III. Post-Site Visit Activities

Documenting a Site Visit

**Summary Report.** Following the site visit, the Visiting Team Leader will coordinate through the CE Intranet the completion of a Summary Report (up to 3 pages, submitted via the CE Intranet). Although completing and submitting the report to the CE Intranet within ten business days is the responsibility of the Team Leader, all three members of the Visiting Team are responsible for the content. Prior to submitting the Summary Report to the CE Intranet, the Team Leader shares it with the Host Institution's project director within four business days of the site visit. The Host Institution reviews and comments on the draft, returning it to the Team Leader within three business days. The Team Leader makes final revisions and submits the report to the CE Intranet with copies to the Host Institution and the other two Visiting Team members.

The Summary Report should include

- general project information;
- areas of focus for the site visit;
- intended and actual site visit outcomes;
- ways the community of practice model informed the exchange;
- spotlights and unique practices and products that can be replicated;
- lessons learned or emerging trends that can facilitate continuous learning among grantees; and
- suggestions from the Visiting Team to Host Institution.

Although the Summary Report may include possible technical assistance needs of grantees, it must be noted that the Visiting Team's purpose is not that of compliance monitoring. If, while on the site visit, a programmatic issue surfaces that should be brought to the attention of the Department, the Visiting Team will encourage the Host Institution to consult with its designated Program Officer to resolve the issue.

*(Refer to Appendix F for information on the Summary Report.)*

**Individual Reflection.** A second document is required from *all four projects* in a site visit. The Individual Reflection summarizes, from each individual perspective, expectations of the visit, outcomes most relevant to the work of the grantee, and ways in which the lessons learned from the site visit might be implemented. The 3-5 paragraph Individual Reflection should be submitted via the CE Intranet to the Department within three business days of the site visit.

*(Refer to Appendix G for information on the Individual Reflection.)*

**Evaluation Survey.** One of the goals of the Collaborative Exchange is a process of continuous improvement. For continuous improvement to happen and for the Collaborative Exchange to be an effective and useful tool for the PT3 Grantees, all projects must evaluate the Collaborative Exchange and the process to share their insights and recommendations.
In order for this pertinent information to be captured in a timely manner, the Evaluation Survey will be on-line and must be submitted within three days after the completion of the site visit. The PT3 Office believes that the lessons learned and the recommendations from the 64 site visits will prove to be a valuable resource in the effort to continually improve and refine the Collaborative Exchange.

**Follow-Up with PT3 Program Officer**

After reviewing the Summary Report, the PT3 Program Officer may schedule a telephone call with the Host Institution’s project director for clarification. The purpose of the call is to address any issues or concerns pertaining to the progress of the project. If there are any monitoring or compliance issues that the project director became aware of during the site visit, this call is an excellent opportunity for an open discussion to determine a viable solution.

**Final Outcome Statement**

**Outcome Statement.** The Outcomes Statement is the final step in documenting the Collaborative Exchange experience. Each Exchange Team submits one Outcome Statement to the CE Intranet *only after all site visits are complete*. While the Summary Reports and the Individual Reflections will document most of the work of the On-Site Teams, the Outcome Statement is necessary to enhance each team's work as a group. In three pages or less, the Outcome Statement should address how the Exchange Team fulfilled its mission and how the Collaborative Exchange aided or impeded this process. Additionally, the Outcome Statement should explain how the Collaborative Exchange process benefited the individual projects. Like the Mission Statement, the Outcome Statement is required and must be written with the collaboration of all Exchange Team members.

The Outcome Statement is due on the CE Intranet 10 days after the Exchange Team has completed all site visits.

*(The Outcome Statement form is in Appendix H.)*