**Title X Subrecipient Onboarding Work Plan: Phase 3**

**Purpose:** The purpose of this tool is to help Title X grantees plan, communicate, and implement an onboarding process for new Title X subrecipients.

**How to Use:** Insert grantee and subrecipient information where indicated. Transfer outstanding action steps from Phase 1 and Phase 2 to this work plan. As needed, customize the suggested Phase 3 goals, action steps, and tasks to meet your and/or your subrecipient’s unique needs. For each task, determine the timeline for completing the task, who is responsible for completing it, and how you will know whether the task has been completed. For an overview of onboarding, refer to [Onboarding New Title X-Funded Agencies: A Toolkit for Grantees](https://www.fpntc.org/resources/onboarding-new-title-x-funded-agencies-toolkit-grantees).

*[Insert* ***Grantee Name/Logo****]*

*[Insert* ***Grantee Contact Name and Contact Information****]*

*[Insert* ***Subrecipient Agency Name****]*

| Phase 3 Goal: During the third and final phase of onboarding, the grantee works with the subrecipient to ensure the subrecipient is set up to comply with Title X program requirements, Quality Family Planning Recommendations (QFP), and other guidance—and provide quality family planning services. In other words, they close out any outstanding items from Phases 1 and 2. To keep the process moving, the grantee should promptly review data submissions, fiscal reports, and any other documents shared by the subrecipient, and provide timely feedback and technical assistance. Before this phase is over, the grantee should establish and communicate a plan for ongoing communication, monitoring, quality improvement activities, and support. |
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 *[Insert* ***Subrecipient Contact’s Name and Contact Information****]*

**Action Step 1: Organize Phase 3 onboarding work.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Add outstanding tasks, timelines, and responsible individuals to the Subrecipient Onboarding Phase 3 Work Plan. |  | Filled in Phase 3 Work Plan  |

**Action Step 2: Complete outstanding Phase 1 and Phase 2 work plan tasks.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Update the Title X Subrecipient Policy, Administrative, Clinical, and Fiscal Onboarding Assessments and Checklists on a regular basis. |  | Updated Title X Subrecipient Policy, Administrative, Clinical, and Fiscal Onboarding Assessments and Checklists |
|  | Review all checklists and work plans to ensure that all necessary action steps and tasks have been completed. |  |  |

**Action Step 3: Develop and communicate a plan for the grantee to provide ongoing monitoring, communication, quality improvement activities,** **and support.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Initiate an on-going quality improvement (QI) process. Start with the [Quality Improvement Agency Self-Assessment](https://www.fpntc.org/resources/quality-improvement-agency-self-assessments) to evaluate the subrecipient’s strengths and areas that need improvement for conducting QI activities. |  | Meeting minutes, quality improvement plan |
|  | Work with the subrecipient to develop a plan for ongoing support and monitoring. Include Title X program and reproductive health updates and information on training opportunities. This may occur through newsletters, network-wide meetings and conferences, subrecipient website portals, informal virtual or in-person site visits, and other mechanisms.  |  | Plan developed |