Site Visit Planning Meeting Agenda for Large Applicant/High Complexity

**Saturday**

| **TIME** | **TOPICS** |
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| 1:00 p.m. | 1. Introduction 2. Exchange room numbers to assist in team communication 3. Clarify that the use of cell phones on site is limited to the Team Lead and Process Coach 4. Team assignments for site visit 5. Team roles for the day: scribe, timekeeper, etc. 6. Review overall purpose of the site visit including clarify / verify information 7. Expectations – what would we like the Applicant to say about our site visit? 8. Review final output requirements of the site visit. See pages 6-19 for reference 9. Review each form and its purpose 10. Point out the need for a connected story. Consensus Scorebook + Site Visit Issue Worksheets + Summary of Sites Visited + Score Summary Worksheet = Site Visit Scorebook. Judges must be able to follow and fully understand the story 11. Select Site Visit Issues |
|  | 1. Review site visit schedule 2. Identify special interviews to schedule in advance 3. Discuss each step of the site visit process and address any Team Member questions 4. Highlight things to expect and requirements of each Team Member:  * Applicant research on team * Long intense week * Do not write on Applicant documents * Keep all notes confidential * Do not share issues with Applicant except for the ones provided in advance of the site visit * *NO FEEDBACK* to Applicant (verbal or non-verbal), but always be gracious * Stick to your agenda, etc. * Point out special importance of:  1. Group meeting times – be prompt and prepared 2. Back-up meeting – especially while separated 3. Keeping up with SVI worksheet documentation 4. Buddy system – always interview in pairs and give one another feedback 5. Team Meetings 6. Role Play Interviewing Skills 7. Team Lead as Applicant in role play 8. Team Member practice interviewing skills |
|  | 1. Use of laptops, printers, virus checking, etc. |
| 6:00 | Team eats dinner together, engages in group activity for team building |
| Noon Sunday | Team meets for lunch |
| 1:00 p.m. | 1. Team members meet with back-up to develop Site Visit Issue Worksheet for Intent Observations |
| 2:00 p.m. | 1. Team reviews each SVI by Item to: 2. Be prepared to eliminate or combine issues and to prioritize issues for each item – priority issues 3. Reduce duplication 4. Ensure key issues are covered 5. Ensure all key organizational units of Applicant are interviewed 6. Suggest any strategy / closure enhancements 7. Compare lists of documents needed to address Site Visit Issues:  * Eliminate duplication * Determine which Team Members will request additional documents * Determine the submission deadline for documents needed to answer a Site Visit Issue |
| 3:00 p.m. | * Breakout into sub-teams. Each sub-team prepares a detailed schedule of places and organizational units to visit based on SVIs  1. Consider coverage of unique operations at each location as they relate to resolving SVIs. 2. Develop the plan for which Examiner pair: where, how, and when 3. Schedule visits to cover 24-hour / multi-shift operations, if applicable 4. Prepare specific questions for the interviews to be conducted on the first day |
| 5:00 p.m | 1. Each sub-team presents its plan for review / input. Final products are: a detailed schedule for each day for each pair; and the related package of SVIs. |
| 6:00 p.m | * Prepare walk around questions for each Item with no more than three to five questions that relate to SVIs. Consolidate the list of walk around questions for common use by all Team Members. * Remember the need for caution and to keep your data requests reasonable; ask the Applicant to flag relevant portions of the data requested |
| 7:00 p.m.  Working Dinner. | * Review questions for the one-hour leadership meeting * Remember that you are seeking to verify and clarify – not to conduct an audit. |
| 8:00 p.m. | * Finalize schedule for the next day * Agree on gathering time and place for morning * Adjourn and ***REST !!!*** |