

10 Ways to Improve Your Monitoring

1 Clearly differentiate between compliance and performance.



The Uniform Guidance requires pass-through entities to measure both fiscal compliance and program performance.

2 Use the monitoring program to achieve systemic change.



Monitoring helps identify obstacles and areas of opportunity, strengthening your program.

3 Don't ask for paperwork you aren't going to analyze.



Nobody likes extra work. Save your grantees and yourself time, stress, and resources.

4 Develop checklists and file management systems.



Ensuring your documentation is well organized and easily accessible simplifies the process of responding to agency requests.

5 Leverage technology across programs and functions.



Whether it's using video to capture site visits or custom software to record findings, the right technological resources can make or break a monitoring program.



Schedule a kick-off meeting and regular check-ins.

6

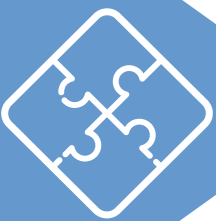
Meet early on to discuss timelines, deliverables, and status schedules. Communicate frequently with your team regarding progress, changes, updates, and next steps.



Document EVERYTHING.

7

Written policies and procedures help set consistent expectations and strengthen internal controls. They're a mandatory part of monitoring and protect you during audits.



Capture evidence and citations to support findings.

8

This ensures accuracy, promotes fairness, and creates a teaching tool for grantees.



Clean and de-duplicate your data regularly.

9

Prioritizing data hygiene cuts down on unhelpful redundancies, ensures accuracy, and reveals ineffective processes.



Conduct regular training sessions.

10

Training is a critical tool for ensuring agency staff and grantees alike understand a program's procedures, policies, regulations, and requirements, and are aware of key changes.

Overwhelmed? We can help.