



727-570-9696

info@aaapp.org

9549 Koger Blvd. N, Suite 100
St. Petersburg, FL 33702

www.agingcarefl.org

June 2, 2026

Brian Hoben, Community Services Director
Pasco County Community Services
8620 Galen Wilson Blvd.
Port Richey, FL 34668

Dear Mr. Hoben,

Enclosed is the 2026 Annual Programmatic Monitoring report for the Emergency Home Energy Assistance for the Elderly Program (EHEAP).

The purpose of monitoring is to perform a programmatic review of operations and to verify that corrective actions resulting from previous monitoring reviews have been implemented. 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 2026 monitoring produced no findings and no recommendations. The cooperation of your staff during the desk review and on-site monitoring process was appreciated.

Sincerely,

Kristina Jalazo

Kristina Jalazo
Chief Financial Officer

Enclosure

cc: Jordan N. French, Human Services Manager
Jacqueline Grenon, Case Management Coordinator
Danielle Berman, Case Management Coordinator



**Area Agency on Aging of Pasco-Pinellas, Inc.
2025-2026 Emergency Home Energy Assistance Program for the Elderly
(EHEAP)**

PROVIDER:	Pasco County Human Services EHEAP (Emergency Home Energy Assistance for the Elderly Program)
DATE OF VISIT:	March 6, 2026
PARTICIPANT(S):	Jordan N. French, Human Services Manager Danielle Berman, Case Management Coordinator Georgie Darrah, Assistant Director of Programs Christine Didion, Director of Programs
MONITOR(S):	Yesenia Rivera, OAA Program Manager
FUNDING PERIOD:	2025-2026
SITES VISITED:	8239 Youth Lane Port Richey, FL 34668

REPORT SUMMARY

(This section provides an overview of minor recommendations, significant, findings and positive/noteworthy activities recognized during the monitoring period. Details are outlined in the Contract Compliance and Service Delivery section of the report.

I. Positive/Noteworthy Activities:

- In July 2025, Pasco County Human Services demonstrated effective coordination and crisis intervention in assisting a vulnerable senior diagnosed with Alzheimer's who was living alone without electricity and with limited access to food. The referral was received through collaboration with the Pasco County Sheriff's Office, whose case manager provided immediate support by obtaining food from local pantries and attempting to identify payment resources to restore utility services. Due to the client's cognitive impairment, lack of local family support, and inability to access financial information, significant barriers existed to resolving the utility crisis.
- A Pasco County Human Services case manager conducted a home visit to assess the situation, determine eligibility for assistance, and gather the documentation required for EHEAP services. The client was unable to locate necessary documents independently, requiring hands-on assistance from the case manager to locate identification, income verification, and utility information within the home. After confirming eligibility, the case manager secured EHEAP assistance to cover the \$271 utility restoration amount and coordinated Withlacoochee Electric to restore service. Electricity was reinstated remotely within approximately one hour of the guarantee being issued. During the visit, the case manager also assessed the client's overall well-being. The home was found to be clean and well-maintained, and the client had taken steps to preserve food by keeping the refrigerator closed during the outage. The client disclosed a recent fall resulting in injury; however, she declined medical attention when offered. This case highlights the critical role of EHEAP in addressing urgent utility crises and supporting vulnerable older adults at risk of losing access to essential services, allowing the client to remain safely in her home despite significant cognitive and social support challenges.
- During the 2026 Quarter I, Pasco County Human Services conducted extensive outreach activities throughout Pasco County to increase awareness of available programs and services, including the Emergency Home Energy Assistance for the Elderly (EHEAP) program. Outreach efforts targeted community partners, healthcare providers, recovery organizations, senior-serving agencies, and residents through both virtual and in-person events. Outreach efforts covered all areas of Pasco County, supporting continued access to EHEAP services for eligible seniors experiencing energy-related hardships.

II. Recommendations for Improvement

(Recommendations require a written response from the provider)

- No recommendations.

III. Findings/Corrective Action

(Findings result in a formal corrective action plan)

- No findings.

CONTRACT COMPLIANCE AND SERVICE DELIVERY

Each standard will note at least one of the following:

- *Achieved*
- *Partially Achieved*
- *Not Achieved*
- *Not Applicable*
- *Follow-Up Required*

Standard #1 – Previous Programmatic Monitoring

All issues from the previous programmatic monitoring have been resolved within an established and reasonable timeframe.

Response: Achieved.

No recommendations. No findings.

Standard #2 – Signage

- A. The Provider maintains posters at the EHEAP intake offices stating their non-discrimination policy that no person is excluded on the grounds of race, color, nation origin, sex, or age.*
- B. A policy that ensures no consumer fees charged, or donations accepted from a consumer in order to receive EHEAP benefits and has a written notice stating “No money, cash, or checks, will be requested or received from customers in an EHEAP office. If an employee asks for money, report this to the agency Executive Director or Department Head,” posted in a conspicuous place at all points where EHEAP applications are received.*
- C. Appeal provisions are posted in a prominent place within the office where applications are taken.*

Response: Achieved.

- A. The provider maintains a written notice posted at all points where EHEAP applications are received stating their non-discrimination policy.
- B. The provider maintains a written notice posted at all points where EHEAP applications are received ensuring the consumer that no fees are charged or donations accepted in order to receive EHEAP benefits.
- C. Appeal provisions are adequately posted in a prominent place at all points where EHEAP applications are received.

Standard #3 – Policies and Procedures

The provider maintains updated policies and procedures:

- A. Written policy and procedure for referral or access assistance to the “Lifeline Program” for elders who are on oxygen support and must have power.*
- B. The written policy and procedure which details allowable timeframes for applicants to submit required documentation, is missing at the time of application, before an application for services will be denied.*
- C. Written policies and procedure that defines the criteria and required verification to determine if a household has a “home energy crisis” and is eligible for crisis assistance.*
- D. A written policy and procedure concerning the use of funds for the purchase or repair of heating or cooling equipment that addresses under what conditions an applicant is eligible and what constitutes a crisis related to lack of heating and cooling.*
- E. Written policy and procedures regarding Florida Statute 119.071 (5) require any agency that collects social security numbers to provide a written explanation to the individual the reason for its collection.*
- F. Written policy and procedure addressing client confidentiality.*
- G. Written policy and procedure for computer system backup and recovery.*
- H. Written policy and procedure that address serving family members and employees.*
- I. Written policy and procedure that encourage households to seek assistance prior to incurring non-energy penalties such as disconnect/reconnect fees, additional deposits, interest, or late payments.*

Response: Achieved.

- A. The provider maintains a written policy and procedure for referral access or access assistance to the “Lifeline Program” which also addresses elders who are on oxygen as and must have power.
- B. The provider maintains a written policy and procedure which details allowable timeframes for applicants to submit required documentation that is missing at time of application, before an application for services to be denied.
- C. The provider maintains a written policy and procedure that defines the criteria and required verification to determine if a household has a “home energy crisis” and is eligible for crisis assistance.
- D. The provider maintains a written policy and procedure concerning the use of funds for the purchase or repair of heating or cooling equipment that addresses under what conditions an applicant is eligible and what constitutes a crisis related to lack of heating and cooling.
- E. The provider maintains a written policy and procedures regarding Florida Statute 119.071 (5) requiring any agency that collects social security numbers to provide a written explanation to the individual of the reason for its collection.
- F. The provider maintains a written policy and procedure addressing client confidentiality.
- G. The provider maintains a written policy and procedure for computer system backup and recovery.

- H. The provider maintains a written policy and procedure that addresses serving family members and employees.
- I. The provider maintains a written policy and procedure that encourages households to seek assistance prior to incurring non-energy penalties such as disconnect/reconnect fees, additional deposits, interest, or late payments.

Standard #4 – Coordination with LIHEAP & WAP

Provider coordinates with Department of Economic Opportunity (DEO) LIHEAP and Weatherization Programs:

- A. *MOUs with both LIHEAP and WAP are on file. MOUs with the WAP must be reviewed and renewed every 3 years. MOUs with the LIHEAP Provider must be renewed each program year. and reviewed and renewed every 1 years.*
 - *Refer to the most current EHEAP Technical Assistance Guide, specifically ‘Program Partners and Stakeholders Coordination’ for appropriate language.*

Response: Partially Achieved.

The provider maintains coordination efforts with the Low-Income Home Energy Assistance Program (LIHEAP) and the Weatherization Assistance Program (WAP) through formal agreements with You Thrive Florida, Inc. Current agreements are on file and were reviewed during monitoring. A Memorandum of Agreement supporting coordination efforts for individuals eligible for EHEAP and LIHEAP assistance is effective from 10/1/2025 through 9/30/2028. Additionally, a current Memorandum of Understanding regarding referrals for Weatherization Assistance Program services is also on file with the same effective dates.

During monitoring, the provider explained that previous EHEAP Technical Assistance Guidance and contractual requirements required Memorandums of Understanding with LIHEAP and WAP providers to be reviewed and renewed every three years. Current contract requirements now state that agreements with LIHEAP providers must be reviewed and renewed every program year and agreements with WAP providers must be reviewed and renewed every two years to ensure continued coordination, updated referral procedures, and compliance with current program requirements. It was discussed that, should the EHEAP contract continue in future program years, the provider will be required to renew its MOUs in accordance with the current contractual requirements. While the existing agreements remain valid through 9/30/2028, the current three-year term does not meet the contract requirement for annual LIHEAP MOU renewals and biennial WAP MOU renewals. The provider acknowledged this requirement and the importance of adapting internal monitoring practices to align with the revised renewal timelines.

To prevent delays in future renewals, the provider has developed a plan that includes maintaining a centralized contract and agreement tracking system with renewal dates, implementing advance reminder notifications to program management staff, and conducting periodic internal reviews of all active MOUs and MOAs related to EHEAP

partnerships. The provider also stated they will begin renewal discussions with partner agencies several months prior to expiration dates to allow adequate time for review, revisions, and execution of agreements. These measures will help ensure continued compliance with contractual requirements, the current EHEAP Technical Assistance Guide, and uninterrupted coordination with LIHEAP and Weatherization partners.

Standard #5 – Staff Training

Provider staff has received training pertinent to the performance of required functions:

- A. Utilizing the DOEA 114 Application form.*
- B. DOEA standards for specific service training as outlined in the most current Technical Assistance Documents and/or Notice of Instructions.*
- C. Mandatory reporting of suspected abuse, neglect, self-neglect, and exploitation of the elderly training has been conducted, and include the number of reports that have been made YTD.*

Response: Partially Achieved

- A. The provider submitted documentation that training was provided to staff in March 2026, on using the appropriate application form. File reviews demonstrate that staff use this form correctly.
- B. N/A – No recent technical assistance or notices of instructions received.
- C. The provider confirmed that mandatory reporting training related to suspected abuse, neglect, self-neglect, and exploitation of the elderly was last conducted on March 22, 2024. In addition, newly hired employees receive the required training as part of their onboarding process following employment. During the Site Visit, the provider stated that they have requested the annual refresher training and are currently awaiting confirmation and scheduling from Human Services. The provider continues to maintain awareness of mandatory reporting requirements and procedures for reporting suspected incidents involving vulnerable adults. The provider should continue efforts to ensure annual refresher training is completed timely for all applicable staff.

Standard #6 – Home Energy Vendors

Contracts with home energy vendors are on file:

- A. Payments are made directly to the home energy vendors on behalf of eligible consumers.*
- B. Vendor agreements with home energy suppliers meet contract requirements and are reviewed every five years.*
- C. EHEAP Providers who provide benefits payments made to vendors for energy related costs, such as blankets, fans, heaters, or air conditioners, comply with the vendor's purchase agreement requirement (these do not require a "Vendor Agreement").*

Response: Achieved

- A. All payments are made directly to the home energy vendors in accordance with the providers' policies.
- B. The provider maintains active Emergency Home Energy Assistance for the Elderly Program (EHEAP) Vendor Payment Agreements with multiple utility vendors to support eligible households within the service area. Agreements reviewed during monitoring included Bahr's Propane, Duke Energy, Tampa Electric Company, and Withlacoochee River Electric Cooperative. The agreements with Bahr's Propane and WREC are effective January 1, 2026, through December 31, 2028. The Vendor Payment Agreements with Duke Energy and TECO are also effective January 1, 2026, through December 31, 2028, replacing prior agreements dated July 12, 2022, and June 21, 2022, respectively, in accordance with previous EHEAP contracts that vendor agreements be in effect for five year periods. The agreements outline responsibilities related to payment processing, non-discrimination of applicants receiving assistance, verification of eligible energy-related charges, account reconciliation procedures, confidentiality requirements, and monthly reporting of benefit delivery and costs. The contracts further confirm that utility vendors will coordinate directly with authorized BOCC representatives to resolve crisis situations and apply program benefit commitments to eligible applicant accounts. During the monitoring review, all agreements were examined and verified to be fully executed, current, and compliant with DOEA EHEAP program requirements and applicable DOEA regulations. To ensure continued compliance with DOEA EHEAP program requirements and prevent lapses in Vendor Payment Agreements, the provider will implement a formal contract monitoring and renewal tracking process for all utility vendor agreements. The provider will maintain a centralized vendor agreement log that includes the vendor's name, contract effective date, expiration date, renewal requirements, and primary vendor contact information. Staff will conduct quarterly reviews of the tracking log to monitor upcoming expiration dates and identify agreements requiring renewal action.

The provider will begin the renewal process at least six (6) months prior to contract expiration to allow adequate time for review, revisions, approvals, and execution by all parties. Reminder notifications will be incorporated into the provider's internal calendar system and shared with supervisory staff to ensure timely follow-up. Copies of fully executed agreements will be maintained electronically in a centralized compliance folder accessible to authorized program staff for monitoring and audit purposes.

Additionally, the provider will designate a primary staff member responsible for monitoring vendor agreement status and coordinating communication with utility vendors and county representatives. Management will periodically review the status of agreements during internal compliance meetings to ensure all Vendor

Payment Agreements remain current and compliant with EHEAP program requirements, including the required review and renewal cycle at least every two years.

C. N/A

Standard #7 – Case Record Compliance

A sample of completed applications reviewed with the EHEAP Client File Content Checklist indicates:

- A. Eligibility is correctly determined, based upon an Application for Emergency Home Energy Assistance for the Elderly Program, DOEA Form 114.*
- B. Application information is entered in CIRTS.*
- C. Applications are taken when there is a signed contract and adequate funding.*
- D. All program requirements listed on DOEA Form 211, are met.*
- E. Client files are labeled with the applicant's name (last, first, middle), application date, and benefit season.*

Response: Achieved

- A. A total of ten (10) client files were reviewed for this monitoring period. All files contained appropriate documentation and no concerns were noted. Please see Attachment I for specific details.
- B. All applications are entered into the eCIRTS database.
- C. All applications were accepted, and services provided while a signed contract is in place and adequate funding is available.
- D. All requirements listed on DOEA Form 211 are met.
- E. Client files are appropriately labeled.

Standard #8 – Grievances and Appeals

Appeal process is in place:

- A. The Notice of Approval/Denial form is provided on letterhead (with provider contact information), indicates what EHEAP benefit is furnished or reason for denial, and is signed and dated by the intake worker.*
- B. The provider has written appeal procedures in place that provide an opportunity for a fair administrative hearing to individual's whose applications for assistance are denied.*

Response: Achieved

- A. The provider submitted a sample Written Notice of Approval/Denial form on agency letterhead that includes provider contact information and identifies the EHEAP benefit provided or the reason for denial. Client file reviews confirmed that the forms are being completed appropriately and signed and dated by the intake worker as required.

During the monitoring review, the Programs Team reviewed the provider's Written Notice of Approval and Notice of Denial policies to ensure alignment with

current DOEA requirements and policy standards. The provider's policy was found to be substantially compliant; however, technical assistance was provided regarding the need to clearly document the date the application was submitted on the approval/denial form. The provider acknowledged the recommendation and will implement the necessary updates and revisions to strengthen compliance with policy requirements.

- B. The provider also maintains written appeal procedures that provide applicants with an opportunity for fair administrative hearing when assistance is denied. The appeal procedures were reviewed during monitoring and were found to be appropriate and compliant with program requirements.

Standard #9 – Budgetary Compliance

Provider has adequate procedures to ensure EHEAP funds are budgeted for assistance throughout the entire contract period:

- A. *Policies and procedures denoting the allocation of funds per season.*
- B. *When EHEAP funds are not available or insufficient, the Provider assists in securing other community resources.*
- C. *The Provider has expended or is on track to expend all EHEAP budgets for the fiscal year observed.*

Response: Achieved

- A. The current benefit cycle as instructed by DOEA is a 12-month cycle which allows households to receive multiple crisis benefits per program year, up to a maximum of \$2000.
- B. When funds are not available, the provider is able to refer individuals to other community partners that may be able to assist.
- C. The provider is utilizing a monthly Surplus/Deficit Report as an ongoing financial monitoring tool to track expenditures, client service levels, and remaining funding balances for the EHEAP program. The reports demonstrate that the provider is actively reviewing spending trends and implementing strategies to fully utilize available funding while continuing to serve eligible seniors.

The December 2025 report reflects that the provider had a contracted EPO25 crisis budget of \$271,827, with Year-to-Date expenditures totaling \$157,684.11, representing approximately 58% of the contract expended at that time. The provider reported serving 359 clients year-to-date and 78 citizens during the reporting month. The provider explained that they had recently received a new contract and purchase order for crisis funding that had to be fully expended by June 15, 2026. To address spending projections and ensure utilization of funds, the provider stated they had previously divided the remaining balance into monthly allotments but later began assisting all eligible applicants who met program requirements and had not exceeded the \$2,000 combined EHEAP/LIHEAP assistance threshold.

The April 2026 report reflects increased expenditures and utilization of funding. The provider's contracted budget increased to \$286,827 after receiving an additional \$15,000 in crisis funding. As of April 2026, Year-to-Date expenditures totaled \$242,096.05, representing approximately 84% of the contract budget, with 602 clients served year-to-date and 59 clients served during the reporting month.

The provider noted that the additional \$15,000 in crisis funding awarded in March 2026 must be expended by June 30, 2026. The provider further explained that beginning in February 2026, they implemented a plan to divide the remaining funding into four monthly allotments to help ensure funds remain available through the remainder of the contract period while continuing to assist eligible seniors. The provider also continues to monitor the EHEAP and LIHEAP combined assistance limit, provide case management services, and connect individuals with additional community resources when assistance cannot be provided.

Overall, the reports demonstrate that the provider is proactively monitoring expenditure, adjusting spending strategies as funding changes occur, and balancing the need to fully utilize available crisis funds with continued service delivery to eligible households experiencing high utility assistance needs.

Standard #10 – Outreach and Reporting

The Provider undertakes Outreach Initiatives to advertise the program to consumers and ensure utilization of funds:

- A. Developing and implementing a written procedure for making home visits to households with homebound elderly persons in order to assist with the completion of the program application when other assistance is not available.*
- B. Outreaches to organizations that serve elderly consumers and especially those that serve seniors who meet EHEAP eligibility standards.*

Response: Achieved

- A. When necessary, the provider will make home visits to homebound seniors to complete the application and to obtain the required eligibility documentation. A policy and procedure on home visits are in place and is considered appropriate.
- B. The provider submits quarterly outreach reports demonstrating ongoing efforts to educate and engage organizations and community partners that serve elderly consumers who may meet EHEAP eligibility requirements. Outreach activities were conducted throughout Pasco County using both in-person and virtual platforms, allowing the provider to reach a broad range of community

stakeholders and service networks. Activities included participation in community meetings, recovery round tables, senior-focused task force meetings, health alliance collaborations, library outreach events, and county fair events where information regarding Human Services programs, including EHEAP assistance, was shared with attendees.

The provider demonstrated consistent outreach efforts during the review period by participating in outreach opportunities such as the Acute Care Meetings, Recovery Round Table meetings, Alliance for Healthy Communities, Senior Task Force meetings, Starkey Ranch Theatre Library event, and the Pasco County Fair Grounds event. Outreach efforts were conducted by program leadership and case management staff, including the Manager, Case Management Coordinator, and Case Managers, illustrating agency-wide involvement in community engagement and education efforts.

Provider staff deliver client-centered services by adapting communication styles, demonstrating cultural sensitivity, and ensuring individuals from diverse backgrounds feel respected, understood, and supported throughout the application and service delivery process. The provider continues to ensure services are accessible to seniors with disabilities and individuals representing various gender identities, family structures, and socioeconomic backgrounds.

Additionally, the provider's outreach and service delivery practices demonstrate continued efforts to reach and support populations identified as having Greatest Social Need and Greatest Economic Need, including minorities, low-income minority populations, individuals with Limited English Proficiency, and seniors considered at-risk. The provider's participation in diverse community-based meetings and collaborative partnerships supports increased awareness of available EHEAP services and strengthens access to assistance for vulnerable elderly residents throughout Pasco County.

Standard #11 – Report Compliance

EHEAP Provider submits reports on time and accurately:

- A. *Monthly Client Service Report*
- B. *Surplus Deficit Report*
- C. *Quarterly Outreach Activity Report*

Response: Achieved

- A. The provider submits monthly client service reports on time. Technical assistance provided on site visit.
- B. The provider submits surplus deficit reports on time and are accurate.
- C. The provider submits the quarterly outreach activity report as requested and on time.

Standard #12 – Background Screenings

Provider completes Level II Background Screenings, as necessary.

Documentation to include:

- *Signed and dated Privacy Policy;*
- *“Eligibility Statement” with proof of Employment History from DOEA;*
- *Signed and dated Affidavit of Compliance Employee Form*

Response: Achieved.

Level II Background Screenings were reviewed for two direct service staff. All documents were available and completed as required.

Signatures:

Yesenia Rivera
Yesenia Rivera, Program Manager

06/02/2026

Date

Georgie Darrah
Georgie Darrah, Assistant Director of Programs

06/02/2026

Date

Christine Didion
Christine Didion, Director of Programs

06/02/2026

Date

Tawnya Martino
Tawnya Martino, Chief Operating Officer (COO)

06/02/2026

Date

[illegible]