

# ElderSource

## Policy and Procedure

Area: Advisory Council	No.: AC-1	No. of Pages:1
Title: Client Satisfaction Surveys	Issued: June 18, 2009	Revised: December 16, 2019
Signature:		

**Policy:** As part of their responsibility to help identify the needs of seniors in the community and to advocate on behalf of seniors, the Advisory Council members will assist with ElderSource annual client satisfaction surveys.

### Procedures:

- I. The Planner, under the supervision of the VP of Planning and Programs, will coordinate the surveys, assigning the Advisory Council members names of clients to call and centers to visit.
- II. Advisory Council members will complete the calls and center visits within the allotted timeframe using the reporting tools provided.
  - a. Advisory Council members who are contract service providers will not be completing surveys with their own clients.
  - b. All Advisory Council members are provided with confidential information and are entrusted with this information. Members are prohibited from selling or marketing any services to the clients. Members may not share the clients' information with any other party.
- III. Advisory Council members will return report forms to the Planner.
- IV. Draft and final reports of the findings from the survey will be shared with the Advisory Council members.

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## Policy and Procedure

Area: Advisory Council	No.: AC - 2	No. of Pages: 1
Title: Advocacy	Issued: June 18, 2009	Revised: October 17, 2019
Signature:		

**Policy:** As part of their responsibility to advocate on behalf of seniors, the Advisory Council members will assist with ElderSource with its grassroots advocacy efforts

### Procedures:

- I. Letters, emails or phone calls to elected officials
  - A. The CEO will inform Advisory Council members of issues requiring them to write letters or make phone calls to their elected officials.
  - B. The CEO will provide the members with contact information.
  - C. Advisory Council members will notify the CEO when letters, calls are emails are sent and if they receive any responses.
- II. Visits
  - A. The CEO will inform Advisory Council members of opportunities to participate in visits with elected officials.
  - B. Advisory Council members may schedule their own visits and will let the CEO know of these visits.

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## Policy and Procedure

Area: Advisory Council	No.: AC-3	No. of Pages: 1
Title: Outreach	Issued: June 18, 2009	Revised: October 17, 2019
Signature:		

**Policy:** As part of their responsibility to help identify the needs of seniors in the community and to advocate on behalf of seniors, the Advisory Council members will assist with ElderSource's outreach efforts.

### Procedures:

- I. Distribution of Materials
  - A. The Vice President of Communications will provide the Advisory Council with materials (e.g. posters, flyers, brochures, etc.)
  - B. Advisory Council members will help to distribute these materials at various locations in their community (e.g. pharmacies, libraries, etc.)
  - C. Advisory Council members will report to the Vice President of Communications the number of materials distributed and the location utilizing the form provided.
- II. Representing the agency at fairs and meetings
  - A. The Advisory Council members may be requested to participate at events like health fairs in their community to represent the agency.
  - B. The members may represent the agency at other meetings they attend (e.g. AARP chapters, church, etc.)
  - C. The members will report these activities to the Vice President of Communications
  - D. The members will notify the Vice President of Communications of other in their communities.

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## Policy and Procedure

Area: Advisory Council	No.: AC-4	No. of Pages: 1
Title: Public Hearings	Issued: June 18, 2009	Revised: October 17, 2019
Signature:		

**Policy:** As part of their responsibility to help identify the needs of seniors in the community and to advocate on behalf of seniors, the Advisory Council members will assist with ElderSource's public hearings.

### **Procedures:**

- I. The Vice President of Planning and Programs will notify the Advisory Council members of the need to schedule Public Hearings (e.g. preparation for bids and area plans).
- II. The Advisory Council members will help to identify and secure locations for the public hearings.
- III. The Advisory Council members will help publicize the public hearings.
- IV. The Advisory Council members will attend the public hearings and help with the operations of the public hearings (e.g. help people sign in, hand out question cards, hand out materials, etc.)

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## Policy and Procedure

Area: Advisory Council	No.: AC-5	No. of Pages: 1
Title: Area Plan	Issued: June 18, 2009	Revised: October 17, 2019
Signature:		

**Policy:** As part of their responsibility to help identify the needs of seniors in the community and to advocate on behalf of seniors, the Advisory Council members will assist ElderSource with the development of their area plan.

### **Procedures:**

- I. The Vice President of Planning and Programs will review the area plan template with the Advisory Council.
- II. The Vice President of Planning and Programs will coordinate with the Advisory Council to schedule public hearings.
- III. The Advisory Council will provide the Vice President of Planning and Programs with relevant information regarding the needs of elders in the community to include in the development of the area plan.
- IV. The Vice President of Planning and Programs will provide a draft area plan to the Advisory Council for their review, input and approval.
- V. The Vice President of Planning and Programs will provide the Advisory Council with a final version of the area plan.
- VI. The Vice President of Planning and Programs will work with the Advisory Council on any updates to the area plan.