

PCA Site Visit Training

**Department of Health and Human Services
Bureau of Primary Health Care (BPHC)
Health Resources and Services Administration (HRSA)**



Agenda

1. Site Visit Background
2. Site Visit Process Overview
3. Site Visit Participant Roles Review
4. Site Visit Preparation
5. Health Center Interviews
6. On-Site Experience
7. Site Visit Reports



HRSA Speakers

- **Nathalia H. Drew, Team Lead, State and Regional PCA Team**
- **Tobey Manns Royal, Senior Public Health Analyst**
- **Ebony Burrowes, Public Health Analyst**



PCA Speakers

- **Texas Association of Community Health Centers, Inc.**
 - Daniel Diaz, Director of Operations/Interim Director of Information Technology
- **Pennsylvania Association of Community Health Centers**
 - Cheri Rinehart, President & CEO, PACHC
 - Cindi Christ, COO, PACHC



SITE VISIT BACKGROUND



How BPHC Evaluates PCAs

- 1. Is the PCA fulfilling all requirements as described in the most recent PCA NOFO?**
- 2. To what extent is the PCA accomplishing its work plan activities?**
- 3. What is the PCA impact on health centers?**



Guide Questions

- Based on NOFO requirements
- Will be updated to align with new NOFOs
- Designed to elicit examples and dialogue between PCA and consultants



Site Visit Purpose



Site Visit Purpose cont.

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

- Increase access to care
- Increase health center operational excellence
- Improve health outcomes and health equity

What Does Verification Mean?

- The evaluation of whether or not the approved PCA work plan fulfills its intended purpose
- Meaning “is this work plan responsive to the NOFO?”
- Did the PCA meet the goals that they set?



PCAs to be Visited

- **26 PCAs will receive site visits in 2019**
- **A minimum of one PCA from each HHS region will receive a site visit**
- **Selected PCAs will receive eight weeks notice in advance of the visit**
- **All PCAs will receive a site visit this project period**



Site Visit Process Overview



PCA Site Visit Process

Who

- All PCAs will receive a site visit
- One consultant to conduct each visit

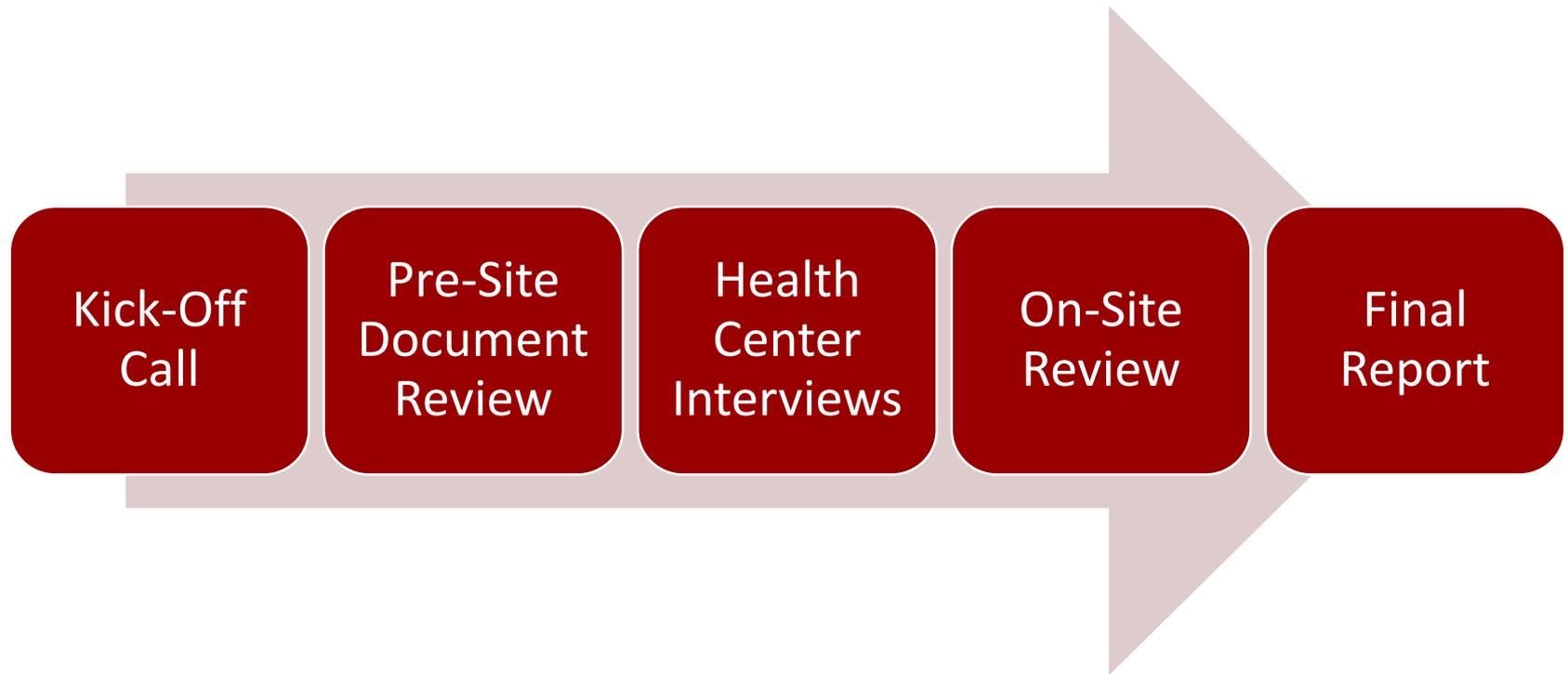
When

- Once per project period

How Long

- On-site portion will last 2 days

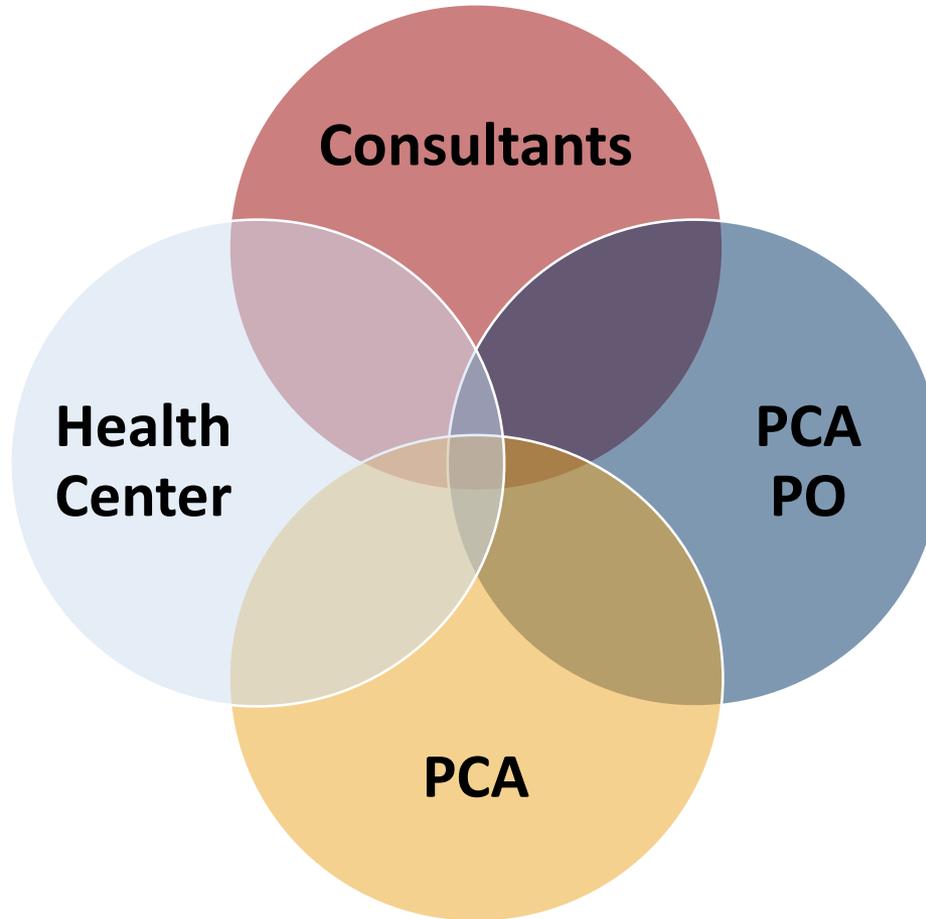
Site Visit Process



Site Visit Participant Roles



PCA Site Visit Team



BPHC PCA PO Role

- **Point for programmatic questions**
- **Initiate the TATs request for the site visit**
- **Coordinate kick-off conference call**
- **Provide required documents to the consultants**
- **Invited but not required to attend site visits**
- **Participate on entrance/exit conference during site visit**
- **Review and approve the site visit report**
- **Engage PCA in post-site visit discussions during monthly calls**



Consultant Role

- Respond to the TATs request
- Participate in a kick-off conference call
- Review documents in the pre-site visit section and complete corresponding questions
- Conduct phone interviews with health centers
- Go on site to conduct site visit
- Complete site visit report by deadlines



PCA Role

- **Provide required documents to the consultants**
- **Confirm staff availability as relates to the on-site agenda**
- **Arrange meeting space and internet connectivity for consultants and off-site participants**
- **Invite the PCA board chair to on-site portion**



SITE VISIT PREPARATION



Pre-Site Visit Purpose

Document and Materials Review

BPHC and PCA to Provide Materials



In-Depth Understanding of PCA

Identify Additional Questions to Ask On-Site

Verification support

Documents to Review

BPHC Documents	PCA Documents
Competing cooperative agreement application	PCA Website
All work plans from the project period	Most recent organization chart, staffing plan, position descriptions, and staff bios
State performance profile	Clinical/financial performance data
Most recent progress report	Documents to ascertain state needs
State conditions report	T/TA tools for two T/TA activities Collaboration examples
Most recent budget narrative	Strategic Plan (if available) MOA (if applicable)
	Statement of work and budget for contracts paid with BPHC funding

TX Document Experience

- How PCA determined what documents to send
- How long selecting and sending documents took PCA
- Method PCA used for sharing documents
- Tips for success

PA Document Experience

- How PCA determined what documents to send
- How long selecting and sending documents took PCA
- Method PCA used for sharing documents
- Tips for success



Health Center Interviews

- Interview results will be shared in the site visit report
- Interviews do not contribute to determining verification



ON-SITE EXPERIENCE



Agenda

- **Consultant sends agenda to PCA PO and PCA for approval:**
 - Include PCA program staff
 - Provide and confirm list of participating PCA staff

Agenda Demo

- See Appendix B for demonstration



TX On-Site Experience

- Describe the process for preparing for the on-site visit and PCA Showcase
- What staff were present and how that was determined
- What resources, tools were shared
- Contributors to a successful visit
- Overall impressions

PA On-Site Experience

- Describe the process for preparing for the on-site visit and PCA Showcase
- What staff were present and how that was determined
- What resources, tools were shared
- Contributors to a successful visit
- Overall impressions

SITE VISIT REPORTS



Site Visit Follow-up

- **PCA will receive a final site visit report within 60-90 calendar days of site visit completion**
- **Report will inform ongoing monitoring between the PO and PCA**
- **See Appendix E for Site Visit Report Demonstration**



Site Visit Report Components

- **Verification status**
- **Interview summaries**
- **Identified innovations**
- **TA recommendations for items found “Verified” but consultant feels could be improved**



Site Visit Report Follow-Up

- If areas are found to be not-verified, the PCA PO will work with the PCA on a Correction Action Plan
- If areas are found to be verified, but have room for improvement, the PCA PO will work with the PCA on a Performance Improvement Plan



Questions



Contact Information

PCA Site Visit Team

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