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MEMORANDUM

TO: Area Agency on Aging Executive Directors
NOTICE #: 070513-1-I-SWCBS

FROM: Charles T. Corley, Secretary

DATE: July 5, 2013

SUBJECT: **Notice of Instruction: OA3D Desk Review Summary**

The purpose of this notice is to transmit the changes to the Older American Act Title III D (OAA Title III D) desk review process. The desk review will be conducted on an annual basis.

The desk review will focus on two areas: program and partnership. The desk review supporting documentation will be selected randomly, with at least five evidence-based interventions (if applicable) and at least three partnerships.

Supporting documentation for the programmatic review includes marketing material (flyers, brochures promoting that particular event) for each service provided, sign-in sheets for each service, training certificates, and licenses for each trainer (if applicable), and any required participant data collected for a particular service as stated by the program design or service description. An example would be the National Council on Aging or Health Foundation of South Florida forms for Chronic Disease Self-Management Education workshops for each participant. The partnership's documentation includes Memorandums of Understanding, Memorandums of Agreement, strategic planning documents, brochures, notes, agendas, emails, or letters, etc.

A list of items will be requested from each Area Agency on Aging (AAA) at least two weeks in advance of the date the items are due to the Contract Manager. The AAA will be required to submit copies of these supporting documents, either electronically or by mail, to the Contract Manager in accordance with the desk review schedule (attached).

In accordance with the OAA Title III D contract, the Partnership tab on the Monthly Programmatic Report is due October 2013; however, in order to conduct

<http://elderaffairs.state.fl.us>

the desk review discussed in this notice, please submit the Monthly Programmatic Report with this information by Friday, July 19, 2013.

The revised desk review tool is attached for your reference.

If you have any questions, please contact your Contract Manager. Thank you for your assistance and cooperation.

Attachments