrative structure (private, non-profit, operated by municipality)
- Number of years in operation

1.2 Description of Senior Center's Self-Assessment Process -provide a comprehensive description of the following: Limit to two (2) pages.

- How the process was organized
- List of individuals who participated in the process with their affiliations.
- Scope and frequency that various workgroup(s) met to accomplish their tasks.
- Interesting experiences related to the process.

3. Insert the completed Self-Assessment Workbook sheets that correspond to each Standard at to the beginning of each standard section in the Self-Assessment Notebooks.

Standard Documents Naming Conventions

Scan and Save each document. Use the Document number and name as it is written in bold.

This naming convention was developed so that you can easily find documents related to your self-assessment. Keep these documents in an online folder that can be shared with current staff and board members. It can also be used to onboard new staff, board and volunteers.

Standard 1 PURPOSE and PLANNING

1A - Planning Document - Senior center's planning document with goals, objectives and action plan.

1B – Planning Document Report - Report on accomplishments and/or status of the planning document

1C – Annual Report - The senior center's most recent annual report.

Standard 2 COMMUNITY CONNECTIONS

2A –Community Partners - List of collaborative community partners.

***2B – Sample Cooperative Agreement** - Sample of a cooperative agreement between senior center and collaborative community partner.

2C – Marketing Plan - Copy of marketing plan.

2D – Marketing Materials - Copy of marketing materials (No older than two [2] years). Put all materials into one PDF or document.

***2E – Research Guidelines** - Research guidelines.

Standard 3 GOVERNANCE

***3A By-Laws** - Documents or by-laws showing that nine (9) of the guidelines are met for the senior center governing board or charitable arm or advisory board/council as listed under Governing Structure C#1

3B - Code of Ethics

3C - Conflict of Interest

3D - Standing Boards and Committees – include the members' names & their affiliation or profession.

3E – Posted Certificates or Inspection Records - List of activities or services that require certificates or inspections to be posted.

Standard 4 ADMINISTRATION and HUMAN RESOURCES

***4A – Chief Administrator Resume**

***4B – Paid Staff job descriptions**

***4C - Personnel Policies for paid staff**

***4D – Unpaid Staff Job Descriptions**

***4E - Organizational chart(s)** showing structure and lines of authority.

***4F - Volunteer Handbook for unpaid staff** that includes policies.

Standard 5 PROGRAM DEVELOPMENT and IMPLEMENTATION

5A. - Description of programs and services that show senior center meets the standard criteria as outlined in Program Implementation #1, 5 and 6

5B - List of Program or Service hours

Standard 6 EVALUATION Be sure to put evaluations for each question into one document. For example, 6B, incorporate the two examples into one PDF.

6A – Evaluation Plan - Senior center's evaluation plan

6B – Two (2) Examples of Evaluations in Different Areas - Two (2) evaluations that show measuring different areas as identified in B, Areas of Evaluation #1. Include compilation of results and two (2) recommendations drawn from the results.

6C -Two (2) Examples of Methods of Evaluation - Examples of two (2) types of evaluations from C, Information Collection Methods #3, with explanation as to why that type was chosen

6D– Two (2)Examples of Outcome-Based Evaluations - Two (2) examples of outcome-based evaluations, with an explanation as to why they were done and how the information was used.

Standard 7 FISCAL and ASSET RESPONSIBILITY

7A - Senior center budget

7B – Financial Statement

7C – Current Audit or Financial Review

***7D – Internal Financial Control**

7E – Insurance Coverage Statement

***7F – Incident Report Form**

***7G – Disaster Recovery Plan or Business Continuity Plan**

Standard 8 RECORDS and REPORTS

8A - Monthly or quarterly report on programs and services

8B - Two (2) Year-end statistical report for two (2) separate years

***8C - Participant Form**

***8D - Participant form for specific services**

8E - Confidentiality policy

***8F - Policy and Procedures Manual** (Table of Contents can be submitted)

Standard 9 - FACILITY and OPERATIONS

9A - Senior Center Picture that includes outside signage.

9B - Transportation Options

9C – Center Layout - Drawing that shows layout of senior center.

9D - Safety Procedures

9E – Preventative Maintenance Schedule

9F – (optional) Rental Policies and Procedures - Written procedure for rental to other groups or agreement for senior center to rent its space.

About the National Council on Aging (NCOA)

About NCOA

We believe every person deserves to age well. That's why we're on a path to improve the lives of 40 million older adults by 2030. Learn about the work we do, the people we serve, and why equitable aging matters now more than ever.

Since 1950, we've walked beside generations of Americans. Perhaps you didn't see us. But we were there—quietly making life better as we age. We were the first national voice for older adults. We helped end mandatory retirement. We advocated to secure Medicare, Medicaid, and the Older Americans Act. Local organizations turned to us for support as they served older adults every day. And we built digital tools that empower older adults with knowledge.

Now, we're stepping forward to do even more. Americans are living longer, but far too many are being left behind without the resources to age with dignity. We're changing that. We believe aging well is something every American deserves—regardless of gender, color, sexuality, income, or zip code.

We will deliver the resources, tools, best practices, and advocacy our nation needs to ensure that every person can age with health and financial security. That's our renewed promise to you. You have an even stronger ally. Because aging well for all is a matter of equity. A matter of dignity. And a matter of justice. Learn more at ncoa.org and @NCOAging.

About the 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. Learn more at ncoa.org/NISC.

As an affiliate member of NCOA's National Institute of Senior Centers (NISC), you're connected to a national network of professional support and innovative solutions. Ask for help, leverage NISC resources, share an opinion, or get your next big idea from your peers!

History of the National Institute of Senior Centers

NCOA's National Institute of Senior Centers (NISC) was established in March 1970. NISC is a network of professionals dedicated to enhancing the lives of older adults through professional development, advocacy, and promotion of national standards. They believe that Senior Centers create opportunities for successful aging in our communities.

Through the efforts of their volunteer leadership, the NISC Delegate Council, members receive these "robust" member benefits:

Get started as a NISC Affiliate: [Joining is easy and free! Join today.](#)

- **With our monthly newsletter**, you'll get the latest news, best practices, and innovations for senior centers right in your inbox every month. Learn what's happening in Congress, discover upcoming free webinars, and get connected to program ideas for your center.
- From virtual brown bag lunches to focus groups on pressing issues impacting senior center professionals nationally—NISC affiliate members have an opportunity to attend **numerous networking opportunities** throughout the year.
- **Our new learning hub, [NCOA Connect](#)**, is curated each season to bring community, state, and national partners together. Learn from experts in their field and talk about the issues that matter to older adults, encouraging discussion around challenges and highlighting solutions. The learning hub is also a great place to promote your own innovations.
- **Share best practices**, national initiatives, strategies, and resources to spur innovation and to identify national senior center leaders.
- **NCOA houses several national resource centers** funded by the Administration for Community Living, including the newly funded Modernizing Senior Centers Resource Center. As a NISC Affiliate, you'll have **access to [The Center for Benefits Access](#)** which connects eligible older adults to benefits programs that can help them pay for daily needs, as well as [The Center for Healthy Aging](#), which supports evidence-based programs on falls prevention and chronic disease self-management.
- **[Get involved in our advocacy efforts](#)** to advance the field of senior centers and improve the economic security and health of the clients you serve.
- **Get a discount** at our [Age+Action](#) conference.

Self-Assessment History

Among NISC’s many accomplishments were its development and publication of national standards for the industry in 1978. It was initially a reference tool for communities interested in developing senior centers and a guide for existing centers. The initial Senior Center Self-Assessment served as a guide for program development, assessment of program quality and identification of areas that needed improvement. Since 1978, NISC has completed revisions of the national standards in 1990, 1996, 1999 and 2010. The national standards function as a guide for developing and implementing programs and service as the core of NISC’s self-assessment process.

In 1996, an AT&T grant to fund the development and implementation of national senior center accreditation was awarded; In 1997, eight pilot sites were selected; In 1998, the first national senior center accreditation was awarded; In 1999, Accreditation was rolled out nationally. Each accreditation lasts for five years. To date there have been 496 individual accreditations at 281 senior centers, the centers completed from one to five accreditations each. An average of 22 accreditations per year for 23 years.

In 2023, to help modernize and transform the field, we moved to a system that can easily engage a substantial portion of senior center professionals. The accreditation process moved to a self-assessment process that did not include peer review. This allows for a relevant learning experience, senior center growth, community involvement and is delivered at no cost to the senior center.

This manual would not have been possible without the advice, opinions and input from experts and professionals who served on advisory committees during the initial development and subsequent revisions.

With emphasis on evidence-based programs in community-based services, NISC’s Senior Center Self-Assessment helps those in the field meet this need. Centers who participate in the process show that they are able to meet new challenges of an aging population, measure their compliance to national standards and demonstrate excellence in accomplishing their mission.

NCOA staff work diligently to ensure that senior centers pursuing self-assessment receive necessary information and materials. Please email membership@ncoa.org and put “self-assessment” in the subject line, if you have any question or concerns when reviewing the manual or during the self-assessment process.

NCOA
251 18th Street South, Suite 500, Arlington, VA 22202

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SENIOR CENTERS

History of Senior Centers: A Long and Proud Heritage

The legacy of senior centers and their roles across the nation represent more than 65 years of rich tradition. The industry started in 1943 with one senior center, the William Hodson Community Center, established by the New York City Department of Welfare. The senior center's primary function was to provide a place where older, isolated members of the community could come together for socialization. Within a few years, similar sites in San Francisco, Philadelphia, Menlo Park, and Bridgeport followed Hodson. By 1961 there were an estimated 218 senior centers operating across the country.

Senior centers were initially small, private clubs established by local nonprofit groups or units of government such as recreation and social service departments. They experienced dramatic growth in the 1970s when the Older Americans Act (OAA) identified senior centers as "essential links in the service network for older adults." In 1972, amendments to OAA provided funding for acquisition, alteration, or renovation of senior center facilities, development and delivery of services and construction and operation of senior centers. The OAA defined a senior center as "a community facility for the organization and provision of a broad spectrum of services..." including health, social, educational, and recreational services and to serve as a focal point for the delivery of services to older adults in the community.

Definition of a Senior Center

No longer do senior centers provide only socialization opportunities. A senior center is a community focal point where older adults come together for services and activities that reflect their experience and interests, enhance their dignity, support their independence, and encourage their involvement in and with the senior center and the community.

As part of a comprehensive community strategy to meet the needs of older adults, senior centers offer services and activities within the senior center, outside the center and link participants with resources offered by other agencies. Senior center programs consist of a variety of individual and group services and activities that include but are not limited:

- Health and wellness
- Arts and humanities programming
- Intergenerational activities
- Employment assistance
- Information and referral services
- Social and community action opportunities
- Transportation services
- Volunteer opportunities
- Educational opportunities
- Financial and benefits assistance
- Meal programs

Senior centers also serve as a resource for the entire community for information on aging, support for

family caregivers, training professionals, lay leaders, and students and for developing innovative approaches to addressing aging issues.

The Senior Center Philosophy

The philosophy of the senior center movement is based on these premises:

- Aging is a normal developmental process.
- Human beings need peers with whom they can interact.
- Peers are a source of encouragement and support.
- Older adults have the right to a voice in determining matters that impact them.

In accordance with these premises, senior centers adhere to the following beliefs.

- Older adults, like all people, are individuals with ambitions, capabilities, and creative capacities.
- They are capable of continued growth and development.
- They have certain basic needs, including the need for opportunities for relationships and for experiencing a sense of achievement.
- They need access to sources of information and help for personal and family problems and the opportunities to learn from individuals coping with similar experiences.
- They have a right to involvement and representation in a senior center's decision-making process.

Senior center staff are obligated to create an atmosphere that acknowledges the value of human life, affirms the dignity and self-worth of the older adult participant, and maintains a climate of respect, trust, and support. Within this atmosphere, the staff creates opportunities for older adults to apply their wisdom, experience, and insight and to learn new skills.

As an integral part of the aging network, a senior center serves community needs, assists other agencies in serving older adults and provides opportunities for older adults to develop their potential as individuals within the context of the entire community.

Today, there are an estimated 15,000 senior centers in the United States. The evolution and growth of the senior center industry has mirrored society in many ways. As the nation's older population has increased, senior centers have grown, adapted, and changed to function as viable participants in the community-based system of services for older persons. They provide social opportunities as well as education, nutrition, recreation, health programs and support services. Senior centers are unique because they focus on older adults as total persons, recognizing their diverse interests, needs, experience, and skills.

Appendix – Standards’ Check List

Use this checklist to assess your status, identify areas for improvement, and generate ideas for future planning. Items marked in bold are considered essential or are highly recommended to be included in a center’s operating policies and procedures.

Standard 1 - PURPOSE and PLANNING

PRINCIPLE: *A senior center shall have a written mission statement, goals and objectives and action plans consistent with the senior center philosophy. Strategic planning is the method by which these are developed. Goals and objectives are based on the mission and the needs and interests of older adults in the community or service area. The action plans describe how the work of the center’s paid and unpaid staff will achieve its goals and objectives. These statements are to guide the character and direction of the senior center’s operation and program.*

1. Does the senior center have a mission statement that is consistent with NCOA/NISC definition and philosophy?

YES

NO

It is essential that a senior center has a mission statement. If the answer is “no” , it should be developed.

1. Which of these are true about the mission statement?

a. Developed by participants, paid and unpaid staff and community representatives _____

b. Describes the who, what, where and why of the organization _____

c. Written in concise, clear and understandable language _____

d. Physically visible in the senior center and on publications _____

e. Reviewed every three (3) to five (5) years _____

f. Used as a test for new projects or activities _____

2. When the senior center completed its strategic planning, which of these were included?

- a. An environmental scan or similar information was used in developing the strategic plan _____
- b. A SWOT analysis was used to analyze the organization. _____
- c. The plan included a statement that is described as one of these: mission, vision or values _____
- d. Goals have been developed from the strategic plan _____
- e. People involved in the strategic plan included board members, paid and unpaid staff, participants and community members _____

The senior center uses a planning document that consists of goals, objectives and action plans. YES NO

It is essential that a senior center have a planning document that includes goals, objectives, and an action plan. If the answer is “no” it should be developed.

- 3. The senior center’s goals are evaluated on these items:
 - a. The goals carry out the mission of the center _____
 - b. The goals were developed as part of the strategic planning process _____
 - c. The goals identify major accomplishments that the center wants to achieve _____
 - d. The goals are broad enough to be viable for three (3) to five (5) years. _____

- 5.. Objectives specify how a goal is to be accomplished. Evaluate the objectives for these characteristics:
 - a. Individuals responsible for carrying them out helped develop them _____
 - b. They are measurable _____

- c. Reviewed each year for revision _____
- d. Form the basis for progress reports to governing and advisory boards
at least quarterly _____

6. Does the senior center action plan have these characteristics?

- a. Consist of the steps that paid and unpaid staff perform to accomplish
the objective _____
- b. Adjusted by staff to meet new circumstances or opportunities _____
- c. Available to those who are involved in carrying it out _____

7. An annual report is a way of communicating to the community information about the accomplishments of the senior center. Does the senior center produce an annual report?

YES NO

It is essential that a center has an annual report. If the answer is “no,” it should be developed.

8. Indicate which of these are part of the senior center’s annual report

- a. List of board of directors or governing body _____
- b. List of decisions made by boards or committees _____
- c. Financial statement _____
- d. List of staff _____
- e. Mission statement _____
- f. Activities completed by the organization _____
- g. Accomplishments of the organization during the year _____
- h. Education on issues that are important to the senior center _____
- i. Recognition of special people including donors and volunteers _____
- j. Includes stories and changes in the lives of the constituents _____

Standard 1 Comments:

Standard 2 - 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.*

1. The senior center serves as a focal point by doing the following:
 - a. Partnering with organizations to offer services at senior center _____
 - b. Developing arrangements for mutual referrals _____
 - c. Encouraging agencies to deliver their services at the senior center _____
 - d. Delivering services at other locations _____
 - e. Collaborating with other agencies to deliver services in the community _____
 - f. Developing written agreements with agencies _____

2. List of collaborative community partners.

_____	_____
_____	_____
_____	_____

We recommend that a senior center collaborates with at least five (5) community partners to offer services at the senior center. Does the senior center have at least five (5) community partners?

YES NO

3. The senior center provides information on community services in these ways:
 - a. Paid or unpaid staff provide information _____
 - b. Referrals are made to appropriate agencies _____
 - c. Information bulletins and pamphlets are accessible to the public _____
 - d. Agencies make presentations at the senior center _____

We recommend that a senior center provide information and referral in at least two (2) of the above methods to seniors and the community. Does the senior center provide information and referral in at least two (2) of the methods community partners? YES NO

4. The senior center reaches out to the community to provide services through these methods:
 - a. Offering home visits to assess need and provide information _____
 - b. Taking information to places seniors live or gather _____
 - c. Locating and identifying underserved or socially isolated seniors _____
 - d. Following up with visits to assure that older adults have received services _____

5. The senior center develops and maintains relationships with other community organizations by the following:
 - a. Being part of community planning _____
 - b. Providing representation on agency boards, committees and task forces _____
 - c. Exchanging information with other agencies _____
 - d. Presenting informational lectures to relevant groups _____

6. The senior center has a marketing plan that includes which of these elements:
 - a. Assessment of marketing techniques _____
 - b. Identification of target audience _____
 - c. Communication that has a consistent message _____
 - d. Timeline _____
 - e. Assigning of responsibility _____
 - f. Utilization of a variety of media _____
 - g. Usage of technology _____
 - h. Measuring and evaluating on a regular basis _____

7. The senior centers marketing materials 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 _____
 - e. Are visually representative of community residents _____
 - f. Provide the private sector an opportunity to support the senior center _____

8. The senior center uses the following marketing techniques to educate the community and advocate for senior needs:

- a. Sponsorship of community events that educate _____
- b. Development and distribution of fact sheets _____
- c. Newspaper articles _____
- d. Radio and/or television shows or spots _____
- e. Maintenance of an interactive web site _____
- f. Other _____

We recommend that a senior center use at least three (3) marketing techniques. Does the senior center use at least three (3) marketing techniques? YES NO

9. In providing field training or internships the senior center does the following:

- a. Participates in research when feasible _____
- b. Has developed research guidelines _____
- c. Works with local educational institutions to provide learning opportunities _____

Standard 2 Comments:

Standard 3 - GOVERNANCE STANDARDS

PRINCIPLE: *The method of operation of a senior center should be to create effective relationships among the participants, staff, governing structure and the community. These guiding principles and system of regulations should be structured so as to strengthen the governance system, provide transparency and ethical standards that are respected in the community.*

- 1. Which of these are true for the senior center? **This is a clarifying question.**
 - a. It is a 501(c)(3) organization. _____
 - b. It has a governing board that sets the policies of the senior center. _____
 - c. There is a charitable arm that solicits, raises and disperses funds. _____
 - d. There is an entity that ensures the senior center lives up to obligations to its donors, participants and community. _____

 - e. It is part of a larger 501(c)(3). _____
 - f. It is part of a governmental entity. _____

- 2. Which of these are true for bodies responsible for senior center operations?
 - a. There are by-laws that are reviewed regularly. _____
 - b. There is a code of ethics. _____
 - c. There are signed 'conflict of interest' statements. _____
 - d. Membership is representative of the community. _____
 - e. Members have the expertise to accomplish the work. _____
 - f. There are procedures for ethical financial oversight. _____

- 3. Which of these are true of the senior center's governing documents?
 - a. Available to the public _____
 - b. Reviewed every three (3) years _____
 - c. Comply with all applicable federal, state and local statutes _____

- 4. Which of these are true for the senior center's organizational chart?
 - a. Indicates the lines of communication and authority. _____
 - b. Indicates the relationship of the senior center components. _____
 - c. Indicates the relationship between different individuals. _____
 - d. Documents are kept in a location accessible to paid and unpaid staff _____

5. The following duties are assigned to be accomplished by an entity associated with the senior center:

- a. Employ a chief administrative person to manage senior center _____
- b. Recruit, interview, train, evaluate and dismiss paid and unpaid staff _____
- c. Develop an annual budget _____
- d. Adopt an annual budget and receive financial reports _____
- e. Raise and disperse funds _____
- f. Review senior center's mission, goals and objectives _____
- g. Receive reports on accomplishments of senior center _____
- h. Evaluate senior center activities and services _____
- i. Review personnel policies and evaluate benefit and compensation package _____

6. Which of these are ways that participants can provide input?

- a. 'Open door' policies _____
- b. Suggestion boxes _____
- c. Question boards _____
- d. Blogs and other use of technology _____
- e. Participant councils _____
- f. Other: _____

7. Which of these can be found in written form for boards or councils with fiduciary responsibility within the senior center?

- a. Qualifications for membership in the organization _____
- b. Election and tenure of officers _____
- c. Specification of officers' and members' duties _____
- d. Announcement and schedule of ongoing and special meetings _____
- e. Name and role of committees _____
- f. Quorums and what constitutes presence at a meeting _____
- g. Recording of minutes _____
- h. Procedure for amending written documents _____
- i. Development and enforcement of 'Code of Ethics' _____
- j. Development and enforcement of 'Conflict of Interest' _____
- k. 'Whistle blower' policy _____
- l. Investment policy _____
- m. Dissolution of the organization and its assets _____

We recommend that the senior center includes at least nine (9) of these established procedures for a governing or advisory board/council.

8. Does the senior center have a Code of Ethics? YES NO

"It is essential for a senior center to establish a Code of Ethics. If one is not in place, it should be developed."

It is essential for a senior center to establish a Code of Ethics. If the answer is "no" it should be developed.

9. Does the senior center have a Conflict-of-Interest statement? YES NO

It is essential for a senior center to establish a Conflict-of-Interest statement. If the answer is "no" it should be developed.

10. The senior center complies with local, state or federal regulations by doing the following:

- a. Licenses are properly posted. _____
- b. Staff have the proper training as required. _____
- c. Inspections and reviews are conducted. _____

11. Does the senior center have licenses and certificates properly posted? YES NO

It is essential for a senior center to properly post their licenses and certificate. If the answer is "no," the process should be implemented.

12. Which of the following does the senior center have procedures for?

- a. Informing family when a participant shows mental or physical changes _____
- b. Denial of services _____
- c. Advertising or sale of products _____
- d. Political activity on- or off-site _____

Standard 3 Comments: _____

Standard 4 - ADMINISTRATION and 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 program and services for its participants.*

- 1. The senior center chief administrator’s qualifications include:
 - a. Education degree/classes that are appropriate for the job description _____
 - b. Experience of at least five (5) years in a position, paid or unpaid with similar responsibilities _____
 - c. Past success and accomplishments that resulted in increasing responsibility _____

It is recommended that a senior center administrator meet all three (3) qualifications

- 2. Indicate to whom the following duties are assigned:
 - a. Developing center’s overall work plan _____
 - b. Assessment of community needs _____
 - c. Planning and implementation of services _____
 - d. Evaluation of program 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 board, community and funders _____
 - k. Financial and risk management _____

- 3. The following are true for the paid and unpaid personnel of the senior center:
 - a. The number of paid and unpaid personnel is sufficient _____
 - b. Individuals have the skills, knowledge and information to complete tasks _____

- c. Staffing pattern defines positions and relationships _____
 - d. Senior center uses resources in the community to help accomplish goals _____
 - e. The racial and ethnic makeup reflects the older adults in the community _____
 - f. Staff show respect and encourage personal growth of the senior participants _____
4. Each staff person has a written job description that includes the following:
- a. Position title _____
 - b. Qualifications _____
 - c. Essential duties and responsibilities _____
 - d. Lines of communication for supervision and reporting _____
 - e. Salary range and benefits _____
5. The senior center has a formal system of staff supervision for paid and unpaid staff that includes:
- | | Paid staff | Unpaid staff |
|----------------------------------|------------|--------------|
| a. Feedback on accomplishments | _____ | _____ |
| b. Establishment of goals | _____ | _____ |
| c. Indication of ways to improve | _____ | _____ |
| d. Ways to acquire skills | _____ | _____ |
| e. Review of job description | _____ | _____ |
6. Performance evaluations include:
- a. Written evaluation based on objectives and job-related criteria _____
 - b. Review of the evaluation in a face-to-face meeting _____
 - c. Opportunity for written dissent to be part of personnel record _____
7. Personnel policies are available to staff and include the following:
- a. Terms of hiring and training periods _____
 - b. Compensation and benefits _____
 - c. Types of leaves from work _____
 - d. Savings programs _____
 - e. Performance appraisals _____
 - f. Job posting and promotions _____
 - g. Communication channels, grievance and disciplinary actions _____
 - h. Reimbursement of staff development and training costs _____
 - i. Family leave policy _____
 - j. Protection from discrimination _____
 - k. Policy on prescription drugs, illegal substances and drug testing _____
 - l. Confidentiality statement _____
 - m. Technology use and abuse _____

It is recommended that a senior center must have personnel policies containing at least nine (9) of the above items that are distributed or available electronically to employees and are followed as written.

- 8. Employees' records contain:
 - 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 _____
 - i. Correspondence _____

- 9. The senior center engages unpaid staff in skilled positions that expand the capacity of the center to carry out its mission. _____

- 10. A volunteer manual is given to volunteers that includes:
 - a. Volunteer application _____
 - b. Organization's mission statement _____
 - c. Orientation information about the senior center _____
 - d. Opportunities for sharing skills _____
 - e. Communication channels, grievance and disciplinary actions _____
 - f. Protection from discrimination _____
 - g. Process of evaluation for appropriate placement and job satisfaction _____
 - h. Confidentiality statement _____
 - i. Recognition of contributions _____

It is recommended that a senior center provide a Volunteer Handbook to unpaid staff that includes at least five (5) of the above policies.

- 11. Which of these techniques or strategies are used by the senior center when involving unpaid staff in helping the center meet its goals:
 - a. Job sculpting _____
 - b. Flexible scheduling to meet person's needs _____
 - c. Self-directed teams _____
 - d. A space provided for unpaid staff to work _____
 - e. Recognition of the impact the person has made _____
 - f. Reimbursement of expenses _____
 - g. Other _____

Standard 4 Comments:

Standard 5 - 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.*

NOTE: For this evaluation, the words program and service are interchangeable and relate to all aspects of delivered services at the senior center.

- 1. Which groups are involved in developing, planning and implementing program for the senior population?
 - a. Participants
 - b. Paid staff
 - c. Unpaid staff
 - d. Community members
 - e. Advisory board
 - f. Governing board
 - g. Others

- 2. Program planning should be a continuous process including the following. Which of these are carried out at the senior center?
 - a. Identifying needs and interests of older adults in the community
 - b. Identifying needs and interests of participants
 - c. Development of annual program plans that reflect the senior center’s mission

 - d. Identifying community resources to support and strengthen services
 - e. Analyzing the best way to provide programs
 - f. Developing guidelines for ethical issues related to program delivery
 - g. Developing accessible program delivery
 - h. Setting up evaluation procedures

- 3. How does the senior center diversify its program delivery system?
 - a. Programs are delivered during the normal business day
 - b. Programs are delivered during evening hours
 - c. Programs are delivered during weekends

- d. Programs are delivered at sites other than the senior center
- e. There are collaborations with other organizations to provide programs

It is recommended that a senior center utilize two (2) of these delivery systems.

4. Senior center activities should promote personal growth by providing a variety of opportunities such as the following:
- a. Socialization through activities in group activities _____
 - b. Mental stimulation through intellectual activities _____
 - c. Increased cognitive functioning by learning new skills _____
 - d. Opportunity for choices _____
 - e. Provision of information to facilitate decision making _____
 - f. Skill development for employment or personal growth _____
 - g. Development of self-efficacy _____
 - h. Leadership development opportunities _____
 - i. Development and engagement in creative and artistic activities _____
 - j. Exploration of racial/ethnic cultures _____
 - k. Exploration of different geographic regions _____
 - l. Participation in activities that improve one’s community _____
 - m. Physical activity appropriate to a broad spectrum of Individuals _____
 - n. Intergenerational activities _____

It is recommended that a senior center provide twelve (12) of these opportunities.

5. A senior center shall respond to individual differences by offering a variety of types and levels of involvement including:
- a. Small groups _____
 - b. Large groups _____
 - c. High activity levels _____
 - d. Low activity levels _____
 - e. Spectator activities _____
 - f. Participatory activities _____
 - g. Intergenerational activities _____

6. The senior center provides activities at least 30 hours a week. What are the hours that the senior center provides activities?

It is recommended that a senior center provides at least 30 hours of activities and services each week.

Standard 5 Comments:

Standard 6 - 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.*

1. An evaluation plan is essential to a senior center’s success. Has the senior center developed and implemented an evaluation plan? YES
NO

This is a required part of the standard. The senior center must have developed and implemented an evaluation in order to be accredited.

2. An evaluation plan provides a senior center the opportunity to do many things. Which of these does the senior center do?
- a. Demonstrate program successes _____
 - b. Discover program weakness _____
 - c. Assess programs for efficiency, effectiveness and customer satisfaction _____
 - d. Produce valid data to facilitate decision making _____
 - e. Provide information for duplication of programs _____
 - f. Discover unmet needs or duplication of services _____
 - g. Document accomplishments and successes _____
 - h. Substantiate financial needs _____
 - i. Show willingness to let people voice their assessment _____
3. Not only should evaluations be carried out, but also there should be a method and procedure to examine the evaluation process. Which of the following does the senior center do?
- a. The evaluations are reviewed periodically by a consultant for their validity _____
 - b. Evaluation summaries are produced and made available to those completing the evaluation _____

- c. Evaluation summaries are made available to boards, funding sources or public _____
- d. Results of evaluations are used in planning and improvement of operations _____
- e. Adequate resources for evaluation are part of the operating budget _____

4. There are many areas that should be included in a senior center’s evaluation plan. Which of these are parts of the senior center’s evaluation plan:
- a. The extent to which the activities are meeting the mission _____
 - b. Extent to which an activity or service is achieving its objectives _____
 - c. Participant’s satisfaction with a program _____
 - d. Evaluation of participation rate over time _____
 - e. Examination of need for the program and if the need is being met _____
 - f. Analysis of cost/benefit for programs _____
 - g. Analysis of cost per participant _____
 - h. Examination of how decisions are made and who is involved _____
 - i. If a customer is receiving the service, they expect _____
 - j. Assessment of the adequacy of the facility and equipment _____
 - k. Assessment of the visibility and image of the senior center in the community _____

It is recommended that the senior center show measurements of at least two (2) areas as identified above.

5. There are numerous ways to collect information for evaluations. Which of the following does the senior center use?
- a. Satisfaction questionnaires that show whether expectations were met _____
 - b. Surveys or checklists that can be easily completed _____
 - c. Interviews to evaluate more fully a subject _____
 - d. Observation by trained observers who use a criteria checklist _____
 - e. Focus groups to explore a topic in depth _____
 - f. Case study reviews _____
 - g. Other _____

It is recommended that the senior center show examples of two (2) methods of evaluation.

6. Outcome based evaluations show what impact a program has on an individual. How has the senior center performed outcome evaluations?
- a. The senior center uses self-reporting questionnaires _____
 - b. The senior center uses pre- and post-tests to gauge how a person has changed _____
 - c. The senior center uses a logic model to evaluate outcomes _____
 - d. Other ways the senior center measures outcomes:
 - 1) _____
 - 2) _____

It is recommended that a senior center show two (2) examples of outcome-based evaluations.

Standard 6 Comments:

Standard 7 - 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.*

- 1. Which of these are included in the budget development process?
 - a. Development of programs/services that would fulfill senior center’s mission _____
 - b. Input from staff and governing board _____
 - c. Costs of ongoing programs and services _____
 - d. Cost of planned expansion of program and services _____
 - e. Inclusion of anticipated income _____
 - f. Budget is approved by a governing board _____

- 2. The senior center prepares and publishes an annual budget document. YES NO

It is recommended that the center prepares and publishes an annual budget document. If the answer is “no” it should be developed.

- 3. As the senior center works toward diversification of funding, their income stream includes:
 - a. Government grants for delivery of service _____
 - b. Foundation support for physical plant needs or program delivery _____
 - c. Fees for service _____
 - d. Membership dues as allowed by funding sources _____
 - e. Shared cost or sliding scale payment _____
 - f. Donations for services _____
 - g. Annual appeal or solicitation for specific or general needs _____
 - h. Fundraising events _____
 - i. Planned giving _____
 - j. Financial support from local business community _____
 - k. In kind support or pro bono professional support _____

4. The senior center shows fiscal responsibility by doing the following:

- a. Reviews the Sarbanes-Oxley Act to see what effect it has on their _____
- b. fiscal management _____
- c. Has an audit committee with a member who is a financial expert _____
- d. Has a full financial review or an audit by a qualified accountant _____
- e. Staff responsible for financial management has proper education _____
- f. Staff is able to analyze cost to deliver programs _____
- g. Staff has information to make responsible decisions _____

5. Senior center financial reports are prepared on a regular basis and include:

- a. Income for a specific time period _____
- b. Expenses for a specific time period _____
- c. Comparison of expenses to budget _____
- d. Comparison to previous year or period _____
- e. Balance statement _____
- f. Commentary explaining any unusual activity _____
- g. Distribution to staff, governing boards, funding agencies, and others who have a need to know _____
- h. In-kind and unpaid staff contributions recorded in conformance with _____
- i. income source regulations _____
- j. Participant/members receive budget information in a way that is most appropriate for them _____

6. The senior center publishes budget reports on a regular basis and provides

the reports to the appropriate governing board. YES NO

It is recommended that the center publish reports on a regular basis. If the answer is “no” the process should be developed.

7. Committees or other groups within the senior center abide by these fiscal reporting practices:

- a. Accurate and complete records are maintained _____
- b. Records are available for review by administrative staff _____
- c. An audit committee reviews records annually _____

8. The internal control system has written procedures for the following:

- a. Recording cash receipts _____
- b. Depositing cash _____
- c. Separation of cash handling and record keeping _____
- d. Petty cash requests and distribution _____
- e. Control of and use of credit cards _____
- f. Use of technology to handle management of funds _____
- g. Bidding and purchasing approval system _____
- h. Separation of ordering and receiving functions _____
- i. Check approval and signature requirements _____

9. The senior center has insurance coverage that includes the following:

- a. Liability insurance protecting organization from claims alleging negligent conduct _____
- b. Director's and officer's liability policy _____
- c. Business auto policy or non-owned auto liability _____
- d. Workers' compensation _____
- e. Umbrella or excess liability insurance that can cover catastrophic liability _____
- f. Property insurance ensuring recovery _____
- g. Crime or employee dishonesty to cover paid and unpaid staff _____

It is recommended that the senior center's insurance coverage include at least five (5) of the above items.

YES NO

10. Has the senior center made plans to continue critical functions after a disruption? YES NO

It is essential that the senior center have plans to continue critical function in the event of a disruption. If the answer is "no" the center should develop it.

11. Which of these events has the senior center made plans to avoid disruption?

- a. Weather related damage to physical plant _____
- b. Extended power outages _____
- c. Technology breakdowns _____
- d. Sudden loss of a significant staff person _____

Standard 7 Comments:

Standard 8 - RECORDS and REPORTS

PRINCIPLE: *A senior center shall keep complete records that provide a picture of its daily, weekly and yearly operations. It shall regularly prepare and circulate reports about its operation to inform its governing structure, participants, staff, funders and community about aspects of its operation, program and services. A senior center shall maintain information on participants.*

- 1. Which of these results are produced by the records collection policy?
 - a. Document scope of current operations _____
 - b. Meet funding reporting requirements _____
 - c. Promote community support _____
 - d. Guide future planning _____
 - e. Maintain a statistical system of recording number of activities _____
 - f. Maintain a statistical system of recording number of participants in activities _____
 - g. Establish a system for recording number of individuals each day _____

- 2. Does the senior center produce a statistical report for a specific time period for all activities and services?
 YES NO

It is recommended that the senior center produce a statistical report for a specific time period for all activities and services.

- 3. Which of these is part of a statistical management report?
 - a. Unduplicated number of individuals participating _____
 - b. Number of people served by each activity in a certain time period _____
 - c. Number of units of each program or service _____

4. To whom are written program/service reports given on a regular basis?
- a. Participants _____
 - b. Governing bodies or advisory committees _____
 - c. Community _____
 - d. Funders _____
 - e. Others _____
5. The senior center has maintained statistical reports over several years to determine:
- a. Trends over the years _____
 - b. Emerging activities _____
 - c. Activities diminishing in popularity _____
6. The senior center uses a standardized participant form that gathers this information:
- a. Name _____
 - b. Address _____
 - c. Phone numbers including cellular _____
 - d. Email address _____
 - e. Emergency contact phone numbers _____
 - f. Birth Date _____
 - g. Interests and skills _____
 - h. Professional affiliations _____

It is recommended that the senior center have a general participant information form with at least six (6) of the above items that are completed by all participants.

7. Information the senior center collects is safe guarded in the following ways:
- a. Access to physical files and computer files is limited _____
 - b. Information is used only for its intended purpose _____
 - c. Where technology is used procedures are in place to protect information _____
8. Does the senior center have a confidentiality policy that is followed by paid and unpaid staff?
- YES NO

It is essential that the senior center have a confidentiality policy that all paid and unpaid staff are expected to follow.

9. Does the senior center have a Policy and Procedures manual that contains information on administrative functions? YES NO

It is essential that the senior center have Policy and Procedures Manual that contains information on administrative functions.

10. Check off the items included in the senior center's *Policy and Procedures Manual*.

a.	Access and denial of services	<input type="checkbox"/>
b.	Advisory council activities	<input type="checkbox"/>
c.	Application form for service	<input type="checkbox"/>
d.	Application forms	<input type="checkbox"/>
e.	Budget development	<input type="checkbox"/>
f.	Cash receipts and disbursements	<input type="checkbox"/>
g.	Client records	<input type="checkbox"/>
h.	Confidentiality policy	<input type="checkbox"/>
i.	Contact information for collaborating organizations	<input type="checkbox"/>
j.	Credit cards	<input type="checkbox"/>
k.	Crisis communication	<input type="checkbox"/>
l.	Disruptive participant procedures	<input type="checkbox"/>
m.	Emergency preparedness guidelines	<input type="checkbox"/>
n.	Incident report form	<input type="checkbox"/>
o.	Inclement weather closing	<input type="checkbox"/>
q.	Lunch reservations	<input type="checkbox"/>

r.	Maintenance request forms	<input type="checkbox"/>
s.	Membership criteria	<input type="checkbox"/>
t.	Petty cash	<input type="checkbox"/>
u.	Photograph release form	<input type="checkbox"/>
v.	Record retention	<input type="checkbox"/>
w.	Record retention and disposal	<input type="checkbox"/>
x.	Reference checks	<input type="checkbox"/>
y.	Refund/credit	<input type="checkbox"/>
z.	Safety issues	<input type="checkbox"/>
aa.	Security	<input type="checkbox"/>
bb.	Services available	<input type="checkbox"/>
cc.	Spending authority guidelines	<input type="checkbox"/>
dd.	Technology usage	<input type="checkbox"/>
ee.	Trips	<input type="checkbox"/>

Standard 8 Comments:

Standard 9 - FACILITY and OPERATIONS

PRINCIPLE: *A senior center shall establish facilities that promote effective program operation and provide for the health, safety and comfort of participants, staff and community.*

- 1. Which of these are true for the location of the senior center?
 - a. The location is acceptable based on demographic information. _____
 - b. It is adequately located in good proximity to other services and facilities. _____
 - c. It is convenient to transportation or has safe walking conditions. _____
 - d. There is adequate parking. _____
 - e. There are no structural barriers or difficult terrain. _____
 - f. Safety and security of participants has been considered. _____
 - g. There is the ability to expand the footprint of the building or expand in other ways. _____

- 2. Does the building provide barrier free access to the facility? YES NO

It is essential that the senior center provides free access to the facility. If the answer is “no” it should be provided.

- 3. Which of the following are true for the senior center?
 - a. It is visible and easily recognized. _____
 - b. The external appearance is attractive and well-maintained. _____
 - c. Its location can be easily found. _____
 - d. Identification signs are visible and clearly indicate the purpose of the facility. _____

4. Indicate whether these items are true for the senior center or planned for

	Current	Planned for
a. Adequate controls for HVAC system	_____	_____
b. Illumination levels that are adequate	_____	_____
c. Natural light is used when possible	_____	_____
d. Acoustical surfaces are used where possible	_____	_____
e. Amplification systems are available	_____	_____
f. Technology is used in different areas	_____	_____
g. The use of "green buildings" ideas	_____	_____
h. Use of energy efficiency where possible	_____	_____

5. The following is true for the signage of the senior center:

a. There is identification of different areas	_____
b. Exits are identified with lighted signs	_____
c. There is a place for announcement of current activities	_____
d. There is information about future activities	_____
e. There is general information about the senior center	_____

6. The following is true for the senior center facility:

a. The toilet facilities are easily accessible, clean, sufficient and in good condition	_____
b. Office space is adequate and encourages interaction among paid and unpaid staff and participants	_____
c. The environment provides for groups of all sizes to come together	_____
d. Universal design solutions have been incorporated into the building	_____

7. When examining the interior design and furnishings which are true for the senior center?

a. The furnishings appear to be comfortable, safe and easy to maintain	_____
b. The placements of furnishings compensate for visual and mobility limitations.	_____
c. The placement of furnishings promotes socialization	_____
d. Floor coverings are appropriate for the activity	_____

8. Regular reviews for risk and hazards are completed considering the following:

a. Loading and unloading areas	_____
b. Exterior lighting after sunset	_____
c. Street or parking lot crossings	_____
d. Paved exterior walkways	_____
e. Areas where spills or water accumulate	_____

9. The safety of participants and staff is evident due to the following:
- a. Procedures for egress of building are posted in each room _____
 - b. Staff are familiar with safety procedures such as CPR and use of an automatic external defibrillator (AED) _____
 - c. Maintenance records of safety equipment including fire extinguishers _____
 - d. Regular maintenance and cleaning logs are kept _____
 - e. There are ongoing efforts at pest control _____

8. Does the senior center have safety and maintenance procedures in place? YES NO

It is essential that the senior center have a safety and maintenance procedure. If the answer is “no” the senior center should develop it.

10. Agreements for rental or outside group use are in place with the following part of the agreement:

- a. Time of use _____
- b. Maintenance and responsibility _____
- c. Equipment use _____
- d. Security and safety _____
- e. Liability and insurance _____
- f. Cost and reimbursement of expenses _____

Standard 9 Comments:


VILLAGE OF
McFarland
SUMMARY SHEET

MEETING DATE: Wednesday, July 16, 2025

SECTION: Business

DEPARTMENT: Outreach

CONTACT:

AGENDA ITEM: Discuss progress and preliminary reporting from research about and visits to other Dane County senior centers.

PREVIOUS ACTION:

ISSUE SUMMARY:

FINANCIAL/BUDGET IMPACT:

VILLAGE PLAN REFERENCE:

ORDINANCE REFERENCE:

BOARD, COMMISSION OR COMMITTEE RECOMMENDATION:

ATTACHMENTS:

None


VILLAGE OF
McFarland
SUMMARY SHEET

MEETING DATE: Wednesday, July 16, 2025

SECTION: Business

DEPARTMENT: Outreach

CONTACT:

AGENDA ITEM: Director will share upcoming programming and events.

PREVIOUS ACTION:

ISSUE SUMMARY:

FINANCIAL/BUDGET IMPACT:

VILLAGE PLAN REFERENCE:

ORDINANCE REFERENCE:

BOARD, COMMISSION OR COMMITTEE RECOMMENDATION:

ATTACHMENTS:

None