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January 14, 2025

Christine Didion, Director of Programs
Officer Area Agency on Aging of Pasco-Pinellas, Inc.
9549 Koger Blvd.
St. Petersburg, FL 33702

Dear Christine,

Enclosed is the 2024 programmatic monitoring report for the IID 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 2024 monitoring produced no findings and two (2) recommendations. Please submit a written response and corrective action plan in response to the recommendation within ten business days of receiving this report.

The cooperation of your staff during the desk review and monitoring process was appreciated.

Sincerely,

A handwritten signature in black ink that reads "Ann Marie Winter".

Ann Marie Winter
Executive Director

Enclosure

Cc: Georgie Darah, Assistant Director of Programs
Stephanie Young, Health and Wellness Specialist

2024 OAA IIID Disease Prevention & Health Promotion Programmatic Monitoring Standards

Date of Visit(s):	November 15th, 2024
Date of Report:	December 31,2024
Provider:	AAAPP
Monitor:	Yesenia Rivera, AAAPP OAA Program Manager
Contract Review Period:	January 1, 2024 – December 31, 2024
Participants:	Terri Toner, Health & Wellness Coordinator Stephanie Young, Health & Wellness Specialist Georgie Darrah, Assistant Director of Programs

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: Georgie Darrah, Assistant Director of Programs, Terri Toner, AAAPP Health & Wellness Coordinator, and Stephanie Young, Health & Wellness Specialist are the designated liaisons and facilitators for the OAA IIID Disease Prevention and Health Promotion Programs in 2024.	

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 DOEA Monthly Report is submitted timely by AAAPP IIID staff throughout 2024. Reports are reconciled with eCIRTS data entries. b. N/A c. N/A	

Standard #3	Compliance Measure
Highest Level Evidence-Based Programs meet program requirements: 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.	Achieves [x] Partially Achieves [] Not Achieved [] Not Applicable [] Follow-Up Required []

<p>Description: Savvy Caregiver and A Matter of Balance programs were selected for review. Class materials selected for review: Savvy Caregiver and A Matter of Balance for the contract period of January 2024 to December 2024. Marketing materials reviewed are appropriate and include 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.</p> <ol style="list-style-type: none"> Licensed Agreements were reviewed for both programs. Both agreements are current. Credentials for facilitators of both programs were reviewed. All facilitators completed the required training for each program as evidenced through receipt of training certificates; however, training certificates were not signed by Master Trainer. It is recommended that AAAPP maintain training certificates with all appropriate fields notated and back-up documentation for coach training is maintained appropriately. Fidelity Monitoring Policies and Procedures are in place and followed. Policy and Procedure effective 01/01/16 reviewed annually, with last revision on 10/24/24. <p>Sign In sheets for each class were reviewed. Appropriate DOEA sign-in sheets are utilized and accurately accounts for eligible clientele.</p>
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Standard #4	Compliance Measure
<p>The Program records/inputs data appropriately</p> <ol style="list-style-type: none"> Services are accurately recorded in eCIRTS. Information is entered into the NCOA CHA Community online data system when applicable. 	<p>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>
<p>Description:</p> <ol style="list-style-type: none"> Services Reported by Program and Service eCIRTS report reviewed for Savvy Caregiver January 2024 to September 2024, A Matter of Balance January 2024 to September 2024. Services were accurately recorded in eCIRTS and in accordance with DOEA Programs and Services Handbook, Appendix A – Service Descriptions. N/A 	

Standard #5	Compliance Measure
<p>Provider is serving or has a plan to serve the number of proposed units as identified in the service provider application.</p>	<p>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>
<p>Description: In CY 2024, Health and Wellness Class Log: There were a total of 9 savvy, 23 mob, 4 CDSMP, 2 CPSMP, and 1 diabetes SMP for a total of 39 classes. It is recommended that AAAPP continues to review available opportunities to increase offered classes in 2025 to reach new seniors and partner with new community organizations to offer classes in diverse locations.</p>	

Standard #6	Compliance Measure
<p>The provider establishes collaborations and partnerships with other agencies to</p>	<p>Achieves <input checked="" type="checkbox"/>]</p>

assist with Evidence Based Disease Prevention and Health Promotion activities. Documentation is maintained for partnerships listed in the DOEA Report.	Partially Achieves [] Not Achieved [] Not Applicable [x] Follow-Up Required []
Description: The AAAPP partners with a variety of senior community living locations, senior centers, and for-profit and not-for-profit organizations to offer evidence-based classes. It is recommended that the AAAPP maintains a listing of these relationships in their DOEA report.	

Standard #7	Compliance Measure
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 [x] Partially Achieves [] Not Achieved [] Not Applicable [] Follow-Up Required []
Description: a. OAA Program Manager observed and had discussions with clients in attendance at the Savvy Caregiver Session number five (5) on November 18, 2024 . Clients reported they were made aware of the classes through fliers distributed through the community, in doctors' offices and recreational centers. Participants shared that this class has helped them increase skills and knowledge for caregiving, understand the diseases that cause dementia and its progressive cognitive losses, gain confidence to effectively address dementia behaviors, learn effective ways to increase family involvement and reduce adverse impacts of caregiving. Participants also indicated that their families have learned strategies to enhance their own self-care as well as day-to-day time with their person. b. Consumer satisfaction Surveys (pre and post surveys) were reviewed for classes A Matter of Balance (September 2024 to November 2024), Surveys indicate overall consumer satisfaction and effective service delivery of the programs. Comments for the A Matter of Balance class included, "Keep the classes coming."	

Standard #8	Compliance Measure
Verify that all corrective actions and follow-up have been appropriate, adequately, and timely implemented.	Achieves [x] Partially Achieves [] Not Achieved [] Not Applicable [x] Follow-Up Required []
Description: N/A No corrective actions reported in 2023	

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. A Matter of Balance class was observed by monitor on November 15, 2024 . 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. **Hale Center** community room was utilized for the A Matter of Balance class and was appropriate. 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 to achieve the appropriate participant class completion percentages. Savvy Caregiver during the period of September 2024 to December 2024 had a 73.9% completion rate. A Matter of Balance held during the period of September 2024 to December 2024 had a 77.78% completion rate. Overall CY2024 completion rate for all direct service programs was 73.53%.	

Signatures:

<i>Yesenia Rivera</i> <hr/> Yesenia Rivera, Program Manager	Jan 14, 2025 <hr/> Date
<i>Georgie Darrah</i> <hr/> Georgie Darrah, Assistant Director of Programs	Jan 14, 2025 <hr/> Date
<i>Christine Didion</i> <hr/> Christine Didion, Director of Programs	Jan 14, 2025 <hr/> Date
<i>K Marsalek</i> <hr/> Kerry Kimball Marsalek, Chief Operating Officer	Jan 14, 2025 <hr/> Date

Attachment II.

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

Date Fidelity Monitored:	11/15/2024
Course Start Date:	January 1, 2023 – December 31, 2023
Name of Instructor(s):	Leader 1- Kristine Boyle, Facilitator Lader 2-Vally Kalariotes, Facilitator
Location of Course:	Halte Center Dunedin FL
Fidelity Monitored by:	Yesenia Rivera-OAA Program Manager

Section 1. (General)				
		Yes	No	Comments
1.	Is a sign-in sheet being maintained for the course?	X		Sign in Sheet Provided. Participants completed form.
2.	Did all participants at the start of the class complete course specific required paperwork?	X		Participants completed paperwork.

Section 2. (Facility/Venue/Environment)				
		Yes	No	Comments
1.	Does the space provide accommodate the class in total, comfortably?	X		Facilities were clean and comfortable. There was space for wheelchairs. Space was accessible for individuals with disabilities.
2.	Does the space provided have accessible restrooms?	X		Restrooms were accessible and accessible for individuals with disabilities.
3.	Was the space adequately lighted?	X		Room had adequate lighting.
4.	Was the space quiet so class instruction could be easily heard?	X		Room and hallways were quiet. Instructor could be heard easily.

Section 3. (Class Fidelity)				
		Yes	No	Comments
1.	Did the instructors complete required training and obtain credentials?		X	Certificates for AMOB except Jim, BK, Izzy, Bonnie (unsigned), and Pat Evans
2.	Was the appropriate amount of instructors' present?	X		There were 2 instructors present.

3.	Did the instructors start & end the class timely?	x		Class started on time at
4.	Did instructors follow the curriculum per required fidelity?	x		Instructors used curriculum property
5.	Did instructors have appropriate class materials for participants, if applicable?	x		Instructors provided handouts, wrote notes on the board, and provided visual materials for participants.
6.	Was the class conducted in the required time interval?	x		Yes. Class lasted 1 ½ hour approximately.
7.	Were participants encouraged to participate, interact in meaningfully?	x		All participants were engaged and provided feedback.
8.	Did not give medical advice, referred to personal physician	x		Participants asked medical related questions. Instructors advised participants to consult with a doctor.
9.	Leader 1-Good Personal Skills?	x		100% Very skilled and knowledgeable.
10.	Leader 2-Good Personal Skills?	x		100% Very skilled and knowledgeable.
11.	Break Time Given?	x		Participants took a break to stretch and use the restrooms.

Reviewer's Additional Comments

Participants felt part of the group. The classroom was welcoming and celebrated all participants. Instructors made efforts to include all members regardless of gender, race, ethnicity, sexual preferences, religious backgrounds, and socio-economic status. The classroom participants showed a vested interest in each other and seem to understand each other. A true community exists. Participants and instructors alike are engaged and excited to interact with one another. There was a chair exercise session at the end of the class. All participants enjoyed this activity. A participant shared: *"Very helpful in giving examples, clear answers and asking good questions to have participants engage. Wonderful communicator and empathetic facilitators."* Another participant shared: *"This class was extremely helpful. The teachers are knowledgeable, and compassionate. They went the extra mile to make sure we felt welcome and comfortable."*



Attachment II.

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

Date Fidelity Monitored:	11/18/2024
Course Start Date:	January 1, 2023 – December 31, 2023
Name of Instructor(s):	Leader 1- Jim McConnell, Facilitator Leader 2-Carole Ware, Facilitator
Location of Course:	Zoom-5:30 P.M.
Fidelity Monitored by:	Yesenia Rivera-OAA Program Manager

Section 1. (General)				
		Yes	No	Comments
1.	Is a sign-in sheet being maintained for the course?	x		Participants attendance collected by instructors using Zoom and in the classroom.
2.	Did all participants at the start of the class complete course specific required paperwork?	x		Participants completed paperwork.

Section 2. (Facility/Venue/Environment)				
		Yes	No	Comments
1.	Does the space provide accommodate the class in total, comfortably?	x		Participants were able to attend the class in person or via Zoom from home. Participants like the flexibility of the hybrid setting.
2.	Does the space provided have accessible restrooms?	x		Participants had access to restrooms.
3.	Was the space adequately lighted?	x		There was adequate lighting in the classroom.
4.	Was the space quiet so class instruction could be easily heard?	x		Room was quiet. It was easy to hear the instructors.

Section 3. (Class Fidelity)				
		Yes	No	Comments
1.	Did the instructors complete required training and obtain credentials?	x		Credentials provided
2.	Was the appropriate amount of instructors' present?	x		There were 2 instructors present.

3.	Did the instructors start & end the class timely?	x		Yes. The class started at 5:30pm and ended at 7:45 p.m. approximately.
4.	Did instructors follow the curriculum per required fidelity?	x		Instructors followed the curriculum.
5.	Did instructors have appropriate class materials for participants, if applicable?	x		Instructors have appropriate class materials for participants,
6.	Was the class conducted in the required time interval?	x		Class lasted 2 hours and 15 minutes approximately.
7.	Were participants encouraged to participate, interact in meaningfully?	x		Participants were engaged, asked questions and provided feedback. Instructors answered questions as needed.
8.	Did not give medical advice, referred to personal physician	x		Participants asked medical related questions. Instructors advised participants to consult with a doctor.
9.	Leader 1-Good Personal Skills?	x		100% Very skilled and knowledgeable.
10.	Leader 2-Good Personal Skills?	x		100% Very skilled and knowledgeable.
11.	Break Time Given?	x		Participants took a break to stretch and use the restrooms.

Reviewer's Additional Comments

Instructors focused on what participants do well and recognize when they put in effort. Instructors made sure all students had the tools they need to learn. Participants have built positive relationships which is not only limited to the class. It also involves building trust and communicating with families and community supports. Participants provided meaningful feedback. Participants shared personal experiences and encouraged each other. Participants stated that this class has been lifesaving; they don't feel alone; they have a healthy support system. A Participant shared: "Thank you for everything you do for your students. Your class was so impactful for me not only because of the content of the course but because of how you treated us and my learning from your empathy. "











IIID Disease Prevention & Health Promotion Program.Packet 011425


Final Audit Report


2025-01-14


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