



Job Task Analysis (JTA) Re-validation Report

Certified Senior Advisor (CSA)

Submitted to:
Society of Certified Senior Advisors
August 2019



Prepared By:

Dr. Cynthia D. Woodley
Erin Doherty
Professional Testing, Inc
720 S. Colorado Blvd, Suite 750 North
Denver, CO 80246
www.proftesting.com



Overview

Licensing candidates in a profession, selecting the best employees, or increasing the professionalization of individuals through voluntary certification are challenges met by the application of accurate measures of knowledge, skills, and abilities.

In April of 2019 Society of Certified Senior Advisors' began the process for re-validating the Job Analysis for the Certified Senior Advisor (CSA) certification. As part of this process, an online survey was created to validate the results of the job analysis and update the examination blueprint. The online survey was completed by 601 aging industry professionals across the United States.

The 601 survey participants reported working across the majority of the United States, as well as the District of Columbia and U.S. territories. Survey respondents reported working in the aging industry for a varying number of years, and reported having various areas of expertise.

The results of the job analysis revalidation are presented in this report.

Table of Contents

| | |
|---|------------|
| OVERVIEW | I |
| TABLE OF CONTENTS | II |
| LIST OF TABLES | III |
| LIST OF FIGURES | IV |
| INTRODUCTION | 1 |
| PSYCHOMETRIC STANDARDS..... | 2 |
| METHODS..... | 4 |
| Survey Validation Study Overview | 4 |
| Development of Demographic Questions for the Online Validation Survey | 4 |
| Development of Task Rating Scales for the Online Validation Survey | 5 |
| Administration of the Online Validation Survey | 6 |
| RESULTS | 6 |
| Job Analysis Results..... | 6 |
| Online Validation Survey..... | 8 |
| Response Rate and Representativeness of Online Validation Survey | 8 |
| Overview of Survey Respondents Ratings for Task Statements | 27 |
| Combined Frequency and Importance | 29 |
| Missing Tasks..... | 31 |
| Post-Survey Review Meeting and Examination Program Discussion | 36 |
| Survey Respondent Demographics | 36 |
| Review of Task Combined Ratings | 36 |
| Review of Missing Tasks..... | 37 |
| Examination and Certification Criteria..... | 37 |
| Final Weighting of Task List and Proposed Exam Blueprint..... | 38 |
| REFERENCES | 42 |
| APPENDIX A: 2012 JOB ANALYSIS DACUM CHART | A |
| APPENDIX B: COPY OF VALIDATION SURVEY | B |

List of Tables

| | |
|---|-----------|
| TABLE 1: DUTIES AND TASKS PERFORMED BY CSAS IDENTIFIED DURING THE 2012 JOB ANALYSIS | 6 |
| TABLE 2: MAIN AREA OF EXPERTISE OF RESPONDENTS* | 10 |
| TABLE 3: SUBORDINATE AREA(S) OF EXPERTISE OF RESPONDENTS* | 13 |
| TABLE 4: CREDENTIALS HELD BY RESPONDENTS* | 20 |
| TABLE 5: LICENSES HELD BY RESPONDENTS* | 25 |
| TABLE 6: MEANS, STANDARD DEVIATIONS, AND STANDARD ERRORS OF TASK RATINGS OF FREQUENCY AND IMPORTANCE. | 28 |
| TABLE 7: COMBINED FREQUENCY AND IMPORTANCE RATINGS FOR DUTY AREAS..... | 30 |
| TABLE 8: TASKS IDENTIFIED BY SURVEY RESPONDENTS AS MISSING*..... | 31 |
| TABLE 9: COMPARISON OF SURVEY VALIDATION RESULTS EXAMINATION BLUEPRINT WITH 2012 JOB ANALYSIS FINAL BLUEPRINT..... | 38 |
| TABLE 10: FINAL EXAMINATION BLUEPRINT..... | 40 |

List of Figures

| | |
|---|-----------|
| FIGURE 1: PRIMARY WORK STATES OF RESPONDENTS | 8 |
| FIGURE 2: MAIN AREA OF EXPERTISE OF RESPONDENTS | 9 |
| FIGURE 3: SUBORDINATE AREA(S) OF EXPERTISE OF RESPONDENTS | 13 |
| FIGURE 4: YEARS AS A PRACTICING AGING INDUSTRY PROFESSIONAL | 14 |
| FIGURE 5: ARE RESPONDENTS CURRENT CSAS? | 15 |
| FIGURE 6: YEARS SURVEY RESPONDENTS HAVE HELD CSA CERTIFICATION | 16 |
| FIGURE 7: HIGHEST DEGREE COMPLETED | 17 |
| FIGURE 8: AGE OF RESPONDENTS..... | 18 |
| FIGURE 9: GENDER OF RESPONDENTS | 19 |
| FIGURE 10: CREDENTIALS HELD BY RESPONDENTS | 20 |
| FIGURE 11: LICENSES HELD BY RESPONDENTS | 24 |

Introduction

Job analysis is the process by which the tasks performed by individuals in a particular job are identified, and the importance of those tasks is determined. Additionally, job analysis helps to establish the knowledge, skills, abilities, and other characteristics necessary for the effective performance of a job incumbent. Specifically, job analysis can be defined as “any systematic procedure for collecting and analyzing job-related information to meet a particular purpose” (Raymond, 2001, p. 372).

The important tasks and critical competencies identified in a job analysis should be validated by a representative, large-scale group of job incumbents. A well-conducted validation study is a foundational requirement of any valid credentialing program, and helps to identify the core knowledge areas, critical work functions, and skills which are common across a representative sampling of current practitioners or job incumbents. Empirical results which validate the task analysis provide examinees and the public with a fair, reliable, and realistic assessment that reflects the skills, knowledge, and abilities required for competent job performance. A large-scale validation effort allows the results of a job analysis to be quantified, and the validation inventories can reach a large, diversified sample within a short period of time.

The services of Professional Testing, Inc. were secured by the Society of Certified Senior Advisors (SCSA) to assist with the development and administration of a revalidation survey for the CSA certification. This report describes the revalidation study process in detail and presents proposed revisions to the CSA examination blueprint.

Psychometric Standards

The *Standards for Educational and Psychological Testing* (1999) developed by the American Educational Research Association, the American Psychological Association, and the National Council on Measurement in Education (hereafter called the “*Standards*”) serve as the universally recognized benchmark for design, construction, standard setting/cut score, test administration, score reporting, and test scoring of all examinations including educational, personnel selection, licensing and certification examinations.

The most relevant *Standards* that apply to job analyses for credentialing examinations are:

- | | |
|----------------|---|
| Standard 14.8 | <i>“Evidence of validity based on test content requires a thorough and explicit definition of the content domain of interest.” (p 160)</i> |
| Standard 14.10 | <i>“When evidence of validity based on test content is presented, the rationale for defining and describing a specific job content domain in a particular way (e.g. in terms of tasks to be performed or knowledge, skills, abilities and other personal characteristics) should be stated clearly.” (p 160)</i> |
| Standard 14.14 | <i>“The content domain to be covered by a credentialing test should be defined clearly and justified in terms of the importance of content for credential-worthy performance in an occupation or profession. A rationale should be provided to support a claim that the knowledge or skills being assessed are required for credential-worthy performance in an occupation and are consistent with the purpose for which the licensing or certification program was instituted” (p 161)</i> |

The National Commission for Certifying Agencies (NCCA) Standards for the Accreditation of Certification Programs and the International Organization for Standardization (ISO) Standard ISO/IEC 17024 Conformity assessment -- General requirements for bodies operating certification of persons both adopt provisions of the Standards for use with credentialing programs. ISO/IEC 17024 includes additional standards related to governing and administering of certification programs in an international context.

Methods

Survey Validation Study Overview

A survey was developed to validate the tasks as identified during the 2012 job analysis of the Certified Senior Advisor certification. SCSA was consulted throughout the survey development stages to ensure that subject content expertise was available to Professional Testing. Before the survey was sent to the entire population of aging industry professionals, the draft survey was reviewed by a committee of subject matter experts.

Development of Demographic Questions for the Online Validation Survey

The first step in developing the online validation survey is to identify key demographic questions to ensure the representativeness of survey respondents and help evaluate possible threats to the validity of survey responses. Each participant was asked 11 demographic questions. The questions are listed below:

- Which of the following BEST DESCRIBES your main area of expertise?
- Which of the following BEST DESCRIBES your subordinate area(s) of expertise?
- How many years have you been a practicing professional in the aging industry?
- Are you a Certified Senior Advisor?
- If you are a Certified Senior Advisor, how many years have you held your CSA Certification?
- In which State do you primarily work?
- What is your highest level of education?
- What is your age?
- What is your gender?
- Which of the following credentials do you hold?
- Which of the following licenses do you hold?

Development of Task Rating Scales for the Online Validation Survey

The second step in developing the online validation survey is to identify the rating scales which survey participants will use to rate the tasks performed by aging industry professionals. There are multiple models of rating scales used in job analyses; however, for the purposes of this study, two survey scales were used: task frequency and importance. Task frequency was chosen because as identified in Newman, Slaughter, & Taranath, 1999, those tasks that are performed more often should have a higher emphasis placed on them. Task importance was chosen because it is the most common scale used when evaluating tasks for licensure and certification job analysis (Newman et al., 1999) and as illustrated in the *Standards for Educational and Psychological Testing*, “the content domain to be covered by a credentialing test should be defined clearly and justified in terms of the importance of the content for credential-worthy performance in an occupation or profession” (AERA, APA, NCME, 1999, p. 161). The two rating scales are illustrated below:

| Frequency | Importance |
|--------------------------|------------------------|
| Perform very often – 3 | Very important – 3 |
| Perform fairly often – 2 | Important – 2 |
| Occasionally perform – 1 | Somewhat important – 1 |
| Never perform – 0 | Not important – 0 |

An overall rating scale was calculated using the formula illustrated below:

$$\text{Overall rating scale} = 2 * \text{Importance} + \text{Frequency}$$

The overall rating scale was used to develop weights for the duties and tasks within the examination blueprint.

Administration of the Online Validation Survey

Professional Testing used an internet survey software system to develop the survey. Approximately 5,000 aging industry professionals were sent invitations to participate in the online survey. All of the professionals surveyed had access to internet capable computers via their home, employment, or public library. Any computer with a web browser and a web connection could be used to access the survey.

Survey participants received an email from the SCSA describing the purpose of the online survey and inviting them to participate. The email requested input regarding the job tasks routinely performed by aging industry professionals. The survey participants were provided with a link to the survey. The online survey consisted of 34 job tasks separated into nine content domains (or duty areas).

A copy of the survey is included in Appendix B.

Results

Job Analysis Results

During the 2012 job analysis, the participants identified nine overarching duty areas, and 34 tasks, as illustrated in Table 1.

Table 1: Duties and tasks performed by CSAs identified during the 2012 job analysis

| Duties and Tasks | |
|------------------|---|
| A | Anthropology and Sociology |
| 1 | Identify trends in aging |
| 2 | Dispel myths/misconceptions about aging |
| 3 | Identify social and cultural issues associated with aging |
| 4 | Affirm the wishes of the older adult |
| B | Family and Aging |
| 1 | Identify family dynamics |
| 2 | Communicate with seniors and their families |

| Duties and Tasks | |
|------------------|---|
| 3 | Develop resource/referral network |
| C | Health and Wellness Aspect |
| 1 | Identify healthy lifestyles for aging population |
| 2 | Identify physical changes and challenges |
| 3 | Identify mental changes and challenges |
| 4 | Identify the signs and symptoms of potential elder abuse and exploitation |
| D | Lifestyle Aspects |
| 1 | Develop a network of resources for lifestyle issues |
| 2 | Assess the lifestyle situation of the older adult |
| 3 | Provide educational opportunities to older adults/families |
| 4 | Identify social aspects of aging |
| 5 | Identify technological aspects of aging |
| 6 | Present information regarding mobility |
| 7 | Identify sexuality issues of the aging |
| E | Financial Aspects |
| 1 | Develop a network of financial professional resources |
| 2 | Identify concerns older adults/families have about finances |
| 3 | Convey the importance of thinking about financial resources (now and in the future) |
| 4 | Identify financial aspects of estate planning |
| 5 | Educate about health benefit options |
| 6 | Educate about financial assistance available to older adults |
| 7 | Identify options for financing long term care (broad sense) |
| 8 | Identify potential for financial fraud and abuse |
| F | Eldercare Planning |
| 1 | Develop network of professionals and resources |
| 2 | Identify care needs |
| 3 | Facilitate older adults/families to build a plan for care continuum |
| G | Legal Aspects |
| 1 | Develop a base of legal network resources |
| 2 | Address importance of legal planning |
| H | End-of-Life Planning |
| 1 | Educate seniors/families about end of life/care options |
| I | Ethical Issues |
| 1 | Adhere to CSA and professional codes of ethics |
| 2 | Uphold senior's rights within professional ethical guidelines |

The complete DACUM chart developed by the meeting participants from the 2012 job analysis is provided in Appendix B, the results of the 2012 job analysis were used as the basis for the job analysis revalidation for the Certified Senior Advisor certification.

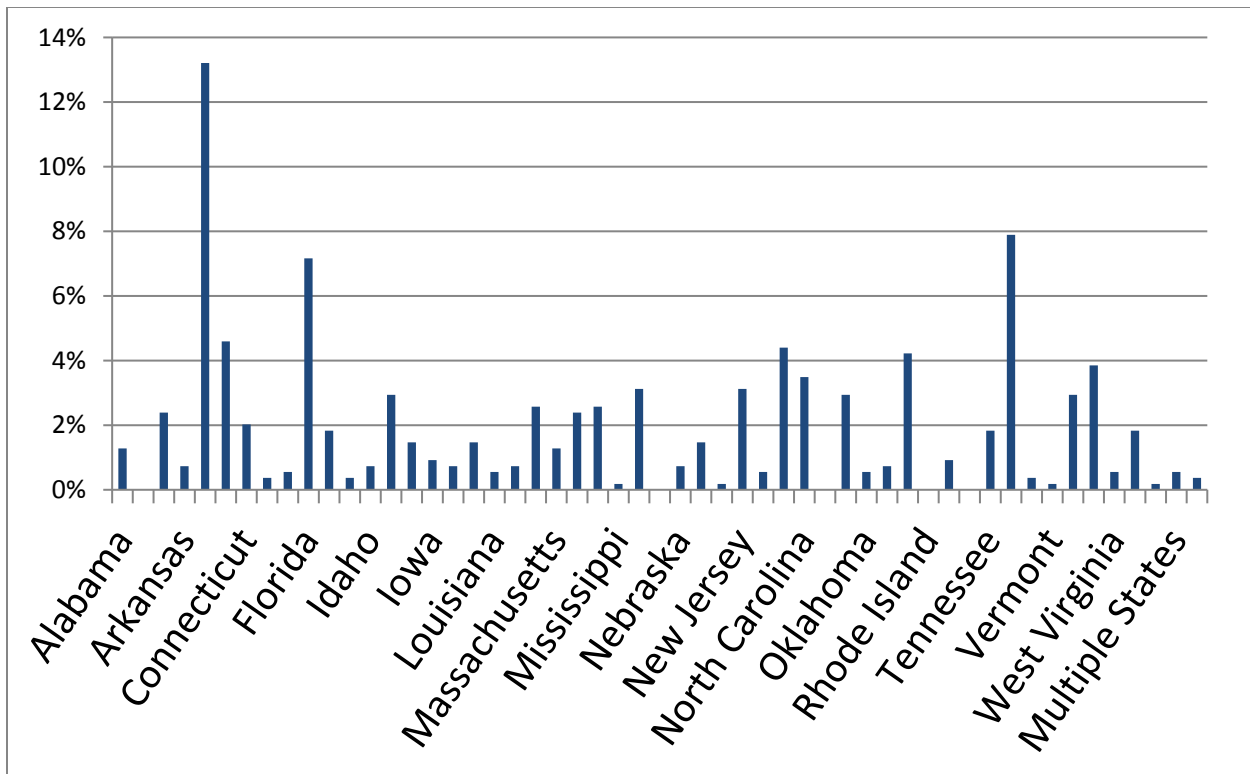
Online Validation Survey

Response Rate and Representativeness of Online Validation Survey

The SCSA invited approximately 5,000 investigators to participate in the online survey. Of the 5,000 participants invited, a sample of 601 responded to the survey.

The background and demographic portions of the survey assist with determining how representative the survey respondents are of the population of interest. Of the 601 participants who responded to the survey, survey respondents represented 45 of 50 states, as well as the District of Columbia and areas outside of the United States. The highest number of respondents (72 or 13.2%) reported working primarily in California, while the next highest number (43 or 7.89%) reported working primarily in Texas, as shown in Figure 1. 56 respondents left this item blank.

Figure 1: Primary Work States of Respondents



Survey respondents were asked to report their main area of expertise. The highest percentage of respondents (122 or 23.69%) reported expertise in “Insurance Services,” as shown in Figure 2. 16.31% or 84 respondents selected “other,” and the write in responses are available in Table 2. Two respondents left this item blank.

Figure 2: Main Area of Expertise of Respondents

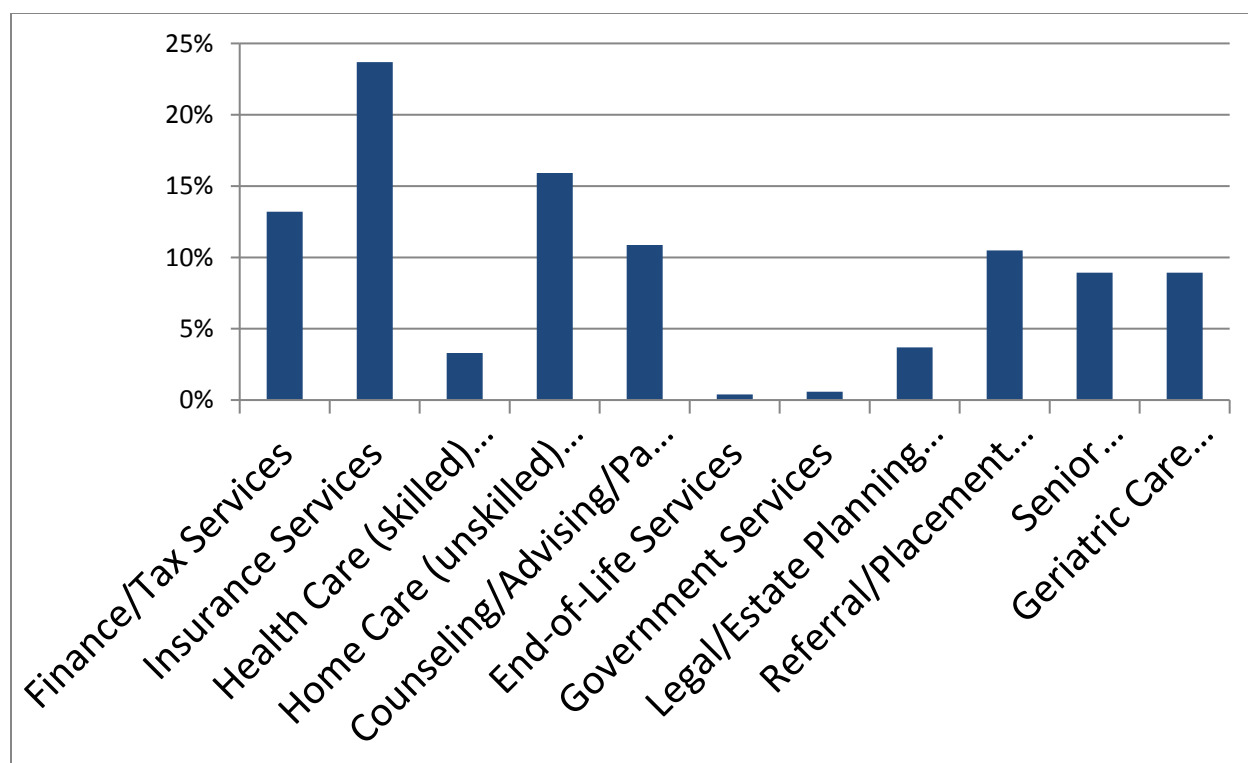


Table 2: Main Area of Expertise of Respondents*

| Other Responses | |
|---|---|
| aging in place instructor and home safety consulting | Aging services systems development |
| All of the above by sponsoring CE for seniors. Primary role was fighting isolation through regular programming. | Also do Senior Placement |
| Also Referral/Placement Services | as well as referral/Placement services |
| Assisted Living | Assisted Living Management |
| Assisted Living Memory Care - development & management | Assisted Living with Memory Care |
| Bookkeeping & accounting services for Seniors | Care in Assisted Living |
| Certified Instructor CE Courses Including LTC Partnership Certification for both the Mandatory 8 hour course and the 4 hour refresher course Also have conducted numerous many seminars on Long Term Planning | CFP |
| Chaplain | complete financial and life planning for retirees |
| Creative Engagement Development and Family Support | Daily Money Management |
| Daily Money Management | Daily Money Management |
| Daily Money Manager (AADMM) | Dementia Caregiver Consultant/Family Facilitator |

Table 2: Main Area of Expertise of Respondents*

| Other Responses | |
|--|--|
| Department of Energy disabled employees | ED and Nursing Home Administrator |
| Education | Education of caregivers. |
| Elder Justice Advocacy; Elder Exploitation Prevention, Public Affairs on Aging Services and Needs, Media Relations, Public Relations | Executive director of senior living community with IL, AL, and MC |
| Financial Adviser primarily Sr clients..long relationships | Financial and Money management Counseling and Reverse Mortgage provider. |
| financial fraud | Financial planning |
| Fundraising | Funeral arranging, preplanning & prefunding |
| Geriatric social work | Gerontologist PhD in private practice LLC |
| Gerontologist who works as a professional speaker and consultant to business | Have worked in Assisted living communities and as placement agent |
| Healthcare Chaplain | Home Health Care-Marketing/Sales |
| Home modifications/Advising/advocacy | Household Maintenance |
| I am a Geriatric Risk Manager | I counsel and work with people who are/wish/may desire to sell their current home and either rent, or buy a different home/condo. I am a Realtor. |
| I have helped several elderly people sell their homes to move into retirement communities or assisted living communities | I work with families transitioning into long term healthcare environments, whether that is home healthcare, assisted living, memory care, or a nursing home, and I do it from a legal and financial perspective. I specialize in areas related to Medicaid and VA Aid and Attendance planning. |
| Lifelong Learning | Lifestyle & Wellness |
| Marketing & Outreach for Senior Issues & Programs | Medicaid Coordination Planning |
| Medicaid planning | Medicare |
| Medicare & income planning for retiring fed, employees & others | Medicare enrollment issues |
| Medicare Supplements, LTC and Life Insurance | Mortgage |
| Nursing case management | Nutritional guidance |
| Older Adult volunteer recruitment and management | Organizing and life coaching |
| person-directed living | Planning and managing portfolios for the individuals and their families |
| publisher of senior resource magazine | publishing |
| ran 10 week FINANCIAL education for seniors NO SALES PITCH | Real Estate |
| Real Estate | Referral/Placement//Real Estate Broker Services |
| Registered Investment Advisor and Financial Consultant | Registered Nurse working with older adults |
| Relocating/move manager/organizer | retirement planning |

Table 2: Main Area of Expertise of Respondents*

| Other Responses | |
|---|--|
| Reverse mortgage loan officer - 16 years | Reverse Mortgages |
| Selling property | Senior Business Owners |
| Senior Move Management/ Age in Place Specialist | Senior services, municipality agency |
| Social engagement for people w dementia and support groups for CPs | Spirituality and Religious Gerontology |
| Transportation | Volunteer Trip Leader in Peru |
| with a strong medical background | |
| *Note: responses are listed here exactly as they were entered in the survey. Typographical and grammatical errors were not corrected. | |

When survey respondents were asked to report their subordinate areas of expertise, the highest number of responses (151 or 27.40%) noted “Financial Services,” as shown in Figure 3. 6.17% or 34 responses selected “other,” and the write-in responses are available in Table 3. 16 respondents left this item blank.

Figure 3: Subordinate Area(s) of Expertise of Respondents

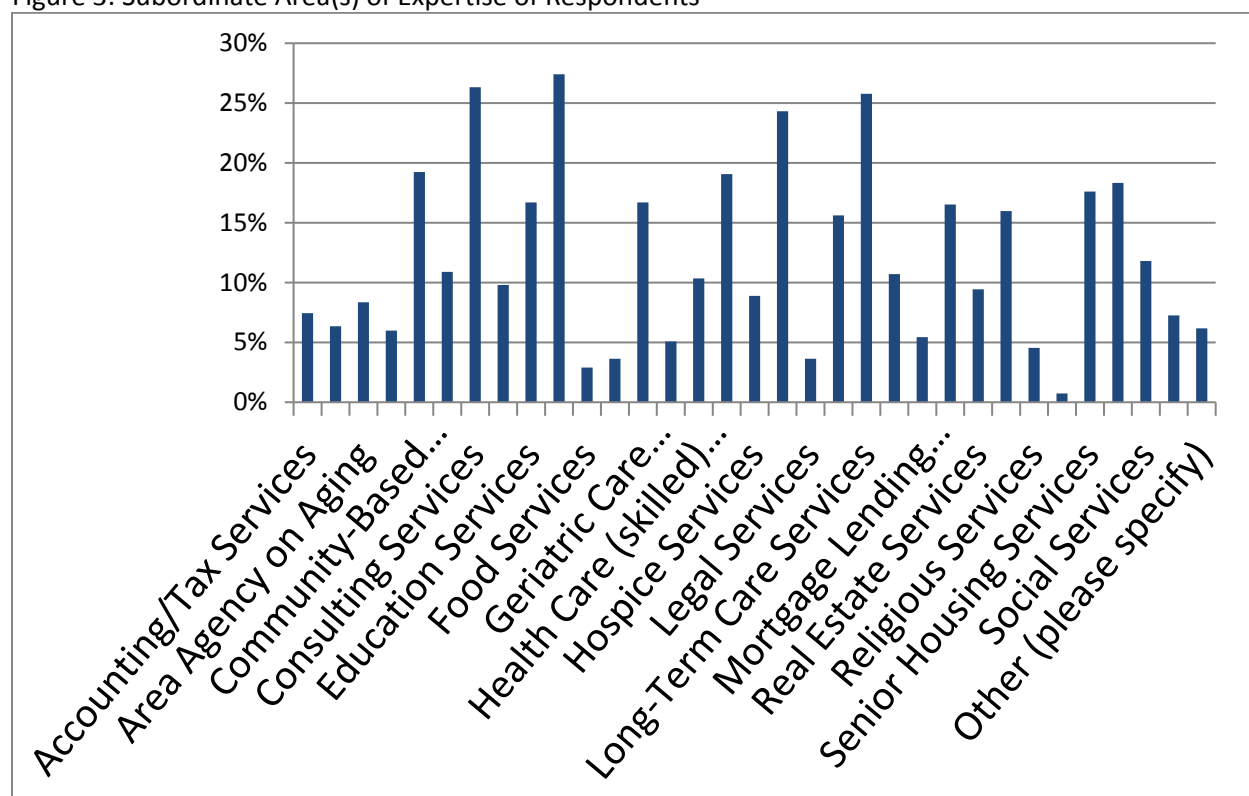


Table 3: Subordinate Area(s) of Expertise of Respondents*

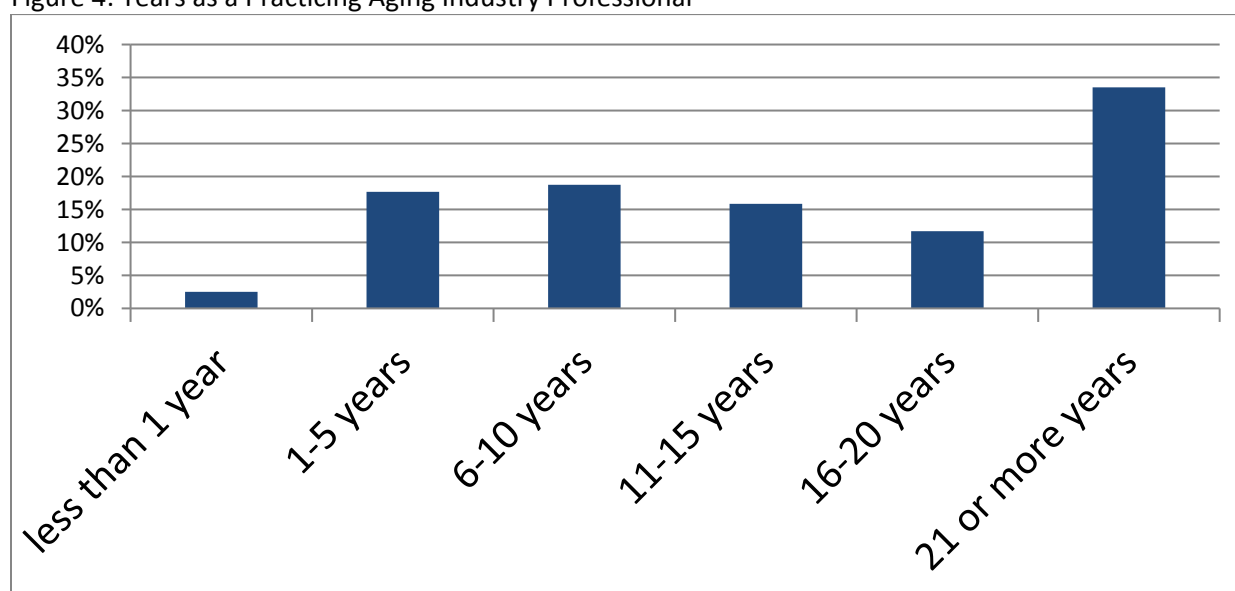
| Other Responses | |
|---|--|
| Adaptive devices | As a member of the Knights of Columbus I have been involved in many volunteer situations helping seniors |
| Assist families locating these services and work with these business in community | Bereavement specialist |
| Bill Payment Services | Bookkeeping, bill paying, and household management |
| Built a Group of Senior Professionals to provide services | caregiving/retirement/life transitions in mid-life and beyond |
| Daily Money Management | Daily Money Management; Conservatorship/Guardian; POA |
| Dementia Caregiver Consultant/Family Facilitator | Dementia education and care |
| Designated "focal point" Senior Center | Emergency Monitoring, medication management systems, home technology |
| Guardianship | health writers |
| Home modifications/Accessibility/fall prevention | home safety consulting and aging in place |

Table 3: Subordinate Area(s) of Expertise of Respondents*

| Other Responses | |
|---|---|
| I own a Senior Risk Management Business | I teach doctoral aging courses at Walden University |
| Lifestyle & Wellness | Long Term Care Planning and Administration for families |
| manage personal affairs, bill paying, "paperwork", administrative help | Medicaid Planning |
| Medicare | Medicare plans |
| Nursing | Public Affairs; Media Relations; Public Relations; Strategic Planning |
| RN | Therapeutic yoga for seniors |
| Tour Guide | Training ElderCare Consultants |
| Trustee, POA, Health Care Surrogate, Personal Representative | victim advocacy for fraud |
| *Note: responses are listed here exactly as they were entered in the survey. Typographical and grammatical errors were not corrected. | |

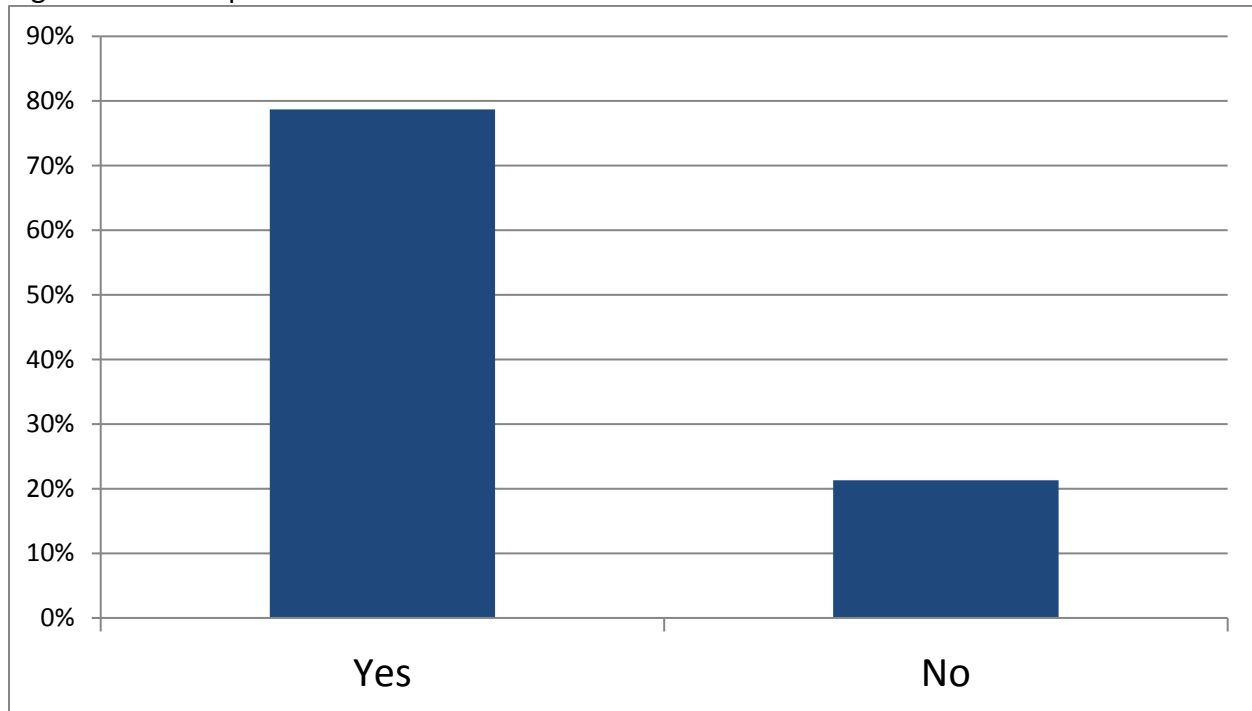
When asked to report how long they have been a practicing aging industry professional, the highest number of respondents (186 or 33.51%) reported “21 or more years,” while the second highest number (104 or 18.74%) reported “6-10 years,” as shown in Figure 4. 46 respondents left this item blank.

Figure 4: Years as a Practicing Aging Industry Professional



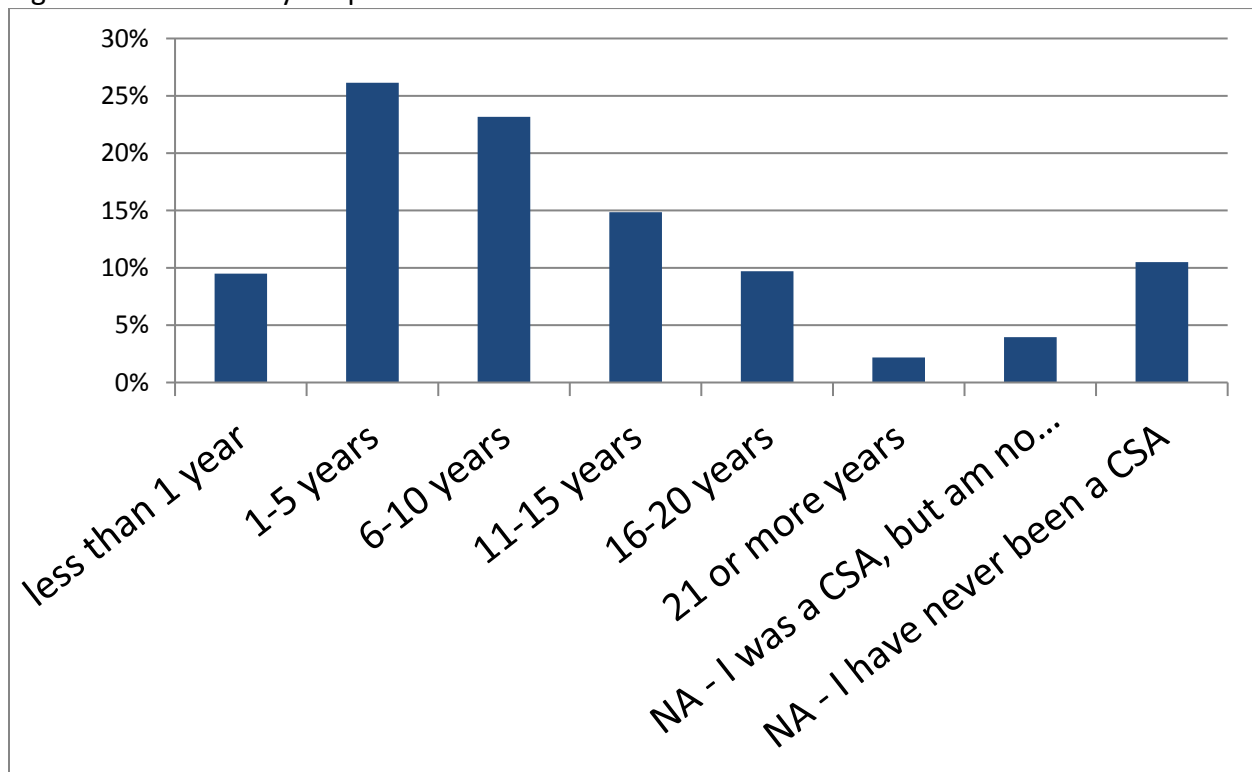
A majority of respondents (436 or 78.70%) reported being current CSAs, as shown in Figure 5. 47 respondents left this question blank.

Figure 5: Are Respondents Current CSAs?



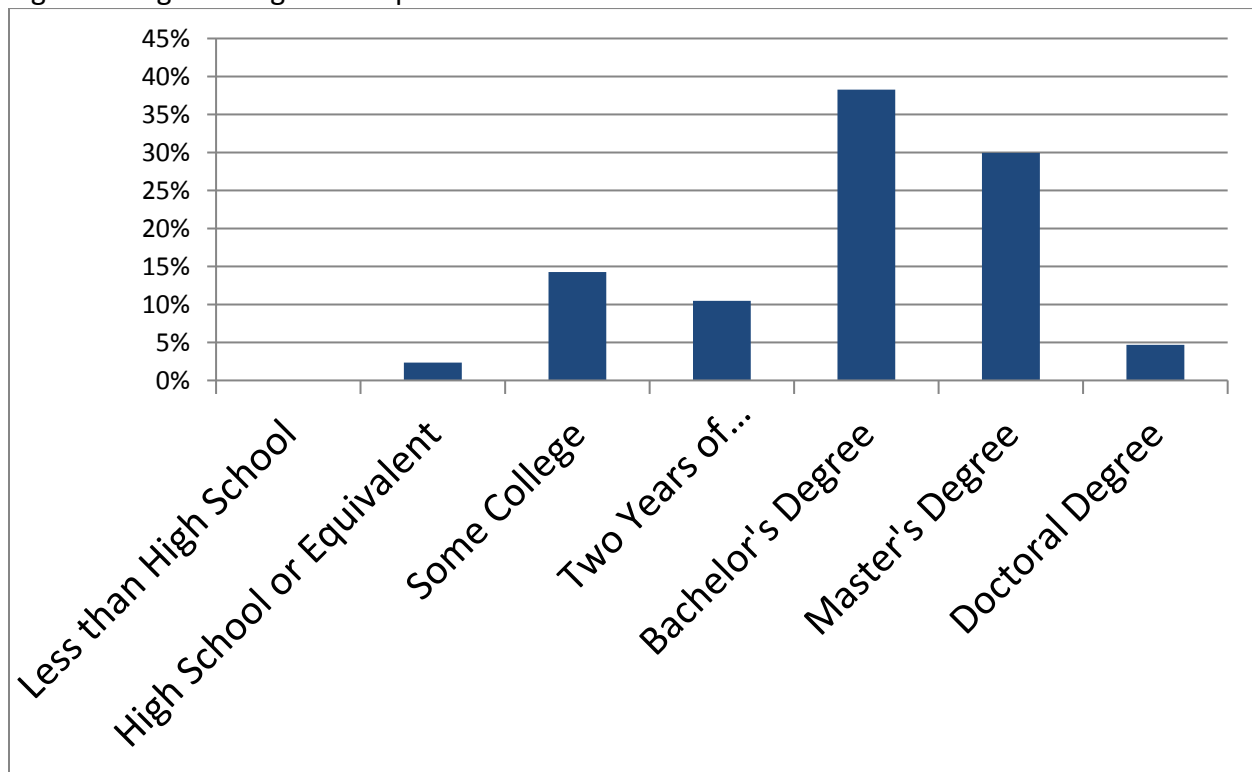
Survey respondents were asked how many years they have held their CSA certification. The highest number of respondents (132 or 26.14%) reported having their CSA certification for 1-5 years, as shown in Figure 6. 96 respondents left this question blank.

Figure 6: Years Survey Respondents Have Held CSA Certification



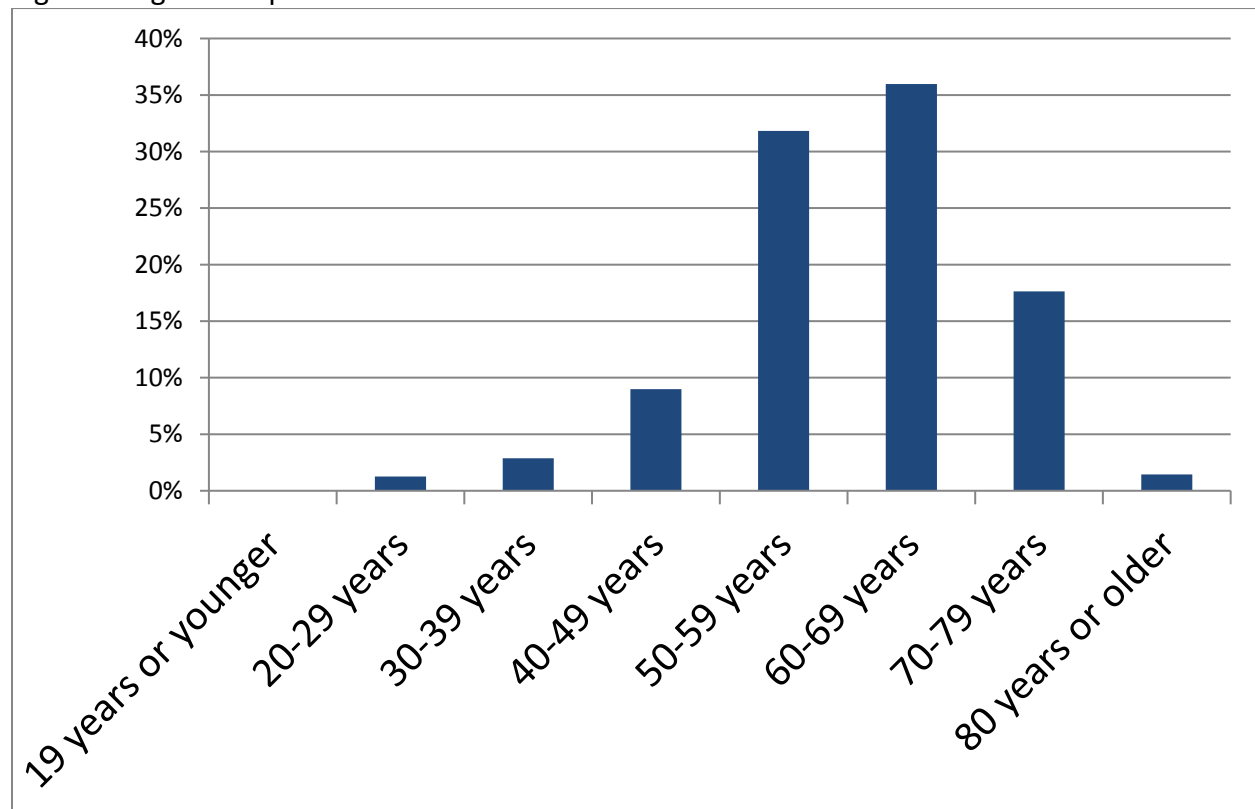
When asked for their highest level of education, the highest number of respondents (212 or 38.27%) reported “Bachelor’s Degree,” while the second highest number of respondents (166 or 29.96%) reported “Master’s Degree,” as shown in Figure 7. 47 respondents left this question blank.

Figure 7: Highest Degree Completed



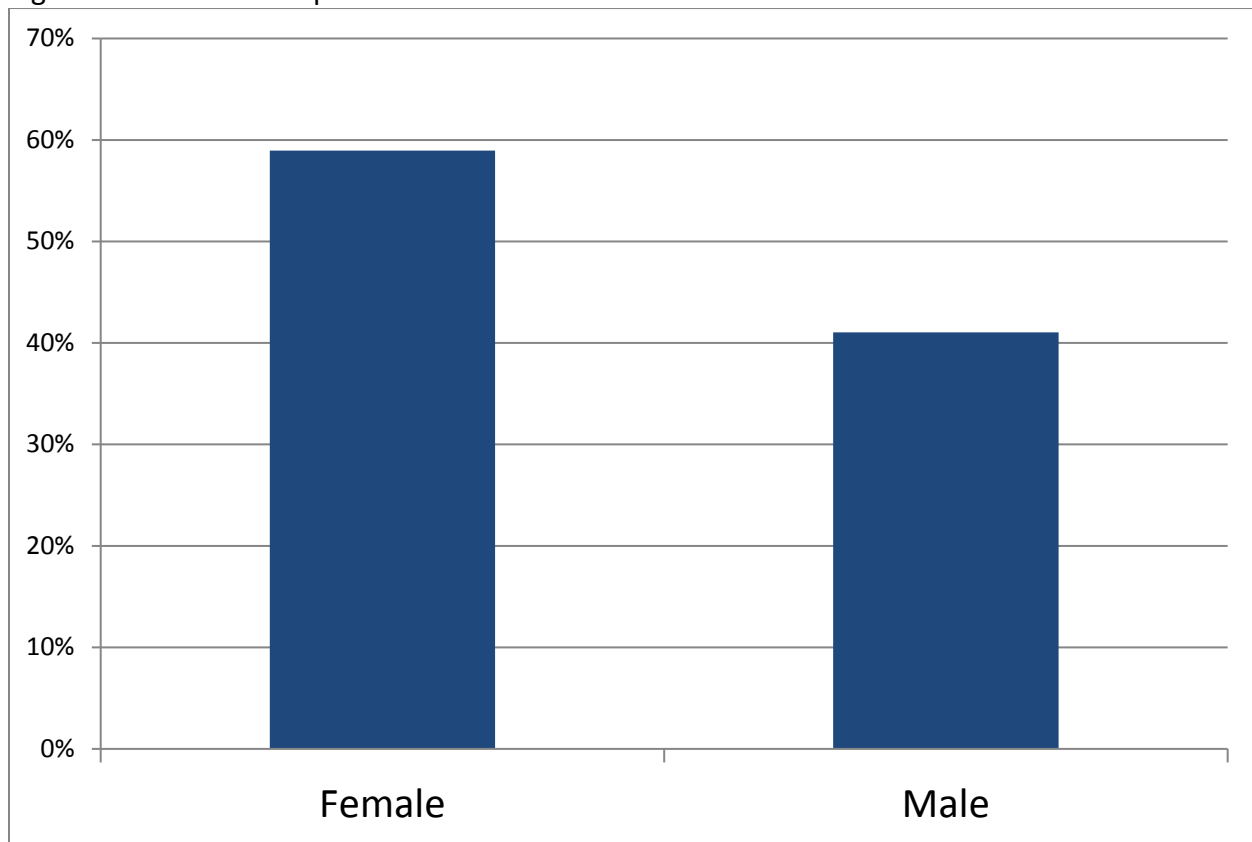
When survey respondents were asked their age, the highest number of respondents (200 or 35.97%) reported “60-69 years,” while the second highest number (177 or 31.83%) reported “50-59 years,” as shown in Figure 8. 45 respondents left this question blank.

Figure 8: Age of Respondents



Survey respondents were then asked to identify their gender. A majority of respondents (326 or 58.95%) reported female, while the remaining respondents (227 or 41.05%) reported male, as shown in Figure 9. 48 respondents left this question blank.

Figure 9: Gender of Respondents



Respondents were asked to identify which credentials they held. A majority of respondents (355 or 88.53%) reported holding the CSA certification, while the next highest number of responses (35 or 8.73%) reported holding a Certification for Long-Term Care (CLTC), as shown in Figure 10. 187 respondents reported holding “other” credentials, and the write-in responses are available in Table 4. 200 respondents left this question blank.

Figure 10: Credentials Held by Respondents

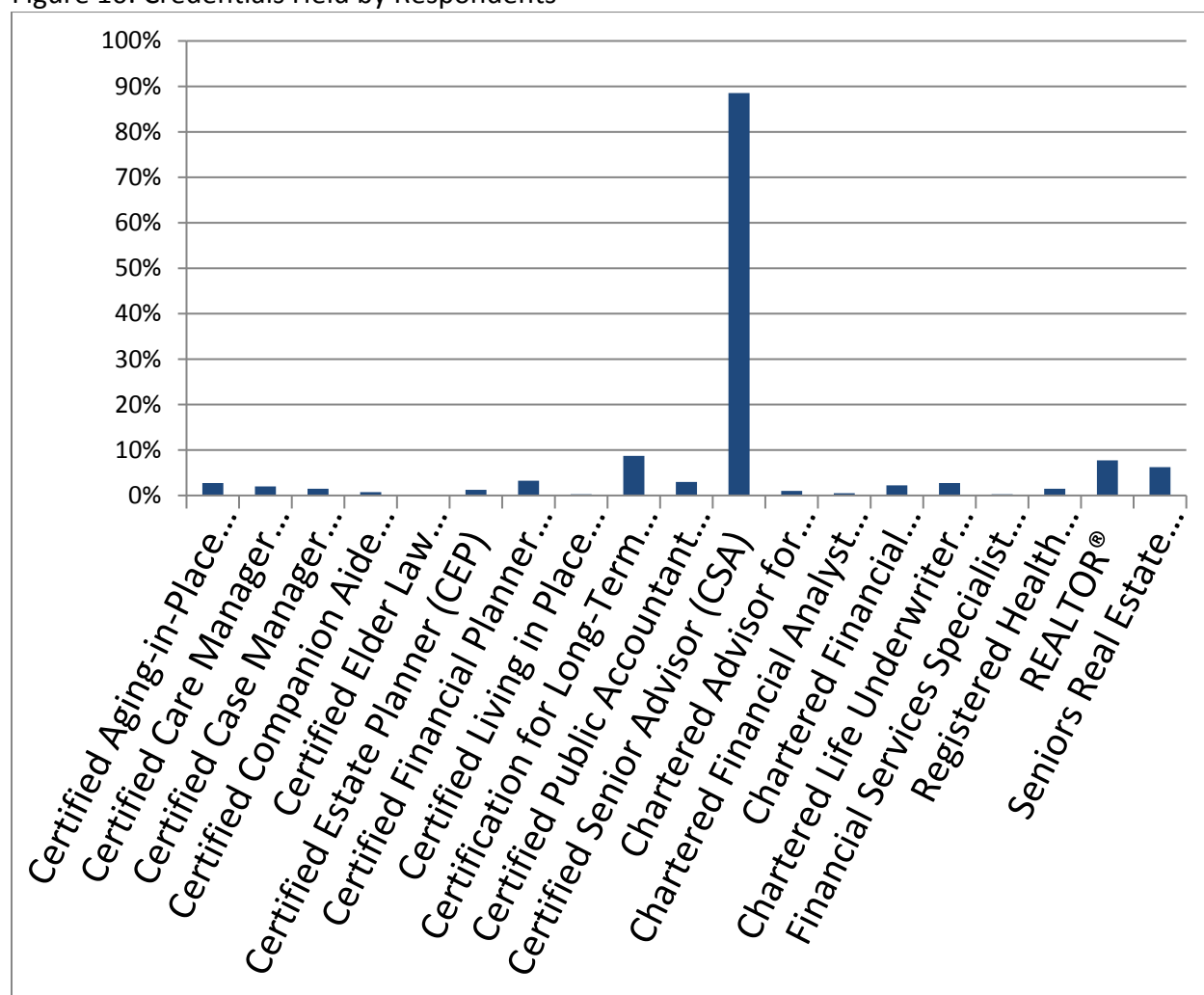


Table 4: Credentials Held by Respondents*

| Other Responses | |
|--|--|
| AAMS, CRPC, C(k)P | ACBSW |
| ACSW, MSW, LISW | Administrators Assisted Living Certificate |
| Advocay for seniors through my role | AHIP, CA life & health license |
| ALCA | Assisted Living Administrator |
| Association of Medicare Supplement Agents (not a certification, tho) | Attorney |
| AZ Licensed Fiduciary | BDD - Beyond Driving with Dignity Professional |

Table 4: Credentials Held by Respondents*

| Other Responses | |
|--|---|
| Board Certified Patient Advocate | Board Certified Patient Advocate |
| Board Certified Patient Advocate(BCPA) | CA Dept of Real Estate Reverse Mortgage CE |
| Ca Real Estate Broker, Officer | CAS (Certified Annuity Specialist) |
| CDAL | CDP |
| CDP | CDP, CCCTM |
| CDP, CDAL | CDP, CRTS |
| CEAC/CHAMPS | CEPS, FLMI |
| Cert. Dementia Practitioner, Cert. PAC Trainer, Cert. Fit Mind Coach | Cert. independent consultant with PAC, Cert. RCFE Administrator (Ca.) |
| Certified Professional Organizer | Certificate in Gerontology, Certified Eden Alternative Educator |
| Certified Alzheimer Caregiver | Certified Alzheimer's Educator, Certified Cognitive Stimulation Instructor |
| Certified Assisted Living Administrator | Certified Dementia Communication Specialist |
| Certified Dementia Communication Specialist (CDCS) and partner with CAPS and UDCP | Certified Dementia Practitioner |
| Certified Dementia Practitioner and Long Term Care Administrator | Certified Dementia Practitioner |
| Certified Dementia Practitioner | Certified Dementia Practitioner |
| Certified Dementia Practitioner | Certified Dementia Practitioner |
| Certified Dementia Practitioner (CDP) | Certified Dementia Practitioner (CDP) |
| Certified Dementia Practitioner (CDP) | Certified Dementia Practitioner; Mental Health First Aid |
| Certified Fraud Examiner, Qualified as CPA in the UK | Certified Fund Specialist |
| Certified Gerontology Specialist | Certified Grief Counselor |
| Certified Home Care Aid | Certified legal assistant |
| Certified Nursing Assistant (CNA) | Certified Nursing Assistant (CNA), Certified Guardian (NCG) |
| Certified Occupancy Specialist (COS) | Certified Pharmacy Technician |
| Certified Reverse Mortgage Professional | Certified Senior Housing Professional (CSHP) |
| Certified Specialist for Spendthrift Trust | Certified Wellness Coach |
| CFF, CFSA, CRMA, CFE | CGMA - Chartered Global Management Accountant |
| Chartered Property and Casualty Underwriter (CPCU); Associate in Risk Management (ARM) | CIC |
| CIC (Certified Insurance Counselor) | CLU, RHU, LUTCF formally CSA and CLTC |
| CMPS, CRP | CMR: Certified Medical Representative (CMRI, Roanoke, VA); Certified Hospital Readmission Prevention Specialist (National Readmission |

Table 4: Credentials Held by Respondents*

| Other Responses | |
|--|---|
| | Prevention Collaborative, LA, CA) |
| COO of a large Home Care Agency | CPA Certified |
| CRPC, CKA | CRPC, CKA |
| CT - Certified in Thanatology (Grief counseling) | CTFA-Certified Trust & Financial Advisor, CRC(R)-Certified Retirement Counselor |
| Currently working on reestablishing my CSA | CVA - Certified Volunteer Administrator |
| EA - Enrolled Agent | EA - IRS Enrolled Agent |
| EA, CTA, CTP, ATA, ATP, NSSA | EMT-B retired after 20 yrs; ECHM |
| Enrolled Agent | FIC, LUTCF |
| FICF (Fraternal Insurance Counsellor Fellow | FLMI,CEPS, |
| Florida Assistant Living Administrator | Former CFP. No longer active |
| Fraternal insurance counselor fellow | Geriatric Risk Manager |
| Gerontologist | Health & Life Insurance Agent/Broker |
| Health Health & Disability Insurance License | Health Insurance Associate (HIA) |
| HIA | In the process of getting my SRES certification now |
| Insurance and securities licensed | Insurance License, health and life |
| Investment Advisor Representative | Juris Doctor Degree |
| Juris Doctorate (JD) | LACP - Life and Annuity Certified Professional |
| LACP, LUTCF, LILI | LCSW |
| Level 2 ALF MC approved Manager | Licensed Assisted Living Administrator; Certified Dementia Practitioner |
| licensed care home manager and certified caregiver | licensed clinical social worker |
| Licensed Funeral Director & CPC (Certified Preplanning Consultant) | Licensed Insurance Adviser |
| Licensed Insurance Counselor (LIC) | Licensed Mental Health Counselor (LMHC), National Certified Counselor (NCC), Geriatric Mental Health Specialist (GMHS), Certified Nursing Assistant (CNA), Approved Clinical Supervisor (ACS) |
| Life Underwriter Training Counsel Fellowship | LTCIS |
| LTCP - Long Term Care Professional | LUTCF |
| LUTCF | LUTCF |
| LUTCF | LUTCF CSSCS |
| LUTCF, CHP | LUTCF, FLMI, ACS, AALU, CPCU, AIAA, CASL, ChFEBC |
| LUTCF,REBC | Master Registered Financial Consultant |
| Masters in Counseling | Masters in Management |
| MBA | MBA |
| MBA - Finance | MBA, Behavioral Psychologist |

Table 4: Credentials Held by Respondents*

| Other Responses | |
|---|--|
| Mortgage license | MRFC - Master Registered Financial Consultant; CPFA |
| MS Psychology | MSFS, CEPA |
| MSN | MSW |
| Na | National Association of Senior Move Mangers - A+ Cert |
| National Certified Guardian | National Certified Guardian , Certified Paralegal, Board Certified Patient Advocate,rd |
| National Placement & Referral Alliance (NPRA) | National Social Security Advisor |
| NCCDP | No certification just hands on experience |
| No Other | None |
| Nurse Practitioner | Nursing home administrator |
| only CSA | Paralegal |
| Paralegal | PDMM - Professional Daily Money Manager |
| Professional Engineer (PE) | RCFE |
| REBC | Registered Dietitan |
| Registered Financial Consultant (RFC) | Registered Financial Consultant (RFC) |
| Registered Financial Gerontologist | Registered Health Information Administrator (RHIA) |
| Registered Health Underwriter | Registered LLife Planner, Certified Professional Consultant on Aging, Elder Planning Counselor |
| Registered Nurse BSN, NCG national Certified Guardian, BCPA Board Certified Patient Advocate | Registered Respiratory Therapist |
| Residential Care for Elderly Administrator (RCFE) | Retirement Options Certified Coach, Certified Sage-ing Leader, Certified Spiritual Director |
| RFC, CSA | RFC, LUTCF, FIC |
| RHU,LUTCF,CREA,SPS,CPE | RIA |
| RIA | RIA - Registered Investment Advisor |
| RICP | RICP, CSFP |
| RICP, RFC, LUTCF | RN |
| RN | RN |
| RN, Certified Dementia Practitioner | rps |
| Securities licensed Series 7/24/63 | Senior Move Manager |
| Six-Sigma Black belt (Quality Assurance) | SLP-CCC |
| studing for CSA | Tax credit Housing , Activity Certified |
| Treasury Licensed Enrolled Agent (E.A.) | UDCP, SHSS |
| VA Accredited | |
| *Note: responses are listed here exactly as they were entered in the survey. Typographical and grammatical errors were not corrected. | |

Finally, respondents were asked to identify which licenses. The highest number of responses (174 or 67.18%) reported holding an “Insurance” license, while the next highest number (61 or 23.55%) reported holding a “Securities/Investments” license, as shown in Figure 11. 84 respondents reported holding “other” licenses, and the write-in responses are available in Table 5. 342 respondents left this question blank.

Figure 11: Licenses Held by Respondents

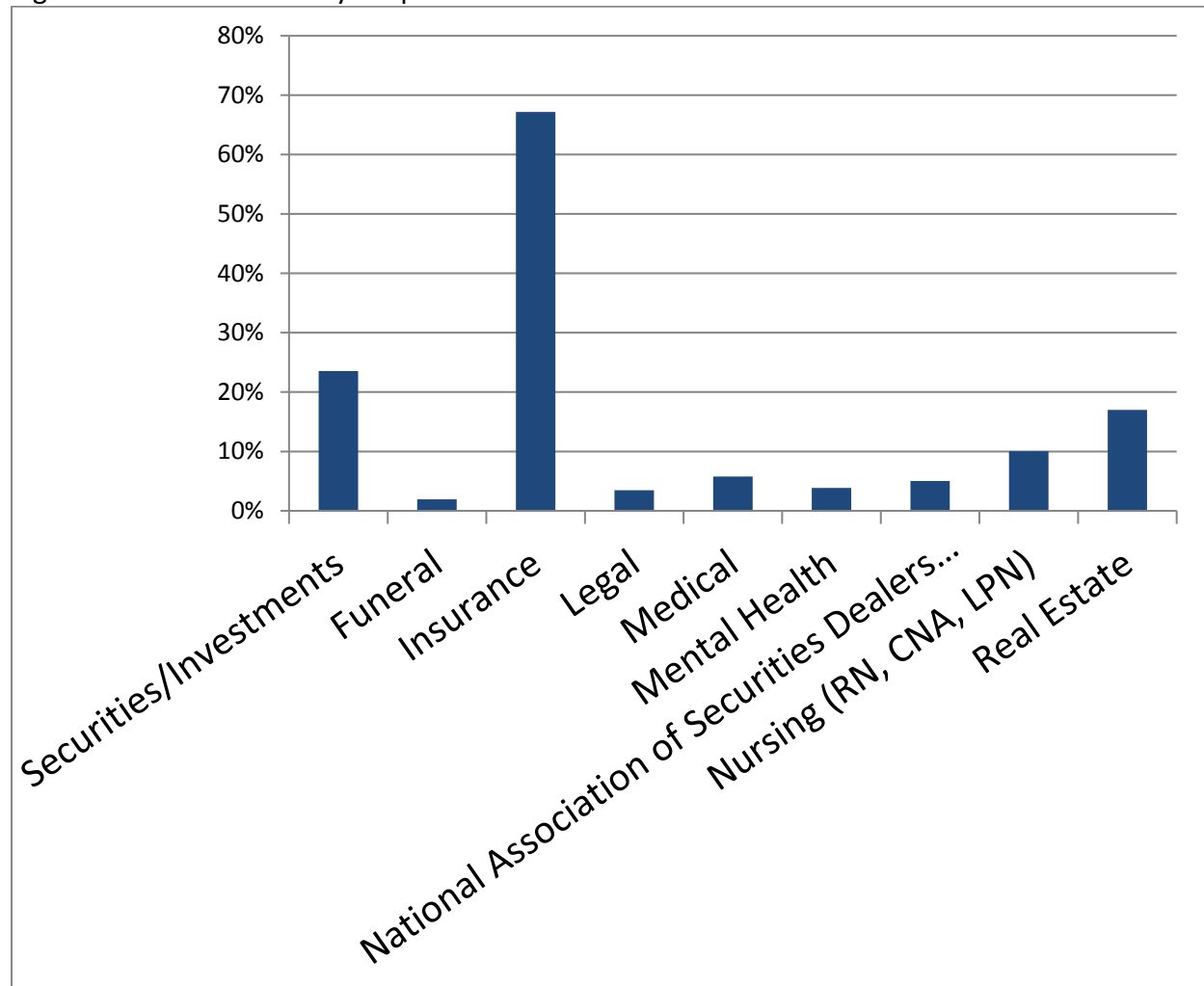


Table 5: Licenses Held by Respondents*

| Other Responses | |
|---|---|
| adf | Administrator RCFE; Home Care Aide Organizatio |
| Arizona State care home manager | Assisted Living Administration |
| AZ Fiduciary License | Care Home |
| CDP, CSA | CFP, EA, ATA |
| Chaplain | Colorado Mortgage Loan Originator |
| CPA | CPA |
| CPA | CSA |
| EA | EA - IRS Enrolled Agent |
| Emergency Medical Technician -B (inactive) | FINRA - Financial Industry Regulatory Authority |
| General Contractor | Had insurance license before I retired |
| HCO | Home Care & Home Health Care |
| Home Care Agency | Home Health Service Firm |
| I did have my series 7,66,63 and Life, Health, Property and casualty insurance licenses | In past years I was licensed in Real Estate and also worked in the Securities/Investment Industry as a Securities Trader |
| Inactive RN | IRS pin P-01074761 |
| just gave up series 7 etc to partly retire | Lender |
| Licensed Home Care Company, Owner | Licensed Nursing Home Administrator |
| Licensed Nursing Home Administrator | life education credentials K thru college |
| Life settlement & Annuity | MBA: University of Miami |
| MDH - Comprehensive | Minister |
| Mortgage | mortgage |
| Mortgage license, Texas, Oklahoma, Kansas, Missouri, Nebraska, Arkansas, Louisiana | mortgage originator |
| mortgage originator (WA) | Mtg |
| N/A | N/A |
| National social security advisor, accredited investment fiduciary | NC AL Administrator |
| NHA | NHA |
| NMLS Loan Officer | no license - I have a PhD in Social work with a focus on aging |
| No licenses | No other |
| None | None |
| none | None |
| none | None |
| none of the above | None of the above |
| non-medical home care agency | Nursing Home Administrator - Senior Consultant for strategic operations in Health Care - Ambassador for Family Care Space |

Table 5: Licenses Held by Respondents*

| Other Responses | |
|---|----------------------------------|
| P & C | Permit to Practice as a CPA |
| Personal Support Services | Physical Therapy |
| Professional Engineer | Property & Casualty, Life/Health |
| RCFE | Registered Dietitian |
| Residential mortgage | Respiratory Therapy License |
| Retired JD, Series 6 and 7 | RIA |
| SLP-CCC | Social Services |
| Social Work | Social Work |
| social work | social work |
| Taxation - licensed by US Treasury Dept | Texas Pharmacy Technician |
| *Note: responses are listed here exactly as they were entered in the survey. Typographical and grammatical errors were not corrected. | |

Overview of Survey Respondents Ratings for Task Statements

The mean ratings for task frequency ranged from 1.19 to 2.78 with an average standard deviation of 0.78. The mean importance ratings ranged from 1.76 to 2.92, with an average standard deviation of 0.59.

The standard error of the mean was also computed for each of the task statements and each of the rating scales. All ratings of all tasks had a standard error of 0.04 or less, indicating that if the survey were to be repeated with a different sample of survey respondents, the same results would be expected. Table 6 below contains the results of the frequency and importance ratings as well as associated standard deviations and standard error of the means.

Table 6: Means, standard deviations, and standard errors of task ratings of frequency and importance.

| Duties and Tasks | Frequency | | | Importance | | |
|---|-----------|------|------|------------|------|------|
| | Mean | SD | SEM | Mean | SD | SEM |
| Anthropology and Sociology | | | | | | |
| Identify trends in aging | 1.84 | 0.86 | 0.04 | 2.39 | 0.74 | 0.03 |
| Dispel myths/misconceptions about aging | 2.10 | 0.77 | 0.04 | 2.59 | 0.60 | 0.03 |
| Identify social and cultural issues associated with aging | 2.00 | 0.79 | 0.04 | 2.51 | 0.63 | 0.03 |
| Affirm the wishes of the older adult | 2.60 | 0.66 | 0.03 | 2.75 | 0.53 | 0.02 |
| Family and Aging | | | | | | |
| Identify family dynamics | 2.45 | 0.70 | 0.03 | 2.72 | 0.51 | 0.02 |
| Communicate with seniors and their families | 2.74 | 0.54 | 0.02 | 2.85 | 0.40 | 0.02 |
| Develop resource/referral network | 2.48 | 0.69 | 0.03 | 2.64 | 0.57 | 0.03 |
| Health and Wellness Aspect | | | | | | |
| Identify healthy lifestyles for aging population | 2.07 | 0.81 | 0.04 | 2.46 | 0.63 | 0.03 |
| Identify physical changes and challenges | 2.38 | 0.73 | 0.03 | 2.62 | 0.55 | 0.02 |
| Identify mental changes and challenges | 2.44 | 0.71 | 0.03 | 2.72 | 0.51 | 0.02 |
| Identify the signs and symptoms of potential elder abuse and exploitation | 2.27 | 0.81 | 0.04 | 2.82 | 0.46 | 0.02 |
| Lifestyle Aspects | | | | | | |
| Develop a network of resources for lifestyle issues | 2.08 | 0.82 | 0.04 | 2.36 | 0.64 | 0.03 |
| Assess the lifestyle situation of the older adult | 2.25 | 0.80 | 0.04 | 2.43 | 0.66 | 0.03 |
| Provide educational opportunities to older adults/families | 2.00 | 0.86 | 0.04 | 2.27 | 0.75 | 0.03 |
| Identify social aspects of aging | 1.99 | 0.81 | 0.04 | 2.33 | 0.66 | 0.03 |
| Identify technological aspect of aging | 1.73 | 0.85 | 0.04 | 2.13 | 0.72 | 0.03 |
| Present information regarding mobility | 1.97 | 0.86 | 0.04 | 2.33 | 0.72 | 0.03 |
| Identify sexuality issues of the aging | 1.19 | 0.93 | 0.04 | 1.76 | 0.83 | 0.04 |
| Financial Aspects | | | | | | |
| Develop a network of financial professional resources | 2.29 | 0.75 | 0.03 | 2.57 | 0.60 | 0.03 |
| Identify concerns older adults/families have about finances | 2.48 | 0.72 | 0.03 | 2.71 | 0.50 | 0.02 |
| Convey the importance of thinking about financial resources (now and in the future) | 2.44 | 0.72 | 0.03 | 2.67 | 0.53 | 0.02 |
| Identify financial aspects of estate planning | 2.17 | 0.88 | 0.04 | 2.46 | 0.67 | 0.03 |
| Educate about health benefit options | 2.22 | 0.83 | 0.04 | 2.50 | 0.66 | 0.03 |
| Educate about financial assistance available to older adults | 2.24 | 0.81 | 0.04 | 2.56 | 0.60 | 0.03 |
| Identify options for financing long term care (broad sense) | 2.13 | 0.85 | 0.04 | 2.49 | 0.67 | 0.03 |
| Identify potential for financial fraud and abuse | 2.30 | 0.80 | 0.04 | 2.74 | 0.50 | 0.02 |
| Eldercare Planning | | | | | | |

| Duties and Tasks | Frequency | | | Importance | | |
|---|-----------|------|------|------------|------|------|
| Develop network of professionals and resources | 2.35 | 0.79 | 0.04 | 2.65 | 0.57 | 0.03 |
| Identify care needs | 2.42 | 0.80 | 0.04 | 2.66 | 0.59 | 0.03 |
| Facilitate older adults/families to build a plan for care continuum | 2.30 | 0.86 | 0.04 | 2.59 | 0.62 | 0.03 |
| Legal Aspects | | | | | | |
| Develop a base of legal network resources | 2.18 | 0.85 | 0.04 | 2.51 | 0.62 | 0.03 |
| Address importance of legal planning | 2.25 | 0.80 | 0.04 | 2.54 | 0.60 | 0.03 |
| End-of-Life Planning | | | | | | |
| Educate seniors/families about end of life/care options | 1.97 | 0.88 | 0.04 | 2.59 | 0.64 | 0.03 |
| Ethical Issues | | | | | | |
| Adhere to CSA and professional codes of ethics | 2.76 | 0.59 | 0.03 | 2.92 | 0.30 | 0.01 |
| Uphold senior's rights within professional ethical guidelines | 2.78 | 0.55 | 0.03 | 2.91 | 0.31 | 0.01 |

Combined Frequency and Importance

The frequency and importance data was combined to form a single scale using the formula below:

$$\text{Overall rating scale} = 2 * \text{Importance} + \text{Frequency}$$

Importance ratings were given extra weight in the combined scaled. This is because while both frequency the task is performed and the importance of the task are both valuable rankings in certification credentialing examinations, importance is often thought of as having more bearing and therefore should receive greater emphases in the examination content specifications or examination blueprint.

The results of the combined ratings appear in Table 7.

Table 7: Combined frequency and importance ratings for duty areas.

| Duties and Tasks | Overall Weight |
|---|----------------|
| Anthropology and Sociology | 11.64% |
| Identify trends in aging | |
| Dispel myths/misconceptions about aging | |
| Identify social and cultural issues associated with aging | |
| Affirm the wishes of the older adult | |
| Family and Aging | 9.66% |
| Identify family dynamics | |
| Communicate with seniors and their families | |
| Develop resource/referral network | |
| Health and Wellness Aspect | 12.20% |
| Identify healthy lifestyles for aging population | |
| Identify physical changes and challenges | |
| Identify mental changes and challenges | |
| Identify the signs and symptoms of potential elder abuse and exploitation | |
| Lifestyle Aspects | 17.82% |
| Develop a network of resources for lifestyle issues | |
| Assess the lifestyle situation of the older adult | |
| Provide educational opportunities to older adults/families | |
| Identify social aspects of aging | |
| Identify technological aspect of aging | |
| Present information regarding mobility | |
| Identify sexuality issues of the aging | |
| Financial Aspects | 23.92% |
| Develop a network of financial professional resources | |
| Identify concerns older adults/families have about finances | |
| Convey the importance of thinking about financial resources (now and in the future) | |
| Identify financial aspects of estate planning | |
| Educate about health benefit options | |
| Educate about financial assistance available to older adults | |
| Identify options for financing long term care (broad sense) | |
| Identify potential for financial fraud and abuse | |
| Eldercare Planning | 9.18% |
| Develop network of professionals and resources | |
| Identify care needs | |
| Facilitate older adults/families to build a plan for care continuum | |
| Legal Aspects | 5.83% |

| Duties and Tasks | Overall Weight |
|---|----------------|
| Develop a base of legal network resources | |
| Address importance of legal planning | |
| End-of-Life Planning | 2.87% |
| Educate seniors/families about end of life/care options | |
| Ethical Issues | 6.90% |
| Adhere to CSA and professional codes of ethics | |
| Uphold senior's rights within professional ethical guidelines | |

Missing Tasks

The survey respondents identified items they felt were missing from the DACUM JTA study. The 92 tasks identified by survey respondents is presented in Table 8.

Table 8: Tasks identified by survey respondents as missing*

| Missing Tasks |
|---|
| 1 Aging and Mental Health 2 Productive Activities that Have a Positive Impact on Mental Status 3. Cognitive Effects of Video Games in Older Adults. |
| Addressing denial and procrastination in seniors and their caring circles to reduce trauma onset shock.... |
| Advice to family on in home care |
| Advocacy in healthcare situations |
| advocacy work at state levels of government on senior issues |
| Advocating for aging in place housing development. Basics of an anti-inflammatory diet and its benefits. Importance of addressing loneliness and/or isolation among the elderly. |
| Be a GOOD Listener!! |
| Being kind, patient and trusting. Following through in a timely manner. Become a resource and mentor to others in the business community. |
| Believe that the religious/spiritual aspect and developing a very astute, analytical approach for "aging individuals" to not really trust anyone without "second opinions", personal researching or "trust but verify!" This is because we all are vulnerable and there are so many scams and schemes that keep increasing daily. |
| Bereavement Care and Grief |
| Bill Paying |
| Care Coordination |
| Caregiving Education & Planning. |
| caring communication |
| Communicating with Trusted Contact Person/POA, etc - coordinating family communications |
| Communication with older adult especially those who suffer from cognitive issues |

Table 8: Tasks identified by survey respondents as missing*

| Missing Tasks |
|---|
| Conscious Aging and Connected Aging (Senior Support Design Technologies) |
| Dealing with the impact of grief, corresponding stress and impact on health. |
| Dementia Caregiving Working with families around dementia care issues Empowering older adults to live independently |
| Determining care options and relative cost/benefit |
| Each person is an individual and has different needs. You can only answer this question as you are understanding the needs of the individual you are working with. |
| Educate a basic understanding of Social Security and Medicare/Medicaid programs. |
| Emotional Support to family Care support services available |
| empathy for each situation is different, both for the elder individual and for the families. many families just do not want to think about the end of life and do not know how to handle it. |
| Encourage funeral preplanning Funeral prefunding options Consumer rights for funeral preplanning Medicaid spend down when transitioning from private pay to Medicaid in facilities & how it impacts inheritance & gifting monies |
| Evaluating the cognitive and functional abilities of older adults. |
| Explaining, finding and referring resources. For example, locating senior centers and senior advocates as needed. |
| Facilitating difficult conversations Assisted Living/Memory Care/Skilled Nursing - differences Care needs in the face of low income |
| General discussion or training or techniques for counseling or simply having conversations with seniors. I think the overall topics listed cover a great deal and give a CSA the broad stroke they need to assess and assist the loved ones and family. |
| -Health literacy should be emphasized. -Integrated planning of all aspects should be taught, i.e. a wholistic plan. |
| Helping out with household management issues |
| Helping people deal with the emotional and physical process of transition |
| HOME SAFETY AND SIMPLE MODIFICATION SOLUTIONS |
| HOUSING ALTERNATIVES GOVERNMENT FUNDING AND PROGRAMS MEDICARE/MEDICAID |
| Housing and housing options |
| Housing assistance, isolation, loneliness |
| I believe that part of ethics is transparency, and that is an important aspect of every business, especially dealing with seniors. |
| I haven't found a good description of the tasks I perform. I organize and manage personal affairs and paperwork. Please see American Association of Daily Money Managers for complete list of tasks. |
| I just want to add that as a Senior Placement Advisor, I spend a lot of my time educating families on the continuum of care and who pays for what. Families have no idea what independent living, assisted living, memory care, skilled nursing encompass, nor how they are paid. |
| I like to stress creativity but this can be brought out in the previously identified areas noted. |
| I'm sure something is missing because in my profession I find each situation is as individual as the individual is |

Table 8: Tasks identified by survey respondents as missing*

| Missing Tasks |
|---|
| Implementing communication among seniors and next generation beneficiaries. |
| Increasing number of grandparents adopting grandchildren which changes lives, especially need to address elder abuse possibilities here Intergenerational trauma, ACEs, and impact on aging |
| it is hard to say since I am not a CSA. However, there are some things I would add: relationship building the importance of a care partner team focusing on well-being fighting loneliness, helplessness and boredom |
| Listening to the Senior Citizen and their Wishes. |
| Long Term Care and Medicaid |
| making sure that seniors have the correct health insurance plan. When they don't have the correct plan it often effects their finances because of the cost of plan and medication. |
| Many of the people I see in classes are very interested in how to start / manage a business Marketing was mentioned in the survey. I think this is a good add on for folks in some form |
| maybe more detail on how to identify and get consulting on senior needed insurance products and how to facilitate. |
| Mediator and counselor to the increasing mental health issues impacting aging in America; especially to the family caregivers and those impacted by the tsunami of elder abuse, neglect and financial exploitation. Happy to share more on this. |
| MEDICARE |
| Medication management Understanding dementia challenges and empathy |
| Mental health Physical activity - May be covered in health & wellness |
| Misconceptions about senior living options such as living in the home, home care costs, skilled nursing versus assisted living. |
| More access to younger children in health care facilities should be encouraged. |
| More aspects of fall prevention and home modifications/home accessibility |
| More emphasis on dealing with dementia |
| More emphasis on elder exploitation and abuse. |
| More training in protecting Seniors from scams and fraud. |
| None that I am aware of at this time |
| not sure if it was covered but ageism and cultural diversity very important; death of a spouse and dating/social; long distance adult kids; millennial caregivers caring for older individuals--how to understand and respect each generation especially the millennials. |
| Not that I can think of |
| Nutritional |
| Pastors/clergy |
| Patient Advocacy, when is it time for Guardianship, Disease identification & control, CPR & first aid. Identifying Developmental disabilities & psychiatric conditions. How to deal with hostile & uncooperative seniors. |
| physical will, health care agent, advance directives, burial/cremation, funeral home, cemetery, officiant, end of life wishes |
| probably but I can't think of any right now |

Table 8: Tasks identified by survey respondents as missing*

| Missing Tasks |
|---|
| Providing companionship and being a good active listener to lonely seniors. |
| Respectful interaction with individuals with hearing loss, vision problems, incontinence, etc Assisting with grief associated with loss of youthful function as well as loss of friends and family. Issues around transporting the elderly. Issues around downsizing belongings. |
| Rights of residents and their families in regard to LTCare services that can be garnered from the becoming a Certified Long Term Care Ombudsman Volunteer through any of the 50 State LTC State Ombudsman Offices. |
| See below |
| Specifically the communication with dementia patients and their families. I used some of what I learned in my CSA training to develop a program for a local facility. More training might have been useful. |
| Spiritual needs. And this is a topic that I am engaged with both with families and their older loved ones. Also changes in GOVERNMENT regulations. I attend the SCSA conferences and those are the ones that I never miss. |
| SURE, We work on all aspects 'known' and as always, every meeting/session with a Senior or Family always reveals issues that may not be in the list. |
| Tax planning |
| team work with medical; legal and financial people, put together to work with the whole family. Get wills etc. done; medical plans explained; educate on the use of LTC systems, and keep the senior informed about scams |
| The field of daily money management (paying bills etc) seems to be missing. It is not the same as accounting. It can be instrumental in keeping an older adult independent and in their home. www.aadmm.com |
| The importance of working with a qualified Realtor with experience in helping seniors downsize and divest themselves of belongings they will not be able to take with them.th |
| The Ins and Outs of Medicare - how to keep from being in a position where Medicare doesn't pay. The importance of maintaining leg strength and hydration Health Care Directives POA Illness related to hospital stays and how to avoid UTI's and other bladder issues Hospice |
| The organization needed to combine the tasks so solutions can be provided to families is an important task performed by CSAs. |
| The value of being a good listener. Few people listen to the elderly. |
| There should be more emphasis on how to deal with issues surrounding dementia and alzheimer's disease. I believe that this condition make seniors most vulnerable while creating tremendous financial and emotion stress to families. |
| These are not tasks, per se, but are becoming more common in disussions that I have seen that may need time to be addressed. Dementia is going to be a large component of working with seniors as the next ten years moves forward. Dementia can mimic so many things that could be medical issues. I really think that Dementia covers every facet that you have as the subjects. The statistic is 1 in 3 people will be diagnosed with a type of dementia, but that leaves 2 out of the 3 at risk of being incorrectly labelled. Therefore, I think a little more emphasis on this should be done. Also, substance abuse and mental health will be a large facet of the senior populations to address (not because they may have not already been present, but people in the upcoming generations are more open to discuss it. They will no |

Table 8: Tasks identified by survey respondents as missing*

| Missing Tasks |
|---|
| longer be stigmas or (she is just a.....(stereotype), so how does this filter in our discussions of appropriate utilization of those dynamics to discuss the impact of these and co-morbidity diagnoses without labelling. Our dynamics will be changing with the numbers of seniors already acclimated to technology, so it doesn't seem to be as much of an issue (there will already be an established learning curve with a large majority of seniors). Millennials will be the new caregivers and this dynamic may prove helpful in realizing that the resources that they will need for loved ones will be at their fingertips, but there may not be as close of a caregiving connection between the generations (since jobs, etc. have caused us to have more long distance caregiving). More communication strategies for medical concerns that will be used (it is not just going to the doctor, assess, etc.). People will be utilizing telemedicine, vests/contact lens that will monitor vitals, people doing more self-management). New living arrangements to be explored since people will no longer have reliance on pensions (costs of care). Ethical dilemmas in facility arrangements (as it relates to LGBTQ) (e.g. roommates that are biologically different sexes, but identify as the same gender-how that integrates with HIPAA, resident rights, etc.) |
| travel may deserve special attention to the needs of the elderly and recommendations for travel as well as special needs such as oxygen use. Insurance should be addressed also other than long term care. Life insurance, travel insurance, ambulance insurance, etc. caring for the caregiver is probably in health issues |
| Understanding Aging in Place. Is this intended to be under a different category. |
| Understanding the difference between Home Health Care provided by Medicare and Home Care services that are private pay. |
| Understanding the different solutions of long term care, as far as care levels and costs, between long term skilled nurse care, in-home care options, assisted living, and memory care. Understanding the nuances of the different Medicaid options across states. |
| Volunteering with senior services organizations |
| When recommending skilled care relocation, how does client and family handle existing dwelling and possessions. |
| Work together with other CSAs. Form teams to benefit clients. Do public education and outreach. |
| Yes, planned activities outside the home. |
| Yes. Performing pro bono work for older people living at or below the poverty threshold. Not everyone can afford to pay for our expertise. The SCSA training and exam focused heavily on financial planning. That should be changed. With three and four generations in the workplace and with the majority of families blended, the family dynamics have changed. Lots of older people do not even have families. DEFINE family. It's far beyond biology. |
| *Note: responses are listed here exactly as they were entered in the survey. Typographical and grammatical errors were not corrected. |

Post-Survey Review Meeting and Examination Program Discussion

Following completion of the survey validation study, a committee of subject matter experts met via webinar and conference call to review the results from the study. The meeting took place on August 7, 2019 and lasted approximately 3 hours.

The meeting participants were as follows:

- | | |
|----------------------|------------------------|
| ▪ Don Desonier, CSA | ▪ Jesse Rodriguez, CSA |
| ▪ Kevin Johnson, CSA | ▪ Kathy Swindle, CSA |
| ▪ Michelle Kunz, CSA | ▪ Gordon Walker, CSA |

The SMEs were reconvened to conduct the following activities:

- Review the results of the validation survey
- Ensure that appropriate and representative individuals responded to the survey
- Review the tasks identified as having relatively low combined ratings
- Review the write-in comments to determine if any tasks were missing
- Determine the final examination blueprint
- Discuss the examination and recertification criteria.

Survey Respondent Demographics

The Post-Survey validation committee reviewed the demographic information associated with the survey participants and determined that a representative sample of individuals responded to the survey.

Review of Task Combined Ratings

The Post-Survey Validation Committee reviewed the tasks and the combined ratings that were used in the survey validation study. Based on the ratings and discussion of the examination blueprint, the committee determined that the task “affirm the wishes of the older” should not

be included on the final examination blueprint. No other items were removed based on their review.

Review of Missing Tasks

The Post-Survey Validation Committee reviewed the write-in list of tasks identified as missing from the JTA. They felt that based on the feedback from the survey, no tasks were missing from the JTA and as a result, no additional tasks were added to the proposed examination blueprint.

Examination and Certification Criteria

The subject matter experts discussed the following topics related to the examination and certification of the Certified Senior Advisor credential.

- the method for scoring candidates' responses.
- the method for establishing the passing standard and for assessing the accuracy of scores and the decisions made on the basis of scores.
- methods for ensuring equivalence among forms of the examination.
- procedures intended to ensure that forms of the examination that are developed over time continue to assess relevant competencies in light of changes that may occur in the profession
- Eligibility requirements for the CSA
- Retest policy for the CSA exam

Final Weighting of Task List and Proposed Exam Blueprint

The Post-Survey validation committee reviewed the results of the survey and compared the analytical and holistic ratings to that of the original examination blueprint that resulted from the 2012 job analysis. Table 9 contains the results of the analytical ratings, holistic ratings, and original examination blueprint ratings.

Table 9: Comparison of survey validation results examination blueprint with 2012 job analysis final blueprint.

| Duties and Tasks | Analytic % | Holistic % | 2012 Final Blueprint % |
|---|------------|------------|------------------------|
| Anthropology and Sociology | 11.64% | 7.36% | 15.56% |
| Identify trends in aging | | | |
| Dispel myths/misconceptions about aging | | | |
| Identify social and cultural issues associated with aging | | | |
| Affirm the wishes of the older adult | | | |
| Family and Aging | 9.66% | 12.19% | 9.63% |
| Identify family dynamics | | | |
| Communicate with seniors and their families | | | |
| Develop resource/referral network | | | |
| Health and Wellness Aspect | 12.20% | 13.62% | 11.85% |
| Identify healthy lifestyles for aging population | | | |
| Identify physical changes and challenges | | | |
| Identify mental changes and challenges | | | |
| Identify the signs and symptoms of potential elder abuse and exploitation | | | |
| Lifestyle Aspects | 17.82% | 9.71% | 16.30% |
| Develop a network of resources for lifestyle issues | | | |
| Assess the lifestyle situation of the older adult | | | |
| Provide educational opportunities to older adults/families | | | |
| Identify social aspects of aging | | | |
| Identify technological aspect of aging | | | |
| Present information regarding mobility | | | |
| Identify sexuality issues of the aging | | | |
| Financial Aspects | 23.92% | 15.15% | 22.22% |
| Develop a network of financial professional resources | | | |
| Identify concerns older adults/families have about finances | | | |

| Duties and Tasks | Analytic % | Holistic % | 2012 Final Blueprint % |
|---|------------|------------|------------------------|
| Convey the importance of thinking about financial resources (now and in the future) | | | |
| Identify financial aspects of estate planning | | | |
| Educate about health benefit options | | | |
| Educate about financial assistance available to older adults | | | |
| Identify options for financing long term care (broad sense) | | | |
| Identify potential for financial fraud and abuse | | | |
| Eldercare Planning | 9.18% | 12.58% | 8.89% |
| Develop network of professionals and resources | | | |
| Identify care needs | | | |
| Facilitate older adults/families to build a plan for care continuum | | | |
| Legal Aspects | 5.83% | 9.77% | 5.93% |
| Develop a base of legal network resources | | | |
| Address importance of legal planning | | | |
| End-of-Life Planning | 2.87% | 9.03% | 2.96% |
| Educate seniors/families about end of life/care options | | | |
| Ethical Issues | 6.90% | 10.60% | 6.67% |
| Adhere to CSA and professional codes of ethics | | | |
| Uphold senior's rights within professional ethical guidelines | | | |

After much discussion, an examination blueprint was finalized taking into consideration the original examination blueprint from the 2012 job analysis with the survey validation results. The committee agreed to remove one task “Affirm the wishes of the older adult”. The final examination blueprint appears in Table 10.

Table 10: Final Examination blueprint.

| Duties and Tasks | Final % |
|---|---------------|
| Anthropology and Sociology | 11.85% |
| Identify trends in aging | |
| Dispel myths/misconceptions about aging | |
| Identify social and cultural issues associated with aging | |
| Family and Aging | 11.11% |
| Identify family dynamics | |
| Communicate with seniors and their families | |
| Develop resource/referral network | |
| Health and Wellness Aspect | 13.33% |
| Identify healthy lifestyles for aging population | |
| Identify physical changes and challenges | |
| Identify mental changes and challenges | |
| Identify the signs and symptoms of potential elder abuse and exploitation | |
| Lifestyle Aspects | 17.78% |
| Develop a network of resources for lifestyle issues | |
| Assess the lifestyle situation of the older adult | |
| Provide educational opportunities to older adults/families | |
| Identify social aspects of aging | |
| Identify technological aspects of aging | |
| Present information regarding mobility | |
| Identify sexuality issues of the aging | |
| Financial Aspects | 18.52% |
| Develop a network of financial professional resources | |
| Identify concerns older adults/families have about finances | |
| Convey the importance of thinking about financial resources (now and in the future) | |
| Identify financial aspects of estate planning | |
| Educate about health benefit options | |
| Educate about financial assistance available to older adults | |
| Identify options for financing long term care (broad sense) | |
| Identify potential for financial fraud and abuse | |
| Eldercare Planning | 8.89% |
| Develop network of professionals and resources | |
| Identify care needs | |
| Facilitate older adults/families to build a plan for care continuum | |

| | |
|---|----------------|
| Legal Aspects | 5.93% |
| Develop a base of legal network resources | |
| Address importance of legal planning | |
| End-of-Life Planning | 5.93% |
| Educate seniors/families about end of life/care options | |
| Ethical Issues | 6.67% |
| Adhere to CSA and professional codes of ethics | |
| Uphold senior's rights within professional ethical guidelines | |
| Total | 100.00% |

References

American Educational Research Association, American Psychological Association, & National Council on Measurement in Education. (1999). *Standards for educational and psychological testing*. Washington, DC: American Educational Research Association.

Brannick, M. T., Levine, E. L., & Morgeson, F. P. (2007). *Job and work analysis: Methods, research and applications for human resource management*. Thousand Oaks, CA: Sage.

Newman, L.S., Slaughter, R.C., & Taranath, S.N. (1999, April). *The selection and use of rating scales in task surveys: A review of current job analysis practice*. Paper presented at the annual meeting of the National Council of Measurement in Education, Montreal, Canada.

Raymond, M.R. (2001). Job analysis and the specification of content for licensure and certification examinations. *Applied Measurement in Education* 14(4), 369-415.

.

Appendix A: 2012 Job Analysis DACUM Chart



DACUM CHART
JOB/TASK ANALYSIS

FOR

Society of Certified Senior
Advisors
Certified Senior Advisor (CSA)

Prepared by:
Professional Testing Inc.
7680 Universal Blvd.
Suite 300
Orlando, Florida 32819

Dr. Cynthia D. Woodley, Facilitator
Tracey Paschal, Recorder

May 21-23, 2012

Certified Senior Advisor

Job Description

Certified Senior Advisors (CSAs) are professionals, who in the course of their practice, apply multi-disciplinary knowledge of the aging process and aging issues to identify the most appropriate options and solutions for seniors' individual needs and best interests to improve their lives.

The following is a proposed content outline resulting from this Job Analysis.

| Certified Senior Advisor |
|-----------------------------|
| Anthropology and Sociology |
| Family and Aging |
| Health and Wellness Aspects |
| Lifestyle Aspects |
| Financial Aspects |
| Eldercare Planning |
| Legal Aspects |
| End of Life Planning |

Professional Testing would like to thank the following individuals who contributed to this project: George Aslanian, Mickey Batsell, Dr. Irene Jackson-Brown, Dr. Thomas Eyssell, Marsha Fields, Sydney Kennedy, Rose Marie Millush, Dr. Lisa Rill, Stephen Rudolph, Judy Rough, Maryann Prudhomme, Lynn Shank, and Anita Sheldon.

Professional Testing would also like to thank Mary Janak (SCSA), Janice Moore (Seacrest Consulting), and Clint Niemeyer (Alabama Securities Commission).

Proposed Exam Blueprint for Certified Senior Advisors

| | | Duties and Tasks | Percent |
|----------|---|--|----------------|
| A | | Anthropology and Sociology | 16.7% |
| | 1 | Identify trends in aging | 2.3% |
| | 2 | Identify issues associated with aging around the world | 1.6% |
| | 3 | Dispel myths/misconceptions about aging | 3.0% |
| | 4 | Identify cultural issues associated with aging | 2.6% |
| | 5 | Address issues associated with the sexual orientation of seniors | 2.0% |
| | 6 | Ensure that employees/vendors are sensitive to the needs of seniors with various sexual orientations | 2.0% |
| | 7 | Affirm the wishes of the senior | 3.2% |
| B | | Family and Aging | 9.4% |
| | 1 | Identify family dynamics | 3.0% |
| | 2 | Communicate with seniors and their families | 3.2% |
| | 3 | Develop resource/referral network | 3.2% |
| C | | Health and Wellness Aspects | 11.5% |
| | 1 | Identify healthy lifestyles for aging population | 2.6% |
| | 2 | Identify physical changes and challenges | 2.9% |
| | 3 | Identify mental changes and challenges | 2.9% |
| | 4 | Identify the signs and symptoms of potential elder abuse and exploitation | 3.1% |
| D | | Lifestyle Aspects | 17.2% |
| | 1 | Develop a network of resources for lifestyle issues | 2.9% |
| | 2 | Assess the lifestyle situation of the senior | 2.7% |
| | 3 | Provide educational opportunities to seniors/families | 2.5% |
| | 4 | Identify social aspects of aging | 2.5% |
| | 5 | Identify technological aspect of aging | 1.9% |
| | 6 | Present information regarding mobility | 2.7% |
| | 7 | Identify sexuality issues of the aging | 2.0% |
| E | | Financial Aspects | 21.2% |
| | 1 | Develop a network of financial professional resources | 2.7% |
| | 2 | Identify concerns seniors/families have about finances | 2.7% |
| | 3 | Convey the importance of thinking about financial resources (now and in the future) | 2.7% |
| | 4 | Identify financial aspects of estate planning | 2.2% |
| | 5 | Educate about health benefit options | 2.6% |
| | 6 | Educate about financial assistance available to seniors | 2.6% |
| | 7 | Identify options for financing long term care (broad sense) | 2.6% |
| | 8 | Identify potential for financial fraud and abuse | 3.1% |
| F | | Eldercare Planning | 8.8% |
| | 1 | Develop network of professionals and resources | 3.2% |
| | 2 | Identify care needs | 3.2% |
| | 3 | Facilitate seniors/families to build a plan for care continuum | 2.4% |
| G | | Legal Aspects | 5.7% |
| | 1 | Develop a base of legal network resources | 3.0% |
| | 2 | Address importance of legal planning | 2.7% |
| H | | End of Life Planning | 3.0% |
| | 1 | Educate seniors/families about end of life/care options | 3.0% |
| I | | Ethical Issues | 6.5% |
| | 1 | Adhere to CSA and professional codes of ethics | 3.4% |
| | 2 | Uphold senior's rights within professional ethical guidelines | 3.1% |
| | | | 100.00% |

Specialized Knowledge Required of Certified Senior Advisors

| Specialized Knowledge |
|--|
| Abusive situations (e.g., physical, financial, verbal, sexual, etc.) |
| Age identification (e.g., chronological, subjective, functional, physical, emotional, social, etc.) |
| Ageism |
| Aging attitudes (e.g., denial, adaptation, irrelevance, affirmation, etc.) and sense of purpose |
| Aging demographics (e.g., race, age, gender, class, etc.) |
| Aging demographics around the world (awareness of) |
| Aging physiology (e.g., functional declines including ADL and IADL) |
| Aging stages |
| Ambulation issues |
| Ancillary Assistive Devices (AAD) and Durable Medical Equipment (DME) |
| “Behind the wheel” assessments and issues related to taking away the car keys |
| Beneficiary designations |
| Care levels |
| Care options (e.g., short term, rehab, long term, etc.) |
| Care plan process/resources and care giver support |
| Care provider types (e.g., companions, aides, nurses, etc.) |
| Chronic illness (e.g., most common conditions, plus obesity and Parkinson's) |
| Cognitive changes and diseases (e.g., dementia, Alzheimer's, mild cognitive impairment, etc.) |
| Cognitive issue myths (e.g., everybody gets dementia, seniors are feeble, etc.) |
| Communication barriers |
| Communication techniques for talking to the elderly |
| Communication types and styles |
| Communications that are nondiscriminatory or non-exclusionary (awareness of how to ensure) |
| Community resources and lifelong learning opportunities |
| Community resources for education and support |
| Community resources for family support (e.g., social workers, police, community centers, associations [ad], etc.) |
| Competence or lack of capacity and the effect on decision making |
| Confidentiality issues (e.g., HIPAA, legal, financial, preservation of trust, etc.) |
| Coping behaviors |
| Credentials and certifications associated with financial professionals |
| CSA code of ethics |
| Cultural context during senior assessment (e.g., different treatments for different cultures, how different cultures treat their aging) |
| Cultural issues related to aging |
| Cultural traditions |
| Discrimination (evidence of and what should be done) |
| Diseases that are age-related |
| Divorce, re-marriage, death of a partner or child |
| Economic policy trends associated with aging |
| Eldercare planning process and resources (e.g., case managers, geriatric care managers, senior move managers, social workers, eldercare advisors, medical and non-medical service providers, etc.) |
| Employment issues (changes in employment and retirement) |
| Employment myths for seniors |
| End of life/care options (e.g., hospice, palliative care, home care, spiritual, etc.) |
| Environmental barriers associated with seniors |
| Environmental trends impacting seniors |

| Specialized Knowledge |
|---|
| Estate planning (e.g., basic knowledge of wills, trusts, titling of assets, asset protection, taxation, insurance, etc.) |
| Estate planning (importance of) |
| Ethical conflicts |
| Facilitation/mediation |
| Family care giving issues (e.g., sandwich generation, educate care givers on importance of self-care, etc.) |
| Family challenges |
| Family dynamic impacts on seniors |
| Family involvement |
| Family roles |
| Family structure and supporting relationships |
| Family support system structures |
| Family systems theory (e.g., functioning eldest, birth order, etc.) |
| Family types (e.g., relatives, supporting relationships, etc.) |
| Financial fraud warning signs (e.g., missing cash, withdrawals of money, unusual transactions, forgery, etc.) |
| Financial fraud/abuse and remedies/assistance that CSAs can provide for victims (e.g., assistance with contacting credit bureaus) |
| Financial goals and retirement objectives (basic knowledge of typical objectives) |
| Financial issues related to lack of trust |
| Financial plans of seniors (basic knowledge of typical retirement plans, roadmap, etc.) |
| Financial professionals |
| Financial programs (e.g., associations/organizations that provide assistance, Fraternal organizations, etc.) |
| Financial scams (e.g., mail solicitations, prize announcements, phone solicitations, Ponzi schemes, sweepstakes, lottery scams, foreign exchange currency schemes, home repair scams, free lunch seminars, disaster relief scams, etc.) |
| Financial statements (basic knowledge of income statements, assets, liabilities, etc.) |
| Financial wealth of seniors (they may have more financial resources than thought) |
| Fitness and exercise myths (e.g., seniors just sit around) |
| Funeral planning (e.g., choices, costs, funding, and consumer protection, etc.) |
| Global health care systems (general awareness of) |
| Global influence trends |
| Health care alternatives and emerging trends (e.g., concierge health care services, foreign medical care and insurance, integrated care for dual eligibles, etc.) |
| Health insurance (private) |
| Holistic care options |
| Home and community trends |
| Housing issues associated with aging |
| Identity theft (phishing, etc.) |
| Individual differences and commonalities among seniors |
| Infections prevalent in seniors (e.g., STDs, UTIs, others, etc.) |
| Informed consent and disclosure |
| Interpersonal relations |
| Legal documents types and purposes (e.g., wills, trusts, advanced directives, beneficiary designations, etc.) |
| Legal guardianships and conservatorships (e.g., special needs trusts for dependents) |
| Legal issues and when legal professional is necessary (e.g., dementia and powers of attorney, etc.) |
| Legal resources (e.g., private attorneys, legal aid, community services, bar referral services, etc.) |
| Legal specialties, certifications related to senior issues |
| Legal wishes (importance of communicating to a trusted agent) |
| Legislative and regulatory issues |

| Specialized Knowledge |
|--|
| LGBT aging population |
| LGBT issues related to housing, benefits, legal issues, etc. |
| Life-course transitions |
| Lifestyle choices (e.g., sedentary, active, social, etc.) |
| Lifestyle issues (e.g., preference for "aging at home", etc.) |
| Limitations and loss associated with aging |
| Loneliness and social isolation behaviors |
| Long term care types (e.g., nursing home, assisted living, home care, continuing care retirement communities, etc.) |
| Loss and grief types |
| Marital status impacts associated with seniors |
| Medicaid eligibility |
| Medical advances |
| Medical evaluations (importance of ongoing evaluations) |
| Medicare (A, B, C and D) |
| Medicare eligibility and enrollment |
| Medication and pain management (importance of) |
| Medigap/supplemental |
| Mental disorders (e.g., depression, anxiety, personality disorders, etc.) |
| Mental health activities to sustain/improve quality of life |
| Military benefits (financial and health) |
| Misconception about contributions seniors can make to society |
| Misconception about seniors' ability to manage their personal affairs (e.g., financial, business, legal, etc.) |
| Mobility myths (e.g., all seniors are weak and can't move around, can't drive, etc.) |
| Mobility trends |
| Nutrition, fitness and health |
| Payment sources (e.g., Medicaid, private pay, long term care insurance, reverse mortgage, etc.) |
| Physical and financial asset disposition |
| Physiology of aging (e.g., functional declines including ADL and IADL) |
| Powers of attorneys (types, uses, and challenges of) |
| Prescription programs |
| Professional services for seniors (e.g., fiduciaries, daily money managers, etc.) |
| Protective services and any mandatory reporting requirements |
| Recreational aids for individuals with disabilities (e.g., special running prosthesis, specialized recreational wheelchairs, etc.) |
| Recreational issues associated with aging |
| Relationships later-in-life |
| Religious/spiritual issues associated with aging |
| Resources (e.g., community, web, professional associations, etc.) |
| Resources for addressing financial fraud and abuse (e.g., law enforcement, attorneys general, securities regulators, etc.) |
| Resources for disease education (e.g., community, online, state/federal, etc.) |
| Resources public and private related to home and community based services |
| Resources to assist with health benefits (e.g., community, state, federal, etc.) |
| Resources to obtain costs of long term care (e.g., AALTCI, industry studies, etc.) |
| Safety hazards (e.g., falls, hoarding, environmental, etc.) |
| Self-neglect behaviors |
| Self-determination rights of the elderly |
| Senior living trends (e.g., more options, congregate housing, etc.) |

| Specialized Knowledge |
|--|
| Seniors supporting adult children and/or raising grandchildren |
| Sexual activity of seniors |
| Sexual behaviors that are inappropriate |
| Sexual myths of seniors |
| Sexual offender issues associated with seniors previously convicted |
| Sexual orientation differences in seniors |
| Social security |
| Social security disability income (SSDI) |
| Standards and continuing education requirements |
| Stereotypes of seniors |
| Substance abuse |
| Supplemental security income (SSI) |
| Technological advances that impact seniors (e.g., ability for medical information to be sent to remote locations, pill dispensers that communicate, alert systems, etc.) |
| Technology and how it can enhance communication |
| Technology and how seniors use it |
| Transportation issues associated with seniors |
| Universal design principles |
| Victimization fears (e.g., robbery, physical attack, scams, fraud, etc.) |

Knowledge of Calculations and Communication Required of Certified Senior Advisors

| Calculations |
|--|
| Collect information to solve a problem |
| Compare numbers |
| Make rough estimates |
| Perform simple math operations of addition |
| Perform simple math operations of division |
| Perform simple math operations of multiplication |
| Perform simple math operations of subtraction |
| Use a calculator |

| Communications |
|--|
| Apply assertiveness |
| Ask questions |
| Communicate using the vocabulary/terminology of a related trade |
| Communicate with co-workers and/or business people in writing (letters, memos) |
| Communicate with co-workers and/or business people verbally (face-to-face) |
| Communicate with co-workers and/or business people verbally (telephone, radio) |
| Evaluate options/alternatives |
| Evaluate solutions |
| Explain procedures |
| Find information in catalogs |
| Find information in references (Machinery handbook, tap/drill charts, etc.) |
| Follow verbal job instructions |
| Listen |
| Participate in brainstorming |
| Present to others |
| Read and follow a map, chart, plan, etc. |
| Research information |
| Speak to large groups |
| Summarize information |
| Write reports |
| Write words and numbers legibly |

Skills, Abilities, and Attributes Required of Certified Senior Advisors

| Skills, Abilities, and Attributes |
|--|
| Ability to adopt professional approach based on aging limitations |
| Ability to assess social interests of seniors (social, loner, antisocial, etc.) |
| Ability to build relationships/rapport with seniors |
| Ability to develop resources/materials to educate about death/dying issues |
| Ability to empathize with seniors and the aging process |
| Ability to identify when seniors are being patronized and infantilized |
| Ability to identify when the client should be referred to a financial professional |
| Ability to identify when there are financial issues associated with clients |
| Ability to interview effectively |
| Ability to recognize the influence of personal biases |
| Ability to recognize the need for medical attention |
| Ability to facilitate discussions regarding end of life issues |
| Active listening skills |
| Communication skills |
| Detail-oriented to maintain current resources/referrals |
| Interpersonal skills |
| Interviewing skills |
| Networking skills |
| Problem-solving skills |
| Project management |
| Reactive listening skills |
| Read, write, plan, problem solving |
| Research skills |
| Sensitivity to seniors with various sexual orientations |

Attitudes Required of Certified Senior Advisors

| Attitudes | |
|---------------------------|---------------------------------|
| Accurate/Precise | Adaptable/Flexible |
| Analytic | Appropriate dresser |
| Caring | Common sense |
| Compassionate | Confident |
| Conscientious | Cooperative |
| Courteous | Creative |
| Critical thinker | Customer-oriented |
| Dependable | Detail-oriented |
| Eager to learn new things | Empathetic |
| Enthusiasm | Ethical |
| Focused | Free of substance abuse |
| Friendly | Goal-oriented |
| Good listener | Good time manager |
| Helpful | Honest |
| Industrious | Initiative |
| Integrity | Lack of prejudice (bias) |
| Leader | Manage stress/pressure |
| Meticulous | Multi-tasker |
| Neat | Non-aggressive |
| Open-minded to change | Organized |
| Patience | Persistent |
| Personal hygiene | Physical stamina |
| Positive attitude | Pride in job |
| Professional | Punctual |
| Quality focused | Respectful |
| Responsible/accountable | Safety conscious |
| Self-control | Self-discipline |
| Self-esteem | Self-motivated |
| Sense of humor | Sensitive to thoughts of others |
| Social skills | Tactful |
| Team player | Tolerant |
| Trustworthy | Work efficiently (resources) |
| Work efficiently (time) | Work in teams |

Physical Conditions Recommended for Certified Senior Advisors

| Physical Conditions | |
|---------------------|--|
| Talk | |
| Hear speech | |

Resources Used by Certified Senior Advisors

| Resources |
|---|
| Refer families to available resources to prepare for senior's death (grief and bereavement) |

Acronyms used in the DACUM Chart for Certified Senior Advisors

| Acronym | Description |
|---------|---|
| AAD | Ancillary Assistive Devices |
| AALTCI | American Association for Long-Term Care Insurance |
| ADL | Activities of Daily Living |
| CCRCs | Continuing Care Retirement Communities |
| DME | Durable Medical Equipment |
| HIPAA | Health Insurance Portability and Accountability Act |
| IADL | Instrumental activities of daily living |
| LGBT | Lesbian, Gay, Bisexual and Transgender |
| SSDI | Social Security Disability Income |
| SSI | Supplemental Security Income |
| STD | Sexually Transmitted Disease |
| UTI | Urinary Tract Infection |

DACUM Chart for Certified Senior Advisors

| | | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|---|---|----------------------------|--|-----------------------------------|-----------|
| A | | Anthropology and Sociology | | | |
| | 1 | Identify trends in aging | | | |
| | | | <ul style="list-style-type: none"> • Age identification (e.g., chronological, subjective, functional, physical, emotional, social, etc.) • Aging demographics (e.g., race, age, gender, class, etc.) • Economic policy trends associated with aging • Employment issues (changes in employment and retirement) • Environmental trends impacting seniors • Family care giving issues (e.g., sandwich generation, educate care givers on importance of self-care, etc.) • Global influence trends • Home and community trends • Legislative and regulatory issues • Life-course transitions • Lifestyle issues (e.g., preference for "aging at home", etc.) • Medical advances • Mobility trends • Senior living trends (e.g., more options, congregate housing, etc.) • Seniors supporting adult children and/or raising grandchildren • Sexual activity of seniors | | |

DACUM Chart for Certified Senior Advisors

| | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|---|--|---|--|-----------|
| 2 | Identify issues associated with aging around the world | | | |
| | | <ul style="list-style-type: none"> • Aging demographics around the world (awareness of) • Cultural context during senior assessment (e.g., different treatments for different cultures, how different cultures treat their aging) • Global health care systems (general awareness of) | | |
| 3 | Dispel myths/misconceptions about aging | | | |
| | | <ul style="list-style-type: none"> • Age identification (e.g., chronological, subjective, functional, physical, emotional, social, etc.) • Ageism • Cognitive issue myths (e.g., everybody gets dementia, seniors are feeble, etc.) • Employment myths of seniors • Financial wealth of seniors (they may have more financial resources than thought) • Fitness and exercise myths (e.g., seniors just sit around) • Misconception about contributions seniors can make to society • Misconception about seniors' ability to manage their personal affairs (e.g., financial, business, legal, etc.) | <ul style="list-style-type: none"> • Ability to identify when seniors are being patronized and infantilized | |

DACUM Chart for Certified Senior Advisors

| | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|---|--|---|---|-----------|
| | | <ul style="list-style-type: none"> • Mobility myths (e.g., all seniors are weak and can't move around, can't drive, etc.) • Sexual myths of seniors • Stereotypes of seniors | | |
| 4 | Identify cultural issues associated with aging | | | |
| | | <ul style="list-style-type: none"> • Aging demographics (e.g., race, age, gender, class, etc.) • Cultural context during senior assessment (e.g., different treatments for different cultures, how different cultures treat their aging) • Cultural issues related to aging • Cultural traditions | | |
| 5 | Address issues associated with the sexual orientation of seniors | | | |
| | | <ul style="list-style-type: none"> • LGBT aging population • LGBT issues related to housing, benefits, legal issues, etc. • Sexual orientation differences in seniors | | |
| 6 | Ensure that employees/vendors are sensitive to the needs of seniors with various sexual orientations | | | |
| | | <ul style="list-style-type: none"> • Communications that are nondiscriminatory or non-exclusionary (awareness of how to ensure) • Discrimination (evidence of and what should be done) • Interpersonal relations | <ul style="list-style-type: none"> • Sensitivity to seniors with various sexual orientations | |
| 7 | Affirm the wishes of the senior | | | |
| | | <ul style="list-style-type: none"> • Competence or lack of capacity and the effect on decision making • Self-determination rights of the elderly | | |

DACUM Chart for Certified Senior Advisors

| | | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|----------|----------|---|--|---|-----------|
| B | | Family and Aging | | | |
| | 1 | Identify family dynamics | | | |
| | | | <ul style="list-style-type: none"> • Divorce, re-marriage, death of a partner or child • Family care giving issues (e.g., sandwich generation, educate care givers on importance of self-care, etc.) • Family challenges • Family involvement • Family roles • Family systems theory (e.g., functioning eldest, birth order, etc.) • Family types (e.g., relatives, supporting relationships, etc.) | | |
| | 2 | Communicate with seniors and their families | | | |
| | | | <ul style="list-style-type: none"> • Aging attitudes (e.g., denial, adaptation, irrelevance, affirmation, etc.) and sense of purpose • Communication barriers • Communication techniques for talking to the elderly • Communication types and styles • Confidentiality issues (e.g., HIPAA, legal, financial, preservation of trust, etc.) • Facilitation/mediation | <ul style="list-style-type: none"> • Active listening skills • Communication skills • Interviewing skills • Reactive listening skills | |

DACUM Chart for Certified Senior Advisors

| | | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|---|---|--|---|---|-----------|
| | 3 | Develop resource/referral network | | | |
| | | | <ul style="list-style-type: none"> • Community resources for education and support • Resources for disease education (e.g., community, online, state/federal, etc.) | <ul style="list-style-type: none"> • Communication skills • Detail-oriented to maintain current resources/referrals • Interpersonal skills • Networking skills • Problem-solving skills • Research skills | |
| C | | Health and Wellness Aspects | | | |
| | 1 | Identify healthy lifestyles for aging population | | | |
| | | | <ul style="list-style-type: none"> • Holistic care options • Lifestyle choices (e.g., sedentary, active, social, etc.) • Medical evaluations (importance of ongoing evaluations) • Nutrition, fitness and health | | |
| | 2 | Identify physical changes and challenges | | | |
| | | | <ul style="list-style-type: none"> • Aging physiology (e.g., functional declines including ADL and IADL) • Ancillary Assistive Devices (AAD) and Durable Medical Equipment (DME) • Chronic illness (e.g., most common conditions, plus obesity and Parkinson's) • Diseases that are age-related • Infections prevalent in seniors (e.g., STDs, UTIs, others, etc.) | <ul style="list-style-type: none"> • Ability to adopt professional approach based on aging limitations • Ability to empathize with seniors and the aging process • Ability to recognize the need for medical attention | |

DACUM Chart for Certified Senior Advisors

| | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|---|---|---|--|-----------|
| | | <ul style="list-style-type: none"> • Limitations and loss associated with aging • Medication and pain management (importance of) • Safety hazards (e.g., falls, hoarding, environmental, etc.) | | |
| 3 | Identify mental changes and challenges | | | |
| | | <ul style="list-style-type: none"> • Cognitive changes and diseases (e.g., dementia, Alzheimer's, mild cognitive impairment, etc.) • Coping behaviors • Loneliness and social isolation behaviors • Loss and grief types • Mental disorders (e.g., depression, anxiety, personality disorders, etc.) • Mental health activities to sustain/improve quality of life • Self-neglect behaviors • Substance abuse | <ul style="list-style-type: none"> • Ability to empathize with seniors and the aging process • Ability to recognize the need for medical attention | |
| 4 | Identify the signs and symptoms of potential elder abuse and exploitation | | | |
| | | <ul style="list-style-type: none"> • Abusive situations (e.g., physical, financial, verbal, sexual, etc.) • Protective services and any mandatory reporting requirements • Victimization fears (e.g., robbery, physical attack, scams, fraud, etc.) | | |

DACUM Chart for Certified Senior Advisors

| | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|----------|---|---|---|-----------|
| D | Lifestyle Aspects | | | |
| 1 | Develop a network of resources for lifestyle issues | | | |
| | | <ul style="list-style-type: none"> Lifestyle issues (e.g., preference for "aging at home", etc.) Resources (e.g., community, web, professional associations, etc.) | | |
| 2 | Assess the lifestyle situation of the senior | | | |
| | | <ul style="list-style-type: none"> Environmental barriers associated with seniors Family dynamic impacts on seniors Family structure and supporting relationships Housing issues associated with aging Marital status impacts associated with seniors Universal design principles | <ul style="list-style-type: none"> Ability to assess social interests of seniors (social, loner, antisocial, etc.) Ability to interview effectively | |
| 3 | Provide educational opportunities to seniors/families | | | |
| | | <ul style="list-style-type: none"> Community resources and lifelong learning opportunities | | |
| 4 | Identify social aspects of aging | | | |
| | | <ul style="list-style-type: none"> Aging stages Family support system structures Individual differences and commonalities among seniors Recreational issues associated with aging Religious/spiritual issues associated with aging | <ul style="list-style-type: none"> Ability to build relationships/rapport with seniors | |

DACUM Chart for Certified Senior Advisors

| | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|----------|--------------------------|--|-----------------------------------|-----------|
| | 5 | Identify technological aspect of aging | | |
| | | <ul style="list-style-type: none"> • Technological advances that impact seniors (e.g., ability for medical information to be sent to remote locations, pill dispensers that communicate, alert systems, etc.) • Technology and how seniors use it • Technology and how it can enhance communication | | |
| | 6 | Present information regarding mobility | | |
| | | <ul style="list-style-type: none"> • Ambulation issues • “Behind the wheel” assessments and issues related to taking away the car keys • Recreational issues associated with aging • Transportation issues associated with seniors | | |
| | 7 | Identify sexuality issues of the aging | | |
| | | <ul style="list-style-type: none"> • Community resources for family support (e.g., social workers, police, community centers, associations [ad], etc.) • Relationships later-in-life • Sexual behaviors that are inappropriate • Sexual offender issues associated with seniors previously convicted | | |
| E | | Financial Aspects | | |
| | 1 | Develop a network of financial professional resources | | |
| | | <ul style="list-style-type: none"> • Financial professionals • Credentials and certifications associated with financial professionals | | |

DACUM Chart for Certified Senior Advisors

| | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|---|---|---|---|-----------|
| 2 | Identify concerns seniors/families have about finances | | | |
| | | <ul style="list-style-type: none"> Financial issues related to lack of trust | | |
| 3 | Convey the importance of thinking about financial resources (now and in the future) | | | |
| | | <ul style="list-style-type: none"> Financial goals and retirement objectives (basic knowledge of typical objectives) Financial plans of seniors (basic knowledge of typical retirement plans, roadmap, etc.) Financial statements (basic knowledge of income statements, assets, liabilities, etc.) | <ul style="list-style-type: none"> Ability to identify when the client should be referred to a financial professional Ability to identify when there are financial issues associated with clients | |
| 4 | Identify financial aspects of estate planning | | | |
| | | <ul style="list-style-type: none"> Beneficiary designations Estate planning (e.g., basic knowledge of wills, trusts, titling of assets, asset protection, taxation, insurance, etc.) | | |
| 5 | Educate about health benefit options | | | |
| | | <ul style="list-style-type: none"> Health care alternatives and emerging trends (e.g., concierge health care services, foreign medical care and insurance, integrated care for dual eligibles, etc.) Private Health insurance Medicare (A, B, C and D) Medicare eligibility and enrollment Medigap/supplemental Military benefits (financial and health) Prescription programs Resources to assist with health benefits (e.g., community, state, federal, etc.) | | |

DACUM Chart for Certified Senior Advisors

| | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|---|---|---|-----------------------------------|-----------|
| 6 | Educate about financial assistance available to seniors | | | |
| | | <ul style="list-style-type: none"> Financial programs (e.g., associations/organizations that provide assistance, fraternal organizations, etc.) Military benefits (financial and health) Professional services for seniors (e.g., fiduciaries, daily money managers, etc.) Social security Social security disability income (SSDI) Supplemental security income (SSI) | | |
| 7 | Identify options for financing long term care (broad sense) | | | |
| | | <ul style="list-style-type: none"> Care options (e.g., short term, rehab, long term, etc.) Long term care types (e.g., nursing home, assisted living, home care, continuing care retirement communities, etc.) Payment sources (e.g., Medicaid, private pay, long term care insurance, reverse mortgage, etc.) Resources to obtain costs of long term care (e.g., AALTCL, industry studies, etc.) | | |
| 8 | Identify potential for financial fraud and abuse | | | |
| | | <ul style="list-style-type: none"> Financial fraud warning signs (e.g., missing cash, withdrawals of money, unusual transactions, forgery, etc.) Financial fraud/abuse and remedies/assistance that CSAs can provide for victims (e.g., assistance with contacting credit bureaus) | | |

DACUM Chart for Certified Senior Advisors

| | | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|----------|----------|--|--|---|-----------|
| | | | <ul style="list-style-type: none"> Financial scams (e.g., mail solicitations, prize announcements, phone solicitations, Ponzi schemes, sweepstakes, lottery scams, foreign exchange currency schemes, home repair scams, free lunch seminars, disaster relief scams, etc.) Identity theft (phishing, etc.) Resources for addressing financial fraud and abuse (e.g., law enforcement, attorneys general, securities regulators, etc.) | | |
| F | | Eldercare Planning | | | |
| | 1 | Develop network of professionals and resources | | | |
| | | | <ul style="list-style-type: none"> Eldercare planning process and resources (e.g., case managers, geriatric care managers, senior move managers, social workers, eldercare advisors, medical and non-medical service providers, etc.) | <ul style="list-style-type: none"> Project management Read, write, plan, problem solving Research skills | |
| | 2 | Identify care needs | | | |
| | | | <ul style="list-style-type: none"> Care levels Care options (e.g., short term, rehab, long term, etc.) Care provider types (e.g., companions, aides, nurses, etc.) | | |
| | 3 | Facilitate seniors/families to build a plan for care continuum | | | |
| | | | <ul style="list-style-type: none"> Care plan process/resources and care giver support Payment sources (e.g., Medicaid, private pay, long term care insurance, reverse mortgage, etc.) | <ul style="list-style-type: none"> Communication skills | |

DACUM Chart for Certified Senior Advisors

| | | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|----------|----------|---|--|-----------------------------------|-----------|
| | | | <ul style="list-style-type: none"> Resources public and private related to home and community based services | | |
| G | | Legal Aspects | | | |
| | 1 | Develop a base of legal network resources | | | |
| | | | <ul style="list-style-type: none"> Legal resources (e.g., private attorneys, legal aid, community services, bar referral services, etc.) Legal specialties, certifications related to senior issues | | |
| | 2 | Address importance of legal planning | | | |
| | | | <ul style="list-style-type: none"> Estate planning (e.g., basic knowledge of wills, trusts, titling of assets, asset protection, taxation, insurance, etc.) Informed consent and disclosure Legal documents types and purposes (e.g., wills, trusts, advanced directives, beneficiary designations, etc.) Legal guardianships and conservatorships (e.g., special needs trusts for dependents) Legal issues and when legal professional is necessary (e.g., dementia and powers of attorney, etc.) Legal wishes (importance of communicating to a trusted agent) Physical and financial asset disposition Powers of attorneys (types, uses, and challenges of) | | |

DACUM Chart for Certified Senior Advisors

| | | Duties, Tasks, and Steps | Knowledge | Skills, Abilities, and Attributes | Resources |
|----------|----------|---|--|--|---|
| H | | End of Life Planning | | | |
| | 1 | Educate seniors/families about end of life/care options | | | |
| | | | <ul style="list-style-type: none"> Community resources and lifelong learning opportunities End of life/care options (e.g., hospice, palliative care, home care, spiritual, etc.) Funeral planning (e.g., choices, costs, funding, and consumer protection, etc.) Legal documents types and purposes (e.g., wills, trusts, advanced directives, beneficiary designations, etc.) | <ul style="list-style-type: none"> Ability to develop resources/materials to educate about death/dying issues Ability to facilitate discussions regarding end of life issues | <ul style="list-style-type: none"> Refer families to available resources to prepare for senior's death (grief and bereavement) |
| I | | Ethical Issues | | | |
| | 1 | Adhere to CSA and professional codes of ethics and standards | | | |
| | | | <ul style="list-style-type: none"> CSA code of ethics Ethical conflicts Standards and continuing education requirements | <ul style="list-style-type: none"> Ability to recognize the influence of personal biases | |
| | 2 | Uphold senior's rights within professional ethical guidelines | | | |
| | | | <ul style="list-style-type: none"> CSA code of ethics Ethical conflicts Standards and continuing education requirements | | |

DACUM PERFORMED FOR:

Society of Certified Senior Advisors

DACUM PERFORMED BY:

Professional Testing Inc.
7680 Universal Blvd, Suite 300
Orlando, Florida 32819

DACUM FACILITATORS:

Dr. Cynthia D. Woodley
Tracey Paschal

DACUM OBSERVERS:

Mary Janak, SCSA, Director of Education
Janice Moore, SCSA, Certification Manager
Clint Niemeyer, Alabama Securities Commission

DACUM PANEL:

George H. Aslanian, Esq.

Aslanian & Aslanian, Attorneys
Broward Senior Care, LLC
Fort Lauderdale, FL

Mickey Batsell, CASL, CLU, CLTC, CSA

ICB
Leander, TX

Irene Jackson-Brown, Ph.D., CSA, CMC

Jackson-Brown Associates, LLC
The Art of Elder Care
Washington, DC

Thomas H. Eyssell, Ph.D., CSA

Associate Dean and Director of Graduate Studies
Director, UMSL Financial Planning Programs
Professor of Finance
University of Missouri – St. Louis
St. Louis, MO

Marsha Fields, EA, CSA

Duval Fields Consulting
Green Cove Springs, FL

Sydney J. Kennedy, CSA

Founder and CEO
Time to Move Care Placement, Inc.
San Diego, CA

Rose Marie Millush

Health and Wellness Counseling
RMCE Counseling, PLLC
Rochester, MI

Maryann Prudhomme, RN

Director
Bayada Home Health Care
Linwood NJ

Lisa Rill, Ph.D.

Research Associate
The Claude Pepper Center at Florida State
University
Tallahassee, FL

Judy Rough, CSA

Owner – Senior Move Manager and Professional
Organizer
Carefree Transitions, LLC and Papervana, LLC
Phoenix, AZ and Denver, CO

Stephen P. Rudolph, MHCA, FACHE, CSA, NHA

Owner, President
Rudolph Enterprises LLC dba Comfort Keepers
Madison WI

Lynn Shank, CSA

CEO & Founder
A+ Longevity Management
Austin, TX

Anita R. Sheldon, RN, BSN, MS, CCM, CSA, CLNC

Case Manager Legal Nurse Consultant
Jacksonville, FL

Appendix B: Copy of Validation Survey





2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Welcome

Welcome!

The Society of Certified Senior Advisors, is currently updating the Certified Senior Advisors (CSA) credential.

The first step in this process, was to conduct a Job/Task Analysis (JTA) which resulted in a list of duties and responsibilities. This survey is designed to validate those tasks identified during the JTA. After answering a few demographic questions, you will be given an opportunity to review the tasks established during the JTA and rate their frequency and importance as related to the job of a Certified Senior Advisor.

This survey is 11 pages long and should take approximately 20 minutes to complete. If you do not have time to complete the survey in one sitting, you can stop and complete the survey later (provided you use the same computer and have cookies enabled on that computer). The survey will resume where you left off.

Your responses will be kept confidential. If you have any difficulty responding to this survey, please contact us at edoherty@proftesting.com or call (800) 653-1785. Thank you, we appreciate your assistance.

To begin the survey, click on the Next button below.



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

*** 1. Have you ever worked with older adults or in the aging industry?**

☐ Yes

☐ No



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Respondent Background

Please answer the following background questions. Your responses will be kept confidential and this information will only be used for statistical purposes.

2. Which of the following BEST DESCRIBES your main area of expertise?

- ☐ Finance/Tax Services
- ☐ Insurance Services
- ☐ Health Care (skilled) Services
- ☐ Home Care (unskilled) Services
- ☐ Counseling/Advising/Patient Advocacy Services
- ☐ End-of-Life Services
- ☐ Government Services
- ☐ Legal/Estate Planning Services
- ☐ Referral/Placement Services
- ☐ Senior Housing/Transition Services
- ☐ Geriatric Care Management/Social Services

Other (please specify)

3. Which of the following BEST DESCRIBES your subordinate area(s) of expertise? Choose all that apply.

- | | | |
|---|---|--|
| <input type="checkbox"/> Accounting/Tax Services | <input type="checkbox"/> Funeral & Cemetery Services | <input type="checkbox"/> Mortgage Lending Services |
| <input type="checkbox"/> Adult Day Care Services | <input type="checkbox"/> Geriatric Care Management | <input type="checkbox"/> Patient Advocacy |
| <input type="checkbox"/> Area Agency on Aging | <input type="checkbox"/> Government Services | <input type="checkbox"/> Real Estate Services |
| <input type="checkbox"/> Banking Services | <input type="checkbox"/> Health Care (skilled) Services | <input type="checkbox"/> Referral/Placement Services |
| <input type="checkbox"/> Community-Based Services | <input type="checkbox"/> Home Care (unskilled) Services | <input type="checkbox"/> Religious Services |
| <input type="checkbox"/> Concierge Services | <input type="checkbox"/> Hospice Services | <input type="checkbox"/> Security Services |
| <input type="checkbox"/> Consulting Services | <input type="checkbox"/> Insurance Services | <input type="checkbox"/> Senior Housing Services |
| <input type="checkbox"/> Counseling Services | <input type="checkbox"/> Legal Services | <input type="checkbox"/> Senior Transition Services |
| <input type="checkbox"/> Education Services | <input type="checkbox"/> Estate Planning Services | <input type="checkbox"/> Social Services |
| <input type="checkbox"/> Financial Services | <input type="checkbox"/> Long-Term Care Services | <input type="checkbox"/> Transportation Services |
| <input type="checkbox"/> Food Services | <input type="checkbox"/> Marketing Services | |
| <input type="checkbox"/> Other (please specify) | | |

4. How many years have you been a practicing professional in the aging industry?

- ☐ less than 1 year
- ☐ 1-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21 or more years

5. Are you a Certified Senior Advisor?

- ☐ Yes
- ☐ No

6. If you are a Certified Senior Advisor, how many years have you held your CSA Certification?

- ☐ less than 1 year
- ☐ 1-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21 or more years
- ☐ NA - I was a CSA, but am no longer actively certified
- ☐ NA - I have never been a CSA

7. In which State do you primarily work?

8. What is your highest level of education?

- ☐ Less than High School
- ☐ High School or Equivalent
- ☐ Some College
- ☐ Two Years of College/Technical School/Community College
- ☐ Bachelor's Degree
- ☐ Master's Degree
- ☐ Doctoral Degree

9. What is your age?

- ☐ 19 years or younger
- ☐ 20-29 years
- ☐ 30-39 years
- ☐ 40-49 years
- ☐ 50-59 years
- ☐ 60-69 years
- ☐ 70-79 years
- ☐ 80 years or older

10. What is your gender?

- ☐ Female
- ☐ Male

11. Which of the following credentials do you hold? *Choose all that apply.*

- ☐ Certified Aging-in-Place Specialist (CAPS)
- ☐ Certified Care Manager (CMC)
- ☐ Certified Case Manager (CCM)
- ☐ Certified Companion Aide (CCA)
- ☐ Certified Elder Law Attorney (CELA)
- ☐ Certified Estate Planner (CEP)
- ☐ Certified Financial Planner (CFP)
- ☐ Certified Living in Place Professional (CLIPP)
- ☐ Certification for Long-Term Care (CLTC)
- ☐ Certified Public Accountant (CPA)
- ☐ Certified Senior Advisor (CSA)
- ☐ Chartered Advisor for Senior Living (CASL)
- ☐ Chartered Financial Analyst (CFA)
- ☐ Chartered Financial Consultant (ChFC)
- ☐ Chartered Life Underwriter (CLU)
- ☐ Financial Services Specialist (FSS)
- ☐ Registered Health Underwriter (RHU)
- ☐ REALTOR®
- ☐ Seniors Real Estate Specialists (SRES)

Other (please specify)

12. Which of the following licenses do you hold? *Choose all that apply.*

☐ Securities/Investments

☐ Funeral

☐ Insurance

☐ Legal

☐ Medical

☐ Mental Health

☐ National Association of Securities Dealers (NASD)

☐ Nursing (RN, CNA, LPN)

☐ Real Estate

Other (please specify)



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor Survey Description

In the following pages is a list of tasks performed by Certified Senior Advisors.

The tasks are organized in nine work areas:

- Anthropology and Sociology
- Family and Aging
- Health and Wellness Aspects
- Lifestyle Aspects
- Financial Aspects
- Eldercare Planning
- Legal Aspects
- End-of-Life Planning
- Ethical Issues.

You will be asked to think about tasks that a Certified Senior Advisor (CSA) might do and to indicate how important these tasks are to being a Certified Senior Advisor. Then, considering the same task statement, you will be asked to indicate the frequency with which a Certified Senior Advisor might perform each task.

Indicate your response by selecting the corresponding button for each task statement on the pages to follow.



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor: Importance of Performing Tasks

IMPORTANCE - Rate each task statement based on how important the task is to successful performance of a Certified Senior Advisor:

Very important

Important

Somewhat important

Not important

13. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to Anthropology and Sociology.

| | Very Important | Important | Somewhat Important | Not Important |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Identify trends in aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Dispel myths/misconceptions about aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify social and cultural issues associated with aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Affirm the wishes of the older adult | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

14. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to Family and Aging.

| | Very Important | Important | Somewhat Important | Not Important |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Identify family dynamics | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Communicate with older adults and their families | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Develop resource/referral network | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

15. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to Health and Wellness Aspects.

| | Very Important | Important | Somewhat Important | Not Important |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Identify healthy lifestyles for aging population | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify physical changes and challenges | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify mental changes and challenges | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify the signs and symptoms of potential elder abuse and exploitation | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor: Importance of Performing Tasks - Continued

16. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to Lifestyle Aspects.

| | Very Important | Important | Somewhat Important | Not Important |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Develop a network of resources for lifestyle issues | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Assess the lifestyle situation of the older adult | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Provide educational opportunities to older adults/families | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify social aspects of aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify technological aspects of aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Present information regarding mobility | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify sexuality issues of the aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

17. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to Financial Aspects.

| | Very Important | Important | Somewhat Important | Not Important |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Develop a network of financial professional resources | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify concerns older adults/families have about finances | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Convey the importance of thinking about financial resources (now and in the future) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify financial aspects of estate planning | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Educate about health benefit options | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Educate about financial assistance available to older adults | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify options for financing long term care (broad sense) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify potential for financial fraud and abuse | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor: Importance of Performing Tasks - Continued

18. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to Eldercare Planning.

| | Very Important | Important | Somewhat Important | Not Important |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Develop network of professionals and resources | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify care needs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Facilitate older adults/families to build a plan for care continuum | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

19. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to Legal Aspects.

| | Very Important | Important | Somewhat Important | Not Important |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Develop a base of legal network resources | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Address importance of legal planning | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

20. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to End-of-Life Planning.

| | Very Important | Important | Somewhat Important | Not Important |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Educate older adults/families about end-of-life/care options | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

21. Please indicate how important each task is when a Certified Senior Advisor is performing tasks related to Ethical Issues.

| | Very Important | Important | Somewhat Important | Not Important |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Adhere to CSA and professional codes of ethics | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Uphold older adults' rights within professional ethical guidelines | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor: Frequency of Performing Tasks

FREQUENCY - Rate each task statement based on how often a Certified Senior performs each task:

Perform very often
Perform fairly often
Occasionally perform
Never perform

22. Please indicate how often a Certified Senior Advisor is performing tasks related to Anthropology and Sociology.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|---|-----------------------|-------------------------|-------------------------|-----------------------|
| Identify trends in aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Dispel myths/misconceptions about aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify social and cultural issues associated with aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Affirm the wishes of the older adult | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

23. Please indicate how often a Certified Senior Advisor is performing tasks related to Family and Aging.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|--|-----------------------|-------------------------|-------------------------|-----------------------|
| Identify family dynamics | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Communicate with older adults and their families | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Develop resource/referral network | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

24. Please indicate how often a Certified Senior Advisor is performing tasks related to Health and Wellness Aspects.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|--|-----------------------|-------------------------|-------------------------|-----------------------|
| Identify healthy lifestyles for aging population | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify physical changes and challenges | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify mental changes and challenges | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify the signs and symptoms of potential elder abuse and exploitation | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor: Frequency of Performing Tasks - Continued

25. Please indicate how often a Certified Senior Advisor is performing tasks related to Lifestyle Aspects.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|--|-----------------------|-------------------------|-------------------------|-----------------------|
| Develop a network of resources for lifestyle issues | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Assess the lifestyle situation of the older adult | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Provide educational opportunities to older adults/families | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify social aspects of aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify technological aspects of aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Present information regarding mobility | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify sexuality issues of the aging | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

26. Please indicate how often a Certified Senior Advisor is performing tasks related to Financial Aspects.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|---|-----------------------|-------------------------|-------------------------|-----------------------|
| Develop a network of financial professional resources | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify concerns older adults/families have about finances | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Convey the importance of thinking about financial resources (now and in the future) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify financial aspects of estate planning | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Educate about health benefit options | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Educate about financial assistance available to older adults | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify options for financing long term care (broad sense) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify potential for financial fraud and abuse | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor: Frequency of Performing Tasks - Continued

27. Please indicate how often a Certified Senior Advisor is performing tasks related to Eldercare Planning.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Develop network of professionals and resources | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identify care needs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Facilitate older adults/families to build a plan for care continuum | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

28. Please indicate how often a Certified Senior Advisor is performing tasks related to Legal Aspects.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Develop a base of legal network resources | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Address importance of legal planning | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

29. Please indicate how often a Certified Senior Advisor is performing tasks related to End-of-Life Planning.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Educate older adults/families about end-of-life/care options | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

30. Please indicate how often a Certified Senior Advisor is performing tasks related to Ethical Issues.

| | Perform Very Often | Perform Fairly Often | Occasionally Perform | Never Perform |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Adhere to CSA and professional codes of ethics | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Uphold older adults' rights within professional ethical guidelines | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor: Examination Blueprint

31. An examination blueprint for a credential for Certified Senior Advisors will be developed based on this survey. Please enter the percentage of the exam that you feel should be devoted to each of the content areas listed below.

(Note: Your responses should add up to 100.)

Anthropology and Sociology

Family and Aging

Health and Wellness Aspects

Lifestyle Aspects

Financial Aspects

Eldercare Planning

Legal Aspects

End-of-Life Planning

Ethical Issues



2019 SCSA Certified Senior Advisor JTA Re-validation Survey

Certified Senior Advisor: Missing Tasks

32. Are there any tasks performed by a Certified Senior Advisor that are missing from this survey?

- ☐ No
- ☐ Yes

If yes, please provide any missing tasks below:

33. Would you like to provide any additional comments?

- ☐ Yes
- ☐ No

If yes, please provide your comment below: