# Title X Site Visit Agenda Template

**Purpose:** This sample agenda can be adapted and used for site visits. It is designed for a two-and-a-half day site visit with the third half-day dedicated to preparation for and conducting the exit meeting; site visit observations are discussed with the subrecipient during this meeting. The specific number of days, locations, and agenda for reviews will differ from agency to agency. Title X grantees can modify the original agenda for each additional service site, if necessary.

**How to use**:Insert the grantee’s name and logo, subrecipient information, and other details where indicated and as needed.

[*insert* ***Grantee Name/Logo***]

**Title X Site Visit Agenda**

## Administrative Office Review

[***Dates***]

Day 1 [***Date***]

[***Day 1 Administrative Office Location***]

Grantee contact: [***Grantee Contact Name and Phone Number***]

Subrecipient contact: [***Subrecipient Contact Name and Phone Number***]

| **Time** | **Activity** | **Notes** |
| --- | --- | --- |
| 8–10 am | Site visit team travels to subrecipient administrative offices |  |
| 10–10:30 am | Entrance meeting  Welcome and introductions, overview of the Title X site visit process for staff at the administrative office. Subrecipient overview of its Title X project. | * Include all administrative, fiscal, and clinical staff at the administrative location involved in the review. |
| 10:30–10:45 am | Tour of administrative offices |  |
| 10:45–12 noon | Document review and interviews with subrecipient | * Reserve a private room for the site visit team. * Have requested documents available on site. * Have requested personnel files on- site. * Make sure the following people are available to answer questions:   + family planning project manager   + billing staff   + finance staff   + staff responsible for Information and Education materials review process   + staff responsible for Community Participation, Education, and Program Promotion |
| 12–12:30 pm | Lunch |  |
| 12:30–3:30 pm | Document review and subrecipient staff interviews, continued. | * Medical director or lead clinician to be available for a 30-minute discussion with the clinical reviewer (can be done over the telephone). |
| 3:30–4 pm | Day 1 debrief with subrecipient staff | * Include all administrative, fiscal, and clinical staff who were involved in the review at the administrative site. |
| 4–5:30 pm | **Site visit team** debrief and drive to Day 2 location (if applicable) | [***Site Visit Team Travel/Hotel Information***] |

## Clinical Location Review

Day 2 [***Dates***]

[***Day 2 Service Site Location***]

Service site contact: [**S*ervice Site Contact Name and Phone Number***]

| **Time** | **Activity** | **Notes** |
| --- | --- | --- |
| 9–9:20 am | Welcome and introductions, **overview of the Title X site visit process for staff at this service site location if different from Day one location** | * Include all administrative, fiscal, and clinical staff involved in the review at the Day 2 location. |
| 9:20–9:35 am | Tour of Day 2 location |  |
| 9:35 am–12 noon | Site visit team conduct document review, chart audit, client observations, and staff interviews | * Reserve a private room for the site visit team. * Have requested documents available on-site. * Have requested personnel files available on-site. * Print the clinic schedule for the clinical reviewer, so they can plan for client observations. * If using an electronic health record (EHR), have a staff member who is highly skilled in the use of the EHR available during the review to assist the clinical reviewer as they complete the chart audit. * Make sure the following people are available to answer questions:   + family planning project manager   + billing staff   + front desk staff   + clinical staff   + staff that provide client education   + staff responsible for Information and Education materials review process   + staff responsible for Community Participation, Education, and Program Promotion |
| 12– 12:30 noon | Lunch |  |
| 12:30–4 pm | Site visit team continue document review, chart audit, client observations, and staff interviews |  |
| 4–4:30 pm | Day one debrief with subrecipient staff | * During this debrief, the site visit team will provide a brief summary of its impressions. Include all administrative, fiscal, and clinical staff who were involved in the review at the Day 2 site. |
| 4:30–5:30 pm | **Site visit team** drive to Day 3 location | [***Site Visit Team Travel/Hotel Information***] |

## Exit Meeting

**[*Day 3 Location***]

| **Time** | **Activity** | **Notes** |
| --- | --- | --- |
| 9–10:30 am | **Site visit team** exit meeting preparation | * This meeting is an opportunity for the site visit team to meet privately and prepare for the exit meeting; it may be conducted off-site. |
| 10:30 am–  12 noon | Exit meeting | * Include the administrative, fiscal, and clinical staff who were involved in the review. |