**As you plan your site visit and agenda, please consider the following:**

* Include the names, credentials and titles for all meeting attendees
* Include the address/room/location of where each meeting will take place
  + If travel to another site is needed, please include a travel time slot and the new address, as well as a note about whether or not the site will provide transportation or if the site visitors should drive themselves (sometimes they use Lyft/Uber and don’t have a rental car)
* Make sure to include site visitor work time (at least 45 minutes to 1 hour for each day)
* The order of the meetings listed here on this template are only suggestions, and you can move the meetings around as it makes sense for you and your organization.
* **The only meetings that should remain in place are the opening and closing meetings each day.**
  + The opening can take place as early as 8:00 am.

**Day 1:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time** | **Meeting** | | **Attendees** | | **Location/Standard(s)** |
| 8:30 –  9:00 am | Welcome and Meeting with Senior Leadership | | Consortium Presentation  President and CEO  Chief Medical Officer  Chief Nursing Officer  Program Director | | Standard I Mission  Standard 5 Administration |
| 9:00 –  9:30 am | Organization and Residency/Fellowship **Presentation** | | Program Director | | Standards 1-8 |
| 9:30 –10:00 am | Meeting with CFO and COO | |  | | Standard I Mission  Standard 5 Administration  Standard 8 Trainee Services |
| 10:00 – 10:30 am | Meeting with Credentialing, HR & Education | |  | | Standard 4 Eligibility  Standard 8 Trainee Benefits |
| **Time** | **Meeting** | | **Attendees** | | **Location** |
| 10:30 –  11:00 am | Site Visitor Meeting/ Break | |  | |  |
| 11:00 –  11:30 am | Meeting with Program Graduates | |  | | Standard 2 Curriculum  Standard 3 Evaluation  Standard 8 Trainee Services |
| 11:30 –  12:00 pm | Stakeholder Meeting | | (examples include: External rotations, employers of the trainees, academic partner, residency/fellowship advisory committee members, community partners) | |  |
| 12:00 –  12:30 pm | LUNCH | | Working lunch for site visitors | |  |
| 12:30 –  1:00 pm | Meet with Current Residents/Fellows |  | |  | |
| 1:00 –  1:30 pm | Tour of clinical space, and/or Observe Didactic/Sim lab | Site visitors can split for either the tour or meeting with program preceptors | |  | |
| 1:00 –  1:30 pm | Meet with Program Preceptors | Site visitors can split for either the tour or meeting with program preceptors | | Standard 2 Curriculum  Standard 3 Evaluation | |
| 1:30 –  2:00 pm | Meet with  Clinic Staff | Examples of the primary care team include: medical assistant, nurse, provider, nurse manager, scheduler, case manager | | Standard 6 Operations  Standard 7 Staff | |
| 2:00 –  2:30 pm | Board Member | Meet with a member from the board of directors | |  | |
| 2:30 –  3:30 pm | With academic partner or advisory committee members | Only if you have an academic partner or advisory committee | | Standard 2 Curriculum | |
| 3:30 –  4:30 pm | Meeting with Program Director | Program Director | | Standard 1-8 | |
| 4:30 pm | Wrap up Day 1 |  | |  | |

**Day 2**

|  |  |  |  |
| --- | --- | --- | --- |
| **Time** | **Meeting** | **Attendees** | **Location** |
| 9:00 –10:00 am | Questions and Follow up | Program Director |  |
| 10:00 –  11:00 am | Observe Precepted Clinic non-clinical interaction between residents/fellows and preceptor | Observe a precepted session, mentored session and/or specialty rotation. Site visitors can split up to observe different experiences | Standard 3 Evaluation |
| 11:00 –12:00 pm | Site Visitor Work/ Break |  |  |
| 12:00 –  1:00 pm | Final Report | Consortium Site Visitors Present Report |  |