**Sample Monitoring Visit Procedure**

The purpose of a programmatic grant monitoring visit is to meet the key people involved, gain a deeper understanding of the program, establish rapport, build the basis for a long-term collaboration, provide training and technical assistance, and monitor progress.

Here are guiding questions:

* What is really happening?
* How is it happening?
* Who is involved?
* What is the public benefit gained from the effort?

To answer these questions, you will need to rely on a mixture of active listening, conversation, and strategic curiosity. The following are steps to help you gather the information for a successful and meaningful grant monitoring visit.

1. Be prepared. Review the entire grant (including work plan, budget, results of pre-award risk assessment, amendments, current expenditure pattern, etc.) and progress reports with an eye to understanding the intent and activities of the program. Make notes of your observations, questions, or concerns.
2. Schedule the grant monitoring visit.
   * Offer several dates and times to choose from.
   * Request to meet with individuals directly involved in the programming.
   * Describe the format of the visit.
   * Request missing materials ahead of time.
   * Give grantees the “heads up” on what you’ll need to discuss so they will have time to prepare.
3. Send grant monitoring visit confirmation information.
4. Ask a variety of questions.
   * Specific (How many participants do you serve per year?)
   * Open-ended (Tell me how things are going)
   * Reflective (What moments in your work have told you that you are on the right track)
   * Presumptive (Many organizations experience ongoing dialogue re: vision, mission, implementation, and outcomes. At times this results in a different understanding of shared expectations between staff, leadership, and the board. Can you share an update on how this is going within your organization?)
5. Communicate from a perspective of seeking to understand and learn more about the program and its activities.
6. Offer a balanced perspective. Inform grantees what they are doing right, identify areas to improve, and offer suggestions, including technical assistance opportunities.
7. Set deadlines for follow up activities and follow-through on any required next steps.
8. Complete grant monitoring visit summary report.