

**Programmatic Monitoring Tool for Administering Awards under
the Community Services Block Grant Program to the
State Association**



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The State Community Services Office has assembled the following monitoring guides and checklists in an effort to provide comprehensive procedures for monitoring agencies that are awarded subcontracts under the Community Services Block Grant program. These guides and checklists are a work-in-process. As new ideas and innovative techniques and procedures emerge, both through “hands-on” use by our Program Specialists and Fiscal monitoring staff, as well as the continual training and collaborating with others throughout the year, the guides and checklists are modified in an effort to make the monitoring process as efficient and effective as possible.

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Section I

Monitoring Overview



DEFINITION OF MONITORING

The State Community Services Office (SCSO) defines monitoring as a comprehensive approach to ensuring compliance with Federal, State, Eligible Entity performance goals, administrative standards, financial requirements and Federal regulations governing the CSBG program, including reviewing, assessing, evaluating, and improving the quality and types of services provided by CSBG sub-recipients to low-income individuals and families.

GUIDING PRINCIPLES TO MONITORING

- **Mutual Respect** – In working with local boards, staff, and consultants, SCSO recognizes and will value the unique knowledge, ability, and independence of each person. We are committed to treating all persons fairly and maintaining credibility by matching actions with words.
- **Open Communication** – Effective communication is key in facilitating good working relationships amongst partners, and SCSO is committed to keeping lines of communication open. The purpose of our communications is to assist in developing solutions to problems, to share program improvement ideas, and to provide information on new developments in the anti-poverty field. We will communicate frequently through a variety of tools and media. SCSO is committed to listening to suggestions and concerns, to gaining an understanding of local operations, and to assisting local CAAs in pursuing their priorities.
- **Joint Problem Solving** – SCSO believes that a team approach to problem solving is in the best interest of all parties involved. Our office sincerely believes that collectively SCSO, the CAA, and our other community action partners can arrive at the best solution to any situation. Through a team approach to problem solving, we can come up with the best strategies for program development, conflict resolution, and compliance issues. SCSO wants to promote an environment in which our office and all our community action partners will be open to change and can work together in exploring options and developing mutually agreeable solutions. The goal is to have agencies function independently but with SCSO support in an effort to meet the needs of local communities within the parameters set by legislation.

MONITORING METHODOLOGY

The Program Specialist is the key contact person between SCSO and the Association. This individual performs ongoing monitoring through desktop reviews of the agency's periodic requests for reimbursement and program performance reports. Any problem encountered by the Association should be addressed with the Program Specialist.

In addition to onsite programmatic and fiscal monitoring the SCSO program specialist and fiscal auditor will conduct ongoing desktop reviews. On site monitoring will utilize tools, checklists, and guides found in this packet. These guides and checklists were developed over a period of several months utilizing information from various resources, including a review of the

monitoring tools used by several other states and through participation in the CSBG Monitoring Workgroup sponsored by NASCSP.

INTRODUCTION TO CSBG MONITORING TOOLS

The **CSBG Pre-Visit Questionnaire** and **Internal Control Questionnaire** are sent or emailed out to the CAA at least three weeks in advance of an on-site visit. We have found this method to be quite effective as a representative from the CAA provides the information in advance, allowing the Program Specialist or Fiscal Auditor an opportunity to review the information before the actual on-site visit and customize the review planning process. An electronic version of these tools has been developed to facilitate the response of the CAA within the context of the documents.

The **Monitoring Tool for Program Specialists** is used for interim monitoring visits, and focuses on reporting, governance, client eligibility and program operations.

Section II

Scheduling and Preparation

**PROCEDURES FOR SCHEDULING
AND PREPARING FOR
THE ON-SITE
PROGRAMMATIC REVIEW**



Planning the On-Site Visit

Notify the agency by telephone and email least three weeks in advance of planned visit. Ask for input from the sub-recipient's Executive Director/Project Director to select specific date and time and to develop an agenda that serves the needs of all parties. Ask the agency to prepare an electronic or physical file of need documents for review. Via email send the agency director and program manager the notification letter, pre-visit questionnaire, and other documentation listed in the letter.

The Association receives a different notification letter than the CAAs, see the association Monitoring tool for the correct letter.

WRITTEN NOTICE OF ON-SITE REVIEW WITH APPROPRIATE ENCLOSURES:

PROGRAM SPECIALIST:

- Necessary attachments as listed in the letter
- Pre-visit Questionnaire

NOTICES AND DOCUMENTS

- Documents, data, and systems to be returned with the questionnaire;
 - Most recent Board Roster
 - Most recent board Minutes
- Documents, data, and systems to be made available for onsite monitoring as they related to CSBG**
 - Most Recent CSBG Application and work plan
 - Award notification(s) and copy of executed contract/amendments
 - Documentation of current corrective action plans and audits with accompanying descriptions of progress to date, if applicable.
 - Copy of the latest employee and Director's evaluation/appraisal.
 - Documents related to any termination of federal or state funding in the last year
 - If there are changes please provide the new organizational Chart that relates to the department or agency carrying out the CSBG.
 - Board member packet
 - Employee policies and procedures
 - Poverty Conference Feedback
 - ROMA Training Feedback

OTHER PRE-VISIT PREPARATORY TASKS:

Review pertinent materials in the agency's contract file including:

- ❑ The contract/amendments
- ❑ Work Plan/Scope of Work
- ❑ Approved budget by categories
- ❑ Progress & financial reports

Review the following board documents

- ❑ **Last year's board rosters**
- ❑ **Last year's board minutes**
- ❑ **Last year's board by-laws**

Note timeliness of agency's submission of required reports, review previous site visit reports including any follow-up documentation, review agency's most recent independent audit report and any other available monitoring reports such as Head Start PRISM.

Gather all forms, instruments, and other information needed for the site visit, such as monitoring tools, checklists, client list for programmatic & administrative points and guides.

Notification Letters

[SAMPLE NOTIFICATION LETTER FOR PROGRAMMATIC REVIEW]

[Date]

[Contract Person]

[Agency]

[Mailing Address]

[City, State & Zip Code]

Re: **FY CSBG Monitoring Notification Confirmation Letter**

Contract# [insert contract #]

Dear [insert name]:

The State Community Services Office (SCSO) will be conducting an on-site monitoring visit with your agency regarding the Community Services Block Grant program for **fiscal year [insert date]**. The visit is scheduled for **[Day, Month & Year at Time]**. We appreciate your cooperation and partnership in the CSBG networks efforts to maintain quality services and standards.

Attached to this letter you will find the following documents:

- A Pre-visit Monitoring Questionnaire.
- List of other documentation to have ready for our review (these documents may be reviewed during or after the visit)

The Pre-visit Questionnaire must be returned to our office no later than one week prior to the monitoring visit.

The purpose of this visit is to review and discuss the following documents for program compliance:

- ✓ Your agency's current program application/work plan/amendments
- ✓ Award notification(s) and executed contract
- ✓ Any relevant correspondence regarding the CSBG contract
- ✓ Any financial reports related to this fiscal year funding
- ✓ For review and discussion – progress reports, client files and other documents pertaining to this program

Lastly, please allow for a 15 minute slot in your governing/advisory board meeting for the program specialist to ask questions relating to the boards roles and responsibilities.

I am looking forward to meeting with you, your staff, and board members you wish to be in attendance for this visit. Please feel free to call me if you have any questions or concerns regarding my upcoming visit.

Sincerely,

In-Office Pre Visit Questionnaire

Agency: _____ Contract Number: _____

SCSO Program Specialist: _____ Review Date: _____

The following are question that the CSBG Program Specialist should answer and review before visiting the Agency

PRE VISIT IN-OFFICE QUESTIONS

	Yes	No	Comments
Is the agency submitting the RFF forms on a timely basis?			
Are expenditures reported by the agency to date within the budgeted amounts by category per the contract?			
Has the agency submitted required quarterly reports (Form 508-A) on a timely basis?			
Does SCSO have a copy of the most recent Board roster?			
Does the Board roster include the name, title, address, sector represented, date appointed or elected, and term expiration date for all Board members?			
Have all Board Minutes been submitted to SCSO?			
Board Minutes			
Do the Minutes Contain the Following			
<ul style="list-style-type: none"> • Date, Time, Location • Regular or Special Meeting • Number and name of Attendees • Presence of a Quorum • Guests in attendance • Action on minutes • Major proposals and the actions taken • Treasures Report • Major Discussions • Committee Reports • Compensation Decisions 			
Do Minutes list Board members in attendance & absent?			
Is there evidence in the Minutes that the Board uses community needs and service gap analysis to establish service priorities and adopt program objectives?			
Do the Minutes indicate that the agency's Board fully participates in the development, planning, implementation, and evaluation of the CSBG program?			
Do the Board By-laws establish procedures under which a low income individual or organization serving low income			

individuals may petition for adequate representation?			
Are all staff positions identified in the CSBG Contract application, and any amendments thereto, filled?			
Is the agency gathering and tracking all information needed to complete the CSBG program reports?			
Are program outcomes sufficiently documented?			
If reported expenditures exceed budgeted amounts by line item, has the agency requested an amendment to the original budget and/or provided adequate explanation for any significant variances?			
Do By-laws specify a method for selection that is appropriate for each Board sector? (review by laws)			
Do By-laws state that written advance notice, including an agenda, shall be given to the Board members at least 5 days in advance of Board meetings? (Review By Laws)			

B-PROGRAM OPERATIONS

- a) Briefly describe, what is the agency's current assessment of its progress towards accomplishing the objectives of its CSBG related programs as stated in the Application and Work Plan?

- b) Please list any current Corrective Action Plans (CAPL), Technical Assistant Plans (TAP), Quality Improvement Plans (QIP), or unresolved findings (UF) or compliance issues previously brought to the agency's attention that are unresolved or have been resolved since the last monitoring visit. These plans and findings will result from monitoring or Organizational Standard Assessments.

Please list any other corrective action prescribed by other government or funding agencies.

CAPL, TAP, QIP, UF	Current Status	Time left to complete
Other Prescribed Corrective Action	Current Status	Prescribing Agency

- a) What Technical Assistance and/or Training does the agency need?

- b) Does the agency have adequate staff assigned to administer the CSBG program activities effectively and efficiently?

- c) What skill gaps is the agency experiencing in its staff?

- d) Please provide one to two specific examples of how your agency's / organization's programs and services are reducing poverty?

- e) What is the morale of the staff in your organization? How is morale measured? What is the staff turnover rate over the past 5 years (list rates by year)?

AGENCY GOALS / OUTPUTS / OUTCOMES

Please provide your goals / outputs / outcomes below. Please provide an explanation regarding how each goal and or outcome is being achieved in your current fiscal year.

Section III

Program Monitoring

CSBG PROGRAM SPECIALIST



Board Meeting Attendance Report

Board Members during the Meeting

Agency: _____ Contract #

SCSO Program Specialist/Representative:

Meeting Called to Order: _____ (date/time)

Meeting Chaired by:

Current Size of Board: _____ Total Board Members Present:

Were meeting notice, agenda, & minutes distributed prior to the meeting?[]Y []N

How far in advance?

Was attendance taken?[]Y []N

Title of person responsible for keeping attendance records:

Was a quorum present at the meeting?[]Y []N

Were the minutes of the previous meeting reviewed and approved?[]Y []N

If applicable, were corrections made to previous minutes?[]Y []N

Briefly describe the topics and reception of the Executive Director's Report:

Presentation of report: [] Written [] Oral

Recommendations for Board actions:

FINANCIAL REPORT

Presentation of report: Written Oral

Is the Board provided with current financial information?Y N

Highlights of report as presented:

COMMITTEE REPORTS

The committees presenting a report:

_____	_____
_____	_____
_____	_____
_____	_____

PROGRAM REPORTS

Presentation of report: Written Oral

Highlights of report as presented:

OLD/NEW BUSINESS

Highlights, if applicable:

Time Adjourned: _____

Program Specialist observations/comments, including, but not limited to:

Board member(s) preparedness:

Meeting procedures followed:

Other comments (Attitude and participation of board members):

Was the prepared agenda followed? []Y []N

QUESTIONS FOR THE BOARD OF DIRECTORS

The following should be asked directly to the board or a group of board members

	Yes	No	Comments
Does the board engage in activities with the Staff <i>(provide description)</i>			
Does the board engage in fundraising activities (only for private CAAs)			
Does the Board evaluate the effectiveness of the Director? (Review Minutes)			
a- What Methodology does the board use?			
Does the Board review the evaluations and performance of Staff? (Review Minutes)			
How was the board individually and as a whole made aware of the board's roles and responsibilities?			
Do the programs operated by the agency contribute to the agency's overall mission, and does each program achieve measurable outcomes that help Improve the networks capacity?			
When was the last time the board reviewed its own by laws?	<i>(verify with meeting minutes)</i>		

Monitoring Tool for Program Specialists

Agency: _____ Contract Number: _____

Program Specialist: _____ Date of Visit: _____

Agency Staff involved in the review:

Was a CSBG Pre-Visit Questionnaire mailed out to the agency at least three weeks in advance of the scheduled on-site visit?.....[]Y []N

Did the agency complete and return the questionnaire one week prior to the visit.....[]Y []N

1.1- BOARD GOVERNANCE SYSTEM

Review the agency’s Board roster, information provided by the agency on the CSBG pre-visit questionnaire, and interview appropriate agency staff to complete the following:

	Yes	No	Comments
Have 25% of Board seats remained vacant for more than 90 days?			
Does the Board approve the agency’s policies? View Minutes			
Does the Board have committees structured to fully address its fiduciary and governance responsibilities?			
What are the different committees?			
How often do the committees meet / and are they performing their assigned duties?			
What is the orientation process for the new members of the board?			
Does it include, at a minimum, the following: Re-verify using packet	Yes	No	Comments
Board Manual (if one exists)			
Organization History, Mission, Vision and values			
Roles and responsibilities of the board and staff			
Board committees and committee vacancies			
Financial and time expectations of board members			
Annual calendar of events			
An organizational chart			
Tripartite Board By-Laws			
Tour of the facility			
Code of Ethics			

1.2- BOARD ROLES AND RESPONSIBILITIES

	Yes	No	Comments
Does the Board participate in the:			
Program Development Program Planning Program Implementation And Evaluation of the programs to serve low income communities			
Does the board fill the following best practices of Role and Responsibilities: (if applicable)			
Determine the mission and purpose of the agency / organization			
Select the chief executive / director			
Support and evaluate the chief executive / director			
Ensure adequate financial resources			
Protect assets and provide proper financial oversight			
Build a competent board			
Ensure legal and ethical integrity			
Enhance the organization's public standing / public awareness			

1.3- BOARD MEETINGS AND MINUTES

Review the Minutes of the agency's Board meetings to re verify the following:	Yes	No	Comments
How often does the Board meet?	Monthly / Quarterly / Bi-annually		
Are regular Board meetings open to the public?			
Does the Board monitor staff development/training needs, plans and outcomes?			
Does the Board formally evaluate major programs every three to five years, including regulatory compliance and outcome analysis?			
Is there a quorum at most board meetings?			
Is the board an advisory board a policy making board or an operational or procedural board?			
Does the Board direct the agency to new ways of providing service or do they merely maintain the status quo? Provide an example?			

1.4- ORGANIZATIONAL PARTNERSHIPS

	Comments
How are other organization being partnered with to fulfill the mission of your organization as it relates to CSBG and the goals of the discretionary application	
What are your strongest partnerships and what do they achieve?	

1.5- PERSONNEL

Based on previous knowledge of the agency's operations and the updated information gathered during the current review, assess the agency staff assigned to CSBG program:

	Yes	No	Comments
How often does the agency conduct performance reviews of its staff? When were the last appraisals?			
How often is the executive team's performance reviewed? Who conducts these reviews? When were the last reviews?			
Is your agency's staff aware of the strategic plan and how their jobs contribute to fulfilling the plan?			
Is any staff other than the Executive Director involved in the community partnerships and collaborations? Who?			
Does your organization / Agency have and maintain the following personnel policies:			
Classification and pay plan			
Employee selection and appointment			
Conditions of employment and employee performance			
Employee benefits			
Employee-management relations including procedures for filing and handling grievances, complaints and rights of appeal			
Personnel records and payroll procedures			
Job description for all positions			
Drug Free Work Place Policy			
Affirmative Action policy and plan / nondiscrimination policy			
Conflict of Interest Policy			
Equal Opportunity			
Prohibit Political Activity or Lobbying			
Whistle Blower			

1.6- ONE ON ONE WITH OTHER EMPLOYEES

Speak to individual(s) or group of employees who are funded using CSBG dollars

	Yes	No	Comments
Do you feel the programs are run efficiently?			
Does this organization foster kindness, fairness, and respect?			
What function and duties in the organization could be described as waste, or unnecessary?			
What does the organization do well?			
What, in the organization, would you change if you could?			
If you could tell your director anything, what would it be?			
What is your organizations mission			
Given your job description do you perform the functions listed in your job description?			
What types of supervision do you receive?			
How often do supervision sessions occur?			

1.7- USE OF DISCRETIONARY FUNDS

Review/update these questions each year from the previous year's Scope of work.

	Yes	No	Comments
Did the organization produce a poverty conference?			
What was the feedback in the following areas			
Types of training offered Quality of trainings offered Quality of speakers Subjects of speakers			
How many attended the conference?			
What was the agencies attendance goal?			
Did the agency conduct ROMA Trainings			
Who conducted the training			
How many trainings were conducted			
What was the feedback on the quality of the ROMA training			
How many IS reports did the agency assist with			
How many family development specialist trainings were conducted			
How has the networks capacity been improved			

Previous Year Corrective Action Follow up

This section is for both monitoring corrective action and corrective action from Organizational Standards

Previous unresolved corrective action: CAPL T/TAP QIP Termination

Date is should be resolved by:

What is the current progress for this correction:

What is the next step if it is unresolved:

Previous unresolved corrective action: CAPL T/TAP QIP Termination

Date is should be resolved by:

What is the current progress for this correction:

What is the next step if it is unresolved:

Previous unresolved corrective action: CAPL T/TAP QIP Termination

Date is should be resolved by:

What is the current progress for this correction:

What is the next step if it is unresolved:

Previous unresolved corrective action: CAPL T/TAP QIP Termination

Date is should be resolved by:

What is the current progress for this correction:

What is the next step if it is unresolved:

Previous unresolved corrective action: CAPL T/TAP QIP Termination

Date is should be resolved by:

What is the current progress for this correction:

Summary of the On-Site Monitoring Visit

SUMMARY OF ON-SITE MONITORING VISIT

Based on information obtained from completing this checklist, a review of information provided in the questionnaire, and interviews with various agency personnel, briefly describe any training or technical assistance needs identified during the monitoring process:

Briefly describe any instance(s) of noncompliance / areas that require improvement and recommended corrective action with time frames and expected results:

From this visit, does the agency demonstrate that they are looking for new and better ways to do its work? Or is the agency still doing what it did five or more years ago?

Did agency staff involved in the on-site review demonstrate knowledge of CSBG program guidelines and procedures?

(SCSO Program Specialist)

(Date)

(Sub recipient Representative and Title)

(Date)

SECTION IV

CONCLUDING THE ON-SITE VISIT



THE EXIT CONFERENCE

The forgoing tools and checklists were designed to provide guidance for SCSO staff to conduct an overall comprehensive review of the association's operations. Throughout both the programmatic and fiscal review process there should be ongoing, open communication with the association's staff to facilitate clarification of facts and prevent misunderstandings, provide the reviewer with a full understanding of the CAA's operations, and provide the association with a full understanding of the monitoring process.

SCSO staff should strive to ground their judgments in fact, based on what they hear, observe or read. SCSO reviewers should document relevant details of the agency's activities and performance during the on-site visits, including taking notes while interviewing agency staff and during their attendance at the agency's board meetings.

Preliminary areas of noncompliance should be summarized and discussed with the association Executive Director and/or designated staff during the exit conference. Copies of specific documents, supporting schedules, and reports obtained during the site visit to facilitate preparation of the report should be discussed during the exit conference. The grantee is given the opportunity to provide comments and present additional information or explanation regarding a specific finding before it is included in the report.

THE REPORT

Monitoring and Standards results will be provided in the same format and report. Each deficiency and/or area of noncompliance will be identified by a topic line, and include a brief description of how the grantee is out of compliance with a program requirement or standard. A brief description will be provided for each deficiency. Each noted problem or deficiency should be presented in a logical manner, with reference to supporting evidence and without ambiguity of meaning or confusion of terminology. The specific program requirement, OMB Circular reference, or other regulation should be cited, along with a clear explanation as to why the evidence gathered leads the SCSO reviewer to conclude that the agency is not in compliance.

The report will include specific timelines for any required and agreed upon corrective action. Copies of the report will be provided to the agency's Director and to the association's Governing Board.

Example of how findings are reported:

Subject: Board Members have not received ROMA training. 7/22/15.

Description: upon review of the governing board's minutes the program specialist discovered that no board members have received ROMA training, the monitoring tool and organizational standards require that governing boards receive ROMA training.

Corrective Action Plan Type: CAPL

Plan Description: after reviewing this finding with the ABC agency, the Agency and the SCSO have decided that a CAPL will be in place until this standard is met. The target date for the CAPL to be complete is 10/15/2015. The outcome is, ROMA training by a ROMA trainer at the next board meeting.

Date to be complete: 10/15/2015

Date of follow up: 10/17/2015

Responsible Party: SCSO Program Specialist

Required Documentation: Most Recent Board Minutes and training material

The SCSO Program Specialist who conducted the monitoring will submit a report back to the CAA within 14 business days after the monitoring or assessment is complete and after review and approval from the SCSO Director. The association is required to respond in writing to each of the deficiencies and observations mentioned in the report, including a detailed plan for taking corrective action and or assistance that is needed. The association's response is due within 14 business days after receipt of SCSO's monitoring report. The association's plan for resolution and corrective action will be reviewed by SCSO staff to ensure that all deficiencies have been adequately addressed. Reporting timeline requirement, differ for QIP, see step (7) under the corrective action section (below).

The SCSO Staff will review the agency's prescribed corrective action and will either approve or disapprove. If disapproved, the SCSO Staff and association Director will discuss and plan different and more appropriate corrective action and or training. The association is responsible for drafting the new corrective action plan(s) and submitting it to the State for final approval. After receiving the new plan the SCSO will respond with approval or changes if needed to the association within seven business days.

(SAMPLE - FINAL MONITORING REVIEW LETTER)

[Date]

[Contact Persons Name]

[Agency]

[Address]

[City, State Zip Code]

Re: On-site Monitoring Review(s):

[Program CSBG] – [Contract #]

Dear [insert name],

I want to thank you and each of your staff for taking the time to meet with me regarding the above program and contract. It is always a pleasure visiting your office and facilities and hearing about the services that your agency provides to low-income families and individuals. Thank you for your efforts and your time; it is greatly appreciated by our office and staff.

I want to commend and thank you for your hard work and diligence administering the above programs and striving to meet the requirements and standards of each one.

This letter contains an overview of the monitoring that occurred on **[insert date]**. Below are a list of the strengths as well as any deficiencies and areas of noncompliance found during monitoring. Each strength, deficiency, or area of noncompliance is labeled with a topic line followed by a description and other supporting information as needed, such as corrective action plans, timelines, and expected outcomes.

If there are areas of noncompliance listed, the agency is required to respond, in writing, within two weeks of receipt of this letter. If there are only strength related comments, the response needs to be an acknowledgement of receipt. If there are deficiencies or areas of noncompliance your response must also include the following:

- ✓ A copy and paste of the deficiencies, as they are provided below; with an accompanying
- ✓ Written statement of acceptance for each corrective action and the agencies plan to implement the prescribed plan(s), accompanied by a timeline and expected outcomes;
- ✓ If the agency disagrees with the prescribed corrective action plan(s), the agency needs to provide an alternate plan with a detailed description and accompanying timelines and outcomes.

If you have any questions regarding what is required, or if you need an extension on the two week requirement, please contact me.

****Please respond to any weakness findings no later than [insert date]****

Findings Report

[Program #1] – [Contract #]

Strength

**Subject
Description**

[Program Specialist – insert more areas as needed]

Weakness

**Subject
Description
Corrective Action Plan
Type
Plan Description
Date to be complete
Date of follow up
Responsible Party
Required Documentation**

[Program Specialist – insert more areas as needed]

[Insert salutation]