

How to Prepare for the ORR Site Visit



Jaime Jones-Wormley and Travis Mann
Medical Countermeasure Specialists
CDC Division of State and Local Readiness
July 26, 2017



Office of Public Health Preparedness and Response
Division of State and Local Readiness

Purpose

- ❑ Review the process of planning for the ORR site visit conducted by CDC.
- ❑ Outline planning, implementation, and documentation considerations.
- ❑ Discuss standard ORR site visit criteria as part of an overall strategy.

Frequency and Scheduling

Two- Year Cycle:

- ❑ CDC will schedule approximately 50% of the recipient ORR site visits in Budget Period (BP) 1 and the other half in BP2, continuing in alternating years.
- ❑ CDC will schedule ORR site visit(s) in collaboration with the recipient, US Marshal Service, and other relevant federal partners.

Site Visit Planning Considerations

CDC considerations in scheduling an ORR in BP1:

- Performance measures or target metrics did not meet the requirement
- Provided insufficient or incomplete ORR documentation
- MCM drills or exercises were not performed according to CDC Requirements
- IMATS or Inventory Data Exchange (IDE) was not submitted successfully (annual requirement)
- RSS Site Survey or MCM drill data was not submitted by annual deadline

Note: All 4 Directly Funded Localities are required to have an MCM ORR site visit in BP1.

Site Visit Planning Considerations (continued)

Other CDC considerations in scheduling an ORR in BP1:

- Were there recent changes in personnel, lack of resources, or incomplete drills and exercises that would warrant concern or require technical assistance?
- Has the jurisdiction experienced challenges with meeting key benchmarks, performance measures, or target metrics?
- Do jurisdiction's MCM Action Plans indicate progress?

Agenda Development

- ❑ CDC will develop an agenda in collaboration with the recipient before the ORR site visit.
 - The agenda should highlight and reflect the purpose, goals, and objectives of the meeting.

- ❑ CDC will advise the recipient to identify speakers and participants in advance to ensure appropriate partners are available to attend the meeting.

Partners

- ❑ **CRI coordinator**
- ❑ **Dispensing lead**
- ❑ **Distribution lead**
- ❑ **Federal partners**
 - **HHS regional emergency coordinators**
 - **United States Marshals Service**
 - **HPP field project officers (FPOs)**
 - **Federal executive board partners**
- ❑ **Health officer**
- ❑ **Hospital Preparedness Program coordinator**
- ❑ **Inventory control lead**
- ❑ **Law enforcement or security lead**
- ❑ **MCM coordinator**
- ❑ **Military installation liaison(s)**
- ❑ **National Guard (if applicable)**
- ❑ **PHEP director**
- ❑ **Private sector partners or agencies**
- ❑ **Public health, Public information officer**
- ❑ **Receipt, state and store (RSS) lead**
- ❑ **State/local emergency management representative**
- ❑ **Tactical communications lead**
- ❑ **Training lead**
- ❑ **Tribal partners**
- ❑ **Volunteer coordinator(s)**

Notification and Confirmation

- ❑ After the ORR site visit dates and agenda have been determined, CDC will notify the recipient, by email, of the visitation dates and include instructions to submit relevant documentation.
- ❑ CDC will request the recipient to confirm the scheduled date and time of the ORR via email to ensure mutual understanding of the visit.

Form Submission and Documentation Review

- ❑ Submit the appropriate forms and corresponding documentation to the designated reviewer no later than 20 business days prior the site visit.
- ❑ Do not wait until the last minute; preparation will be key.
- ❑ Recommend submitting data in smaller chunks of time rather than one large data push.
- ❑ If forms and documentation are not submitted in a timely manner, CDC reviewers may cancel the visit.

Options for Submitting Documentation

Jurisdiction's Shared System	Provide reviewer access to relevant documentation on the jurisdiction's internal shared system.
ORR system	Upload each file (possibly ZIP files if larger than 25M) using the supporting documentation tab.
Save information in a compact disk (CD) and mail to reviewer	ONLY if reliable Internet access is not available.

ORR Self-Assessments and Forms

❑ Self-Assessment:

- All jurisdictions that are scheduled for an ORR site visit in BP2 are still responsible for submitting a self-assessment by June 30, 2018.

❑ Validate:

- CDC reviewers will validate the ORR self-assessment submitted by the recipients and ensure there is sufficient evidence by reviewing the supporting documentation.

Form Submission

Minimum forms that must be completed and submitted prior to a scheduled site visit.

Type of Form	State	DFL	Territory	CRI
Jurisdictional Data Sheet (JDS)	✓	✓	✓	✓
Critical Contact Sheet	✓	✓	✓	
Point-of-Dispensing (POD)	✓*	✓	✓	✓
Distribution Planning	✓	✓	✓	✓
Dispensing Planning	✓	✓	✓	✓
Training and Exercise Planning Form	✓	✓	✓	✓

Planning for the ORR Site Visit

Things to consider when planning for the ORR site visit:

- ❑ Expect full day meeting**
- ❑ Plan to have key stakeholders such as the MCM coordinator and PHEP director attend the full meeting**
- ❑ Consider logistical elements**
 - Access to Wi-Fi
 - Projector/screen
 - Room large enough to accommodate all stakeholders

Opening Remarks and Introductions

- ❑ CDC will reiterate the goals, objectives, and purpose of the ORR site visit.
- ❑ CDC will review the agenda and timeframes.
- ❑ Participants will introduce themselves and provide background experience.

Program Discussion and Observations

CDC will consider the following actions to better facilitate discussions between MCM program staff and partners:

- Take time to build a relationship with the recipients and their associated partners.
- Allow the flow of the agenda to lead the discussion, share the intent of the form and each element.
- Provide technical assistance as appropriate for each area needing improvement.
- Ask probing questions to gain valuable information from ORR attendees and increase overall understanding of planning and operational readiness.

Verify plans and operational implementation

CDC will conduct the following actions to better facilitate discussions between MCM program staff and partners:

- Make a note of the progress made towards the completion of each ORR element and Action Plan activities
- Note challenges or barriers presented

Identify 'action items' for follow-up:

- Identify additional documents that are missing
- Request additional relevant documentation be provided to CDC no later than five (5) business days from the ORR site visit date
- Discuss technical assistance identified or requested during the ORR

Discuss Technical Assistance

CDC will do the following:

- ❑ Address previously identified issues covered during the ORR site visit.
- ❑ Provide (or make a plan to provide) technical assistance by identifying appropriate resources to help close identified gaps.

Exit Meeting

- ❑ At the conclusion of the ORR meeting, CDC will take time to organize observations and recommendations.
- ❑ The exit meeting (wrap-up) is the opportunity for both parties to provide feedback and for high-level leadership to be present for important observations, including program strengths, opportunities for improvement, and new or pending action plan items.

Questions?



For more information please contact Centers for Disease Control and Prevention

1600 Clifton Road NE, Atlanta, GA 30333

Telephone, 1-800-CDC-INFO (232-4636)/TTY: 1-888-232-6348

E-mail: cdcinfo@cdc.gov Web: www.cdc.gov

The findings and conclusions in this report are those of the authors and do not necessarily represent the official position of the Centers for Disease Control and Prevention.



Office of Public Health Preparedness and Response
Division of State and Local Readiness