

Performance Needs Assessment: Helping our Seniors

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Introductory Material

Summary of the Project

As the population of seniors is increasing, in part to baby boomers ageing (Elderly Poverty, 2013) and moving away from the workforce, so are the number of seniors ill-prepared for living on a reduced income (Seniors | The Homeless Hub, n.d.). Food banks have often been a source for seniors to fill food gaps to secure food for themselves (Banks, 2018). The increased use of food banks has consequently forced food banks to rely more on funding from different government levels ("Quebec food banks receive help from government", 2009). The purpose of this performance improvement campaign is to contain expenses for the municipality of Glenoak by reducing the amount of municipal funding allocated to local food banks. Improved performance will be accomplished by designing appropriate interventions which would aid low-income seniors in planning nutritious meals on their lower income and staying within their budget.

How Data was Collected

Interviews. Interviews were conducted with local food banks in the city of Glenoak to understand which food items they were frequently low on. Five low-income seniors were interviewed to get a better understanding of their knowledge and attitudes on food purchasing, planning meals, and budgeting. A nutritionist and outreach coordinator from the Office of Nutrition Policy and Promotion (Canada, 2007) was contacted to understand cost-effective nutritious food purchasing. A bargain grocery store manager was interviewed to understand the variety of food choices and selections available.

Documents. Several documents were used to collect data such as Canada's food guide (Canada, 2018), journal articles on low-income seniors and food insecurities, as well as Statistics Canada documents.

Observations. Observations were made at the local bargain grocery store to see how local seniors currently perform and move within a grocery store.

About the Problem

The Request

The director of municipal funding, for the city of Glenoak, has requested a performance improvement campaign in order to increase the number of low-income seniors planning nutritious budget conscious meals to reduce the reliance on local food banks.

The Business Need

The business need in this project is to contain expenses for the municipality of Glenoak, by reducing the amount of municipal funding given to local food banks.

The performance improvement campaign will benefit the sponsor, as low-income seniors will have the competencies to plan a meal, make necessary food purchases and eat nutritiously while respecting their low budget. When a low-income senior can purchase the necessary healthy food on a low-income, they will be less likely to turn to the local food banks for supplementing their meals. In turn, the food banks will not need to request additional funding from the municipality of Glenoak as less low-income seniors will turn to them for food, saving the municipality money.

Current and Ideal Performance

Job one. Low-income seniors will be able to eat nutritious meals while respecting their weekly food budget.

Current performance. Nadia is a 68-year-old low-income senior who lives in the town of Glenoak. She has started using a cane recently as she just had surgery on her knee consequently reducing her mobility. She plans her healthy weekly meals for dinner to try and stay within her lower income and to not have to rely on the food bank. Getting to the grocery store by public transit, she goes with a prepared list of items but gets overwhelmed when she has to decide on more cost-effective food options and alternatives at the grocery store. For example, this week she went to her local grocery store and wanted to plan a meal of oven fried chicken legs with steamed vegetables. They were out of stock of the green beans as advertised on their flyer and that she had marked down on her grocery list. She wasn't sure which vegetable would be a good alternative to replace the green beans, so she bought the pricier asparagus as they seemed similar to green beans. She was hesitant to ask the store workers as they seemed overly busy. As a result, she exceeded her weekly food budget, did not have enough funds to buy all the items on her list and be able to cook the nutritious meals she had planned. Due to the lack of food items she was not able to purchase, she had to visit the food bank this week to pick up items which were not as healthy to have some food to eat. The whole process has her feeling overwhelmed, anxious and unsuccessful.

Ideal performance. Nadia is a 68-year-old low-income senior who lives in the town of Glenoak. She has recently started using a cane as she just had surgery on her knee, consequently reducing her mobility. She has started to plan her weekly healthy meals for dinner to try and stay within her lower income and to not rely on food from the local food bank. She has a grocery list based on planned meals, that she takes with her to the grocery store every week. She gets to the grocery store by adapted public transit. There have been a few occasions where she has had to replace items on her list with an alternative item that still fit her food budget for that week. On

one occasion, she had to find a food item to replace whole grain couscous as it was unavailable at the grocery store. She knew that whole grain pasta could be a healthy and appropriate alternative to the couscous, keeping her within her weekly food budget. She is confident to go shopping on her own as she knows she can work through situations when they don't carry the exact items on her list while staying within her food budget and eating healthy at the same time.

Hierarchical List of Tasks

Current performance. Main task: Low-income seniors eat meals through purchases at the grocery stores and food items from the local food bank, exceeding their weekly food budget.

- Calculate a weekly food budget.
- Plan weekly nutritious meals for dinner.
- Create a grocery list based on planned meals and weekly food budget.
- Purchase food items at the grocery store not within the weekly food budget.
- Exceed weekly food budget.
- Fill gaps in food purchases from local food banks.
- Cook a few planned meals, supplement other meals with food bank supplies.

Ideal performance. Main task: Low-income seniors will be able to eat nutritious meals while respecting their weekly food budget.

- Calculate a weekly food budget.
- Plan weekly nutritious meals for dinner.
- Plan meals incorporating a variety of healthy foods.
- Create a grocery list based on planned meals and a weekly food budget.
- Purchase food items at the grocery store.
- Assess if the weekly food budget was respected.

- Prepare planned nutritious meals with food purchases.

Description of Performers

Demographics. The table provides information and data on a general representation of performers (see Table A1).

Character sketches. The following narratives are based on three key groups. Within each group, three variations of key performers are described.

Hard-working and active senior. The following group of performers represent baby boomers who are actively involved in their community and life, who might also be working part-time and be more inclined to use technology.

Minimally hard-working and active senior. Anna-Maria just turned sixty-five and used to be extremely involved in her volunteer endeavours with the hospital. She has had to cut down her hours in the past six months due to her arthritis getting worse as she can't stand for long periods of time. As a low-income senior she takes advantage of the free aqua-movement class at her community pool once a week. She also looks after her two young grandchildren on occasional Fridays. She plans a food budget and her meals through a spreadsheet on the computers available at the city library. When her grandchildren come over she likes to plan a special meal. She tries to include that special meal as part of her planned meals for the week but picks up a prepackaged treat for them which tends to put her over her weekly food budget. She views money and time spent on her grandchildren important, and she doesn't feel that turning to the food bank is an issue as it helps support her time with her grandchildren.

Moderately hard-working and active senior. Roger is a 66-year-old senior who just had his working hours cut to part-time at the local hardware store, as the store is focusing more on online sales and have therefore reduced the staff. Due to the reduced pay, he has had to tighten

his financial belt even more and his budget is becoming increasingly difficult to cover all his monthly needs. He doesn't feel that anyone would hire him at this late age, and has decided to keep the part-time hours. He goes to the gym more often to stay healthy as he has been identified as being pre-diabetic. His weekly grocery shopping success can vary, as despite going with a well prepared list if an item is not available he is not sure what to substitute it with. He will even check his smartphone for other local grocery store flyers to see if they have the same item, but if they don't he ends up often buying an item on a whim as he doesn't see a similar alternative for his food budget. This results in him turning to the food bank to have enough to eat some weeks due to a lack of funds. He is not overly concerned at this point as he is transitioning to part-time pay but would like to get a better grip on things as he knows this could be his permanent financial situation.

Extremely hard-working and active senior. Sadia is 66 years old and works as a part-time secretary at a local dentist's office. She also organizes a monthly book club, has potluck lunches with her friends once a week, and volunteers at the local elementary school. She is financially organized and goes through the weekly digital grocery flyer on the tablet at the library to plan her meals and a corresponding grocery list. She enjoys trying new recipes but some call for items that can be pricier and once she gets to the grocery store, she often doesn't have enough funds to buy everything on her list as those pricier items take a larger portion of her budget and are more expensive than she initially planned for. She must then turn to her local food bank to fill the food gaps in her weekly meals. She would like to get a handle to her weekly food purchases as she doesn't enjoy turning to the food bank for assistance.

Unconcerned and conforming senior. The following group of performers represent those with a generational lens (Green-LaPierre et al., 2012) and accepting their current situation as is.

Slightly unconcerned and conforming senior. Melissa is a low-income senior who lost her husband six months ago and has taken on the household finances since his passing. She has learned many personal finance skills since then, as she was a stay-at-home mother for most of her life and her husband took the responsibility of finances. She has learned to budget for her weekly meals and eat healthy at the same time. Despite these new skills she often overspends at the grocery store some weeks as she is not used to the reduced income she now must live off of and is purchasing the same food products she once did. Despite feeling a little anxious about using food banks, she feels as a recent widow this is might be the lifestyle that comes with adjusting to her new situation, and that eventually she will not be using the food back resources.

Moderately unconcerned and conforming senior. Laila is a 67-year-old retired librarian and as a result of years of overspending, despite making a decent salary, she is now living as a low income senior. She is getting better at managing her monthly income as some month's finances can be extremely tight. She feels she is starting to get on track and grocery shops according to the meals she has planned. She isn't overly concerned with the few times she goes over on her shopping trip, and tries to just focus on her successful weeks and sees a few food banks trips as a part of the learning process. She is brand aware when she grocery shops and buys premium brand products even if they are pricier.

Extremely unconcerned and conforming senior. John is a 70-year-old senior who grew up in extreme poverty. Weekly food bank trips were a normal part of his upbringing. He sees going to the food bank as being resourceful, and a way to save money on his low-income as his family

once did. Nutritious food is not a concern for him, as he feels he is in fairly good health and can sustain himself on food basics he has always consumed. He has lived through more severe financial times and feels this is just part of being a senior and scraping by.

Isolated and vulnerable senior. The following group of performers represent those with mobility or severe health issues, and who could be living without much social contact.

Slightly isolated and vulnerable senior. Francine is a 72-year-old low-income senior who is not as mobile as she once was. She is currently on the waiting list for a hip replacement surgery and cannot be as active. Her children live in the same city but are busy with their own lives and she only sees them once a month. While she has a few local friends, she sees a few times a month, she doesn't get out as much as she used to due to her health issues. She does use the free bus service offered to seniors to go to the weekly grocery store. Despite being well organized with a grocery list based on meals she has planned, she doesn't feel confident at the grocery store as she gets overwhelmed by the decisions on food purchases she has to make if an item on her list is not available and she doesn't have anyone to ask. She then makes unplanned purchases, going over her food budget. She often has to supplement her meals with items from the food bank.

Moderately isolated and vulnerable senior. Sarah is a 75-year-old low income senior who has a heart condition, is diabetic and has recently started using a cane for more support when walking. Sarah doesn't have any close family nearby and cannot attend activities at her local seniors' club as she doesn't have the same stamina as she once did. Her friend Alana comes to visit her once or twice a month but she's often on her own, and in turn, watches a lot of television to keep herself entertained. She organizes her meals for the week and her neighbour is kind enough to drop her off at the local grocery store on her way to work and she uses a taxi to

get home. She cannot use public transportation as the walk to the bus stop is too difficult for her. At times when grocery shopping, she will spend more time talking with the store workers than focusing on her grocery shopping. As a result, she will often forget a few items or buy items not on her list as she is in a rush to finish in time for her taxi pickup. Due to the unsuccessful grocery trip and not staying within her budget, Sarah must turn to her local food bank for necessary food resources.

Extremely isolated and vulnerable senior. Carlos is a 74-year-old low-income senior who uses a walker to get around. He is slowly recovering from recent surgery to have a pacemaker installed. His children live in another province and he doesn't have many local friends or support, this leads him to feel very isolated and lonely at times. He tries to get to the grocery store once a week to have some social interactions as the cashiers are very friendly, but there are some weeks where the adapted bus service is not available at the time he needs or he doesn't have the physical energy to get to the grocery store. On weeks when he does get to the grocery store, despite his well-planned list, he has a difficult time reading the store labels and will pick up the wrong item. He also has difficulty in maneuvering his walker around the store aisles and isn't able to easily access items on his list. He is hesitant to ask for help as he feels he is bothering the store workers and feels anxious and overwhelmed by the whole experience. Due to not purchasing the correct items on his list and exceeding his budget, he must turn to the local food bank to supplement his meals.

Context

The model follows Gilbert's Behaviour Engineering Model (Stolovitch & Keeps, 2004) providing possible performance issues in both the environment and with the individual performers (see Appendix A).

Constraints**Product.**

Grocery stores. Location of bargain grocery stores cannot be changed due to corporate and organizational needs.

Technology. Limited, as not all low-income seniors have access to smart phones, computers or internet access limiting the easy availability of information on food and resources. Some seniors are also not comfortable using technology due to lack of experience or knowledge in using it. Technology must be very user friendly and easy to use for a senior demographic.

Editorial guidelines. Large print for senior demographic.

Design guidelines. Must have Glenoak municipal logo on all material (both digital and hardcopies), any participating local food bank may have their logo placed on material as a collaborative partner.

Templates. N/A.

Project.

Budget. The municipality would provide a specific budget amount allocated to providing necessary funds in order to support and implement the performance improvement campaign. For this fictitious performance improvement campaign, we will assume that funds are 300 000\$.

Schedule. The performance improvement will be implemented by April 1st, 2020 and assessed after six months.

Quality guidelines. Should follow municipal guidelines with adaptation permitted for the senior demographic.

The Requirements

Objectives

Business objective. The business objective is to contain expenses for the city of Glenoak by reducing the amount of municipal funding provided to local food banks by 50% over a year.

Performance objectives. Job one: Low-income seniors of Glenoak will be able to eat nutritious meals while respecting their weekly food budget.

- Given a weekly food budget and following Canada's food guide, plan five weekly nutritious meals for dinner, 100% of the time.
- Based on five planned meals and one possible alternative food item per meal, create a corresponding grocery list 100% of the time.
- Plan each meal with one new variety of food, 100% of the time.
- When shopping at a grocery store purchase appropriate food items, and stay within the food budget, in order to have a successful grocery shopping experience 100% of the time.
- Given a grocery store receipt, compare the total to assess if the weekly food budget was respected, 100% of the time.
- Utilizing food purchases from the grocery store, prepare and eat nutritious meals with necessary substitutions if needed, 100% of time.

Environmental issues.

Shopping experience. In collaboration with a local bargain grocery store, provide a physically adapted grocery shopping experience for a senior demographic addressing store labelling, easier movement within the store, and guides to provide improved orientation.

New foods. Develop a campaign to encourage trying new food on a seasonal basis.

Access to information. Provide information on cost conscious healthy food alternatives and substitutes, as well as information in both digital and paper format.

Personnel. Provide social support to address questions or concerns low-income seniors may have while grocery shopping.

Budget. Provide an incentive campaign to stay within their weekly food budget on a monthly basis.

Transportation. Offer more frequent and accessible transportation to a local bargain grocery store.

Cause Analysis

The cause analysis map analyzes factors which could be potentially affecting performance. It provides further analysis on bottlenecks and issues which could be preventing performers from attaining job one, and where in the flow of tasks performance issues are arising (see Appendix B).

Summative Evaluation Instruments

The summative evaluations will focus on the overall effectiveness of the performance improvement campaign, using an adapted version of Kirkpatrick's four levels of evaluation (Davidson, 2020).

Engagement levels 1 and 2. In this level, the evaluation will focus on both the performer's level of engagement with the performance improvement campaign and if a level of transfer occurred as a result of changed behaviour (Davidson Ann-Louise, personal communication, February 4, 2020).

In conjunction with the local bargain grocery store, a municipal worker will conduct a monthly anonymous survey which will be handed out at the end of the performer's grocery shopping trip, after they have paid near the cash, in both paper and digital copies. The survey will be used to assess performers level of engagement with the interventions put in place, and a self-reflection on their personal growth in the process of staying within a budget and being able to eat healthy meals. The survey itself will ask specific questions on a scale from one to four, to capture feedback from a willing participating performer. A monthly tabulation of survey answers will aid in assessing the level of overall engagement with the performance improvement campaign.

Individual performance levels 2 and 3. To assess individual performance two instruments will be used, depending on the performance objective, to capture and assess the accomplishments and results of the performer.

For personal information such as a weekly food budget, number of planned meals, or if they utilize a corresponding grocery list a related poll will be done with performers upon entering the grocery store. The poll will provide a percentage of performers who come prepared with an established food budget, a five-day meal plan and a corresponding grocery list. The pre-shopping poll will provide a metric to the municipal funding department on the percentage of performers who come well prepared. The poll will be conducted weekly by an assigned municipal worker set up at the entrance of the grocery store.

Three trained shopping auditors, provided by the city of Glenoak, will ask willing participants performers from the previous poll if they may shadow them to better understand their shopping experience. They will directly observe if performers are successful in purchasing necessary food items from their list, finding appropriate nutritious substitutes when necessary,

and if they can stay within their budget based on the final grocery bill. Data, like the poll, will be conducted weekly and observation notes will be categorized and assessed for trends and areas of success and failure.

Organizational performance level 4. To provide an assessment of the return on investment (Stolovitch & Keeps, 2004) for the municipality, data will be collected and audited monthly from a municipal food bank funding report over a six month period. The data will assess if funding to local food banks in the city of Glenoak have been contained, and ultimately if the city of Glenoak has met its business need from the performance improvement campaign.

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Table A1
Demographic Information

Demographic	Information
Age	<ul style="list-style-type: none"> Seniors are generally considered anyone 65 years of age or older (E. and S. D. Canada, 2016). Many are part of the baby boomer generation which will see a rapid growth in the next ten years ("Seniors", 2018).
Gender	<ul style="list-style-type: none"> There tends to be a higher number of low-income seniors who are female, then male (Green-LaPierre et al., 2012).
Housing	<ul style="list-style-type: none"> "74 percent of seniors that visit food banks are rental or social housing tenants"(Banks, 2018, para.3).
Health	<ul style="list-style-type: none"> "Individuals aged 65 and older were more likely to have one or more chronic health conditions such as hypertension (53%), arthritis (43%) and back problems (29%) than those aged 45 to 64 (24%, 20% and 25%, respectively)." ("Seniors," 2018, para.11).
Income	<ul style="list-style-type: none"> To be considered low-income in Canada (which you must be in order to receive additional benefits such as the Guaranteed Income Supplement as a senior) your maximum annual income cannot exceed \$18,600 as a single individual (E. and S. D. Canada, 2015).
Transportation	<ul style="list-style-type: none"> Most do not own a vehicle, and either rely on family and friends for mobility or public transportation to access food (Green-LaPierre et al., 2012).
Other relevant information	<ul style="list-style-type: none"> Research has suggested that single seniors have statistically been shown to be a vulnerable group when it comes to food insecurities (Green-LaPierre et al., 2012). Lack of awareness of their own food insecurities (Green-LaPierre et al., 2012). View utilizing a food bank as being resourceful (Green-LaPierre et al., 2012). Generational lens; having lived in more difficult financial situations in the past they don't perceive their current financial situation to be problematic (Green-LaPierre et al., 2012).

Appendix A
Behaviour Engineering Model

	Information	Resources	Incentives/Consequences
Environment	<ul style="list-style-type: none"> • Lack of feedback and support if they are on the right track when selecting food items. • Lack of access to information on food alternatives, such as plant-based substitutes and cost-conscious alternatives. 	<ul style="list-style-type: none"> • Lack of information material which are adapted to seniors (both digital and hardcopies). • Lack of grocery store orientation or difficulty maneuvering within the grocery store. • Inadequate labeling of products to facilitate grocery shopping or food selection. • Transportation to grocery store may be infrequent or difficult to access. 	<ul style="list-style-type: none"> • Lack of incentives to discover new foods. • Lack of incentive or recognition to stay within a defined food budget.
	Knowledge and Skills	Capacity	Motivation
Individual	<ul style="list-style-type: none"> • Knowledge of new foods is limited. • Able to plan weekly nutritious meals. • Able to develop a grocery list according to planned meals. • Able to create a weekly food budget. 	<ul style="list-style-type: none"> • Possible physical mobility issues. • Capacity to perform budget calculations on the spot might not be as quick due to advanced age. • Get overwhelmed or anxious easily when faced with making quick decisions in regard to food selection. 	<ul style="list-style-type: none"> • Indifferent to staying within a defined food budget. • Lack of confidence in being able to make healthy food related decisions. • Stress of staying within a budget.

Adapted from Gilbert's Behaviour Engineering Model (Stolovitch & Keeps, 2004).

Appendix B Cause Analysis Process Map

