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January 8<sup>th</sup>, 2025

Mr. Christian J. Engle, President/CEO  
YMCA of the Suncoast  
2469 Enterprise Rd.  
Clearwater, FL 33763

Dear Mr. Engle,

Enclosed is the 2024 report for the Older Americans Act, Title IIID Disease Prevention & Health Promotion Program, specifically Enhance Fitness. This in-person class monitoring visit and desk review was conducted on December 4<sup>th</sup>, 2024, by Georgie Darrah, Assistant Director of Programs, and Stephanie Young, Health and Wellness Specialist. In addition to a desk review, all submitted documentation was reviewed in November through December of 2024.

The purpose of monitoring is to perform a programmatic review of operations as of the dates of the monitoring visit. The objective of monitoring is to ensure programs, policies and practices comply with state and federal rules and meet standards of good governance and practices. The cooperation of Kristine Schneider, Summer Cruff, and teacher, Linda Gillie throughout the monitoring was greatly appreciated.

All monitoring standards were adequately achieved.

The monitors did make two recommendations, on Standard #6 and standard #7.b. Recommendations require a written response. Please submit written response within ten (10) business days of receipt of this monitoring report.

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 outstanding and impactful work throughout the year. If you have any questions or concerns about this monitoring report, please do not hesitate to contact our office.

Sincerely,

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

Ann Marie Winter  
Executive Director

## 2024 OAA IIID Disease Prevention & Health Promotion Programmatic Monitoring Standards

<b>Date of Visit(s):</b>	12/4/2024
<b>Date of Report:</b>	12/23/2024
<b>Provider:</b>	YMCA
<b>Monitor:</b>	Terri Toner, Health & Wellness Coordinator Georgie Darrah, Assistant Director of Programs Stephanie Young, Health & Wellness Specialist
<b>Contract Review Period:</b>	January 01, 2024, through December 31, 2024
<b>Participants:</b>	Summer Cruff, Kristine Schneider

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 <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 2024 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>On November 7<sup>th</sup>, 2024, an email from Summer Cruff, V.P. of Healthy Living, was received to update the position of Director of Community Health Programs to Kristine Schneider. Ms. Schneider and Ms. Cruff are the Health and Wellness Staff's primary contact for programmatic purposes. The program has appropriate levels of staff and supervision.</p>	

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 Annual Volunteer Report	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> a. The Director of Community Health Programs submitted DOEA monthly reports throughout CY2024 punctually.</p>	

- b. The IID Provider, YMCA, is required to submit a Quarterly report every 10<sup>th</sup> of January, April, July, and October. As of this monitoring report's date, provider has submitted all quarterly reports covering the 1st through 3rd quarter, detailing their intent to meet client targeting and budgetary proposals, per the approved service provider application.
- c. The YMCA submitted their 2023 Annual Volunteer Report in a timely manner. Provider will submit the Annual Volunteer Report in January of 2025 covering CY2024.

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 <input checked="" type="checkbox"/></p> <p>Partially Achieves <input type="checkbox"/></p> <p>Not Achieved <input type="checkbox"/></p> <p>Not Applicable <input type="checkbox"/></p> <p>Follow-Up Required <input type="checkbox"/></p>
<p><b>Description:</b>            During CY2024 and as of the date of this report, the YMCA of the Suncoast has conducted a total of 12 Episodes of Enhance Fitness. They concluded the remaining 2 classes in Pasco as of December 20<sup>th</sup>, 2024.            The monitor reviewed a sample of the aforementioned for compliance with requirements:            Classes Selected:</p> <ol style="list-style-type: none"> <li>1. Pinellas – EnhanceFitness – Dates (01/29/24-05/17/24) - City of Clearwater – Countryside Recreation Center</li> <li>2. Pasco – EnhanceFitness – Dates (01/03/24-05/03/24) - J.P. Gills YMCA</li> </ol> <p><b>a. Marketing is appropriate and contains mandatory elements.</b>            All (2) evidence-based (EB) classes reviewed were appropriately marketed. Marketing contained the mandatory information: “Event Title”, “Date”, “Time”, “Length of Event”, “Location”, &amp; “Instructions on if Further information is needed.” On both flyers, there were no directions on how to register for the course.</p> <p><b>b. Required licensure is current and on file.</b>            The AAAPP is in receipt of the verification letter from Sound Generations, confirming YMCA’s EnhanceFitness licensees are in good standing as of 7/2/24.</p> <p><b>c. Credentials of program facilitators.</b>            Appropriate credentials were verified through AAAPP’s receipt of Official Training Transcripts for all EnhanceFitness instructors.</p> <p><b>d. Provider has procedures in place to ensure the fidelity of programs and procedures are followed.</b>            To ensure program fidelity, the provider has established and uses the following forms for all EB classes:</p>	



1. Before the provider's monthly report is submitted to the AAAPP for reconciliation, the YMCA attests to reviewing the fidelity of each completed class and requesting reimbursement.
2. Additionally, the 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 the maximum number of participants.
2. All classes and records complied with DOEA standards.
3. All the required client forms were completed and on file.
4. All clients met eligibility requirements.
5. The number of program participants and completers matched the Provider's monthly and post-checklists for the (2) courses reviewed.
6. The programs were billed correctly in eCIRTS.

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

In review of the (2) courses, the provider utilizes a first day sign-in sheet with participant names and signatures in addition to a daily online sign-in sheet conveyed to paper in compliance with DOEA standards.

Standard #4	Compliance Measure
The Program records/inputs data appropriately <ol style="list-style-type: none"> <li>a. Services are accurately recorded in eCIRTS.</li> <li>b. Information is entered into the NCOA CHA Community online data system when applicable.</li> </ol>	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"/>
<b>Description:</b> <ol style="list-style-type: none"> <li>a. Provider accurately input E-CIRTS data monthly to reflect the full completion of evidence-based classes and units.</li> <li>b. Not Applicable</li> </ol>	

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"/>
<b>Description:</b> The provider has served the proposed 6 units in Pinellas, and 6 units in Pasco for CY2024 as of 12/20/24.	

Standard #6	Compliance Measure
The provider establishes collaborations and partnerships with other agencies to assist with Evidence Based Disease Prevention and	Achieves <input type="checkbox"/> Partially Achieves <input checked="" type="checkbox"/>

Health Promotion activities. Documentation is maintained for partnerships listed in the DOEA Report.	Not Achieved <input type="checkbox"/> Not Applicable <input type="checkbox"/> Follow-Up Required <input type="checkbox"/>
<b>Description:</b> The Provider submitted the Use of Non-YMCA Partner Agreement for previous year 2023 that establishes their partnership with the City of Clearwater to conduct Enhance Fitness classes at the Aging Well Center at the Long Center, Countryside Recreation Complex, and Morningside Recreation Complex. All documentation is maintained by the YMCA of the Suncoast for this partnership and is reflected accurately in the monthly DOEA reports. The AAAPP recommends the YMCA review and update the current Use of Non-YMCA Partner Agreement to ensure its continued validity and compliance for 2025.	

<b>Standard #7</b>	<b>Compliance Measure</b>
Consumer satisfaction and effective delivery of service has been verified through: 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"/>
<b>Description:</b> a. The monitors did have the opportunity to speak to 1 participant and gather feedback regarding their course participation. b. The Provider does collect satisfaction surveys for quality assurance purposes. The AAAPP recommends that the YMCA consistently reviews the surveys for completeness and quality assurance purposes. They should ensure the class site name and time are properly filled in by the office and participants are noting which instructor is being reviewed.	

<b>Standard #8</b>	<b>Compliance Measure</b>
Verify that all corrective actions and follow-up have been appropriate, adequately and timely implemented.	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"/>
<b>Description:</b> The provider had no corrective actions or need for follow-up.	

<b>Standard #9</b>	<b>Compliance Measure</b>
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 <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></p> <ul style="list-style-type: none"> <li>a. The monitors observed an Enhance Fitness Class and completed an EB Fidelity Checklist. The monitors met with the class instructor, Linda Gillie. Please see "Fidelity Checklist for Evidence Based Classes" accompanying this report. To also maintain fidelity, the Provider utilizes pre- and post-class checklists, a physical first-class sign-in sheet with signatures, and the program evaluation form at the culmination of the program.</li> <li>b. The space observed was appropriate for safe class participation.</li> <li>c. The monitors observed consistent participation from the attendees and encouragement from the instructor.</li> </ul>
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Standard #10	Compliance Measure
<p>Participant completion analysis.</p> <ul style="list-style-type: none"> <li>a. Provider has a plan to achieve appropriate participant class completion percentages</li> <li>b. Provider demonstrates effectiveness regarding participant class completion percentages</li> </ul>	<p>Achieves <input checked="" type="checkbox"/></p> <p>Partially Achieves <input type="checkbox"/></p> <p>Not Achieved <input type="checkbox"/></p> <p>Not Applicable <input type="checkbox"/></p> <p>Follow-Up Required <input type="checkbox"/></p>
<p><b>Description:</b></p> <ul style="list-style-type: none"> <li>a. The Provider does have a plan to achieve the appropriate participant class completion percentages.</li> <li>b. Based on a review of the annualized monthly reports and a tabulation of the year, up to November 2024, the provider has achieved an overall excellent completer rate of 91.13 %. By comparison, the required completer rate of the Enhance Fitness Program is 40%. The Provider's completion rates are a clear indicator of the effectiveness of the program and the YMCA's ability to keep participants motivated to attend class weekly.</li> </ul>	

Signatures

Stephanie Young  
Stephanie Young, Health and Wellness Specialist

Jan 8, 2025  
Date

Georgie Darrah  
Georgie Darrah, Assistant Director of Programs

Jan 8, 2025  
Date

Christine Didion  
Christine Didion, Director of Programs

Jan 8, 2025  
Date

K Marsalek  
Kerry Marsalek, Chief Operating Officer

Jan 8, 2025  
Date





**OAA CLIENT INTERVIEW QUESTIONNAIRE**  
**Attachment I.**

**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?**

from Kari Garssi

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

Since 2018, 6 years.

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

no, any of the trainers

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

yes, call YMCA to get a hold of trainers, facebook

**Have you ever had to make a complaint about the services you receive or the person providing the services?**

no

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

light cardio, balance & strength training, light weights, ankle & wrist weights

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

yes.

**Do you receive any other type of assistance?**

no

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

Excellent  Good  Fair  Poor

**Why?**

"keeps me mobile & stronger, community"

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

"I don't think anything" more people should know about it.

**Interviewer observations:**

Gwynne had many friends from the class.

**Client (Initials only):**

**Submitted by:**

Gwynne Barba Gwynne Barba

**Date:**

12/4/2024



Attachment II.

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

<b>Date Fidelity Monitored:</b>	12/4/24
<b>Course Start Date:</b>	9/9/24
<b>Name of Instructor(s):</b>	Linda Gillie
<b>Location of Course:</b>	John Geigle YMCA
<b>Fidelity Monitored by:</b>	Georgie Darrah and Stephanie Young

Section 1. (General)				
		Yes	No	Comments
1.	Is a sign-in sheet being maintained for the course?	X		Electronic Sign-in sheet conveyed to paper version as needed.
2.	Did all participants at the start of the class complete course specific required paperwork?	X		

Section 2. (Facility/Venue/Environment)				
		Yes	No	Comments
1.	Does the space provided accommodate the class in total, comfortably?	X		Large space with plenty of room for participants to move about safely.
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		
2.	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		Clear order of curriculum: warm-up, cardio, strength training, stretching, and ending with cool-down.
5.	Did instructors have appropriate class materials for participants, if applicable?	X		Weight cuffs provided with the option to also use free weights.
6.	Was the class conducted in the required time interval?	X		
7.	Were participants encouraged to participate, interact meaningfully?	X		Instructor provided examples of how movements translate to instrumental activities of daily living like picking up things from the floor or making the bed.

Reviewer's Additional Comments	
<p>The instructor, Linda Gillie, provided encouragement and adaptations to movement throughout the class. She utilized clear visual and verbal instructions for movement, managed her time well, and followed the Enhance Fitness curriculum breakdown (aerobics, strength, and stretching). It was obvious she enjoys teaching the class, interacting with participants, and motivating them to come back every week.</p>	












# YMCA IID 2024 Annual Monitoring


Final Audit Report


2025-01-08


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