Site Visit Issue Worksheet   (Record only one issue per page)

(sample – process OFI)

Item Reference: 5.2-2   Not originally evaluated at consensus

Issue or process
addressed: 5.2c(3) Succession Management

Comment(s) affected: SVIs address one or more comments. List the comments found in the consensus scorebook that are addressed by the findings and conclusions concerning this issue and copy from *Scorebook Navigator*™. (*e.g., 1.1 first +, 1.1 first OFI, KTa.2, and 5.2 second +*)

5.2c(3) OFI

STRATEGY:

1. Who will you interview and at which locations?

    Everett Hugo -- Vice President of Knowledge Management; Corporate Office

    HR Leaders at two locations

    Person who had been through the Gate Way to Leadership training program

    While applicant utilizes its three-tiered Gate Way to Leadership training system to support succession planning by preparing future leaders, it is not clear how this system is reviewed and improved or how it ensures its graduates from the Gate Way program are prepared to succeed to leadership positions in the event of a vacancy. Given applicant's APEX values of Agility and eXcellence, a systematic review and improvement step to the leadership training process may help it stay current with changing patient needs and a changing health care industry.

2. What questions will you ask related to the organization's:

    Approach/Levels

    We'd like to understand more about your succession planning process and the three-tiered Gate Way to Learning process. Please briefly describe the succession planning process. How does the Gate Way to Learning process fit in? Is there a Gate Way III step

    Deployment/Trends

    Who participates in the Gate Way to learning program? From what locations? How are they selected? How many have participated?

    Learning/Comparisons

    How is the process reviewed? Has it always worked this way? How do you know that graduates from this program are prepared for leadership positions?

    Integration

    How are the results of this process shared or used in other parts of the system?

3. What documents will you review?
    Training curriculum. Training results.

4. Are there any walk-around questions?
    None

FINDINGS: What observations, specific answers, and/or updated results did you find during the site visit? Be specific and include data as appropriate. What is the resolution of this site visit issue based on your findings? For each comment listed above, indicate "delete," "modify," or "no change" and the specific findings that led you to that conclusion.

FINAL COMMENT(s): Write the comment as it will appear in the final scorebook. If a new comment is required it should be included in this section.

The site visit findings indicate that the processes and/or results investigated would have the following effect on scoring:

raise ___, no effect on ___, or lower ___ the consensus evaluation.

Item Reference: