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May 11, 2022

Ms. Angela McAuley
Alzheimer's Association – Florida Gulf Coast Chapter
14010 Roosevelt Boulevard
Suite 709
Clearwater, Florida 33762

Dear Ms. McAuley,

Enclosed is the Annual Programmatic Monitoring report for the Alzheimer's Association, Florida Gulf Coast Chapter, Brain Bus program for the contract year July 1, 2021 - June 30, 2022.

The purpose of monitoring is to perform a programmatic review of operations and to verify that corrective actions resulting from previous monitoring reviews have been implemented. The monitoring objective is to ensure programs, policies, and practices comply with state and federal rules and meet standards of good governance and practices.

This year's monitoring resulted in one recommendation. A written response to the recommendation is required. Please submit by May 18, 2022. The cooperation of your staff throughout the monitoring process was appreciated. We look forward to our continued partnership serving those impacted by Alzheimer's disease and related memory disorders throughout Florida.

Sincerely,

A handwritten signature in black ink, appearing to read 'Ann Marie Winter', is positioned above a horizontal line.

AnnMarie Winter (May 11, 2022 13:35 EDT)

Ann Marie Winter
Executive Director

Enclosures

cc: Julie Shatzer, Vice President of Programs
Kasia Sherwin, Statewide Grants Manager



Area Agency on Aging
of Pasco - Pinellas, Inc.

**Area Agency on Aging of Pasco-Pinellas, Inc.
2021-2022 Brain Bus Monitoring**

PROVIDER: Alzheimer's Disease and Related Disorders Association Inc., d.b.a Florida Gulf Coast Chapter

DATE(S) OF VISIT: May 6, 2022

PARTICIPANT(S): Julie Shatzer, Alzheimer's Association, Florida Gulf Coast Chapter, Vice President of Programs
Kasia Sherwin, Alzheimer's Association, Florida Gulf Coast Chapter, Statewide Grants Manager
Kristina Jalazo, AAAPP, Director of Program Accountability
Christine Didion, AAAPP, Program Manager

MONITOR(S): Christine Didion, Program Manager

FUNDING PERIOD: July 1, 2021 – June 30, 2022

SITES VISITED: Monitoring completed as a desk review

REPORT SUMMARY

(This section provides an overview of minor recommendations, significant, findings and positive/noteworthy activities recognized during the monitoring period. Details are outlined in the Contract Compliance and Service Delivery section of the report).

I. Recommendations for Improvement

(Recommendations require a written response from the provider)

- When submitting monthly reports, if corrections to previously reported information exists, please provide documentation on where corrections are made and justification for change in information.

II. Findings/Corrective Action

(Findings result in a formal corrective action plan)

- None.

CONTRACT COMPLIANCE AND SERVICE DELIVERY

Each standard will note at least one of the following:

- *Achieved*
- *Partially Achieved*
- *Not Achieved*
- *Not Applicable*
- *Follow-Up Required*

Standard #1 – Previous Programmatic Monitoring

All issues from the previous programmatic monitoring have been resolved within an established and reasonable timeframe.

Response: Achieved.

There are no outstanding items from monitoring completed for the 2020-2021 contract year. No findings were documented, and no corrective action was necessary.

Standard #2 – Proposed Stops

- A) Provider submits a list of proposed stops to the Area Agency on Aging of Pasco-Pinellas.*
- B) Provider notifies the appropriate Area Agencies on Aging in which each county falls at least fifteen (15) days in advance regarding dates, times, and locations of the proposed stops in each county.*

Response: Partially achieved.

- A. Due to COVID-19, Provider has completed a mixture of virtual and in-person stops this contract year. Provider indicates they have resumed in-person stops April 1, 2022, following CDC, state, and local COVID-19 safety guidance. Provider is reminded that proposed stops must be submitted to the Area Agency on Aging of Pasco-Pinellas (AAAPP). Provider will begin sending a list of the next month's proposed stops to AAAPP with submission of monthly report. Provider maintains an updated listing of proposed stops on the Alzheimer's Association website.
- B. Provider indicates they notified the appropriate Area Agency on Aging of stops in designated counties in advance by sending calendar invites to the appropriate staff person. Provider will resume alerting the correct Area Agency on Aging of the dates, time, and location of the proposed stop now that in-person stops are resuming. Provider included context that relationships with the Area Agencies on Aging throughout the state have become stronger through the AlzStars program of which all eleven Area Agencies on Aging are participating. Provider recognizes the usefulness of partnering with the Area Agencies on Aging, especially those that serve rural counties, to advertise for Brain Bus programming, both in-person and virtually.

Standard #3 – Performance Measures

- A. *Provider ensures materials concerning health concerns for people at higher risk for developing Alzheimer’s disease are made available.*
- B. *Provider demonstrates progress toward proposed goals including number of stops per county, units of memory education, care coordination, and information services, and number of clients served.*
 - i. *For the months of **September 2021 and December 2021**, provider has participant listings and advertisements for Brain Bus informational and educational sessions held virtually and in-person that correspond with submitted monthly Program Outcomes Report.*
 - ii. *Provider demonstrates targeted served clients are from underserved, isolated, and rural communities.*

Response: Achieved.

- A. Provider utilizes educational material, for both in-person and virtual Brain Bus events, which correspond to addressing health concerns for people living with Alzheimer’s disease or a related dementia (ADRD) and risks of developing ADRD in the future. Submitted educational material made available to participants at in-person Brain Bus events included early detection and warning signs of ADRD, healthy living information to reduce the risk of ADRD, and a variety of handouts with information on supportive programs offered by the Alzheimer’s Association, Memory Disorder Clinics, and the Area Agencies on Aging through the Elder Helpline. All handouts are available in both English and Spanish. Monitored virtual stops provide a variety of information related to risk factors of ADRD, warning signs of ADRD, the benefits of early detection, steps to receiving an accurate diagnosis, current research trends related to memory disorders, and best practices for caring for someone with the disease. Virtual Brain Bus events provided this contract year, to date, include 10 Warning Signs of Alzheimer’s, Healthy Living for your Brain and Body: Tips from the Latest Research, Understanding Alzheimer’s and Dementia, COVID-19 and Caregiving, and New Advances in Alzheimer’s Treatment.
- B. Provider submits monthly Outcome Reports to AAAPP to demonstrate progress toward identified goal of providing information and education to two thousand (2,000) individuals at three hundred (300) Brain Bus in-person and virtual stops. In the 2020-2021 contract year, provider completed 341 units of Memory Education reaching 8,387 individuals, far surpassing 2020-2021 contract year goals. Most recent Outcome Report, covering July 2021-March 2022, demonstrates provider has completed 272 units of Memory Education, Care Consultation, and Information Services reaching 5,756 individuals this contract year. Provider anticipates meeting this goal by the end of the contract year. Provider discussed plan to attempt to complete tours throughout Florida to target all rural counties during the last quarter of this contract year.
 - i. Provider submitted participant listing and sign-in sheets for both in-person and virtual stops completed in September 2021 and December 2021. Participant

listings for twenty (20) units of Memory Education and sign-in sheets for thirty-on (31) units of Information Services were present and matched the reported total of 811 individuals in the month of September. Submitted participant listings and sign-in sheets for December 2021 were present for the reported fifteen (15) units of Information Services and five (5) units of Memory Education. Sign-in sheets totaled 193 individuals served in December 2021. Most recent outcome report indicates 171 individuals were served. Provider confirmed the submitted sign-in sheets detailing 193 individuals was correct. Submitted report in the month of May was updated to reflect this corrected number. No further corrections required.

- ii. Based on monitored sign-in sheets and participant listings, Provider gathers demographic information from participants including their zip code, gender, and ethnicity to ensure that members from isolated, minority, and rural communities are served. Further, provider submitted information that groups presented to this contract year include LGBTQIA+ groups and Provider participated in an event supporting transgender individuals. Provider makes all educational materials available in both English and Spanish and provides several of their Memory Education sessions in Spanish. Provider recognizes the challenges of targeting rural counties and advertising to community members about Brain Bus stops in these areas. Provider demonstrated that they work with local community groups and organizations to target as many isolated and rural participants as possible. Groups include religious groups and places of worship, alliance organizations, women's groups, and the Area Agencies on Aging serving those communities. Provider aims to complete Brain Bus tours, in this last quarter, where they will complete numerous stops throughout rural counties to reach as many underserved individuals as possible.

Standard #4 – Programmatic Reporting

All required programmatic reports are accurate and submitted in a timely manner:

- A. *Surplus/Deficit Reports are submitted monthly.*
- B. *Program Outcomes Report are submitted monthly.*
- C. *Program Highlights are submitted annually.*

Response: Achieved.

- A. Provider submits a monthly programmatic report, which demonstrates current expenditures and amount of contract left to spend. Provider works closely with the AAAPP on any potential surplus or deficits and submits requests for budget amendments with appropriate justification to support appropriate program spending.
- B. Program Outcomes Reports are submitted timely. Provider has submitted monthly reports with revised information from previously submitted reports. When revisions are identified for previously reported information, it is recommended that provider submits

documentation on where corrections are made and justification for change in information.

- C. Provider submitted three narratives highlighting success stories that occurred in the 2021-2022 contract year, to date. Two of the narratives discussed how Brain Bus events provided much needed education and resources to caregivers who were new to caring for a loved one living with ADRD and finding the process to access support and care stressful. Both attendees were provided with information on resources and guidance on navigating healthcare needs. Additionally, Provider submitted a success story of a Brain Bus stop at a transgender event. Provider highlighted how this event reached individuals in an underserved community and created a partnership with a new nonprofit organization serving transgender individuals.

Standard #5 – Grievances, Complaints, and Incidents

Consumer satisfaction and effective delivery of service has been verified through:

- A. *Provider has approved grievance policies, procedures and logs, including documentation of the service provider's response and resolution.*
- B. *Provider has approved complaint policies and procedures.*
- C. *Provider has approved incident policies, procedures, and logs, including documentation of the service provider response and resolution.*
- D. *Provider has approved Conflict of Interest policies and procedures.*

Response: Achieved.

- A.) Provider submitted grievance procedure and log. No grievances were noted, to date, for the 2021-2022 contract year.
- B.) Provider submitted complaint policies and procedures and log. No complaints were noted, to date, for the 2021-2022 contract year.
- C.) Provider submitted incident policies, procedure, and log. No incidents were noted, to date, for the 2021-2022 contract year.
- D.) Provider submitted Conflict of Interest policies and procedures.

Standard #6 – Background Screening

Provider completes Level II Background Screening as necessary.

Response: Achieved.

Provider is in compliance with Level II background screening. Provider submits yearly Affidavit of Compliance.

Signatures:

Christina Didion

Program Manager

05/11/2022

Date

Kristina Galazo

Director of Program Accountability

05/11/2022

Date