**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 PresentationPresident and CEOChief Medical OfficerChief Nursing OfficerProgram Director | Standard I MissionStandard 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 MissionStandard 5 Administration Standard 8 Trainee Services |
| 10:00 – 10:30 am | Meeting with Credentialing, HR & Education |  | Standard 4 EligibilityStandard 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 CurriculumStandard 3 EvaluationStandard 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 CurriculumStandard 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 OperationsStandard 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 |  |