

## ***Site Visit Do's & Don'ts***

### **DO. . .**

- ✓ **Come prepared for a heavy schedule.** The site visit agenda is full, and the schedule can be hectic.
- ✓ Bring your KYCPE name badge and represent yourself as a KYCPE examiner while on site.
- ✓ **Review the applicant's key factors**, including important issues, the size of the organization, and the nature of its markets/operations.
- ✓ Wear professional, comfortable clothing appropriate for the types of facilities you will visit and the off-site team sessions where discussion and writing occur.
- ✓ **Plan to stay for the entire site visit.** All team members must remain through the completion and signing of the final scorebook.
- ✓ Before the site visit (two weeks is a best practice), **ask your team leader to request items or information that will require special preparation by the applicant** (e.g., requests for interviews with staff members in remote locations or for data that will need compilation or other preparation).
- ✓ **Exercise common sense when scenarios arise that you have not encountered.** Do what makes sense and is consistent with the principles reinforced in the Rules of Conduct and Code of Ethical Behavior. Discuss any issues with your team leader or the KyCPE office.
- ✓ **Ask the applicant for whatever information is needed to clarify or verify your assigned SVIs.** Ask spontaneous questions. However, be realistic—don't place an undue burden on the applicant by requesting anything unnecessary.
- ✓ **Work in pairs during interviews.** Walk-around questions may be conducted either in pairs or individually.
- ✓ **Adhere to the agenda, but be flexible.** It is vital for the applicant to feel there were sufficient opportunities to "tell its story."
- ✓ **Be alert to any response or lack of response that may affect the team's agenda or approach.** Let the team leader know of the findings so he/she may consider a change in the agenda or approach.
- ✓ **Be prompt** for all appointments.
- ✓ **Take thorough notes.** As you document your findings, note the kinds of things that will help the applicant via the feedback report and assist the KyCPE Panel of Judges in understanding the applicant's processes and results. When backing up another examiner during an interview, take notes for him/her.
- ✓ Have originators of documents attach business cards or place their names, locations, and phone numbers on the front of all documents so they can be returned to the correct people.
- ✓ **Participate in daily meetings and debriefings with your team** to share information and impressions, to ensure that all relevant information is obtained.

- ✓ Make arrangements for the return and disposal of all materials after the site visit. **All applicant materials must be returned to the applicant.**
- ✓ After the Feedback Report is delivered to the applicant, **the team leader will let you know it's time to delete your files.** All notes, drafts, Consensus Scorebooks, drafts of Site Visit Issue Worksheets, applications, and flip chart pages must be shredded. All digitally stored material about the applicant must be deleted.

### **DON'T . . .**

- ✗ Don't contact the applicant unless you are the team leader or backup team leader.
- ✗ Don't leave before the Final Scorebook is finished and signed.
- ✗ Don't take cameras or video recorders to the applicant's site(s).
- ✗ Don't discuss any of the following with the applicant:
  - Personal or team observations, findings, conclusions, or decisions—whether critical or complimentary
  - Practices of other applicants
  - Team observations about other applicants
  - Information about your own organization
  - Your personal or professional qualifications
  - Names of or other information about other applicants
- ✗ Don't give verbal or nonverbal feedback during interviews. Do not let the applicant's representatives know your evaluation of their answers.
- ✗ Don't interview consultants, customers/students/patients, or suppliers unless an exception has been identified by your team leader in consultation with KyCPE.
- ✗ Don't interact with the applicant after departing the site visit.
- ✗ Don't take any of the applicant's materials, reports, documentation, etc., off-site.
- ✗ Don't accept gifts of any sort.
- ✗ Don't bring family members or friends on site visit trips.
- ✗ Don't hold team debriefings, meetings, or discussions regarding the site visit or your findings in open areas.