AREA AGENCY ON AGING PASCO-PINELLAS
Helping Seniors Live Well at Home

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June 30, 2026

Pattye Sawyer, Executive Director
Pinellas Opportunity Council, Inc.
501 First Ave N.
Suite 517
St. Petersburg, FL 33701

Dear Ms. Sawyer,

Enclosed is the 2026 Annual Programmatic Monitoring report for the Pinellas Opportunity Council EHEAP program.

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 throughout the monitoring process is appreciated.

Sincerely,

Ann Marie Winter
Executive Director

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

PROVIDER:	POC EHEAP (Emergency Home Energy Assistance for the Elderly Program)
DATE OF ON-SITE VISIT:	**April 9, 2026**
PARTICIPANT(S):	Georgie Darrah, Assistant Director of Programs Christine Didion, Director of Programs
MONITOR(S):	Yesenia Rivera, OAA Program Manager
FUNDING PERIOD:	**2025-2026**
SITES VISITED:	1035 Burlington Ave N, St Petersburg, FL 33705
EXIT INTERVIEW DATE:	**May 12, 2026**

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:** The provider shared a client testimonial highlighting a positive service experience. A 69-year-old senior contacted Pinellas Opportunity Council (POC) for assistance with a significantly high electric bill that she was unable to pay. The client reported falling behind due to an uncovered medical expense and unexpected car repairs. Upon contacting Duke Energy, it was confirmed that she was two months behind with a balance of $1,100 and needed to pay $911 to avoid disconnection. Through EHEAP assistance, Pinellas Opportunity Council was able to cover the cost of her electric bill. The client expressed great relief, stating she was grateful “not to be left in the dark.” During the site visit, it was observed that the EHEAP Case Manager has served in this role for 34 years, demonstrating a strong commitment to supporting seniors. Clients reported feeling supported and well-served, reflecting a positive and responsive service relationship. The provider maintains collaborative partnerships with the Urban League and other local agencies, enhancing coordinated service delivery and access to community resources.

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.

1. It is recommended that if a name other than the senior is the account holder on the presented utility bill, cut-off notice, or similar document that the senior's name is documented on the utility bill, cut-off notice, or similar document. It is further documented that the relationship between the senior and the account holder is provided on the documentation, and, if the account holder does not reside in the home, that this is also documented and explained.
2. To support the expenditure of outreach funds, it is recommended the Provider submit a robust outreach report, on a quarterly basis, that captures all outreach activities the Provider engaged in to ensure all potential seniors can participate in receiving EHEAP assistance. Per current EHEAP contract, EP021, Attachment I, section II.A.13, Provider must perform consumer outreach to ensure that households in the service area wishing to benefit from the program can do so. Outreach should include, but is not limited to, informing all service area local agencies, non-profits, or similar organizations that serve low-income and senior individuals about EHEAP, local television and radio programs, home visits to households with homebound seniors to assist with the application, performing telephone campaigns to previous clients, and completing presentations about EHEAP to local senior congregational centers.

Response: Achieved.
The provider has addressed prior recommendations and implemented necessary improvements, demonstrating responsiveness and a commitment to compliance.

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 and reviewed.*
    - *MOUs with LIHEAP Providers must be renewed every program year.*
    - *MOUs with WAP Providers must be renewed every three years.*

Response*:* **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 partner agencies.

During the monitoring review, documentation indicated that the Memorandum of Understanding (MOU) between Pinellas Opportunity Council (POC) and the Pinellas County Urban League (PCUL), which supports coordination with LIHEAP and WAP services, expired on April 15, 2026. Since the monitoring review, the provider has submitted fully executed Memorandum of Understanding (MOU) between POC and PCUL. The agreement is effective from **April 15, 2026, through April 15, 2027.** The

MOU establishes coordination between EHEAP, LIHEAP, and WAP programs and outlines responsibilities including prevention of duplicate benefits, referral coordination, staff training and development, joint outreach activities, coordination with Weatherization Assistance Program partners, and procedures for verifying prior receipt of EHEAP or LIHEAP crisis benefits.

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: Achieved

A. The provider submitted documentation that training was provided to staff on **February 17, 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's last training on the mandatory reporting of suspected abuse, neglect, self-neglect, and exploitation was completed **on December 18, 2025.**

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 two years.

Response: Achieved

A. All payments are made directly to the home energy vendors in accordance with the providers' policies.

B. The provider maintains current Vendor Payment Agreements with **the City of Clearwater Home Energy Program, Duke Energy, Peoples Gas System, and Tampa Electric Company.** All agreements are effective from February 5, 2025, through February 5, 2030, except Tampa Electric Company, which is dated October 1, 2025 through October 1, 2027. The agreements were reviewed and verified to ensure they meet all applicable program requirements and contractual criteria. During Site Visit, provider stated that they will start reminders 6 months before expiration, then follow up at 90 days, 60 days, and 30 days. Draft the renewal contract or amendment and confirm the correct funding period, budget, scope of work, and service expectations. Program staff, fiscal staff, and leadership will review the renewal packet before approval. Provider is reminded

that LIHEAP Program Guide requires Vendor agreements to be updated every two years. Provider acknowledges that vendor agreements will be renewed prior to February in 2027.

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 during this monitoring period. All files contained the required documentation, and no deficiencies or concerns were identified. Please refer to Attachment I for detailed file review results.
B. All applications were accepted, and services provided while a signed contract is in place and adequate funding is available.
C. All requirements listed on DOEA Form 211 are met.
D. Client files are properly organized, labeled, and maintained in accordance with program requirements.

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 dates 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 **Notice of Approval/Denial on agency letterhead that includes the required provider contact information, identifies the EHEAP benefit provided or the reason for denial, and contains the appropriate signature and date fields for the intake worker. A review of client files confirmed that the form is completed accurately and consistently. To ensure compliance with current Department of Elder Affairs (DOEA) requirements, the provider has updated its Written Notice of Approval and Notice of Denial policies to reflect the most recent program guidance and revisions.**

B. The provider maintains written appeal procedures that were reviewed during the monitoring process. The procedures provide applicants whose assistance is denied with the opportunity for a fair administrative hearing and clearly outline the process and timeframe for submitting an appeal, in accordance 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 provider administers EHEAP benefits in accordance with current Department of Elder Affairs (DOEA) guidance. The current benefit cycle is a 12-month period, allowing eligible households to receive multiple crisis benefits during the program year, up to the maximum allowable benefit of $2,000.
B. When EHEAP funds are unavailable or insufficient to meet a client's needs, the provider refers applicants to appropriate community resources and partner agencies for additional assistance.
C. The provider utilizes a monthly Surplus/Deficit Report to monitor expenditure, track available funding, and ensure effective budget management throughout the contract period. During early 2026, the provider received contract amendments that reallocated Weatherization funds to the Crisis Assistance program and extended the contract end date. Although the provider initially projected a significant funding deficit, the AAAPP Programs Team confirmed through follow-up discussions that the provider implemented its established prioritization and monthly allocation procedures beginning in **February 2026** to distribute the remaining funds equitably through the end of the contract period. Additionally, the provider received an allocation **of $15,000** in supplemental Crisis Assistance funding in **March 2026, to be expended by June 30, 2026.** Based on the documentation reviewed and discussions with program staff, the provider has appropriate budget monitoring procedures in place and is proactively managing available funding to maximize assistance to eligible households while ensuring full utilization of contract funds.

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 for home visits are in place and is considered appropriate. The provider offers online application options to support seniors with no transportation and those with limited mobility. This accessible format ensures that services remain available to a broader population and helps reduce barriers to participation in the application process. During the site visit, it was observed that the facility includes accessible handicap accommodations. Additionally, the location is centrally situated and is near public transportation, supporting ease of access for seniors utilizing transit services.
B. The provider actively conducts outreach and maintains accessible application options, including online submissions. Outreach efforts demonstrate engagement with the community and support service accessibility. The provider submits quarterly outreach reports that demonstrate the provider is outreaching to organizations that serve elderly consumers who meet EHEAP eligibility standards

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 submitted Monthly Client Service Reports timely and accurately, reflecting services provided during the reporting period.
B. The provider also submitted Monthly Surplus/Deficit Reports on time. As of the **April 2026** reporting period, the provider reported a total EHEAP Crisis Assistance budget of **$109,266**, with **year-to-date expenditures of $75,608.37 (76.95%)** and **201 clients served**. Monthly expenditures for April totaled **$14,611.43**, with **30 new unduplicated clients** enrolled during the month. The provider documented that multiple reimbursable grants temporarily impacted agency cash flow; however, expenditures continue to be monitored daily to ensure available funding is utilized appropriately. The provider projects that **100% of the EHEAP allocation will be expended by June 30, 2026**. No staffing changes affecting expenditure were reported, and the provider indicated that the availability of additional funding has allowed eligible clients to receive payment of their full energy bills rather than partial assistance.
C. The provider submitted the required Quarterly Outreach Activity Reports accurately and within the required reporting timeframes. A review of the reports confirmed they were complete, supported with appropriate

documentation, and consistent with program requirements. During the reporting period, the provider conducted outreach activities throughout **Pinellas County** at community partner locations, including **Jamestown Apartments**, **Daystar**, and the **Pinellas County Urban League**. Outreach efforts focused on identifying and educating eligible older adults about the EHEAP program, increasing awareness of available energy assistance services, and collaborating with community organizations to connect seniors experiencing energy-related hardships with available resources. Documentation identified the dates, locations, outreach activities performed, and staff responsible for each event, demonstrating ongoing community engagement and compliance with outreach reporting requirements.

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.
The provider completed Level II Background Screenings in accordance with DOEA requirements.

Signatures:

Georgie Darrah

06/30/2026

Georgie Darrah, Assistant Director of Programs Signing for Yesenia Rivera, Program Manager — **Date**

Georgie Darrah

06/30/2026

Georgie Darrah, Assistant Director of Programs — **Date**

Christine Didion

06/30/2026

Christine Didion, Director of Programs — **Date**

Tawnya Martino

06/30/2026

Tawnya Martino, Chief Operating Officer (COO) — **Date**