

2018 TEAM LEADER/ASSISTANT TEAM LEADER PRE-TRAINING WEBINAR

PRESENTED BY THE PARTNERSHIP FOR EXCELLENCE

OCTOBER 17, 2018

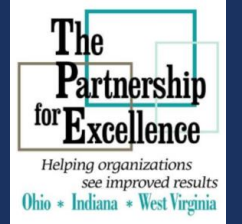
TRAINING OBJECTIVES - WHAT IS UNIQUE TO TLS/ATLS



- Preparing Team Leaders and Assistant Team Leaders for the upcoming cycle
 - Expectations
 - Deliverables
- Sharing Best Practices and Lessons Learned (face to face meeting on 10/30/2018)
- Working our way through the checklists together (11/27/2018 webinar)



INTRODUCTIONS



- Name
- Sector
- Baldrige Experience
 - TPE, National, Internal Organization
 - Year(s) as TL/ATL

TEAM LEADER – ASSISTANT TEAM LEADER

(THE MOST IMPORTANT ROLES WITHIN TPE)



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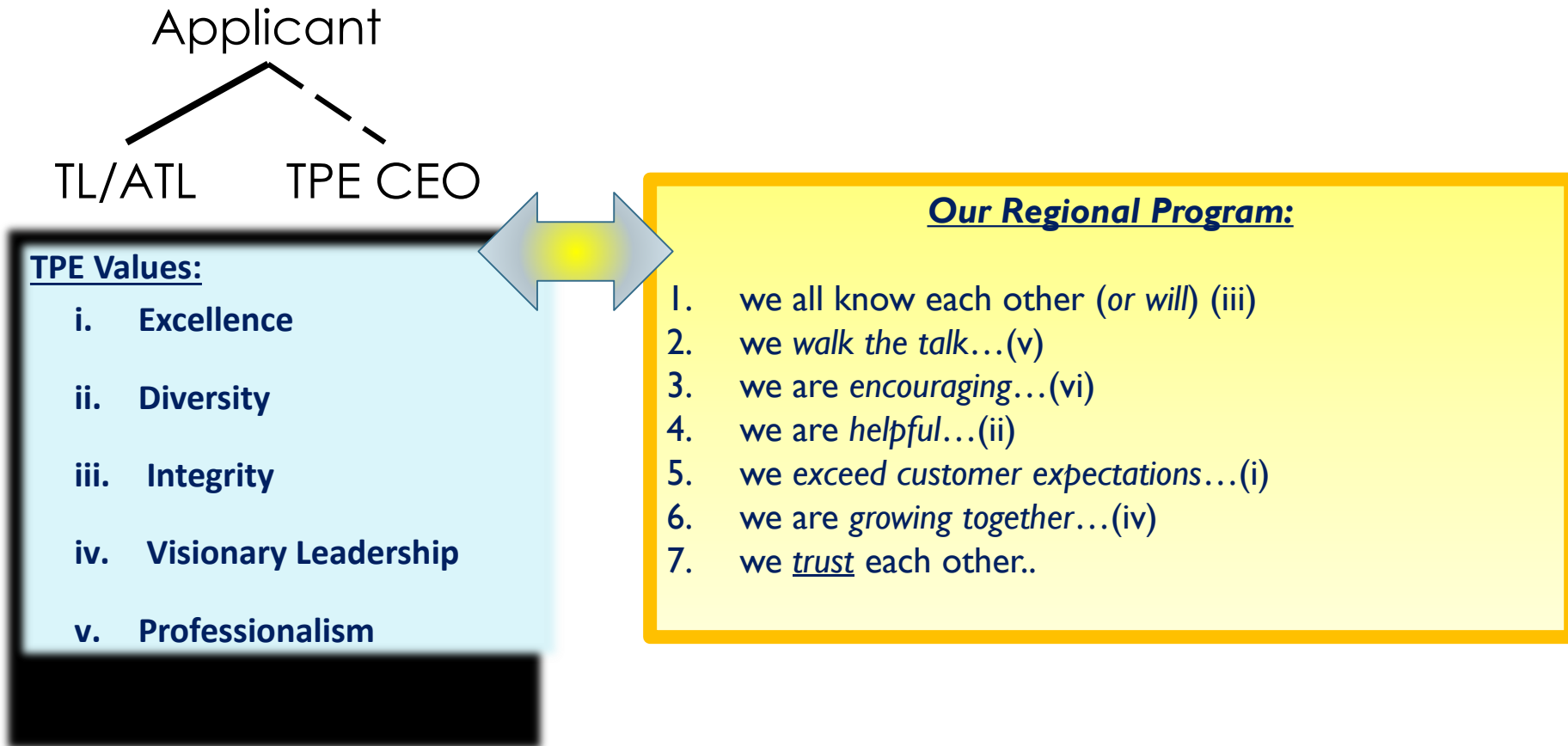


EXHIBIT TPE'S VALUES AT ALL TIMES

EXCELLENCE – DIVERSITY – INTEGRITY – VISIONARY LEADERSHIP – PROFESSIONALISM



Examiners are often the primary face of TPE

- ☐ Adhere to code of conduct (see previous slide)
- ☐ Respect team members and applicants
- ☐ During Site Visit
 - ☐ Appropriate business attire (attire of organization, no jeans)
 - ☐ Appropriate language (no cussing or inappropriate slang)
 - ☐ Leave facility as you found it
 - ☐ Keep doors to war room closed at all time & locked when away

Changes for the 2017-2018 Cycle



- More standardized approach to IR/CR/SV Timeline in order to provide consistent examiner experience
- Safety Briefing at Site Visit (see next slide)

Safety Briefing

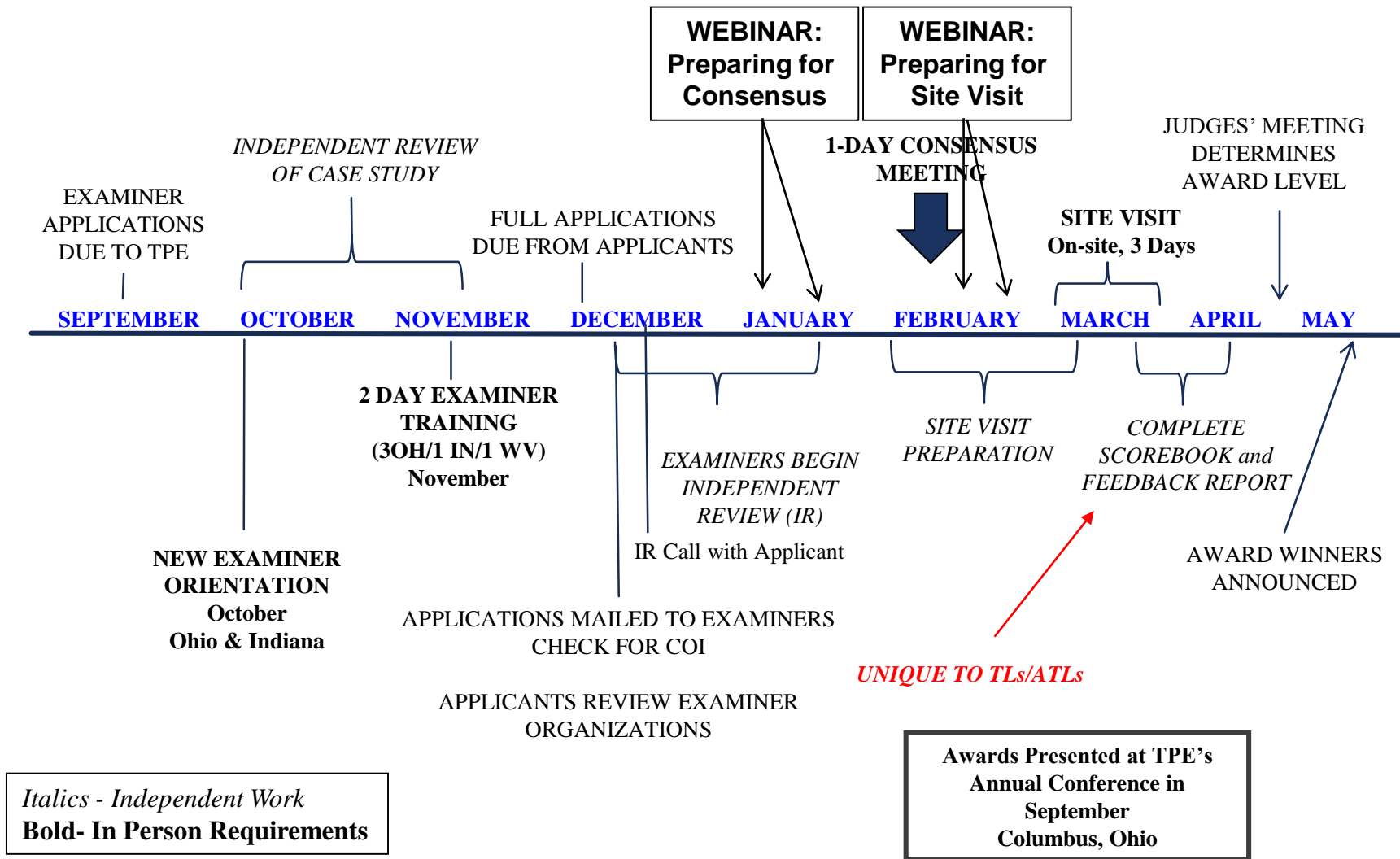
For TPE Training & Site Visits



The Safety of our Examiners is a Top Priority!

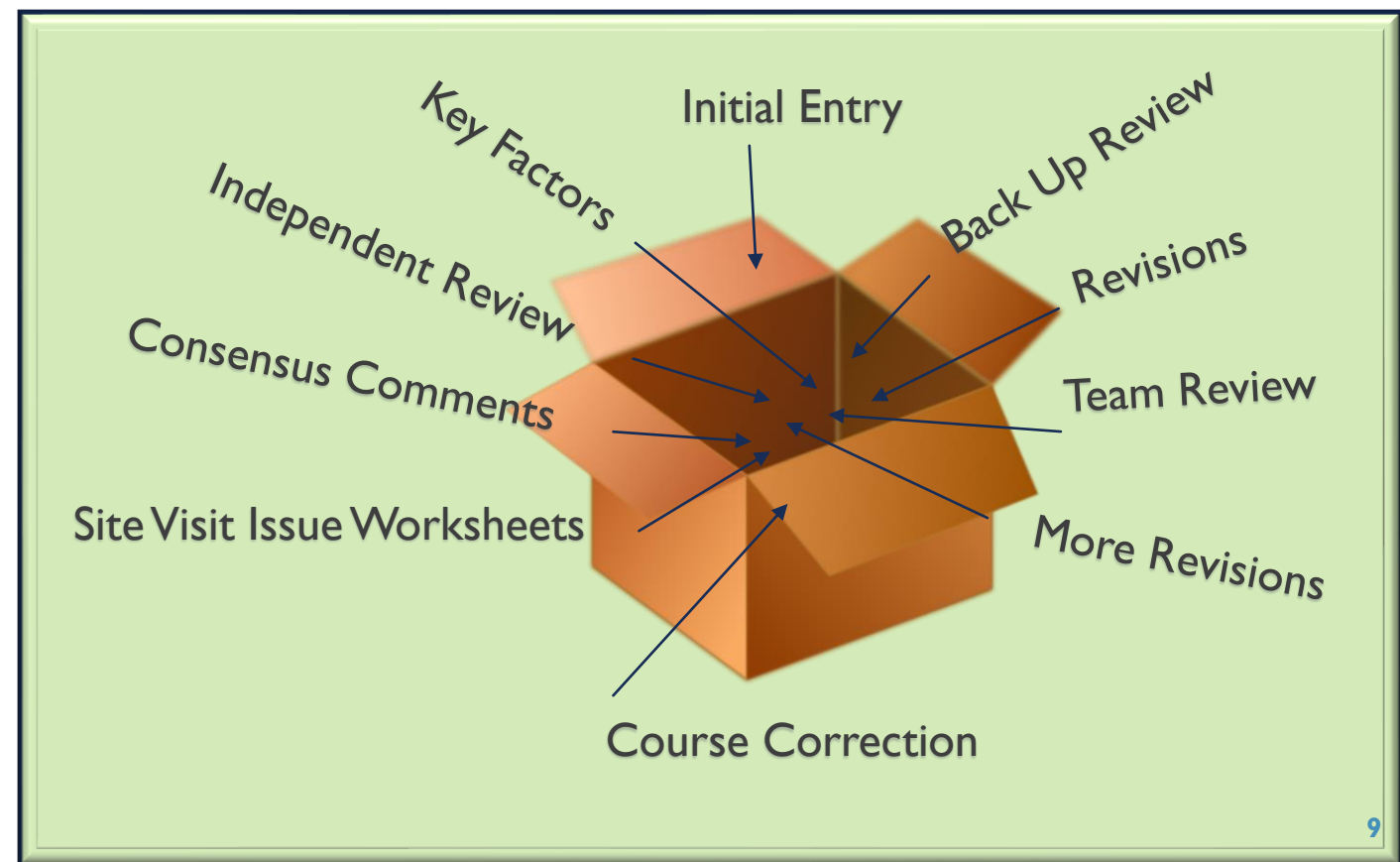
- Evacuation route in case of a fire or similar situation
- Shelter in place in the event of tornado or similar disaster
- In the event of an accident
 - If critical injury, first call 911
 - Alert your Trainer/Team Leader
 - Trainer/Team Leader notifies contact at host facility

The Examination Cycle & Awards Process Timeline



COMPREHENSIVE TIMELINE – KEY COMPONENTS

- Milestones
- Interim Tasks
- Steady Pace
- Team Buy-In



COMPLETING EXAMINATION PROCESS TIMELINE (1 OF 3)



- **Set Site Visit dates, Work back to establish timeline**
 - Three major segments – Independent Review (IR), Consensus Review (CR), Site Visit (SV) Prep
 - Schedule team conference calls as needed
- **IR Interim Deadlines (allow at least 5 weeks to complete)**
 - Team members complete Conflict of Interest form & send to Jan Chorich
 - TL receives all team members' completed bio forms (use to identify Item Leads)
 - TL holds initial conference call with team
 - Team members complete Key Factors & enter into Scorebook Navigator (SBN)
 - TL/ATL consolidate Key Factors & enter into SBN
 - TL conducts IR call with applicant, ATL takes notes
 - Team members complete one IR item in SBN, TL/ATL provide feedback on draft item via phone or posted in SBN Team Files
 - TL determines date & location for Consensus Meeting (to be held in February)
 - Team members continue independent evaluation & enter into SBN
 - Team members each complete IR Scorebooks in SBN and mark as “Done”
 - **IR Completion Deadline**

COMPLETING EXAMINATION PROCESS TIMELINE (2 OF 3)



- **CR Interim Deadlines (allow 4 – 5 weeks to complete)**
 - TL assigns Item Leads and Backups
 - Item leads complete initial CR worksheets & open for item backups' Review (R-1)
 - Backups provide R-1 feedback to item leads in SBN & item leads begin their 2nd drafts
 - Item leads complete 2nd drafts and open feedback pane for the team's review (R-2)
 - TL/ATL/Examiner completes initial Key Themes (KT) Worksheet for team's feedback
 - All team members finish review and provide feedback on all CR Worksheets and KT's.
 - Item leads incorporate feedback and open items for Review 3 (R-3).
 - Team members prepare feedback on issues to discuss during the Consensus Meeting
 - Item leads review feedback and preparing scripts for Consensus Meeting
 - TL sends Consensus Meeting Agenda to team
 - **Team Consensus Meeting**
 - Based on consensus meeting discussions, item leads complete 4th drafts

COMPLETING EXAMINATION PROCESS TIMELINE (3 OF 3)



- **SV & SV Prep Interim Deadlines**

- Team members develop SVI worksheets for assigned items (16 – 23 Days Out)
- Team receives updated results (10 – 11 Days Out)
- Team members review each others SVI worksheets and revise as necessary (7 – 14 Days Out)
- TL sends document request list and interview requests to Applicant (10 – 14 Days Out)
- TL sets agenda for pre-SV planning meeting (3 – 7 Days Out)
- Pre-SV planning meeting
- **Conduct Site Visit**

PREWORK FOR 10/30/2018 FACE-TO-FACE MEETING



- TL and ATL to work together to develop draft schedule for assigned Site Visit
- The next few slides are for new ATLs
- Team Leaders are welcome to stay

ASSISTANT TEAM LEADER TOPICS



- Intro to Competencies
- Intro to Key Themes
- Potential ATL Roles
- What questions and concerns ATLs have

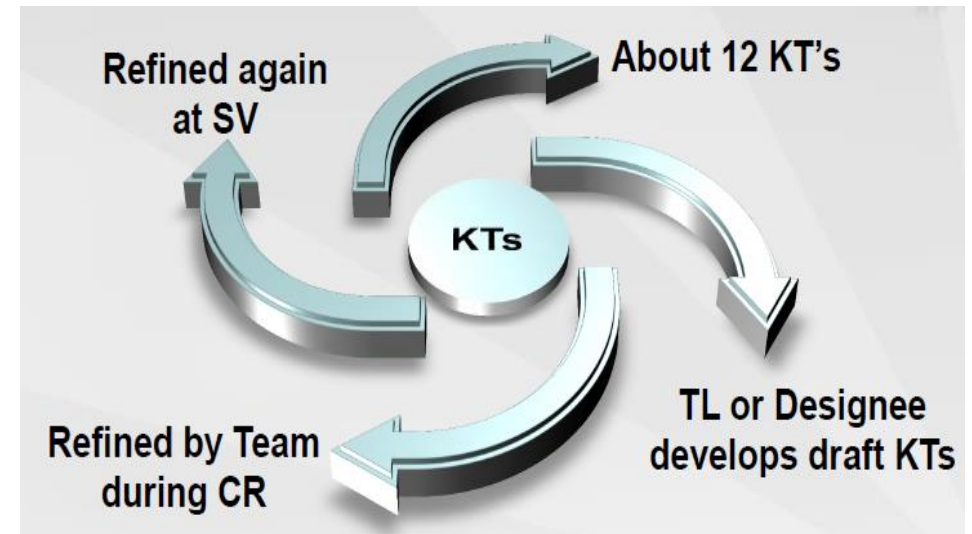
TL/ATL COMPETENCIES



- Planning
- Process Management
- Conflict Management
- Team Development
- Understanding Others
- Even Temperedness

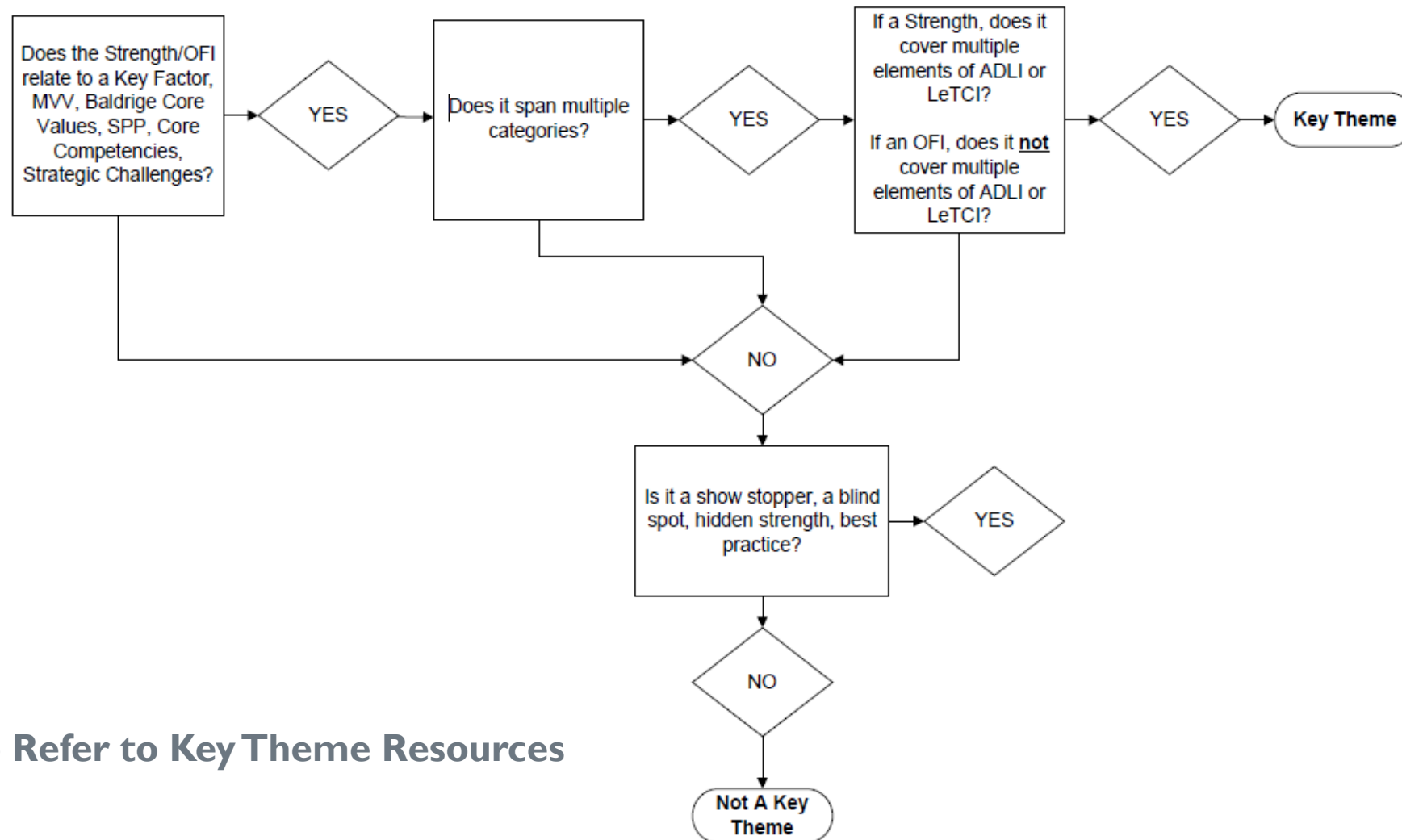
KEY THEMES (THE “BIG PICTURE”)

- If you had ten minutes to tell the CEO what the organization’s key strengths or opportunities for improvement are, what would you tell him/her?
- What would you say if you only had the time of an elevator ride, i.e. an “elevator speech”?



HOW do you identify initial key themes?

WHAT MAKES A KEY THEME?



Also Refer to Key Theme Resources

ASSISTANT TL CONSIDERATIONS & ROLES



- Experience Level
 - New
 - Experienced
 - Prior TL
- ATL goals
 - Stay ATL
 - TL Next Year
 - Drafted/Volunteered
- Role Model Comments
 - Key Themes
 - Early Feedback on Team Work
 - TL/ATL discussion

REMEMBER – if anything happens to the TL, the ATL needs to step in and finish the process



WE WILL SEE YOU ON 10/30/2018

2018 – 2019 TPE AWARD CYCLE