

Policy Memorandum

Advisory Council – III-I

GRANTEE VISITS

Date Effective: 03/01/1993
Date Revised: 10/6/2009
11/13/2013

Director's Signature: _____
Advisory Council Chair
Signature: _____

Wetru
Nancy Conk

Purpose

The purpose of grantee visits is to ensure that the Advisory Council has an intimate knowledge and understanding of the projects funded by the Area Agency on Aging. This information can be very helpful to the Advisory Council when shared at the time of funding considerations or when used as a framework for questions during meetings. Grantee visits are not project monitoring or assessment visits.

General Policy

Advisory Council members who wish to learn more about current grantees will be given the opportunity to visit grantees. Advisory Council members shall be reimbursed for mileage when traveling to and from the site.

Procedure

Advisory Council members that wish to learn more about a grantees operation via a site visit are to contract the respective grants manager to coordinate the visit.

- A. An appointment shall be made with the grantee for the visit, with the amount of time needed for the visit made clear to the grantee in advance. This would be anywhere from 1 to 2 hours depending on the size and structure of the project.
- B. The visit should consist, primarily, of two parts:
- C. During the first part of the visit, the Advisory Council member should be walked through the project as if he/she were a client. At the conclusion of this walk-through, the Advisory Council member should know exactly what services the client receives and how it is provided.
- D. During the second part of the visit, the project should be viewed from the standpoint of the grantee. If there are legislative, reporting, or licensing provisions associated with providing this service, the Advisory Council member should ask for an explanation. This will provide information about internal or administrative costs.

E. Written reports of the visit are required. Questions or concerns related to a grantee or the service should be directed to the Grants Manager.