



NTTAP SITE VISIT AWARDEE TRAINING

Health Resources and Services Administration
Bureau of Primary Health Care

June 2, 2021 1:00pm ET

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Vision: Healthy Communities, Healthy People



Agenda

- Site Visit Purpose
- Process Overview
- Site Visit Participant Roles Review
- Pre-Site Visit Preparation
- Pre-Site Visit Review Process
- On-site or Virtual Review Process
- Post-site Visit Overview



NTTAP Site Visit Requirement

Who

- All NTTAPs will receive a site visit

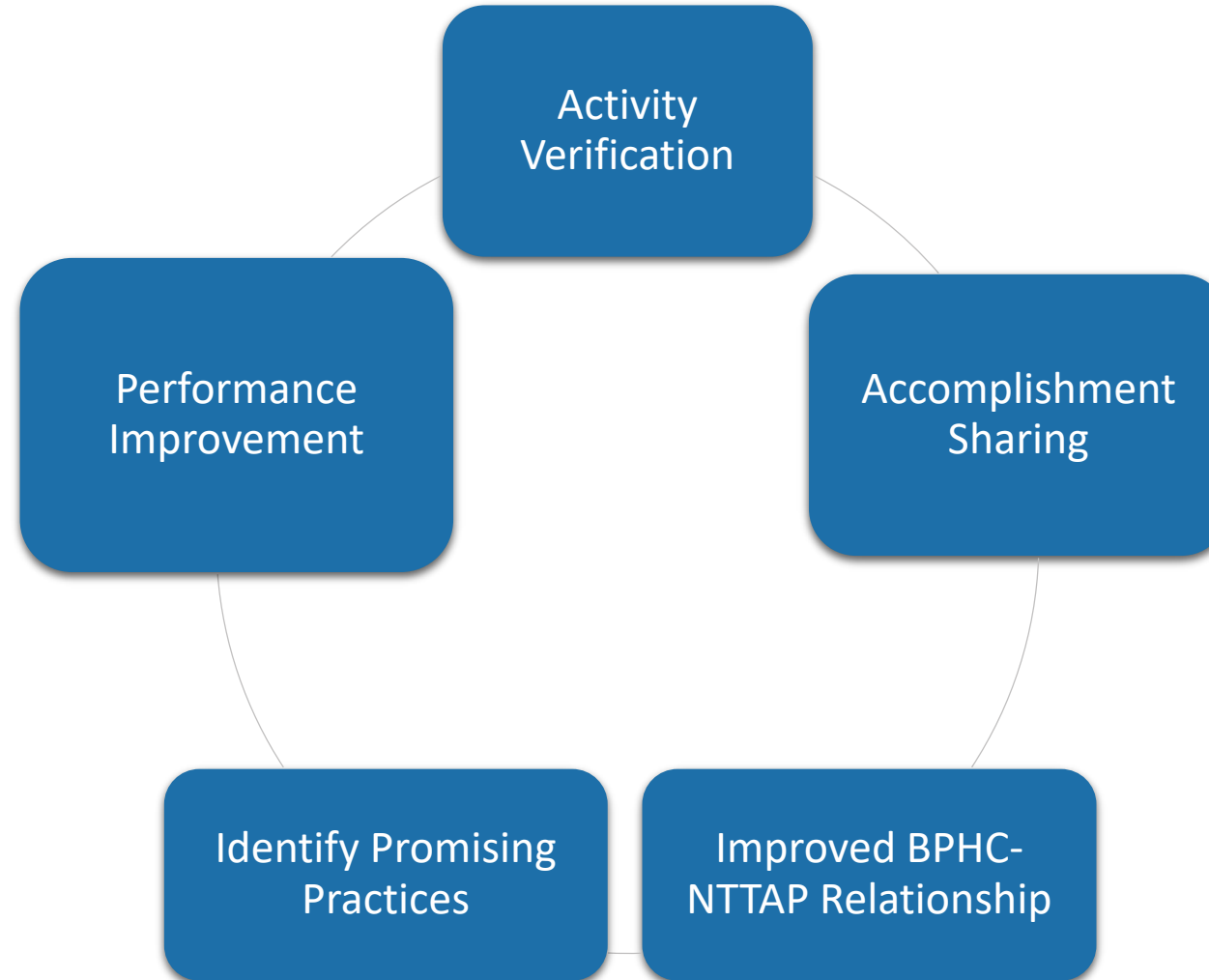
When

- Once per 3-year project period

How Long

- On-site or virtual visit will last 2 days

NTTAP Site Visit Main Components



NTTAP Site Visit Purpose

The site visit will verify whether and to what extent T/TA activities conducted by the NTTAP:

- Correspond to the required objectives and metrics for their awarded NTTAP type
- Strengthen health center operations and improves the clinical performance and outcomes of health centers nationwide.
- Maintains **proper policies, procedures and oversight to manage their programmatic and financial obligations** to the Federal Government
- Adequately address HHS/HRSA Priorities as applicable



NTTAP Site Visits Calendar Year 2021

Special Populations NTTAPs

- **Migrant, Seasonal Agricultural Workers**
 - Health Outreach Partners
 - MHP Salud
 - National Center for Farmworker Health
- **Residents of Public Housing**
 - National Center for Health in Public Housing

Vulnerable Populations NTTAPs

- National Center for Equitable Care for Elders



NTTAP Site Visits Calendar Year 2021 (Continued)

Health Center Development Areas NTTAPs

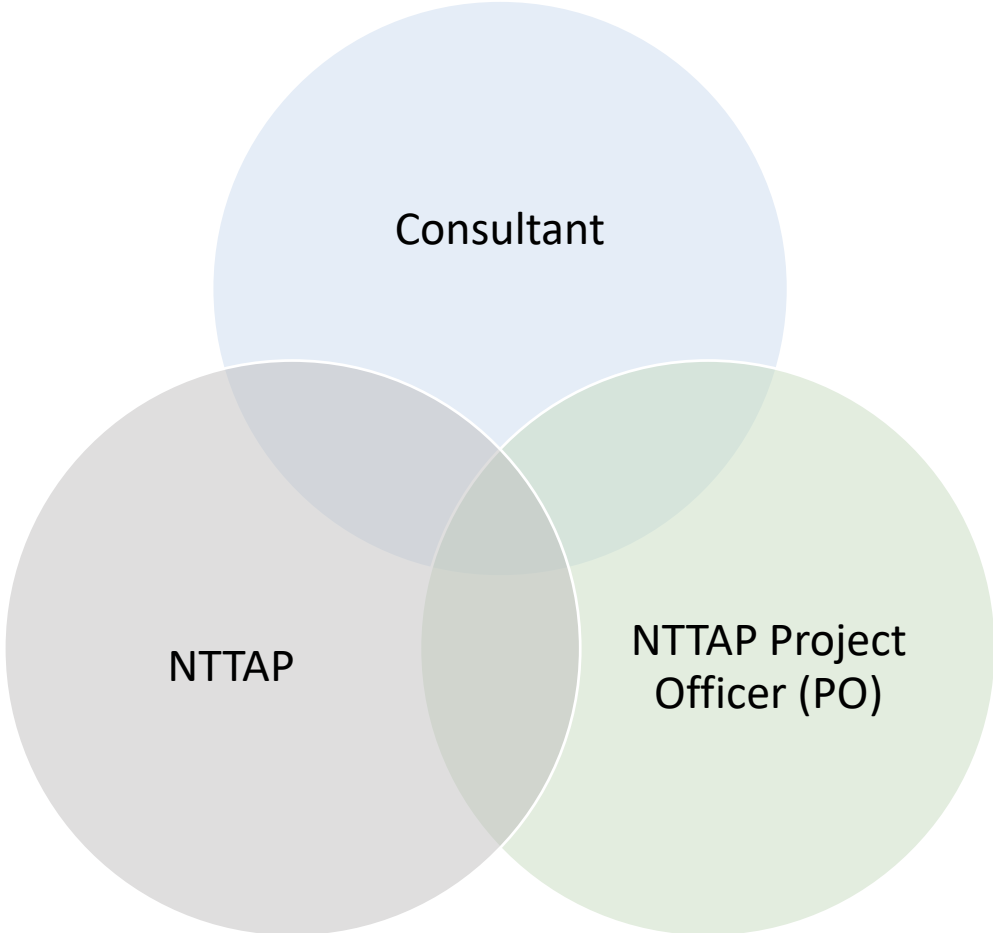
- Association of Clinicians for the Underserved
- National Center for Medical- Legal Partnership
- Community Health Center, Inc.
- Futures Without Violence
- Capital Link
- HITEQ



SITE VISIT PARTICIPANT ROLES OVERVIEW



NTTAP Site Visit Team



BPHC NTTAP PO Role

- Serves as the point person for programmatic questions about NTTAP
- Will conduct preliminary call with consultant
- Initiates the TATs request for the site visit
- Coordinates kick-off conference call
- Ensure that the consultant has received necessary materials (e.g. the site visit guide, NOFO, etc.)
- Attends site visits in-person or virtually, as available
- Participates in entrance/exit conferences during site visit
- Reviews and approves the site visit report
- Work with NTTAP to address any site visit findings



Consultant Role

- Responds to the TATs request
- Participates in a kick-off conference call
- Conducts review of materials as part of the pre-site visit analysis
- Requests follow up information as needed
- Confirms receipt of all necessary documents
- Send GoToMeeting access information to NTTAP PO and NTTAP for site visit
- Develop the site visit agenda
- Facilitates the site visit
- Completes site visit report by the deadlines

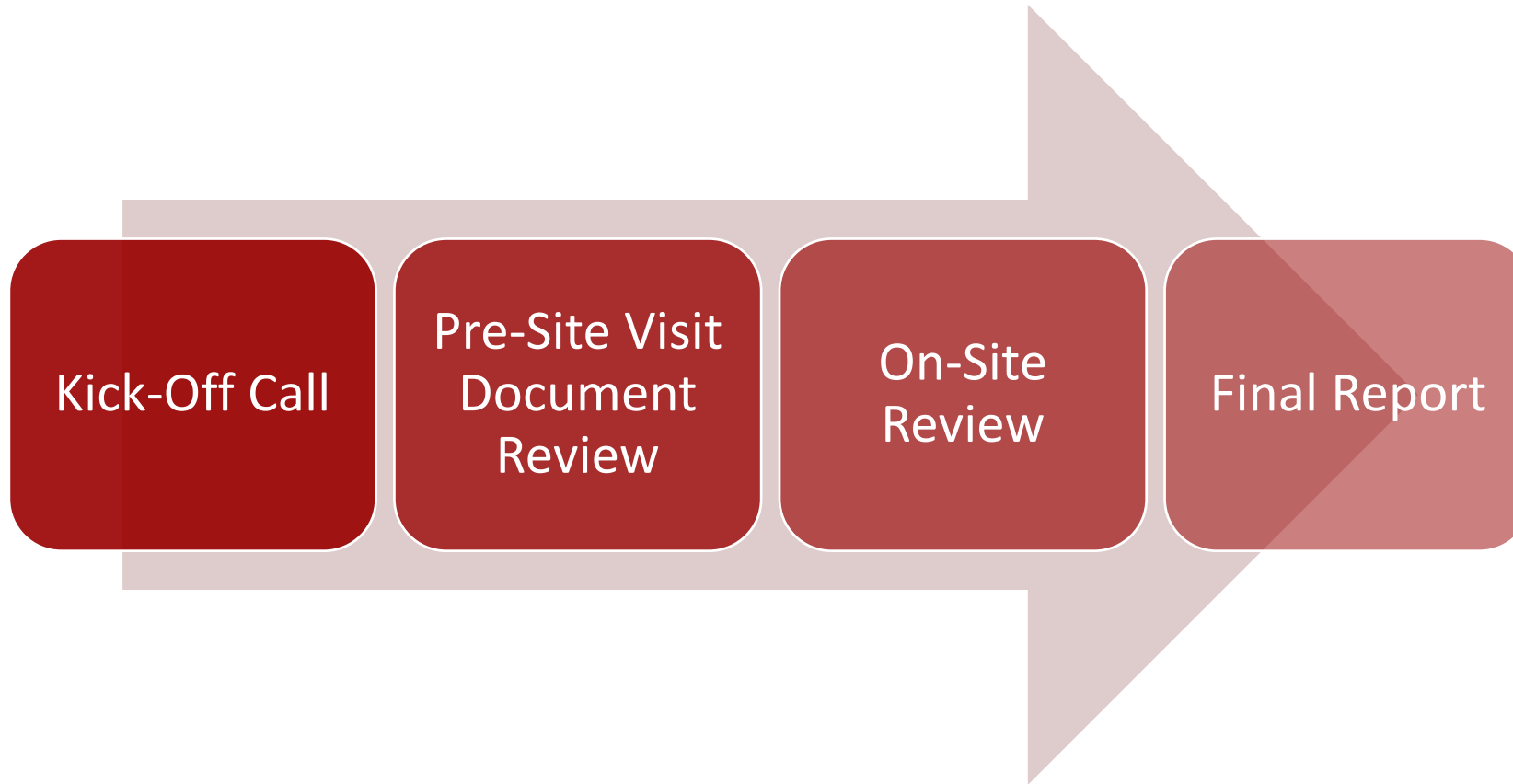


NTTAP Role

- Participates in the site visit kick-off call
- Work with NTTAP PO and consultant to develop the site visit agenda
- Provides required documents and information to the consultant
- Confirms staff availability as relates to the on-site agenda
- Fully participates in person or virtually at the on-site visit
- Present on T/TA activities to showcase accomplishments and for verification
- Complete the consultant evaluation form post site visit
- Work with NTTAP PO to address site visit findings



NTTAP Site Visit Process



PRE-SITE VISIT PREPARATION



Site Visit Guide: What's In It?

- A road map for all site visit participants: NTTAPs, Consultant and POs
- Provides background on the NTTAP Program and key requirements outlined in the NOFO
- Analysis questions are based on NOFO requirements
- Designed to elicit examples and dialogue between NTTAPs and consultants

Site Visit Kick-Off Call

- NTTAP PO will coordinate the call
- Kick-off call purpose:
 - Introduce site visit process, roles, and responsibilities of all participants
 - Familiarize consultant with NTTAP and key points of contact
 - Confirm site visit timing and participants
 - Confirm who will provide what materials and by when
 - Confirm logistics
 - Review the site visit agenda
- Participants:
 - Consultant attending the site visit
 - NTTAP key staff participating in the site visit
 - NTTAP PO



Site Visit Kick-Off Call (Continued)

- Confirm logistics with NTTAP
 - GoToMeeting Platform
 - Confirm with NTTAP which staff will be present for each portion of the site visit. Once the agenda is set, consultant and NTTAP will coordinate with staff to block off their time.
- Confirm pre-site visit materials delivery:
 - Who is responsible for what materials?
 - Deadlines for materials receipt?
 - How materials will be sent (e.g. MSCG Sharefile)

**If the consultant changes during the site visit planning process a new kickoff call must be scheduled between the NTTAP and new consultant



Site Visit Kick-Off Call: Sample Agenda

Time	Agenda Items
25 minutes	<p>Introductions</p> <ul style="list-style-type: none">• Participants and roles• Site visit purpose• Overview of site visit process components• Confirm who will provide what documents, by when
10 minutes	<p>Logistics</p> <ul style="list-style-type: none">• Visit and meeting dates, spaces, and times• Confirm who will be on-site and remote• Review agenda and who will see it, by when
5 minutes	<p>Staff Availability</p> <ul style="list-style-type: none">• Confirm key NTTAP management staff will be available• Review staff who will be interviewed during the visit



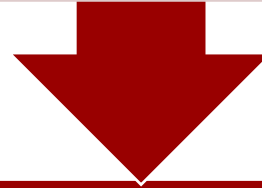
PRE-SITE VISIT REVIEW PROCESS



Pre-Site Visit Reviews: Purpose

Document and Materials Review

BPHC and NTTAP to Provide Materials



In-Depth Understanding of NTTAP

* Review the documents using the questions in the Site visit Guide, Pre-site Visit Verification Appendix D

* Identify Additional Questions to Ask On-Site

Verification support

Pre-Site Visit Reviews: Project Officer Role

- Work with the NTTAP to identify supporting documentation for the two (2) activities: 1- learning collaborative and 1 national audience activity per objective selected by BPHC to be reviewed from year 1 project period.
- Ensure NTTAP documentation are submitted to the consultant ideally 4 weeks before or no less than two (2) weeks prior to the scheduled site visit

Pre-Site Visit Reviews: Consultant's Role

- Upon receipt of materials:
 - Ensure all required materials are received
 - Send confirmation of receipt to NTTAP and NTTAP PO
 - Review materials and ask clarifying questions as needed
 - Note any areas that may need further clarification during the on-site portion of the site visit
- Consultant should also notify the NTTAP that it will be expected to provide examples and documentation for two (2) collaborations for the pre-site visit analysis and review.
 - These samples should include one National Audience and one Learning Collaborative audience activity (if available), during the on-site/virtual portion.
 - These should represent different collaborations than the collaborations found within the two activities per objective selected for presentation during the site visit



Pre-Site Visit Reviews: NTTAP's Role

- Ensure all required materials are submitted via the ShareFile link provided by the MSCG contractor
- Ensure that all documents submitted are clearly labeled for the objective and activity it is connected to



Pre-Site Visit Reviews: Documents

BPHC Documents	NTTAP Documents
<ul style="list-style-type: none"> ❖ FY 2020 NTTAP Notice of Funding Opportunity (NOFO) ❖ The latest competing continuation cooperative agreement application ❖ Year 1 Non-Competing Continuation Progress Report ❖ Year 1 Publication Plan ❖ Year 1 work plan including work plan modifications ❖ Federal Financial Report (SF-425) for the current budget period ❖ Most recent budget narrative and staffing plan ❖ HRSA-Initiated Supplemental Funding Opportunity or Federal Register Notices (FRN) (if applicable) 	<ul style="list-style-type: none"> ❖ The NTTAP’s website ❖ T/TA activities documentation should include: <ul style="list-style-type: none"> ○ Course evaluations and results ○ Attendance records ○ All materials shared with participants including: slide decks, handouts, course materials, etc. ❖ Statement of work and budget for contracts paid with BPHC funding for each budget period within the current project period. ❖ Work plans related to any approved supplemental funding activity (if applicable). ❖ All publication plans with links to posted publications for the current project period. Consultant should document that the provided publication links are active and accessible to the widest possible audience. ❖ Publications that were selected for review at the onsite or virtual site visit, including links to where they could be found online. ❖ Results from the National Resource Center (NRC) health center needs assessment (if available)



ON-SITE/VIRTUAL REVIEW PROCESS



On-Site/Virtual Review Process: Consultant's Role

Consultant will:

- Facilitate the 2-day site visit, invite and accommodate remote staff as necessary
- Conduct on-site analysis using the questions in the Site Visit Guide
- Explain the Consultant Evaluation Form to the NTTAP



On-Site/Virtual Review Process: PO's Role

The NTTAP PO will:

- Participate in the entrance and exit conference
- Participate the rest of in the 2-day site visit in person or virtually, as available
- Facilitate the BPHC Update and Overview presentation
- Ask probing questions and provide feedback and engage in dialogue as appropriate

On-Site/Virtual Review Process: NTTAP's Role

NTTAP will:

- Facilitate the presentation of the NTTAP showcase
- Have any requested documents/tools to present on-site/virtually prepared and accessible
- Answer any questions asked by the Consultant and NTTAP PO
- Key staff should fully participate the 2-day site visit
- NTTAP should present on the selected T/TA activities for verification

On-Site/Virtual Review Process: Sample Agenda – Day 1

Time	Session
9:00 a.m. – 9:30 a.m.	<ul style="list-style-type: none"> • Introductions (PO/or other HRSA Representative if PO unavailable) • Discuss purpose of the site visit • Roles and responsibilities • BPHC Update & Overview (as needed) • Staff Attendance • List staff expected for this portion
9:30 a.m. – 11:00 a.m.	<ul style="list-style-type: none"> • NTTAP Showcase Presentation • BPHC Funded Activity Successes • Innovations • Staff Attendance List staff expected for this portion
10:30 a.m. – 12:30 p.m.	<ul style="list-style-type: none"> • Verification (Consultants) • Staff Attendance List staff expected for this portion
12:30 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 4:30 p.m.	<ul style="list-style-type: none"> • Verification (Consultants) • Staff Attendance List staff expected for this portion



On-Site/Virtual Review Process: Sample Agenda – Day 2

Time	Session
9:00 a.m. – 11:00 a.m.	Project Fiscal Oversight and Management <ul style="list-style-type: none">• Staff Attendance List staff expected for this portion
11:00 a.m. – 12:00 p.m.	Lunch
12:00 p.m. – 2:00 p.m.	Verification (Consultants) <ul style="list-style-type: none">• Staff Attendance List staff expected for this portion
3:00 p.m. – 3:30 p.m.	Debrief CEO prior to exit conference (optional) <ul style="list-style-type: none">• Staff Attendance List staff expected for this portion
3:30 p.m. – 4:30 p.m.	Exit conference <ul style="list-style-type: none">• Staff Attendance List staff expected for this portion



Required On-Site/Virtual Site Visit Materials

- Consultant should have access to all pre-site documents available on-site
- Encourage all participants to have Site Visit Guide in front of them
- NTTAP will demonstrate any interactive tools (website analytics, data tracking methods, peer network platforms, etc.)

Entrance Conference

- Purpose: Reiterate site visit goals, review and confirm schedule
- NTTAP PO provides a BPHC overview presentation
- Allow NTTAP to showcase aspects of the program

**Key Participants: NTTAP Organization's Key Management and Program Staff, Consultant, NTTAP PO

Exit Conference

- Purpose: Consultant summarizes general verification findings with NTTAP, recommended TA and identified innovations
- Consultant will identify next steps and explain the Post-site visit process

**Key Participants: NTTAP Organization's Key Management and Program Staff; Consultant, NTTAP PO, NTTAP organization CEO/Leadership

POST-SITE VISIT OVERVIEW



Site Visit Reports

- NTTAP will receive a final site visit report within 60 calendar days of site visit completion
- Report will inform ongoing monitoring between the PO and NTTAP

Site Visit Report: Content

- Verification status for each objective (1 learning collaborative, 1 national audience activity)
- A requirement is either “Verified” or “Not Verified,” for each objective
- Actions recommended for improvement will be provided whether the objective is verified or not
- Describe any innovative/promising practices identified



Site Visit Report: Follow-Up

- Site Visit Report will inform ongoing monitoring between the PO and NTTAP
- If areas are found to be not-verified, the PO will work with the NTTAP on a Corrective Action Plan (CAP)
- If areas are found to be verified, but have room for improvement, the NTTAP PO will work with the NTTAP on a Performance Improvement Plan (PIP)

Questions



Thank You!

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