

Conducting Local ORR Site Visits



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July 27, 2017



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Purpose

- ❑ Guide MCM coordinators on the process of planning and conducting local ORR site visits.
- ❑ Discuss standardized ORR site visit criteria to enhance consistency among reviewers.

Frequency and Scheduling

Two-Year Cycle:

- ❑ Schedule approximately 50% of the jurisdiction ORR site visits in BP1 and the other half in BP2, continuing in alternating years.
- ❑ Schedule ORR site visit(s) in collaboration with the jurisdiction and the regional MCM specialist.

Site Visit Planning Considerations

Other considerations for 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

- ❑ Develop an agenda in collaboration with the jurisdiction before the ORR site visit.
- ❑ Advise the jurisdiction to identify speakers and participants in advance to ensure the appropriate partners with a role in a MCM response are available to attend the meeting.

Partners

- ❑ **CRI coordinator**
- ❑ **Dispensing lead (PH nurse)**
- ❑ **Distribution lead**
- ❑ **Federal partners**
 - **CDC (MCM specialist, regional MCM specialist, PHEP specialist)**
 - **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**
- ❑ **Local public health public information officer**
- ❑ **Receipt, state and store (RSS) lead**
- ❑ **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, officially notify the jurisdiction by email of the visitation dates and include instructions to submit relevant documentation.
- ❑ A good practice is to request that the jurisdiction confirms the scheduled date and time of the ORR via email to ensure mutual understanding of the visit.

Form Submission and Documentation Review

- ❑ Advise jurisdictions to submit the appropriate forms and corresponding documentation for the designated reviewer no later than 20 business days prior the site visit.
- ❑ They should not wait until the last minute; preparation will be key.
- ❑ Recommend they submit data in smaller chunks of time rather than one large data push.

Options for Submitting Documentation

Jurisdiction's Shared System Required by BP3	Provide Reviewer access to relevant documentation on the jurisdiction's internal shared system.
ORR Data Collection Center	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:

- Reviewers must validate the ORR self-assessment submitted by the jurisdictions 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	✓	✓	✓	✓

LOCAL ORR SITE VISIT

Opening Remarks and Introductions

- ❑ The opening portion of the meeting should reiterate the goals, objectives, and purpose of the local ORR site visit.
- ❑ Review the agenda and timeframe.
- ❑ Start and end the meeting on time.
- ❑ Set expectations on meeting purpose.
- ❑ Allow time for participants to introduce themselves and provide background information.

Program Discussion and Observations

Facilitate discussions with MCM program staff and partners

- ❑ Take the time to build a relationship with the partners
- ❑ Allow sections of the ORR 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 their planning and operational readiness.

Verify plans and operational implementation

Facilitate discussions with MCM program staff and partners

- ❑ Make a note of the progress made (or not made) towards the completion of each ORR element and Action Plan activities.
- ❑ Note any challenges or barriers presented by the jurisdiction.

Identify 'action items' for follow-up

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

Standard Response Options for Reviewer

Reviewers should use the language in the table below when completing the ORR to help ensure consistency of feedback while providing a standardized framework for reviewer responses to recipients/jurisdictions in the CDC Electronic Data Entry System.

Situation	Answer Option	Comment Language
Reviewer determines sufficient evidence has been provided.	Concur: Sufficient Evidence	No comment required.
Reviewer determines insufficient evidence has been provided.	Insufficient Evidence	Provide additional documentation for the following:
Reviewer determines no evidence has been provided.	No Evidence	Submitted documentation does not provide evidence. Provide documentation for the following:
Reviewer determines contradictory evidence has been provided.	Contradictory Evidence	Submitted documentation does not address the criteria. Provide additional documentation for the following:
Recipient/ jurisdiction inadvertently input incorrect data.	Data Input Error	Update data entry with the correct information

Discuss Technical Assistance

- ❑ Address issues covered during the ORR site visit.
- ❑ Provide (or make a plan to provide) technical assistance by identifying appropriate resources to help close gaps.
- ❑ Use your assigned Regional MCM Specialists as a resource

Exit Meeting

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

Best Practices

- ❑ **Allow adequate time between scheduled site visits.**
 - Don't compromise the quality of an individual review by compressing your timeline.

- ❑ **Reinforce the importance of key staff and partner attendance at the site visit.**
 - They are the subject matter experts on their relevant elements.

More Best Practices

- ❑ **Capitalize on your regional MCM specialists**
 - Assistance with CRI coordinator, training on the ORR system
 - Consultation for clarifying questionable evidence
 - Recommend appropriate TA based on outcome of the review

- ❑ **Query the Online Technical Resource and Assistance Center (On-TRAC) peer-to-peer for additional best practices related to conducting local reviews.**

Questions?



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