

04/17/2023



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February 7, 2023

Mr. Scott Goyer, President/CEO  
YMCA of the Suncoast  
2469 Enterprise Rd.  
Clearwater, FL 33763

Dear Mr. Goyer:

Enclosed is the report for your Older Americans Act, Title IIID Disease Prevention & Health Promotion Program (#EA-022), specifically Enhanced Fitness. This monitoring visit was conducted on December 9<sup>th</sup> and 19<sup>th</sup>, 2022, by Jason Martino, Director of Planning and Terri Toner, Health & Wellness Coordinator.

This report is intended to provide an overview of the program's operations as of the date of the monitoring visit. The cooperation of Summer Cruff and trainers throughout the in-person visits was greatly appreciated.

All monitoring standards were adequately achieved.

The Monitors did make a recommendation in Standard #4.A regarding mandatory elements of marketing courses and in Standard #7.b regarding use and maintenance of individual course satisfaction surveys as well as the need for participant signatures on the primary Sign-In Sheet/Form. The AAAPP will follow-up on these during the next Annual Programmatic Monitoring visit.

Your commitment to serving the Health and Wellness needs of older adults in Pasco and Pinellas Counties is greatly appreciated. Your staff are commended for their quality and meaningful work throughout the year. Should you have a question or concern about the monitoring report, please do not hesitate to contact our office.

Sincerely,

A handwritten signature in black ink, appearing to read 'Ann Marie Winter'.

AnnMarie Winter (Feb 7, 2023 14:17 EST)

Ann Marie Winter  
Executive Director

Encl.

CC: Shannon Sprowls, VP of Healthy Living, YMCA of the Suncoast  
Summer Cruff, Director of Community Health Programs, YMCA of the Suncoast

## 2022 OAA IIID Disease Prevention & Health Promotion Programmatic Monitoring Standards

<b>Date of Visit(s):</b>	December 9 <sup>th</sup> and 19 <sup>th</sup> , 2022
<b>Date of Report:</b>	February 7, 2023
<b>Provider:</b>	YMCA of the Suncoast
<b>Monitor:</b>	Terri Toner, Health & Wellness Coordinator Jason Martino, Director of Planning
<b>Contract Review Period:</b>	January 01 through December 31, 2022
<b>Participants:</b>	Summer Cruff, Director of Community Health Programs, YMCA of the Suncoast Ginny Lisle, Wellness Director, Palm Harbor YMCA of the Suncoast Kevin Archibald, Enhanced Fitness Instructor, YMCA of the Suncoast

<b>Standard #1</b>	<b>Compliance Measure</b>
A staff member is designated to act as liaison and facilitator for health promotion programs between volunteer organizations and community agencies.	Achieves <input checked="" type="checkbox"/> Partially Achieves <input type="checkbox"/> Not Achieved <input type="checkbox"/> Not Applicable <input type="checkbox"/> Follow-Up Required <input type="checkbox"/>
<p><b>Description:</b> The most current organizational chart illustrated in the 2022 OAA Title IIID Grant Application denotes several key individuals working with the program in both Pinellas and Pasco Counties. The following positions are reflected: "President/CEO", "Senior VP/COO", "VP of Healthy Living", &amp; "Director of Community Health Programs". Generally, the Program's Director of Community Health Programs is the liaison between YMCA of the Suncoast and the AAAPP.</p> <p>To date, Summer Cruff, Director of Community Health Programs has been the AAAPP Health and Wellness Coordinator's primary contact for programmatic purposes.</p>	

Standard #2	Compliance Measure
<p>All programmatic reports are correct and submitted timely to AAAPP.</p> <ul style="list-style-type: none"> <li>a. DOEA Monthly Report</li> <li>b. AAAPP OAA Quarterly Report</li> <li>c. AAAPP Annual Volunteer Report</li> </ul>	<p>Achieves [X]  Partially Achieves [ ]  Not Achieved [ ]  Not Applicable [ ]  Follow-Up Required [ ]</p>
<p><b>Description:</b></p> <ul style="list-style-type: none"> <li>a. The Director of Community Health Programs submitted DOEA monthly reports throughout CY2022 punctually and reconcile easily to inputted CIRT data.</li> <li>b. The IIID Provider is required to submit a Quarterly report every 10<sup>th</sup> of January, April, July, and October. As of the date of this monitoring report, the provider has successfully submitted all and quarterly reports covering the 1<sup>st</sup> through 4<sup>th</sup> quarter, detailing their intent to meet client targeting, and budgetary proposals, per the approved service provider application.</li> <li>c. The Provider is required to submit a report on an annual basis including the number and type of service(s) where volunteers are utilized. This Volunteer Report is due in the current Calendar Year 2023 yet reflective of the previous.</li> </ul>	

Standard #3	Compliance Measure
<p>Highest Level Evidence-Based Programs meet program requirements:</p> <ul style="list-style-type: none"> <li>a. Marketing is appropriate and contains mandatory elements.</li> <li>b. Required licensure is current and on file.</li> <li>c. Credentials of program facilitators.</li> <li>d. Provider has procedures in place to ensure the fidelity of programs and procedures are followed.</li> <li>e. The Program utilizes appropriate DoEA Sign-In Sheets and accurately accounts for eligible clientele.</li> </ul>	<p>Achieves [X]  Partially Achieves [ ]  Not Achieved [ ]  Not Applicable [ ]  Follow-Up Required [ ]</p>
<p><b>Description:</b></p> <p>During CY2022, the YMCA of the Suncoast has conducted a total of (12) episodes of Enhanced Fitness, a highest level Evidenced Based Program within the entire PSA.</p> <p><b>The monitor reviewed a sample of the aforementioned 12 for compliance with requirements:</b></p> <ul style="list-style-type: none"> <li>1. Pinellas - Dates (05/16/22 - 09/01/22) - City of Clearwater Aging Well Center 25 Starters/23 Completers (92%)</li> <li>2. Pasco - Dates (04/11/22 - 07/29/22) - J.P. Gills YMCA-4 Starters/4 Completers (100%)</li> </ul>	



**a. Marketing is appropriate and contains mandatory elements:**

All (2) Evidenced Based (EB) events reviewed were appropriately marketed. Marketing contained the mandatory required information: "Event Title", "Date", "Time", "Length of Event", "Location, Date, and Address", "How to Register" & "Instructions on if Further Information is Needed". On both flyers, there was no end date of the course observed and should be included. The AAAPP recommends that the YMCA include the end date on each flyer used for course marketing purposes.

**b. Required licenses are on file:**

For the Enhanced Fitness program, the AAAPP is in receipt of the YMCA's acknowledgement of current license for the Enhanced Fitness Program.

**c. Credentials of program facilitators:**

Program records listed the trainers for the programs reviewed. Appropriate credentials were on file for these trainers.

**d. Provider has procedures in place to ensure the fidelity of programs:**

To ensure program fidelity, the provider has established and uses the following forms for all EB Events:

1. Prior to the provider's monthly report being submitted to the AAAPP for reconciliation, the YMCA attests to reviewing the fidelity of each completed class and for purposes of requesting reimbursement.
2. Additionally, Director of Community Health Programs completes a final fidelity review before processing the monthly report for submission to the DOEA Contract Manager.

The records reviewed for the (2) courses verified:

1. All classes met the standards for minimum and maximum number of participants.
2. All classes and records complied with DOEA standards.
3. All required client forms were completed and on file.
4. All clients met eligibility requirements.
5. The correct number of program participants and completers was reported in the Provider's monthly report.
6. The programs were billed correctly in CIRT.

**e. The Program utilizes DOEA Sign-In Sheets and accurately accounts for eligible clientele:**

In review of the (2) courses, it was observed that the provider is utilizing the appropriate and applicable sign-in sheets.

Standard #4	Compliance Measure
The Program records/inputs data appropriately <ul style="list-style-type: none"> <li>a. Services are accurately recorded in E-CIRTS.</li> <li>b. Information is entered into the NCOA CHA Community online data system when applicable.</li> </ul>	Achieves [X] Partially Achieves [ ] Not Achieved [ ] Not Applicable [ ] Follow-Up Required [ ]
<b>Description:</b> a. E-CIRTS Data on a monthly basis is inputted accurately and reflects the full completion of Evidenced Based (EB) classes and units. b. Not Applicable	

Standard #5	Compliance Measure
Provider is serving or has a plan to serve the number of proposed units as identified in the service provider application.	Achieves [X] Partially Achieves [ ] Not Achieved [ ] Not Applicable [ ] Follow-Up Required [ ]
<b>Description:</b>  The Provider has served the proposed number of Units for CY2022. We appreciate the efforts made by the provider on being able to fully execute and expend their budget in delivery of the Enhanced Fitness Classes.	

Standard #6	Compliance Measure
The provider establishes collaborations and partnerships with other agencies to assist with Evidence Based Disease Prevention and Health Promotion activities. Documentation is maintained for partnerships listed in the DOEA Report.	Achieves [X] Partially Achieves [ ] Not Achieved [ ] Not Applicable [ ] Follow-Up Required [ ]
<b>Description:</b>  The Monitor reviewed back-up documentation regarding partnerships the Program has created and/or maintained. Not all partnerships have formal agreements or MOUs/MOAs. The review of two distinct partnerships occurred and the correspondence reflecting an agreement is acceptable. All documentation is maintained by the YMCA of the Suncoast for partnerships listed in the monthly DOEA Report. <b>Partnerships reviewed were:</b> <ol style="list-style-type: none"> <li>1. Morton Plant Mease Fitness Center - Pinellas County</li> <li>2. City of Clearwater Aging Well Center – Pinellas County</li> </ol>	

Standard #7	Compliance Measure
<p>Consumer satisfaction and effective delivery of service has been verified through:</p> <p>a. Client Interview</p> <p>b. Review of consumer satisfaction surveys. (Evaluations and/or pre and post surveys)</p>	<p>Achieves [ ]</p> <p>Partially Achieves [X]</p> <p>Not Achieved [ ]</p> <p>Not Applicable [ ]</p> <p>Follow-Up Required [ ]</p>
<p><b>Description:</b></p> <p>a. The Monitor did have the opportunity to speak to two participants and gathered their feedback on the course they participated in. <b>Please see Attachment I.</b></p> <p>b. The provider does collect Satisfaction Surveys for quality assurance purposes, however, due to how they were managed, the YMCA was not able to retrieve the surveys specifically for the classes monitored in Standard # 4. The AAAPP recommends that the YMCA create a system where surveys are reviewed consistently and analyzed for quality assurance purposes, and filed appropriately, per EB Course. It is also recommended that the provider create A Pre-checklist, including a signature area for attendees on the sign-in sheets, as well as an Evaluation Class survey.</p>	

Standard #8	Compliance Measure
<p>Verify that all corrective actions and follow-up have been appropriate, adequately, and timely implemented.</p>	<p>Achieves [ ]</p> <p>Partially Achieves [ ]</p> <p>Not Achieved [ ]</p> <p>Not Applicable [X]</p> <p>Follow-Up Required [ ]</p>
<p><b>Description:</b></p> <p>Historically, the provider has no corrective actions or need for follow-up.</p>	



Standard #9	Compliance Measure
Service observation indicates appropriateness in the manner it is being conducted. a. Provider follows the fidelity of the program. b. Provision of space allotted for class was appropriate. c. Participants were allowed to engage and participate.	Achieves [X] Partially Achieves [ ] Not Achieved [ ] Not Applicable [ ] Follow-Up Required [ ]
<b>Description:</b> a. The monitor observed an “Enhanced Fitness” class and completed a EB Class Fidelity Checklist. The monitor met with both the Wellness Director, Ginny Lisle as well as the Class Instructor, Kevin Archibald. Please see “Fidelity Checklist for Evidenced Base Classes” accompanying this report as <b>Attachment II</b> . b. The space observed was appropriate. c. The monitor observed promotion of and consistent interaction by each of the participants.	

Standard #10	Compliance Measure
Participant completion analysis. a. Provider has a plan to achieve appropriate participant class completion percentages b. Provider demonstrates effectiveness regarding participant class completion percentages	Achieves [X] Partially Achieves [ ] Not Achieved [ ] Not Applicable [ ] Follow-Up Required [ ]
<b>Description:</b> a. The provider does have a plan to achieve appropriate participant class completion percentages. b. Based on review of the Annualized monthly report and a tabulation of the entire year to date, the provider has achieved an overall excellent completer rate of 89.13%. By comparison, the required completer rate of the Enhanced Fitness Program is 40%. The AAAPP appreciates the attention given to participants for purposes of maintaining their ability to achieve the full benefits of the course.	

<b>Completed By:</b>	Terri Toner, Health & Wellness Coordinator
<b>Date:</b>	February 07, 2023

**OAA CLIENT INTERVIEW QUESTIONNAIRE**

**AGENCY:** YMCA of the Suncoast

**SERVICE:** Older Americans Act (OAA), Title IIID Health Promotion & Disease Prevention Services

**How did you hear about the service you are currently receiving?**

It was presented during COVID.

**How long have you been receiving services from this agency?**

Since 2017

**Do you have a particular contact person you speak with about services?**

Joyce, another instructor

**Do you know how to contact him/her?**

yes

**Have you ever had to make a complaint about the services you receive or the person providing the services?** No, love the class

**What is specifically being done for you?**

Exercise for poor joints to be better

**Do you feel this service allows you to remain home independently?**

Yes

**Do you receive any other type of assistance?** No

**do you rate the quality of the service you are currently receiving and/or the agency providing it?**

Excellent ☒ Good ☐ Fair ☐ Poor ☐

**Why?** Kevin is the best teacher, Joyce is wonderful. Both tailor the class to our needs.

**If you could change anything about the service you receive or the agency providing it, what would you change?** Saturday as well.

**Interviewer observations:**

**Submitted by:** Class Participant, Greater Palm Harbor, YMCA location

**Date:** 12/9/22





**Attachment II.**

**Fidelity Checklist for Pasco & Pinellas County OAA Title IIID Evidenced Based Classes**

<b>Date Fidelity Monitored:</b>	12/9/22
<b>Course Start Date:</b>	4/8/22
<b>Name of Instructor(s):</b>	Kevin Archibald
<b>Location of Course:</b>	Greater Palm Harbor YMCA
<b>Fidelity Monitored by:</b>	Terri Toner

<b>Section 1. (General)</b>			
	<b>Yes</b>	<b>No</b>	<b>Comments</b>
<b>1.</b> Is a sign-in sheet being maintained for the course?	X		Electronic sign-in that conveys to hard copy
<b>2.</b> Did all participants at the start of the class complete course specific required paperwork?	X		

<b>Section 2. (Facility/Venue/Environment)</b>			
	<b>Yes</b>	<b>No</b>	<b>Comments</b>
<b>1.</b> Does the space provide accommodate the class in total, comfortably?	X		
<b>2.</b> Does the space provided have accessible restrooms?	X		
<b>3.</b> Was the space adequately lighted?	X		
<b>4.</b> Was the space quiet so class instruction could be easily heard?	X		

<b>Section 3. (Class Fidelity)</b>			
	<b>Yes</b>	<b>No</b>	<b>Comments</b>
<b>1.</b> Did the instructors complete required training and obtain credentials?	X		
<b>2.</b> Was the appropriate amount of instructors' present?	X		

3.	Did the instructors start the class timely?	X		
4.	Did instructors follow the curriculum per required fidelity?	X		
5.	Did instructors have appropriate class materials for participants, if applicable?			Not Applicable
6.	Was the class conducted in the required time interval?	X		
7.	Were participants encouraged to participate, interact in meaningfully?	X		

Reviewer's Additional Comments	
<p>7 Attendees at this class.</p> <p>Regarding: Rate of Perceived Exertion-Cardiovascular Test</p> <p>Instructor paused at the end of the cardiovascular portion for attendees to check their own "Perceived Rate of Exertion" however there was no reference chart for people to know how they rated.</p> <p>Suggestion given to have a chart put up in the classroom setting.</p>	