



## CONDUCTING A CRITICAL ACCESS HOSPITAL SITE VISIT: RECOMMENDED STEPS

### Prepare for the Site Visit

#### **1. Gather hospital characteristics**

Reach out to critical access hospital (CAH) leadership if you are not familiar with the hospital CEO/leadership. Consider asking a few short questions about their needs, challenges, recent successes and awareness of the state Flex Program. It is helpful to review hospital data and other general information about the community prior to the visit. Examples of questions to ask can be found in the following assessment tools:

- <http://www.ruralcenter.org/tasc/resources/north-dakota-critical-access-hospital-and-flex-program-survey-2011>
- <http://www.ruralcenter.org/sites/default/files/Idaho%20CAH%20site%20visit%20prep%20form.pdf>
- <http://www.ruralcenter.org/sites/default/files/Rural%20Hospital%20Visit%20Form%20Template.pdf>

Look at data on the facility, community, region, demographics. Review the hospital's website and read the local newspaper.

#### **2. Familiarize yourself with state politics and stakeholders**

Know the major health and economic partners and stakeholders. Be sensitive to local, regional or state politics and cultures.

#### **3. Know what resources you can provide**

Bring materials to share based on questions you've asked ahead of time or assessment results (if an assessment was used). Talk about the impact of the Flex Program (nationally and in your state). Don't over promise and feel comfortable saying, "I don't know, but I'll find out and get back to you."

#### **4. Set an agenda with discussion points ahead of time**

The goal is to develop a relationship with CAH leader(s) and establish the Flex Program as an important resource for the hospital and staff.

### Conduct the Site Visit

#### **1. Keep the visit short (<1 hour)**

Know which staff members you are meeting with and their roles.

#### **2. Discuss successes and concerns in each program area of the Flex Program**

Use the questions you asked prior to your visit and the data you have reviewed to guide the conversation. Share resources you have brought or are aware of during the conversation.

#### **3. Ask if time would permit for you to tour the hospital and/or new departments and building projects if you have visited and toured the hospital before**

Open conversation with CEO and others asking about new improvements or programs. Ask about future plans (programs, structure, staffing, initiatives, etc.).

#### **4. Follow-up**

Send a thank you note/email. Respond to any promised technical assistance questions or resource requests. Reach out with a phone call to CAH leadership about three months post visit (as appropriate) to see if there is any new support you can provide and to follow-up on previous discussion.