

Instrument 3: Site Visit Planning Template

**Site Visit Planning Template
 Child Welfare Community Collaborations**

Instructions for Project Director (or designee):

1. Please use this planning template to schedule a **total of 10-12 interview sessions** with the individuals you believe can provide the most insight about your grant implementation (i.e., individuals who are actively involved in the work and can speak to both implementation successes and challenges). Please be sure to invite representatives from the grant’s required partners (public child welfare agency, the courts, and legal community). Please schedule interviews with:
 - a. Project Director (90 minutes)
 - b. Staff from the lead organization who are responsible for day-to-day implementation of grant activities (e.g., program managers, individuals responsible for communicating with collaborative members). Please choose 1-2 individuals (60 minutes each)
 - c. Staff from the lead organization who are involved in service delivery (e.g., case managers, outreach specialists). Please choose 2-3 individuals (60 minutes each). *Note: These interviews can be conducted with up to 4 individuals per interview, so long as staff hold the same position/role*
 - d. Staff person responsible for data collection/entry/sharing (60 minutes)
 - e. Leaders of partner organizations. Please choose 2-3 individuals. (90 minutes each)
 - f. Staff from partner organizations. Please schedule 3-4 interviews. (60 minutes each). *Note: These interviews can be conducted with up to 4 individuals per interview, so long as staff hold the same position/role*
2. Please identify 3-4 activities or events the research team can visit (for example, a demonstration of the lead organization’s data system, a monthly meeting, an information session for participants, or a CQI discussion).
3. Please enter the name(s) and location for each interview or observation.
4. Please account for travel time (if the research team needs to travel to a partner’s location), periodic breaks (20 minutes between blocks of interviews), and lunch breaks (1 hour).

Below is a SAMPLE Site Visit Planning Template. Please complete the blank table at the end of this document.

If I any questions while completing the template, please email CWCCEvalTA@abtassoc.com.

Sample Site Visit Planning Template			
Day 1 (March 10, 2020)		Name(s)	Location
7:00 am – 12:00 pm	<i>Travel to site</i>		
12:00 pm – 1:30 pm	Interview with Project Director		
1:30 pm – 1:50 pm	<i>Break</i>		
1:50 pm – 2:50 pm	Interview with Data Manager		
2:50 pm – 3:10 pm	<i>Break</i>		
3:10 pm – 4:30 pm	Interview with Program Manager		
Day 2 (March 11, 2020)		Name(s)	Location
9:00 am – 10:00 am	Interview with Outreach Specialist		
10:00 am – 10:20 am	<i>Break</i>		
10:20 am – 11:20 am	Interview with staff from Eastern Shore Behavioral Health Services		
11:20 am – 11:40 am	<i>Break</i>		
11:40 am – 12:40 pm	Interview with Director of Community Prevention, Department of Family and Protective Services		
12:40 pm – 1:40 pm	<i>Lunch</i>		
1:45 pm – 3:15 pm	Observation of Monthly Partner Meeting		
3:15 pm – 3:35 pm	<i>Break</i>		

Sample Site Visit Planning Template

3:35 pm – 4:35 pm	Interview with 3 staff members from Community Prevention, Department of Family and Protective Services		
Day 3 (March 12, 2020)		Name(s)	Location
9:00 am – 10:15 am	MIS database demonstration		
10:15 am – 10:35 am	<i>Break</i>		
10:35 am – 11:35 am	Observation of CQI discussion		
11:35 am – 12:35 pm	<i>Lunch</i>		
12:35 pm – 1:35 pm	Interview with Director of Community Response Collaborative		
1:30 pm – 2:00 pm	<i>Travel to Division of Behavioral Health and Substance Use</i>		
2:00 pm – 3:00 pm	Interview with Director, Division of Behavioral Health and Substance Use		
3:00 pm – 3:20 pm	<i>Break</i>		
3:20 pm – 4:20 pm	Interview with 4 case managers from Division of Behavioral Health and Substance Use		
Day 4 (March 13, 2020)		Name(s)	Location
9:00 am – 10:00 am	Observation of Family Information Session		
10:00 am – 10:20 am	<i>Break</i>		
10:20 am – 11:20 am	Interview with Supervisor from Community Health Center		
11:20 am – 12:20 pm	Interview with Director of Court Improvement Project		
12:20 pm – 5:00 pm	<i>Travel from site</i>		

Site Visit Planning Template to be Completed by Grantee

Please add additional rows as needed.

Day 1 (insert date)		Name(s)	Location
Day 2 (insert date)		Name(s)	Location

