

## **Florida Learn & Serve Grants Policies and Purposes for Sub-Grantee Monitoring**

### **Monitoring Purposes**

The Florida Learn & Serve program conducts site visits and other program monitoring. Sub-grantee monitoring has multiple purposes:

- Provide information, assistance, and training
- Respond to questions and concerns
- Review and assess programmatic activities at sub-grantee sites
- Review and assess administrative systems at sub-grantee sites
- Review and assess financial systems at sub-grantee sites
- Identify areas of concern or potential areas of concern and work with sub-grantees to address those areas
- Provide site visit feedback to sub-grantees
- View sub-grantee activities in action and on-site
- Follow-up on corrective action subgrantee has taken

### **What Monitoring Visits May Include**

As noted on the accompanying site visit form, site and monitoring visits may include requests for sub-grantees to provide supporting documentation in the following areas:

1. General Administration: organizational chart and list of personnel working on the sub-grant; record retention policy; level of support of and/or contribution to project.
2. Grants Management and Financial Information: policies, procedures, and/or forms related to financial systems; ledgers or charts of accounts associated with the project; balance sheets, budgeted vs. actual; copies of required reports for the project; source documentation of match; grant files maintained; inventory of property records.
3. Programmatic Progress: Activity of sub-grantee to date, vs. activity projected in proposal timeline; level, amount, and frequency of service-learning activities; level of student leadership in project design and implementation; level of integration of service learning into coursework and curricula; inclusion of service-learning elements; program coordination, challenges and/or concerns; impact assessment/evaluation.

### **Policy/Criteria for Selecting Site Visits**

The program will strive to visit each of the projects in the Learn & Serve **Special Initiatives grant** at least once each year.

For the **Formula Learn & Serve Grant**, it is not possible to visit every sub-grantee, and it is not possible to conduct in-depth monitoring on each site visit. Site visits will, therefore, be prioritized as follows:

1. Response to an identified need/problem or request from sub-grantee
2. New awardees (Pilot Projects)
3. Largest grant awards (district infrastructure projects)
4. Renewal projects that have not yet been visited
5. Random selection from other sub-grantees (renewal projects and model school projects)
6. Visits of opportunity (include some monitoring in conjunction with a sub-grantee training or visit on a day when activities are occurring; visit when staff are visiting locally for another grant-related purpose, etc.)

### **“Desk Audits”**

In addition to actual visits, program staff will, on a periodic basis, contact sub-grantees and request supporting documentation for some of the fiscal, administrative, and/or programmatic components described above. In most cases, this information can be sent electronically, and state-level staff will then respond with any related questions or comments.

### **Required Sub-Grantee Meetings**

In addition to monitoring visits, there will be at least one mandatory sub-grantee meeting each year. This meeting is typically held in a central Florida location during the fall of each year, and in conjunction with the annual program-sponsored Florida Service-Learning Institute.