

SITE VISIT WORKSHEET



In preparation for site visit, please work with your Program Manager to complete all fields and submit NLT 45 days in advance.

Recipient Context	
Name/State	
Congressional District	
Person/s attending	
Site Visit Date/s	
Significant DOT Funding/grants	
Any local media being planned or broader stakeholder public meetings?	
Any other Federal staff requested?	
-Who and for what purpose...	
Rationale	
What is the purpose of the proposed visit; and what are reasons for DOT staff participation (i.e., how do we add value by joining)?	
How will the Recipient benefit from the visit?	
Are there any opportunities to leverage initiatives/interests of regional administrators? (Other high priority federal funding (if known).	
Considering the purpose and benefit of the visit, what is the level of urgency or is this a priority Recipient to visit?	
Coordination	
Share any specifics on the plan for the visits (e.g., agenda, key goals/objectives, etc.)	
Are there significant opportunities to coordinate the visit with federal, philanthropic, local/regional, or other partners? Provide details, as relevant, including specific contact/coordination with field POC's).	
Are you requesting Build America Bureau initiatives staff?	
FHWA field/division staff. Note where already involved, or priority to engage.	
OA regional staff (e.g., FRA, FTA, MARAD, others). Note whether already involved, or priority to engage.	
Need to engage OST leadership? Please identify who, if possible.	
Engagement with other Federal agencies (HUD, EPA, USDA, FEMA, GSA, HHS, DOE, EDA/Commerce) in site visit? Explain which agency and any context for why their involvement will be useful.	

Site Visit Preparation Checklist

Logistics

- ☐ Prepare a list of trip contacts (e.g., VIPs (political), CA POC, Program Manager, project POC), including role, email, and phone numbers
- ☐ Prepare a final agenda, including dates, detailed outline of visit (including key addresses)
- ☐ If a priority visit for DOT, notify Leadership to consider additional attendees

Attendees

- ☐ Confirm participation of DOT attendees
- ☐ Notify OA Field/Division staff, and note if they are participating
- ☐ Confirm participation of DOT and other Federal partners

Coordination

- ☐ **Prepare trip memo and share with Program Manager (at least 2-3 weeks prior to visit)**
- ☐ Trip memo shared with any additional participants from outside DOT, as relevant
- ☐ Schedule a coordination meeting with all federal partners attending the site visit to review agenda and address any questions (within 1 week of visit)
- ☐ Review project info as needed
- ☐ Verify Travel plans, if coordination needed

During Site Visit

- ☐ Take photos to share with US DOT Communications Rep.
- ☐ Take notes and document key quotes, if possible, from site visit.

Post-Site Visit

- ☐ **Finalize and submit site visit summary report, identifying key issues and priorities for TA support, along with photos.**
- ☐ Schedule debrief with Program Manager to review visit highlights, issues/opportunities, etc.
- ☐ Send follow-up notes, as needed, to organizers, key local partners who you met, and if applicable, to other federal agency staff