**Appendix G1 – Sample Monitoring Intro Letter**

CITY OF

PORTLAND, OREGON

PORTLAND HOUSING BUREAU

**Nick Fish, Commissioner**

Traci Manning, Director

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Date

May 3, 2012

Liesl Wendt

211info

1435 NE 81st Avenue, Suite 500

Portland, OR 97213

RE: May 9th, 2012 On-site Monitoring Visit of 211info

Dear Ms. Wendt:

As we have discussed previously via phone and email, the Portland Housing Bureau (PHB) is required to conduct an on-site monitoring of organizations and programs that receive City general funds and federal funds through the bureau. A monitoring visit for 211info is scheduled for **Wednesday, May 9th, 2012 from 12:30 to 4:30 PM** at the 211info offices located at 1435 NE 81st Avenue, Suite 500, Portland, Oregon 97213.

The purpose of the monitoring visit is to ensure that 211info’s activities under PHB Contract #32000611 are in compliance with federal Community Development Block Grant (CDBG) regulations for administrative, financial and programmatic operations. Your organization will also be monitored for compliance to City requirements and performance based on your contracted budget, scope of services, outputs and outcomes. Monitoring will focus on the following activities: 211 information and referral, severe weather, program outreach (including Housing Connections and Rent Well), an d completion of the 2011 Point in Time Count of Homelessness. Please arrange for key staff members to be available to answer programmatic and fiscal questions.

During the visit I will:

* Review program and client records and/or data systems for the current fiscal year (07/01/2011 – 06/30/2012)
* Check grant and other compliance requirements stipulated in the contract
* Review program progress and outcomes, based on contracted outputs and outcomes
* Assess compliance on reporting
* Review existing administrative and financial policies as necessary

Charlie Chau, an accountant on our fiscal team at PHB, will monitor your agency’s financial records and compliance, and I will perform the program monitoring. Charlie and I will provide separate notice in advance of the visit of the specific documents and contract invoices we’d like to review. We look forward to meeting with you and your team to review and discuss the progress of your City-funded programs.

Sincerely,

Ryan Deibert, MPH

Program Coordinator

cc: Charlie Chau, PHB

 Sally Erickson, PHB

 Jacob Fox, PHB