

Area Agency on Aging District 7, Inc.  
**OLDER AMERICANS ACT PROGRAMS**  
**Policy and Procedures**

**Division:** Planning & Program Development

**Policy Name:** Monitoring & Evaluations

**Policy #:** OAA-005

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**Policy:** Area Agency on Aging District 7, Inc. (AAA7) will regularly evaluate the performance of service providers funded by Title III and Senior Community Services with regard to quality of service, goal and objective attainment, recordkeeping, fiscal management, resources development, community relations, affirmative action, overall program adequacy, and other factors as appropriate. The purpose of the evaluation is to identify problem areas and to facilitate improved, more effective and comprehensive service delivery to older Americans.

**Policy Procedures:**

- 1) AAA7 will conduct monitoring on an annual basis.
- 2) Annual evaluations must be completed prior to the yearly independent audit of AAA7.
- 3) Additional evaluations may be made when deemed necessary by the AAA7 director, or when instructed to by the Ohio Department of Aging.
- 4) Each designated unit of AAA7 will be responsible for specific topics/areas of the annual evaluation, and will develop (and update as needed) appropriate standard sections of the evaluation document for their use.
- 5) The total evaluation document will address, at a minimum:
  - a) Compliance with the Older Americans Act and its regulationsPerformance goals and achievements
  - b) Client documentation
  - c) Client donations
  - d) Compliance with Agency Policy and Procedures
  - e) Unmet needs
  - f) Adherence to Ohio Department of Aging taxonomy
  - g) Evaluation of quality assurance system
  - h) Training needs of staff
  - i) Targeting to persons of greatest economic and social need

- 6) Each service provider will be notified at least fourteen (14) days prior to the evaluation to arrange for the evaluation date. The service provider will be notified as to the records they must have available for the review.
- 7) All service providers will make available pertinent and current records and other information requested by AAA7.
- 8) The executive director will be given a final report within ninety (90) days of the evaluation. The final report will include a plan of correction with appropriate time lines and references in non-compliance as identified.
- 9) The executive director of each funded service shall have the right to provide written agreement or disagreement with all preliminary or final evaluation reports within thirty (30) days of receipt of the reports.
- 10) Upon completion of the annual evaluation, each designated unit shall forward copies of their section of the evaluation document, their final report and any subsequent correspondence to the planning unit for filing in each provider's master file.