|  |  |  |  |
| --- | --- | --- | --- |
| Agency Name: |  | | |
| Address: |  | | |
| Phone Number: |  | | |
| Contact Person: |  | | |
| Monitoring Dates/Days: |  | Send Report By: |  |
| Time of Arrival First Day: |  | Time to Leave Home: |  |

**Before the Visit**

1. Send letter announcing visit \_\_\_\_\_\_\_
2. Reserve car \_\_\_\_\_\_\_ DAS Confirmation # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date/time of pick-up\_\_\_\_\_\_\_\_\_
3. Make hotel reservations \_\_\_\_\_ Confirmation # \_\_\_\_\_\_\_\_\_\_\_\_\_Guaranteed Yes No

Confirm state rate $\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Obtain from agency before visit:

* Questionnaire \_\_\_\_\_
* Furnace
  + Invitation to bid announcement \_\_\_\_\_
  + Competitive bid packet \_\_\_\_\_
  + Contract \_\_\_\_\_
  + List of Contractors \_\_\_\_\_
* Weatherization
  + Flat rate prices \_\_\_\_\_
  + Invitation to bid announcement \_\_\_\_\_
  + Competitive bid packet \_\_\_\_\_
  + Contract \_\_\_\_\_
  + List of Contractors \_\_\_\_\_
* Staff names, titles, and hire dates (have them update our spreadsheet) \_\_\_\_\_
* # Homes wxed by county compared to # of LiHEAP apps \_\_\_\_\_
* List of replacement appliances \_\_\_\_\_
* Name, address, and email of Board Chairperson \_\_\_\_\_
* List of current vehicles (have them update our spreadsheet) \_\_\_\_\_
* Electronic copy of agency’s Procurement Policy \_\_\_\_\_ Employee Manual \_\_\_\_\_
* Does the agency need more forms? If so, which ones and how many of each? \_\_\_\_\_\_\_\_

1. Obtain from state staff before visit:

* Agency year-to-date expenditures (shared drive) \_\_\_\_\_
* Specific files/issues to review and reason (ask state staff)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Review before visit:

* Review SLICE and make needed copies \_\_\_\_\_ Agency’s previous monitoring report \_\_\_

**During Visit**

* Review priority list for proper notations.
* Do the inspections have a clear pass/fail line as required?
* Verify that the current audit is being used (check every computer on which the audit is installed)?
  + Are the correct candidate measures being considered?
  + Are the correct fuel, material, and labor costs loaded?