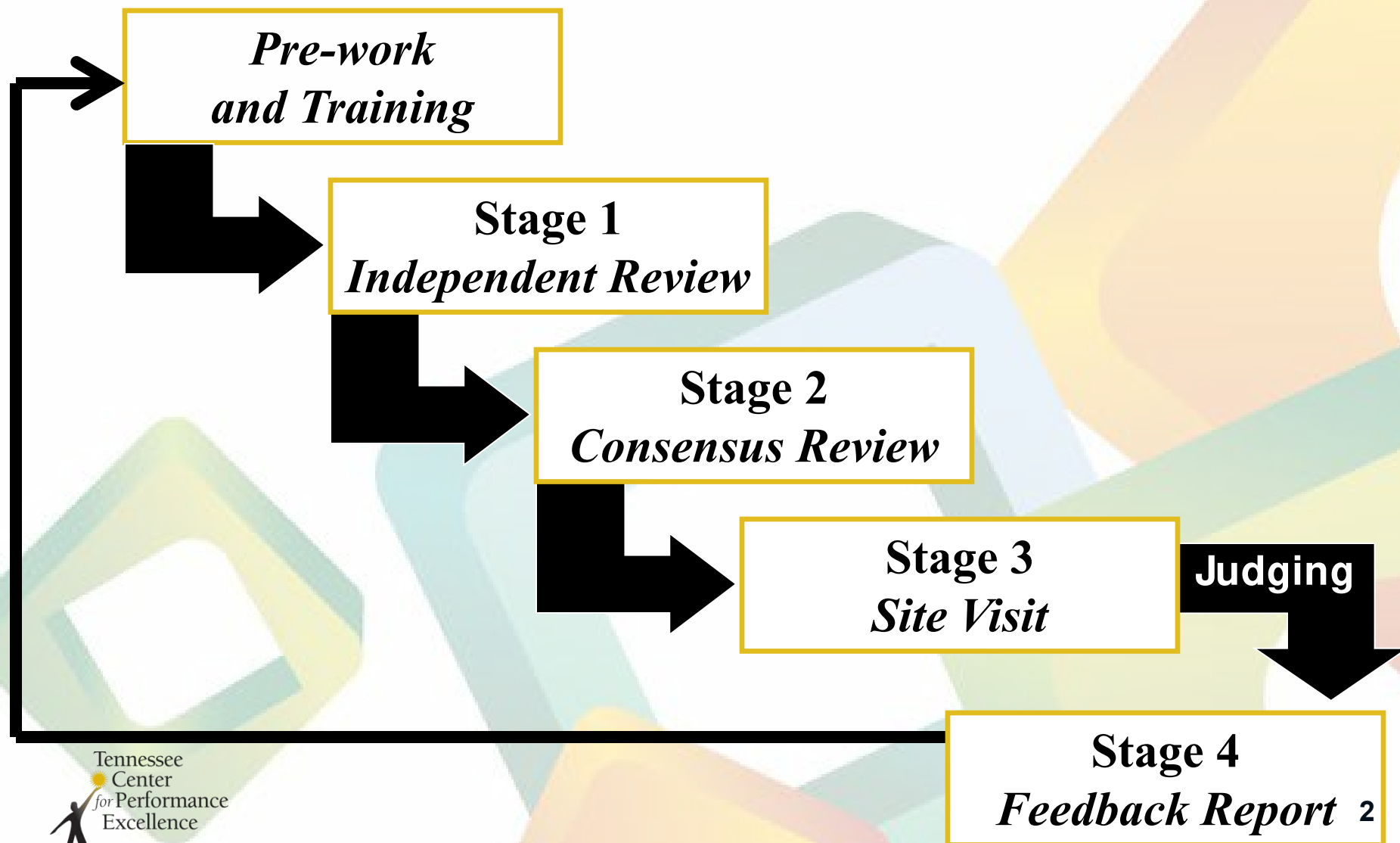


Site Visit Review

Just-in-Time Training

Examiner Evaluation Process



Site Visit Logistics

- When is our site visit?
- Where is our site visit?
 - Has everyone made hotel reservations?
 - Where will we meet on the first day?
- What is the dress code?
 - Don't forget your TNCPE nametag

Site Visit Logistics

- Where is the location of our wrap-up meeting?
- Do we need to bring any special equipment on site or to the wrap-up?
 - For example, a projector?
 - Will we be using laptops on site?

Purpose of a Site Visit

- To learn more about the applicant
 - Not just to get your questions answered!
- To clarify OFIs
- To verify role model strengths

How Do I Prepare?

- Following **consensus meeting**, you have two key deliverables:
 - Updated comments and scoring in *Scorebook Navigator*[™]
 - Site Visit Issue worksheets
- **At least one week before site visit**, team leader faxes or e-mails site visit agenda and issues (or discussion points) to applicant

Selecting Site Visit Issues

- Use site visit issues to
 - **Verify** role model strengths, or
 - **Clarify** OFIs
- How many site visit issues do I need?
 - As a general rule, prepare a site visit issue for each OFI and double-strength (++)
 - Your team leader will assist you in determining the correct number of site visit issues based on the length of the site visit and the size of the organization

The Site Visit Issue Worksheet

- Complete a separate Site Visit Issue (SVI) Worksheet for each site visit issue identified
 - Download template from TNCPE website
- Complete the entire front page of the worksheet prior to site visit:
 - Site visit issue (verify or clarify statement)
 - Comment(s) affected (copy from *Scorebook Navigator™*)
 - Strategy (A-D-L-I or Le-T-C-I, documents, etc.)
- You will complete the rest of the worksheet on site



What to Verify or Clarify

Processes

- Systematic
- Effective, innovative
- Repeatable
- Extent of deployment
- Improvement or cycles of learning
- Aligned, integrated

Results

- **Updated results**
- **Gaps – are results available?**
- Performance levels
- Trends
- Comparisons and benchmarks
- Areas of leadership

Move Them to the Right

- The Strategy section of the SVI Worksheet is broken down by A/D/L/I (process) and Le/T/C/I (results)
- For example: If your site visit issue clarifies the applicant's *approach*, be prepared with follow-up questions regarding *deployment*, *learning*, and *integration*
- Write out the questions as you would plan to ask them in the interview

Site Visit Issue Tips

- Remember that the applicant will see the site visit issue (verify/clarify statement) but not your “strategy” questions
- Also be sure to request any documentation you would like to see, such as updated results
 - Your team leader will request these documents when he/she provides the site visit issues to the applicant

Site Visit Issue Tips

- Be prepared to move the applicant “to the right” (most OFIs never die)
- Prioritize your site visit issue worksheets in case you run out of time
- Send completed SVI worksheets to team leader by established deadline
 - How will your SVI worksheets be shared with your back-up and other team members?

On-site Phase – Our Agenda

- What is our site visit agenda?
- How many days will we be onsite and at what times?
- Will we be visiting multiple locations?
- What is expected of me related to:
 - Interviews?
 - Document review?
 - Walk-around questions?
 - Note-taking?

On-site Phase

- Begins with an opening meeting
 - Your team leader will present the TNCPE opening meeting slides
 - Introduce yourself by name and organization only (do not use your title or the number of years you have been an examiner)
- The applicant usually has an opening presentation as well
 - Be prepared to take notes; they may reference organizational changes or updated results since their application was submitted

Site Visit Schedule

- Be prepared to lead interviews for your assigned items
 - Your back-up will take notes and keep time
 - Prioritize your site visit issues
- Make use of scheduled “downtime”
 - Review documents
 - Ask walk-around questions
 - Update SVI worksheets and comments
- Typically, teams caucus at least twice each day



Interview Tips

- Interview in pairs: one person conducts the interview and the other takes notes
- Take thorough notes for your partner
- Ask open-ended questions
- If the applicant gives examples or anecdotes, ask a follow up question
- At the end of an interview ask “Is there anything else you’d like to tell us?”
- Use your “strategy” (A-D-L-I and Le-T-C-I) to guide your questions

Post-site Phase

- Complete Site Visit Issue Worksheets
- Revise comments
- Finalize key themes
- Complete score summary worksheet
- Complete summary of sites visited
- Complete Award recommendation form; all team members sign
- Team leader notifies TNCPE that the scorebook is complete

In Summary...

Don't Forget to...

- Update your comments and scoring in *Scorebook Navigator*™ as necessary
- Complete your Site Visit Issue Worksheets
- Wear your TNCPE nametag on site
- Return all documentation before leaving site visit
- Have fun!

Remember “It is not clear” means you didn’t do your job!

Site Visit Resources

Available @ www.TNCPE.org:

- 2011 site visit comments from applicants
- Per diem request form
- Site visit document log
- Site visit do's and don'ts
- Site visit interview summary
- Site visit interview tips and techniques
- Site Visit Issue Worksheet
- Summary of sites visited
- Walk around questions