



Video Transcript: August 2025 Program Review Vignette Video 2

Angie (00:00): This video offers a grantee perspective on what Title X agency staff can expect during the onsite or virtual federal program review. This video was produced by the Reproductive Health National Training Center, or RHNTC. The Office of Population Affairs, or OPA, conducts program reviews to ensure grant recipient compliance, provision of high-quality clinical care, and Title X program integrity. Joining us is Lindsey Jones, who will share helpful takeaways from her agency's program review this past November. Lindsey serves as the Title X Family Planning Coordinator at the Iowa Department of Health and Human Services. Welcome, Lindsey. Would you walk us through what happens at the initial introductory program review meeting?

Lindsey (00:54): Yes, I'm happy to, and thanks for having me. All Title X staff, along with agency leadership, should attend that initial program review meeting. This meeting may be in-person—usually at the grantee headquarters, in our case—or virtual. The first meeting, maybe a few hours long as it has its own agenda and is structured around the expectations laid out in the Title X notification letter. For the initial meeting, there are staff introductions, an overview of what to expect during the review, and then some background on Title X that OPA leads. After this, grantee staff are expected to present an overview about their Title X program, but the format is flexible. Per the Title X notification letter, we included the following items in our PowerPoint presentation, which was organization history and mission, duration of the program, our agency structure, our grant structure, including number of sites and the map of the service area, environmental context, which included political and policy contacts and services provided, along with key successes and challenges as the grantee. Our team created the agenda for the remainder of the week, and we worked with each subrecipient, which I'm going to also call SRs throughout the session, to ensure that the schedules fit their clinical needs.

Angie (02:31): Lindsey, what will the reviewers be doing on site?

Lindsey (02:36): Day One of the review takes place at the grantee level. Attendees for Day One meeting should include all of the Title X staff and any relevant leadership. After the presentation and introductions, we separated into three separate meeting rooms to discuss the administrative, clinical, and fiscal components. With those separate breakout groups, each group has a designated point of contact. Make sure each group's point of contact brings any unanswered questions back to the larger team during the debrief or sooner. Plan for 7 to 8 hours for the overall site visit, not including travel. At the subrecipient or service site level, our PO recommended only that the Title X Director or Coordinator attend, which helped with planning and space. Your role is to support the onsite review along with your PO and help answer any questions. The on-site reviews with your SRs will be similar to Day One of the grantee review. Introductions will take place and then this site will provide an overview of their Title X program, along with their service area. After the presentation, clinic staff will guide the review team on a tour of the facility to help reviewers understand the patient flow. They will also want to see any signage on the walls, so I suggest highlighting any poster materials along the way. The three reviewers will review administrative items, including training logs, policies, confidential protocols, and information and education, or I&E materials. Clinical items such as client charts, policies, provider practices, and observing patient interactions. They will also want to observe a client visit from the front desk, checking-in to exiting the clinic. Our federal reviewer navigated the subrecipient electronic medical records, the EMR, independently and only asked for help as needed. Fiscal documents and resources were also reviewed. Examples include: billing practices, policies, fee scales, and how you handle income verification.

Lindsey (04:49): This also includes front desk observation, such as how the patient income was collected, a walkthrough of patient claims, including how fees were charged and the patient's portion. You can expect the review team to hold staff interviews across all three components, administrative, clinical, and fiscal, as well as observations of clinical operations and Title X clinic appointments.

Angie (05:14): What about staff who are nervous about being interviewed?

Lindsey (05:19): These interviews are meant to help the reviewers understand how the Title X program is implemented by you, the grantee, along with a local SRs and service sites. There is no right or wrong way. Look at this as a learning opportunity so you can continue to grow your program and best support your SRs. If you don't know something, say so, and offer to follow up later. To recognize time constraints, we provided each SR with a lump sum payment to help compensate for their efforts. After the federal review, we heard how helpful it was at the SR level to be able to showcase the amazing work their program staff are doing day-to-day.

Angie (06:02): Lindsey, what happens at the end of each day?

Lindsey (06:07): The review team will likely debrief with you each day of the review. This gives you a chance to hear preliminary feedback on your agency's strengths and areas of opportunity, and to answer the review team's follow-up questions. Ask your PO how your review team plans to conduct these debriefs. We felt it was really important for our SRs and service sites to hear feedback firsthand, which typically took 10 to 20 minutes. I also stayed at each review site a few minutes longer to ensure the SR did not have any additional questions from the day and to continue cheering them on. As a reminder, the review team may offer best practice suggestions and guidance. This guidance is separate from a formal area of improvement, also known as an AOI. An AOI is identified if the Title X expectation is not met.

Angie (06:59): What can Title X agencies expect at the end of the review?

Lindsey (07:05): At the end of the program review, there's an exit, or debrief meeting, where the reviewers summarize areas of improvement they have identified. All Title X staff should attend along with your agency leadership. The review team will highlight things that you as the grantee are doing well administratively, clinically, and fiscally, along with a few areas of improvement at the grantee level, or within a specific SR, and or service site. Please note that there are additional strengths and areas for improvement identified in your program review report that are not reviewed the day of the review.

Angie (07:40): Could you share any highlights from your program review, Lindsey?

Lindsey (07:46): We received several positive comments about how the Title X program is implemented at both the grantee level and the subrecipient and service sight levels. Each SR and service sight is unique, and this review made me so incredibly proud of the SRs and service sites, along with our staff and our internal Title X team. The Title X program and services that are provided on a daily basis are so vital, and I'm honored to help carry a small piece.

Angie (08:15): And lastly, what advice do you have for grantees who have upcoming reviews?

Lindsey (08:21): My best advice is to review the Title X Program Review Tool with your subrecipient or service sites and allow that to serve as a guide. At the grantee level, we created a Teams channel for our SRs, which served as a platform for announcements, streamlined organization, collected documents, a place for templates to be uploaded or SRs could adapt. The final versions of these documents from the grantee and SR were then uploaded. This also made it easier to review documents all in one place and prevented getting items lost in email. OPA will provide you with the crosswalk template before the review. I also suggest saving the files in the same naming scheme that you've identified on the crosswalk. This will help reviewers navigate between the different documents. In addition, it's better to upload any documents you think might be relevant ahead of time. Having policies updated is key. We provided policy templates to the SRs, and then they modified them to align with their processes.

Lindsey (09:26): If policies are not up to date, this may result in an AOI, related to the actual policy topic or related to the SR or service site monitoring. Last but not least, continue to reach out to the Title X network. We all have different experiences and are here to support one another.

Angie (09:46): Remember, Title X program reviews are a chance to review the great work you're doing and to identify opportunities for improvement. You have a lot to celebrate in this program review as one way to do that. Thank you to Lindsey Jones and her expert staff and subrecipients who helped inform this video, which has been brought to you by the RHNTC. You can find the resources mentioned in this video, including OPA's Title X Program Review Tool and RHNTC's Policy and Procedure Checklist and the Planning in Conducting Title X Site Visits, a toolkit for family planning providers on the RHNTC website. And remember to connect with RHNTC staff for program review questions and potential TA support.