

# Family and Children's Trust

Site Visit Training  
January 5, 2026



# 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 with 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

<b>SECTION I: GENERAL INFORMATION</b> 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: _____
<b>SECTION II: SITE VISIT ATTENDEES</b> 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!*