

United Way of Henry County & Martinsville
Grant Monitoring Checklist and Report

Background: With oversight of the United Way's Agency & Volunteer Relations Committee, monitoring activities will be conducted four to six months after the grant award, and appropriate recommendations will be given when evidence indicates that such recommendations are needed in the areas of administrative, financial and program documentation.

Agency Name: _____ **Project Name:** _____

Monitoring Visit Date: _____ **Grant Award: \$** _____

In preparation for the monitoring, United Way Executive Director will have reviewed and will bring to the visit:

- Grant proposal
- Funding agreement
- Performance reports if applicable
- United Way's monthly allocation report

In preparation for the monitoring, it is recommended that the agency have for the visit:

- Expenditure report of grant(s)
- Any applicable outcome reports
- Agency representative who is maintaining participant and program data

Grant Status:

1. Is funded program being implemented on schedule?
2. Will funds be expended within the program year?
3. Have grant requirements complied with the Funding Agreement and/or notification of allocation?

Outcome Information:

1. Are program objectives and performance measures on track to be met?
2. Is documentation in place to measure results of program?

Visit Summary:

1. Is technical assistance being offered?
2. Are there any suggestions for the agency to consider?
3. Are there commendations that should be noted?