

BPHC Site Visit Instructions **Draft 10/2/08**

Overview

The purpose of the BPHC technical assistance site visit is to provide technical and consultative assistance in the form of on-site visits, document reviews and video/phone consultation to new and existing BPHC grantees. The technical assistance provided focuses on key operational areas needed to implement effective primary health care programs and to support continuous quality improvement. The report format reflects the Program Analysis and Recommendations (PAR) tool that is currently utilized within BPHC and is designed to enable Project Officers and grantees to readily utilize information provided within the technical assistance site visit report.

The BPHC project officer and consultant have clearly defined roles. The project officer has an oversight role that has an expectation of continued interaction and direct feedback to the grantee in terms of both policy assistance and interpretation, problem resolution and performance improvement. The consultant role is to use expertise, special knowledge and training to assist the BPHC in meeting their responsibilities with the expectation that the appraisal of the grantee's problems and issues and the recommended options for resolution are provided to BPHC and the grantee in a professional manner.

A consultant will rarely be expected by HRSA/BPHC to interpret policy. Any questions about policy need to be clarified with BPHC staff prior to the site visit. In all cases the client is the BPHC. How the consultant's appraisal and recommendations are implemented, rests with the BPHC. The project officer will usually be the conduit for further communication with the grantee after the site visit.

Site Visit Process

There are three common elements to all site visits:

1) Pre-site visit tasks

- Discuss the proposed site visit with the respective Project Officer and/or other BPHC official what their understanding of the issue is, what are the applicable policies and to clarify any questions and details.
- Contact the grantee officials to discuss the reasons for the site visit (what is/are the identified issue(s)), the schedule of the visit, and agree on an agenda for the visit that assures board members, staff, and others who need to be involved will be available. Where a team leader has been designated, this individual will take the lead in communicating with the grantee staff.
- Participate on any pre-site visit conference calls as needed.

2) On-site Process

- Conduct the entrance conference or briefing
- Site visit information gathering and assessment
- Conduct exit conference or briefing

3) Post-site visit tasks

- Participate on post site visit conference with BPHC PO
- Develop and submit the site visit report (individual and/or consolidated)

Consultant(s) Responsibilities

The consultant(s) who are engaged to perform a site visit will be charged with the following:

- Conduct the site visit, reviewing documents as needed, and interviewing board members, staff, and others as appropriate, focusing on the identified technical assistance issues presented.

- Conduct all interactions with sensitivity and respect for the organizational culture, its mission, and the culture(s) of the service recipients.
- Prepare a written report which follows the prescribed report format, and which focuses program requirement and performance improvement recommendations for BPHC and the grantee to consider in resolving issues/problems at the grantee level.
- Participate in any requested conference calls or other communications with BPHC staff after the report has been submitted.
- Recognize that, for all site visits, the BPHC is the client. Therefore, the report which is developed will be submitted to the BPHC through MSCG. Under no circumstance should written reports be shared with the grantee.

Expected Outcome of a Site Visit

It is expected that the outcome of a site visit will be an objective, in-depth appraisal of the grantee's problems and issues, with realistic recommended options for problem resolution. The recommendations may involve actions for consideration by the BPHC to address the grantee's current situation. In formulating recommendations, the consultant(s) are expected to bring to bear their best opinions, expertise, and past experience, and to present their observations with candor. Where appropriate, consultants should offer suggested corrective actions that could improve overall grantee performance.