

2024 CSBG Onsite Monitoring Guidelines

- CSB staff will schedule the visit at a mutually agreed upon time with the agency and EOC member and will confirm the visit by email.
- Please be on time for the scheduled monitoring visit. Leave extra time to make sure can find the location as given to you by staff.
- Staff will bring to visit and will email out ahead of time to assigned EOC member:
 - Copies of the Monitoring Form (see attached)
 - Copies of the File Review Forms (see attached)
 - Copies of the 2023-24 Service Plan from the Contract describing the agreed upon deliverables
 - Copies of Demand Tracking Sheet Information for the Contractor to ensure proper spend-down of the contract by the provider
 - Copy of EOC/CSBG Mission Statement
- EOC Members will interview the agency staff and staff will record answers (using a laptop is best practice but not required).
- Agency will provide staff and EOC members with a tour of the facility.
- When the monitoring form is complete, EOC members will be excused, and staff will remain to conduct the file review due to confidentiality (see attached completed report as an example).
- Leave your business card with the Director and thank the agency staff for their time.
- Be prepared to briefly report to the EOC at the February 8 Business Meeting.