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## MEMORANDUM

**TO:** AAA Executive Directors      **NOTICE#:** 031904-1-I-SWCBS

**FROM:** Susan Tucker  
Deputy Secretary

**DATE:** March 19, 2004

**SUBJECT:** Notice of Instruction: 2004 Monitoring Plan

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Attached is the Department's final draft of its 2004 Monitoring Plan for the upcoming monitoring visits. This document was updated with input from the various units of the Department. Representatives from the Divisions of Statewide Community-Based Services, Volunteer & Community Services, and Administration and Management Information Systems, and the Evaluation and Planning Unit will participate in this year's monitoring visits.

The monitoring features and key elements are as follows:

- The monitoring team will coordinate monitoring activities utilizing a single instrument.
- The monitoring standards and indicators are based on established federal and state guidelines.
- To enhance communication between the monitoring team and AAA staff, each team will have a leader through whom all communication will flow. This will eliminate duplicate information requests and increase efficiency.
- The Department is requesting a brief presentation (15 – 20 minutes) by the AAA's Board President or designee at the monitoring entrance interview to review the agency's accomplishments and priorities for 2003 - 2004.
- The Department is inviting each AAA to present best practices based upon the criteria outlined in the Monitoring Plan. If information presented is substantiated or confirmed as a best practice, it will be included in the final monitoring report and may be considered for the Department's Annual Best Practices Exchange.
- The timetable includes the AAA's submission of a written response to be included in the formal monitoring report. The purpose of this step is to ensure the AAA has an opportunity to provide comments and identify factual errors or omissions for correction. It is not intended to be an opportunity to debate report findings.
- The Department's management review team and senior staff will continue to review and track monitoring results and recommendations.

As you review the instrument included in the Monitoring Plan, you will see a number of new and revised standards and indicators related to the Elder Nutrition Program, RELIEF, Medicaid Waiver, and the Evaluation and Planning Unit. The Evaluation and Planning Unit will provide each Area Agency on Aging (AAA) with data and information on consumer surveys and review and discuss outcome measure performance. The PSA-specific instruments will be sent to each AAA in accordance with the timetable in the Monitoring Plan. Also, there will be an un-scored section of the monitoring instrument that will allow the monitoring team members to address AAA technical assistance issues. Finally, thanks to all AAAs for providing input on the draft monitoring review schedule. The finalized schedule is included in the Monitoring Plan.

We look forward to working with you in completing another successful year of monitoring and technical assistance. If you have questions regarding this notice, please contact your contract manager.

Attachments