Section 8.2.6: Post-Site Visit Activities

PURPOSE AND POLICY

Grant program managers are required to perform post-site visit activities which primarily include the preparation of a site visit report and letter. In addition, grant program managers are required to upload these and other related documents to the subrecipient's eCivis or agency Subrecipient Manager (SRM) solution file within 45 calendar days of completion of the site visit. The section below outlines the steps involved in completing post-site visit activities.

PROCEDURE

1. **Prepare the site visit report.** Grant program managers are required to complete a site visit report upon completion of a site visit. The purpose of the site visit report is to document the results of the site visit and to highlight any innovative/promising or best practices, as well as to note any areas where the subgrantee is in non-compliance or in need of assistance.

   In addition to containing basic information such as the subgrantee name, subaward number(s), date of site visit, and date of site visit report, site visit reports should:

   a. Provide a thorough understanding of the site visit, including the purpose of the visit, the organizations and site(s) visited, and the key participants, including the individual(s) who conducted the site monitoring, as well as the people interviewed.

   b. Contains details indicating that a comprehensive review of administrative, financial, and programmatic requirements was completed, including discussions related to programmatic goals and objectives, program implementation on time, on budget and any implementation roadblocks. The report should also include any issues or findings.

   c. Provide a substantive professional opinion and/or summary of the site visit. For example, the program is/is not going well and why, conclusions drawn based on site visit, potential next steps or observation of future state, etc.).

2. **Prepare the post-site visit letter to subgrantee.** The grant program manager is required to prepare a post-visit letter to the subgrantee and send to the subgrantee within 45 calendar days of the end of the site visit. The purpose of the letter is to thank the subgrantee for its cooperation during the visit, and may also serve to identify areas for improvement or assistance that will be provided by the state.

   There are two types of letters that may be sent: 1) an appreciation letter with no findings or recommendations, or 2) an appreciation letter with findings and recommendations. The letter is addressed to the subgrantee from the grant program manager. At a minimum, the grant program manager thanks the head, or designated representative, of the subgrantee agency or organization for the time devoted to the visit, especially the staff that helped make the visit possible.

3. **Work with grantee to develop Corrective Action Plan (CAP), if necessary.** The grant program manager may wish to request a CAP from the subgrantee, or work with the subgrantee to prepare a CAP to address problems related to laws, regulations, financial, programmatic, intentional wrongdoing, etc. The CAP should describe any findings, and where possible, the tasks involved in resolving issues, who will carry out the tasks, task deadlines and how the problems will be corrected. If TA is requested, a plan for servicing the request should be outlined.

4. **Route site visit report and letter through the state agency approval chain.** The grant program manager routes the site visit report and letter to his or her supervisor for approval if required by the state agency.

5. **Send site visit report or letter (or both) to subgrantee and place a copy in the subrecipient's eCivis or agency SRM solution file.** Upon approval from supervisor, the grant program manager should send the post-site visit letter to the grantee within 45 calendar days of conducting the site visit. Note that letters sent via e-mail must include the formal letter as an attachment; the e-mail can explain the purpose of the attachment. Sending the site visit report to the subgrantee is recommended but not required.

6. **Maintain site visit correspondence in subrecipient's eCivis or agency SRM solution file.** Grant program managers are required to upload an electronic file of the completed site visit correspondence including the approved site visit rReport into the eCivis or agency SRM solution file within 45 calendar days of completion of the site visit. Any correspondence submitted by subgrantees in response to the site visit or site visit report should also be uploaded to eCivis or agency SRM solution file.

7. **Follow up with grantee regarding site visit, Site Visit Report and CAP, if needed.** The grant program manager is responsible for following up to make sure the subgrantee meets obligations, and for collaborating with the subgrantee to resolve issues or questions. The grant program manager should respond to any subgrantee correspondence within 15 business days of receiving the initial subgrantee correspondence. See Section 8.2.6.1 for grant program manager responsibilities regarding follow-up with subgrantee.