**Item \_\_\_\_\_\_\_\_**

**Criteria Summary—item covers \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**

**Key Factors Summary—included here are \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**

**Strengths proposed for the consensus report**

1.

**Strengths not included**

**OFIs proposed for the consensus report**

**OFIs not included**

1.

**Item \_\_\_\_\_ scoring discussion:**

And a score of \_\_\_\_\_\_\_ (include proposed range)

**Sample: Item 5.1**

**Criteria Summary— item covers** how the workforce environment is built so that it’s supportive and effective. Maintaining a safe and secure environment and managing capacity/capability are included in the overall requirements.

**Key Factors Summary—included here are** APEX values; core competencies (e.g. developing clinical and service competencies for a caring and exceptional staff); SNF service offerings; employee demographics and engagement factors (e.g. good work environment and good benefits); health and safety requirements.

**Strengths proposed for the consensus report**

1. a(1) assessing capability and capacity, including daily management - approach incorporates various inputs and is continuous throughout the year - integrated with the APEX scorecard and strategic planning processes (note there is a related OFI (2nd comment) on managing changing capacity/capability needs – possible discussion item for consensus). (All)
2. a(3) provide relationship based care: SNF - interdisciplinary Collaborative Care Teams; ALF - cross-trained universal employees. Ties to CC "deliver excellent clinical outcomes" and supports workforce engagement (top decile). (5+)
3. b(1) Approaches to ensure workplace health, safety, and security: monthly review of progress toward goal, unexpected events and best practices has enabled the applicant to meet identified safety and security goals for the last four years. Approaches appear to be fully deployed at all sites and evidence of evaluation and improvement in processes was evident. (3+)
4. b(2) Services, benefits and policies around four identified factors related to employee satisfaction and engagement – includes array of offerings that covers the major areas identified and allows for individualization. (2+)

**Strengths not included**

1. Systematic approaches are used to recruit and retain employees. Great comment but didn’t incorporate into feedback due to the slightly higher impact of the other comments chosen and there could be a conflict with a(3) OFI. No examiners mentioned issues with excluding this strength.

**OFIs proposed for the consensus report**

1. a,b bolded OFI - Deployment of workforce environment approaches to all workforce segments is unclear. Examples: volunteers and physicians. (3--, 2-)
2. a(4) Preparing the workforce for changing capability and capacity needs is not evident. While examples of addressing increasing capacity needs were provided, a repeatable, defined process was not described. As mentioned, there is a related strength (1st comment). (4-)
3. a(2) Not sure if there’s a truly systematic process to recruit, hire, place, and retain new workforce members to match the diversity of the hiring and patient community. Important because of the linkage to "Being the preferred employer in communities served." (5-)
4. a,b Cycles of refinement OFI – examples: capability and capacity, recruitment process, efforts designed to address the workplace climate including health, safety, security, and benefits. (3-)

Note: feedback on Boss indicates OFIs 1, 3, and 4 may have consensus.

 **OFIs not included**

1. Unclear whether the workforce policies/benefits are tailored to meet the needs of a diverse workforce. Comment didn’t rise to the “vital few” plus part of the intent is covered in the a(2) OFI.
2. Measures for workforce security are unclear. Although the comment was not included due to having 4 OFIs and others prioritized higher, feedback from one examiner (AB) indicates we may want discussion during the consensus call.
3. Unclear how applicant retains new workforce members (Strategic advantage: high retention of employees). Stand-alone comment is covered in a(2) OFI but want to check-in with team during consensus – “so what” of current OFI is on the topic of diversity and may want to consider this “so what” instead.

**Item 5.1 scoring discussion:** Applicant described systematic processes that addressed overall requirements. I scored them at the lowest level due to deployment gaps. Believe the 50-65 scoring range is best fit.

And a score of 50 (based on the scoring range description)

Did feedback on Boss indicate there is agreement on score?

One examiner (CD) questions whether score may be a little high given OFIs. – will need discussion on stand-alone OFI that is not included before discussing score.