



SITE VISIT EXPECTATIONS For APPLICANTS

3/10/05

Purpose: To appropriately set the applicant's expectations for cost and resource support for a site visit

Cost

In addition to the additional fees associated with a site visit, applicants should expect to pay the expenses of a team of examiners.

Site visit fees are included in the Examination Application Guidelines and are posted on our website at www.wsqa.net/application.htm.

Site visit expenses include: hotel rooms for each examiner, conference room within or near the hotel, meals, and travel costs to include mileage, airfare (if required), parking (if required) and ferry or tolls (if required) and limited supplies. Examination teams range from 5 to 10 individuals depending on the size of the organization. Site visits are between 5-7 days in length. Hotel costs vary depending on the location. We recommend that the hotel be selected by the applicant and direct billed to the applicant. Examiners will follow our current expense policy for per diem, mileage rates and supply cost limitations. This policy is available upon request. A conference room is needed near the hotel, because the Examination team works together in the evening to process the information collected during the day.

Resource Support

Equipment:

Examiners may request printers, copiers, shredders and computers be available in the hotel conference room during the site visit time frame.

On Site Resources:

Examiners will require a private meeting room on site. This room will be the hub for all Examiner on site work. Examination teams will be onsite 2 to 5 days, depending on the size of the organization. If you have remote locations, Examiners may choose to visit these locations or include them via conference calls that are facilitated by your organization. Travel costs for visitation to other sites would be included in the Examiner's site visit expenses. Your organization should provide an individual to assist examiners in locating interviewees and meeting rooms. If your organization requires escorts for examiners to move within your facility, please plan on providing one escort for every 2 examiners. Examiners will schedule numerous meetings and will conduct one on one interviews with numerous site employees while at the applicant's site. The Examination Team's goal is to meet with as many of your employees, in smaller organizations this can be as high as 95% of all employees. Every attempt will be made to conduct meetings during the employees normally scheduled workday. In some instances, the examination team may come on site during other shifts to interview individuals on those shifts.

Applicant Preparation:

Prior to coming on site, the applicant will be asked to identify hotel accommodations (and to possibly arrange the reservations) for the examination team. One week prior to the site visit, the examination team will submit a list of documentation that should be made available for review when the team arrives on site. Please remember, that Baldrige Criteria do not require processes to be documented. If processes are not documented, the examination team will verify existence through other means, such as interviews.

Schedules:

To facilitate a successful visit, a schedule of meetings will be made and given to the applicant prior to the visit. However, this schedule will shift and change through out the visit. It is our desire to make the visit less intrusive, but our primary concern is to collect factual information in order to give you the best evaluation possible. It is helpful if you let everyone know that the schedule will change and be flexible.

If you have any questions regarding the impact of a site visit on your organization please contact WSQA. We believe you will find the opportunity of a site visit to be a very rewarding experience. Most applicants find it is a

fabulous opportunity to show case their successes, to build enthusiasm and awareness within their own organizations, and to obtain an in depth and knowledgeable feedback report.