Senior Services—Best Practices

PUEBLO OF ISLETA, ELDER CENTER
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Pueblo of Isleta Elder Center & Assisted Living Facilities

Elder Center

Assisted Living & Memory Care
Elder Center Staffing & Funding

- 43 Positions 98% Tribal Members
  - Administration (Director, Assistant, Regulatory Monitor & Receptionist)
  - 8 Program Managers
  - 27 In-Home Service Workers
  - 5 Kitchen staff
  - 1 Home Chores Worker
  - 2 Transporters

- Funding
  - Tribal
  - Federal (various sources)
  - State (includes Medicaid reimbursements)
  - Fundraising
The Elder Center
A Place Where Everyone Is Welcomed and Families are Supported
Elder Center
A Place Where Everyone Is Welcomed and Families are Supported

Dining Room

Serving Line
Best Practice “Recipes” for Successful Senior Services

• 1 – Fiscal Management
• 2 – Staffing
• 3 - Systems
• 4 – Consumer Representation
## CONSOLIDATED BUDGET Sample

<table>
<thead>
<tr>
<th>Grant Year</th>
<th>2017</th>
<th>2017-18</th>
<th>2017-18</th>
<th>2016-17</th>
<th>Ongoing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Periods</td>
<td>Jan 1, 2017 - Dec 31, 2017</td>
<td>April 1, 2017 - March 31, 2018</td>
<td>July 1, 2017 - June 30, 2018</td>
<td>November 1, 2016 - October 31, 2017</td>
<td>Ongoing</td>
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<tr>
<td>Source/Account Codes</td>
<td>Tribal 5000</td>
<td>Contributions 8500</td>
<td>Federal 4030</td>
<td>Federal 4040</td>
<td>State 3110</td>
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<tr>
<td>5000 Salaries</td>
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<td>5010 Fringe Benefits</td>
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<td>5027 Pay</td>
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<td>7850 Legacy Member Stipends</td>
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<td>5100 Office Supplies</td>
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<td>5101 Postage</td>
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<td>5102 Mileage (local trav)</td>
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<td>5130 Professional Development</td>
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<td>5131 Dues and Subscriptions</td>
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<td>5430 Machinery &amp; Equipment</td>
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<td>5432 R&amp;M Vehicles</td>
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<td>5436 R&amp;M Building</td>
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<tr>
<td>5450 Insurance - Building Contents</td>
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<td>5452 General Liability</td>
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<td>5454 Vehicle Insurance</td>
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<td>5510 Electricity</td>
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<td>5530 Cable Service</td>
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<td>5600 Special Events</td>
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<td>5750 Employee Background Investigations</td>
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<td>5833 Kitchen Supplies (Meal Packaging)</td>
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<td>6111 Prepared Food</td>
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<td>6833 Advertisements &amp; Promotional Materials</td>
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<td><strong>TOTALS (needed)</strong></td>
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<td><strong>AWARDED FUNDS</strong></td>
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Closely track expenditures and costs (examples):
- Transportation (fuel, labor, repairs, insurance, etc.)
- Food Costs (food, labor, packaging, etc.)
- Personnel (breakdown of salaries, fringe benefits, overtime, etc.)

Use cost tracking records to project and justify proposed budgets to funding entities

Work closely with Finance Department to
- Ensure accurate charges to each funding source
- Ensure that drawdowns and reports are filed as required
- Avoid seeking funds where the Scope of Work will take away from your goals and objectives
Best Practices 2 - Staffing

- Establish positions considering:
  - Service needs (e.g. home services, home delivered meals, adult day services, etc.)
  - Funding Source (one time, reoccurring, project based, etc.)
- Research position by seeking assistance from the Human Resource Department (if applicable)
  - Develop job duties/job description
  - Develop Pay range (for fair, equitable and competitive compensation)
Qualifications of Staff

- Hire to suit the position / job description (detail)
- Do not compromise the work required for the lack of qualified applicants. At that point, better to recruit to ensure service quality and consistency.
- Train, train, train your staff – individually and/or group training approaches
Best Practice 3 – Staffing (continued)  Delegation of Authority

- Establish key positions to ensure adequate supervision of staff
- Train key staff (managers and supervisors)
  - Policies and Procedures
  - Team work (decision making, planning, organizing, collaborating, coordinating, etc.)
- Setting goals and objectives
- Reporting
- Public Speaking
- Managing
  - Delegation of duties
  - Performance Evaluation
  - Disciplinary Action
Best Practice Recipe 3 – Systems

- Human Resources
  - Personnel Policies
- Program Policies
  - Specific to Each Service Area
- Procurement Procedures
- Client Services
  - Kee-tu Model – Care Tool for Families
  - Service Referral Process
  - Case Management
  - Eligibility Criteria
  - Assessment / Reassessment

- Procedures
  - Service Unit Tracking
  - Fire and Safety
  - Emergencies/Reporting
  - Fundraising
  - Marketing & Promotions

- Communications
  - Bi-Monthly Management Team Meetings
  - Program level meetings
  - All staff monthly meeting
  - Electronic / computer access
  - In-boxes for everyone
POI Elder Center Advisory Committee
- Fair and equitable access to services
  - Elected by elders 60+
  - Represents 4 districts (distinct area representation)
    - Aware of those in need
    - Aware of who is currently receiving services
    - Satisfaction/dissatisfaction of services
- Program Service Advocates
  - Local
  - State
  - Federal
- Supports and Assists in
  - Home Visiting
  - Special Events
  - Fundraising and Fundraising Accountability

Elder Center Advisory Committee
7 Committee/Board Members
- President – District 1
- Vice President – District 1
- Treasurer – District 4
- Member – District 1
- Member – District 2
- Member – District 2
- Member – District 3
Questions?