



## Grantee Go-and-See Site Visits

June – August 2019

As part of the initial “Design, Measure, Analyze” phase of the TC3 program, teams should plan to go and see about 5 of their participating sites to understand the current state of clinical processes. At least one CCI staff member and your TC3 Coach (Denise Armstorff) will join each team for one of their first site visits.

### Planning for the Site Visit with CCI and your Coach

- Decide which site you will visit with CCI and your Coach and who from your team will go.
- Coordinate a date that works for 1. the site, 2. your team, 3. Denise, and 4. CCI, and schedule a day that for everyone (e.g. send everyone a calendar invite). Potential dates include:
  - June 26, 27, 28
  - July 11, 12
  - July 24, 25, 26
  - July 29, 30, 31, Aug. 1
- Identify in advance and address any related policies or waivers needed to visit sites and shadow staff and/or patients. There *may* be different policies that apply to your team shadowing than for CCI and your coach to shadow.
- Work with the site to set the agenda for the visit based on the processes you would like to shadow. The visit should be about ~4 - 6 hours and should be designed to test your assumptions and refine your charters, driver diagram, and testing plan. You may consider shadowing the same process several times with different teamlets/pods/modules. Plan to be there early enough to see the start of the day at the clinic.
- After the ~4 - 6 hours of shadowing time, the team, Denise, and CCI staff should meet for ~1.5 hours to debrief, process, and record learnings together. Identify where this meeting can be held at or close to the site.
- CCI will pay for lunch for site visit participants.