

Family and Children's Trust

Site Visit Training

January 5, 2026

CONTRA COSTA COUNTY

EMPLOYMENT & HUMAN SERVICES

Site Visit Purpose

- Evaluate the FACT Grantee to ensure:
 - Contracted services are being delivered
 - Contracted services are being delivered to targeted population
 - Funding is being properly utilized
 - Program as being delivered is aligned with FACT Bylaws
- In order to support:
 - Renewing/not renewing contract

Site Visit Process Overview

- 6 Site Visit teams – one for each contract
- All Site Visit teams will be e-mailed:
 - Site Visit Assignment Sheet
 - FACT Bylaws AKA Policies and Procedures
 - Contract Service Plan
 - Grantee completed Site Visit Monitoring Form
 - FY25-26 Budget/Expenditures through 12/31/25
 - FACT Site Visit Monitoring Report Out Form
- Site Visit Teams will conduct Site Visits by February 20, 2026 and Site Visit Leads will submit a completed Site Visit Monitoring Report Out Form at the conclusion of the Site Visit
- At the March 2, 2026 FACT meeting the FACT Committee will report out on each Site Visit and vote to approve/not approve each contract renewal

Before The Visit

- FACT Lead Schedule the Visit – Date/Time/Location
 - Communicate the scheduled Date/Time/Location to Jan Nelson
- FACT Lead Confirm the Site Visit with Grantee 2 days prior to scheduled visit
- FACT Site Visit Team Members:
 - Review the Contract Service Plan and ensure you know the FACT Program, associated deliverables, expectations/outcomes

Before The Visit (cont'd)

- FACT Site Visit Team Members (cont'd):
 - Review the Budget/Expenditures for potential questions
 - Review the FACT Grantee completed Site Visit Monitoring Form and plan on utilizing the FACT Site Visit Monitoring Form to feed the discussion/evaluation
 - Review FACT Site Visit Monitoring Report Out Form in preparation for completing after the Site Visit
- This preparation allows you to use the time you spend with the Grantee efficiently and effectively

Note: The monitoring scope is specifically for the contracted activities, not extraneous activities

During The Visit

- Introductions
- Begin by reminding Grantee of:
 - The reason for the visit
 - Your FACT role (you are a representative of FACT)
- Be thoughtful and clear
 - For example, explain that you want to learn more about a specific aspect of the organization's deliverables; particular people or activities you would like to see/discuss

During The Visit (cont'd)

- The Site Visit should be very organic
- Between Site Visit Monitoring Form and Site Visit Discussion, **ensure that you confirm the following:**
 - **Contracted services are being delivered**
 - **Contracted services are being delivered to targeted population**
 - **Funding is being properly utilized**
 - **Program as being delivered is aligned with FACT Bylaws**

During The Visit (cont'd)

- The visit is an opportunity to get to know the organization in a more personal way than is possible from the information in the completed monitoring form.
- Reminder - Since time is limited, the Site Visit is usually not the best time to bring up small detailed matters that may require the applicant to do research or analysis
- Take detailed notes

During The Visit (cont'd)

- Complete Section I & II of Site Visit Report Out Form

SECTION I: GENERAL INFORMATION 1. Agency Name: _____ 2. FACT Program Name: _____ 3. Report completed by (Lead FACT Site Visit Member) Name: _____ 4. Date of Site Visit: _____ 5. Virtual or In-person: _____ SECTION II: SITE VISIT ATTENDEES 1. FACT Members/Staff Present: _____ _____ _____ 2. Agency Staff Present (Name and Title): _____ _____

- If questions about process/next steps come up share that the FACT Committee will be meeting on March 2, 2026 to discuss the Site Visits and to vote on FY26-27 contract renewal. If you know you will be recommending renewal, feel free to convey that.

After The Visit

- FACT Site Visit Team conducts post Site Visit debrief
 - Compare notes
 - Discuss feedback on Grantees services
 - Review comments to include in Report Out
 - Determine Team recommendation to renew/not renew
- Complete Site Visit Report Out Form (typically responsibility of Lead)
- Submit Site Visit Monitoring Report Out Form at the conclusion of the visit and no later than Thursday, Feb 26 via e-mail to Jan Nelson; cc: Ana Kaye
- Site Visit Lead sends Thank You communication to Grantee

Questions

Enjoy Your Site Visits!