



Virginia Health Care Foundation Site Visit Guidelines

Purpose:

The purpose of the site visit is threefold: (1) to give VHCF an opportunity to see the project in action and meet the people involved; (2) to assure VHCF that the project is meeting the objectives in the letter of agreement; and (3) to provide VHCF with information and insights regarding the project's operations.

Who Should Participate:

The site visit is a good opportunity to reflect on the progress a project has made and its future goals and ambitions. As such, it is important for project leaders to consider who should be included, so that they are able to effectively capitalize on this opportunity. They may find it important to include relevant staff, key volunteers, board members, and/or key donors. Or they may want to meet with VHCF on their own. It is VHCF's policy to leave the final decision regarding whom to invite to the project leaders.

Topics For Discussion:

Typically, each site visit begins with an update by the project leader on the current status of the project. This update should address any notable achievements, any concerns or delays, and any changes in existing policies or processes.

Each visit also includes a discussion of the project's success in meeting the objectives listed in the letter of agreement with VHCF. Clarification of items from progress reports, as well as the project's status in its fundraising, sustainability, patient satisfaction, and public relations efforts may also be discussed.

Overall, the site visit is more than a "show and tell" experience. It provides an opportunity for dialogue regarding challenges a project may be facing. It may be that similar issues have surfaced in other VHCF projects. Where possible, VHCF will offer suggestions or insights gleaned from other project experiences.

Tour of Project Operations:

This aspect of the site visit depends entirely on the nature of the individual project. If the project provides health care services at one physical site, a tour of the facility and its

operations would be appropriate. If the project is mobile and visits several locations, VHCF could accompany staff on one of these visits. Essentially, it is VHCF's goal to witness a project in full operation, in order to appreciate the full scope of services offered. For the few projects which have no facility, it is up to the project leadership to set up a visit which will give VHCF the full flavor of the project's offerings and a good understanding of its impact on the local community. The accompanying list (pages 2-3) highlights some typical items VHCF reviews at site visits.

Follow-up:

Shortly after the visit, the project director will receive a follow-up letter from VHCF which highlights any pertinent thoughts or observations regarding the project and its operations. Please feel free to share this with other project leaders and appropriate community partners.

Typical Items VHCF Reviews at Site Visits

While the specifics will vary depending on the nature of the project, some of the items VHCF typically reviews include:

- How does the clinic/project work?
- How does the clinic/project assure continuity of care?
- Can the project accommodate all who seek care? If there is a waiting list, how many are on it and what is the lag time?
- Are there eligibility criteria? What are they and how are they applied?
- Does the clinic/project accept referrals from other community agencies? If so, how does this work?
- Does the clinic/project refer patients to other clinics, physicians, or community agencies? If so, how does this work and in what instances?
- How strong is community commitment and collaboration?
- Has the project identified appropriate measures of its effectiveness? Are there other outcome measures that could be tracked to demonstrate the project's impact on the health of its target population?
- Does the project have the necessary information systems to efficiently gather, store and analyze project-related data?
- Is the project accounting for all the in-kind contributions it receives?
- Does the project provide medications and/or fill prescriptions?
- Where do the medications come from (e.g. samples, donations from pharmaceutical companies)?