CITY OF

PORTLAND, OREGON

PORTLAND HOUSING BUREAU

**Nick Fish, Commissioner**

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Date

**Appendix G2 – Sample Monitoring Intro Letter**

DATE: October 26, 2012

TO: Kristy Wood, Executive Director

 Oregon Community Warehouse

 3969 NE MLK Jr. Blvd.

 Portland, OR 97212

FROM: Dawn Martin, Program Specialist, PHB

SUBJECT: May 26, 2010 – On-site Monitoring Visit

Kristy:

The Portland Housing Bureau is required to conduct an on-site monitoring of organizations and programs that receive funds through the bureau. A monitoring visit for Oregon Community Warehouse is scheduled at your agency offices on **Thursday, May 26th, 2010 from 10:00 AM to 12:00 noon.**

The purpose of the monitoring visit is to ensure that programs are in compliance with regulations for administration, financial and programmatic operations. Your organization will also be monitored for compliance to City requirements and performance based on your contracted budget, scope of service, outputs and outcomes. The program that will be specifically monitored is: Furnishings for Homeless Individuals and Families. We would appreciate it if you ensured that key staff members are available at the scheduled time to answer any programmatic or fiscal questions that arise.

During the visit we will:

* Review program files and records current fiscal year (July 1, 2010 - June 30, 2011)
* Review a sample of financial records and reports that pertain to the current fiscal year contract for the program referenced above
* Check documentation for eligibility and beneficiaries, including review of beneficiary files
* Check grant and other compliance requirements stipulated in the contract
* Review program progress and outcomes, based on contracted outputs and outcomes
* Review existing financial and administrative policies as necessary

Paul Stewart, Financial Analyst at PHB, will conduct a monitoring of your agency’s financial records and compliance, and I will perform the program monitoring. Paul will notify you approximately one week in advance of the visit the specific contract invoices for which we’d like to review back-up documentation. We look forward to meeting with you and having an in-depth opportunity to discuss the progress of your City-funded program.

Sincerely,

Dawn Martin,

Program Specialist

cc: Paul Stewart, PHB;

Sally Erickson, PHB;

Jacob Fox, PHB