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January 16, 2024

Jason Martino, Director of Planning/Emergency Coordinating Officer
Area Agency on Aging of Pasco-Pinellas, Inc.
9549 Koger Blvd.
St. Petersburg, FL 33702

Dear Jason,

Enclosed is the 2023 programmatic monitoring report for the IIID Disease Prevention & Health Promotion Program.

The purpose of monitoring is to perform a programmatic review of operations and standards. The monitoring objective is to ensure programs, policies and practices comply with state and federal rules and meet standards of good governance and practices.

The 2023 monitoring produced no findings and no recommendations. The cooperation of your staff during the desk review and monitoring process was appreciated.

Sincerely,

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

Ann Marie Winter
Executive Director

Enclosure

Cc: Kerry Marsalek, COO
Terri Toner, Health and Wellness Coordinator

2023 OAA IID Disease Prevention & Health Promotion Programmatic Monitoring Standards

Date of Visit(s):	December 18, 2023
Date of Report:	January 16, 2024
Provider:	AAAPP
Monitor:	Michelle Tavares, AAAPP OAA Program Manager
Contract Review Period:	January 1, 2023 – December 31, 2023
Participants:	Terri Toner, Health & Wellness Coordinator Jason Martino, Director of Planning/Emergency Coordinating Officer

Standard #1	Compliance Measure
A staff member is designated to act as liaison and facilitator for health promotion programs between volunteer organizations and community agencies.	Achieves [x] Partially Achieves [] Not Achieved [] Not Applicable [] Follow-Up Required []
Description: Jason Martino, Director of Planning and Terri Toner, AAAPP Health & Wellness Coordinator are the designated liaisons and facilitators for the OAA IID Disease Prevention and Health Promotion Programs.	

Standard #2	Compliance Measure
All programmatic reports are correct and submitted timely to AAAPP. a. DOEA Monthly Report b. AAAPP OAA Quarterly Report c. AAAPP Quarterly Volunteer Report	Achieves [x] Partially Achieves [] Not Achieved [] Not Applicable [] Follow-Up Required []
Description: a. The Director of IID programs submitted DOEA monthly reports throughout CY2023. Reports are reconciled with eCIRTS data entries. b. N/A c. N/A	

Standard #3	Compliance Measure
<p>Highest Level Evidence-Based Programs meet program requirements:</p> <ul style="list-style-type: none"> a. Marketing is appropriate and contains mandatory elements. b. Required licensure is current and on file. c. Credentials of program facilitators. d. Provider has procedures in place to ensure the fidelity of programs and procedures are followed. e. The Program utilizes appropriate DOEA Sign-In Sheets and accurately accounts for eligible clientele. 	<p>Achieves [x] Partially Achieves [] Not Achieved [] Not Applicable [] Follow-Up Required []</p>
<p>Description: <i>Chronic Disease Self-Management</i> and <i>A Matter of Balance</i> programs were selected for review. Class materials selected for review: <i>Chronic Disease Self-Management</i> 10/30/23 – 12/4/23, <i>A Matter of Balance</i> 10/23/23 – 11/16/23.</p> <ul style="list-style-type: none"> a. Marketing materials reviewed are appropriate and included mandatory information of event titles, start and end dates, times, length of events, locations, how to register, and instructions on how to obtain further information if needed. Materials also included marketing requirements as outlined in the programs license agreements. b. Licensed Agreements were reviewed for both programs. Both agreements are current. c. Credentials for facilitators of both programs were reviewed. All facilitators completed the required training for each program as evidenced through receipt of training certificates. d. Fidelity Monitoring Policies and Procedures are in place and followed. Policy and Procedure effective 1/1/16, reviewed annually, with last revision on 11/1/23. e. Sign In sheets for each class were reviewed. Appropriate DOEA sign in sheets are utilized and accurately accounts for eligible clientele. 	

Standard #4	Compliance Measure
<p>The Program records/inputs data appropriately</p> <ul style="list-style-type: none"> a. Services are accurately recorded in eCIRTS. b. Information is entered into the NCOA CHA Community online data system when applicable. 	<p>Achieves [x] Partially Achieves [] Not Achieved [] Not Applicable [] Follow-Up Required []</p>
<p>Description:</p> <ul style="list-style-type: none"> a. Services Reported by Program and Service eCIRTS report reviewed for <i>Chronic Disease Self-Management</i> 10/30/23 – 12/4/23, <i>A Matter of Balance</i> 10/23/23 – 11/16/23. Services were accurately recorded in eCIRTS and in accordance with DOEA Programs and Services Handbook, Appendix A – Service Descriptions. b. N/A 	

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 <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"/>
Description: In CY 2023, a total of forty-one (41) IIID Disease Prevention & Health Promotion programs were completed. Twelve (12) SAVVY, twenty-six (26) AMOB, and three (3) CDSMP. Eight (8) programs were held in Pasco county, thirty-three (33) were held in Pinellas county.	

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 <input type="checkbox"/> Partially Achieves <input type="checkbox"/> Not Achieved <input type="checkbox"/> Not Applicable <input checked="" type="checkbox"/> Follow-Up Required <input type="checkbox"/>
Description: DOEA approved AAAPP on 4/20/2022 with a Direct Service Waiver to provide IIID program services.	

Standard #7	Compliance Measure
Consumer satisfaction and effective delivery of service has been verified through: <ol style="list-style-type: none"> a. Client Interview b. Review of consumer satisfaction surveys. (Evaluations and/or pre and post surveys) 	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"/>
Description: <ol style="list-style-type: none"> a. Monitor observed and had discussions with clients in attendance at the <i>Chronic Disease Self-Management</i> class on 11/20/23. Clients reported they were made aware of the classes through a flier distributed through the community they reside in. They reported that they enjoyed attending the classes and found classes to be beneficial. Clients felt that the classes helped to manage chronic diseases and remain independent with their care. b. Consumer satisfaction Surveys (pre and post surveys) were reviewed for classes <i>Chronic Disease Self-Management</i> 10/30/23 – 12/4/23, <i>A Matter of Balance</i> 10/23/23 – 11/16/23. Surveys indicate overall consumer satisfaction and effective service delivery of the programs. Comments for the <i>Chronic Disease Self-Management</i> class included, “ I made lifestyle 	

changes, and I am continuing with these changes,” “Great tools for dealing with pain”, and “I set daily goals, and I am keeping up with exercise”. Comments for *A Matter of Balance* class included, “ I am more aware of my surroundings in public”, “I take my time and don’t rush to phone and doorbell”, “I am conscience of walking paths like curbs, ramps, and stairs”.

Standard #8	Compliance Measure
Verify that all corrective actions and follow-up have been appropriate, adequately, and timely implemented.	Achieves [] Partially Achieves [] Not Achieved [] Not Applicable [x] Follow-Up Required []
Description:	

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 []
Description: a. <i>Chronic Disease Self-Management</i> class was observed by monitor on November 20,2023. Fidelity Checklist completed, see attachment I. Pre and Post class checklists are completed by class leaders to also ensure fidelity of the programs. Observation and completion of the checklists indicate that the provider follows the fidelity of the program. b. Mission Hills community room was utilized for the <i>Chronic Disease Self-Management</i> class and was appropriate. c. Leaders encouraged participants to engage. Participants were observed to actively engage in the class and with one another. See comments in attachment I.	

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 []
Description:	

- a. The provider has a plan has a plan to achieve the appropriate participant class completion percentages.
- b. *Chronic Disease Self-Management* held 10/30/23 – 12/4/23 had a 77% completion rate. *Matter of Balance* held 10/23/23 – 11/16/23 had a 100% completion rate. Overall CY2023 completion rate for all direct service programs was 79%.

Completed By:	<i>Michelle Tanoue</i>
Date:	1/16/2024



Attachment I.

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

Date Fidelity Monitored:	November 20, 2023
Course Start Date:	October 30, 2023
Name of Instructor(s):	Leader 1- Bonnie Kerr Leader 2- Wendy Buck
Location of Course:	Mission Hills, 455 Mission Hills Blvd, Clearwater, FL 33759 (Pinellas County)
Fidelity Monitored by:	Michelle Tavares, AAAPP OAA Program Manager

Section 1. (General)				
		Yes	No	Comments
1.	Is a sign-in sheet being maintained for the course?	x		
2.	Did all participants at the start of the class complete course specific required paperwork?	x		Classes started on October 30, 2023. Course specific paperwork reviewed on December 18, 2023. Paperwork completed and dated by all participants on October 30, 2023.

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

Section 3. (Class Fidelity)				
		Yes	No	Comments
1.	Did the instructors complete required training and obtain credentials?	x		Training certificates reviewed and on file for both leaders.

2.	Was the appropriate amount of instructors' present?	x		
3.	Did the instructors start & end 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?	x		
6.	Was the class conducted in the required time interval?	x		
7.	Were participants encouraged to participate, interact in meaningfully?	x		
8.	Did not give medical advice, referred to personal physician	x		
9.	Leader 1-Good Personal Skills?	x		
10.	Leader 2-Good Personal Skills?	x		
11.	Break Time Given?	x		

Reviewer's Additional Comments
<p>Participants were actively engaged in the class. They interacted with the leaders and one another. They participated in breathing exercises, reviewed food labels, practiced exercises, worked on problem solving and communication skills. They set action plans and encouraged one another to set goals for better health management of their chronic diseases. They asked questions which were answered appropriately by both leaders. Participants appeared to benefit from the class as evidenced by their positive comments and feedback.</p>

2023 OAA IID Monitoring Report

Final Audit Report

2024-01-16

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