

History and Documentation

A. Overview.

The first section of the Diagnostic Report and Follow-through Manual puts a context for why this is being done up front for the reader/user. There will be at least two versions of this text - one for the Executive Summary, and another for the Manual itself. The Manual version will likely be longer and in greater detail. This section may also form the foundation for the data collection and report credibility since there will be those who will attempt to discredit the survey results if those results are less than favorable.

B. Selection and Application of the Change Management System.

In many client organizations, end-users will question the selection of *QWLC* as a firm and as a technology used to determine an organization's capacity - and general health. The means used to select this process and the decision-making that led to that selection are appropriate material for inclusion in the history of any project. It may be appropriate even to provide users with an Internet address that will allow an examination of the rationale and the list of satisfied clients.

C. Events List.

During the initial cycle, it is recommended that a list of events be provided so those first-time users can examine and understand the events that have already taken place. In second and subsequent cycles, all Events that have taken place since project initiation can be listed. In each subsequent distribution, only those Events that have taken place between data collection efforts will be listed.

D. Data Collection Documentation.

A copy of the cover letter, instructions, and instrument(s), is provided as a reference. If changes are made in the instrument(s) from the first to subsequent cycles, a table of same or similar items is included. An "Item Category Report" is often included as a record of what survey items are included in which UHS category.

E. Certification of Data Collection Conditions.

Either a listing from Diaries that attest to significant happenings that occurred during or immediately prior to the data collection period will be listed, or a statement to the effect that no occurrences were registered that would impact survey results. These statements are used to help validate the reliability and usefulness of the results.

F. Statement of Reliability.

When appropriate an independent source will be used to certify data collection results. Under normal conditions, internal reliability statements and methods used to determine reliability would be included as a matter of course.

G. Extended Web Resources.

When appropriate a list of Internet addresses may be provided so that those interested in independent research on topics covered by the data collection effort can be easily accomplished.

H. Authority to Advance the Agenda.

Documents that officially direct the advance of the strategic agenda based on this technology are retained behind Tab 5.1 and distributed to book holders.

I. Client Cycle Evaluation.

A brief summary of the results achieved during the previous cycle(s) is retained behind Tab 5.1. This enables people newly assigned to the improvement project and opportunity to understand what has already been accomplished. It is normally a good idea for anyone, newly assigned or charter members, to keep abreast of ongoing advancements.