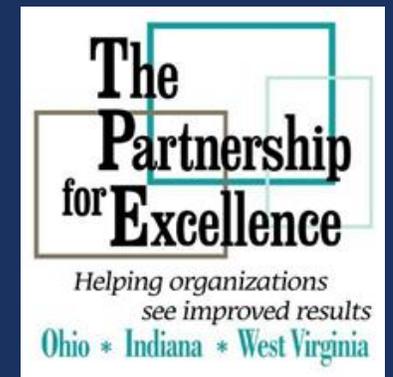# 2018 TEAM LEADER/ ASSISTANT TEAM LEADER TRAINING

PRESENTED BY THE PARTNERSHIP FOR EXCELLENCE
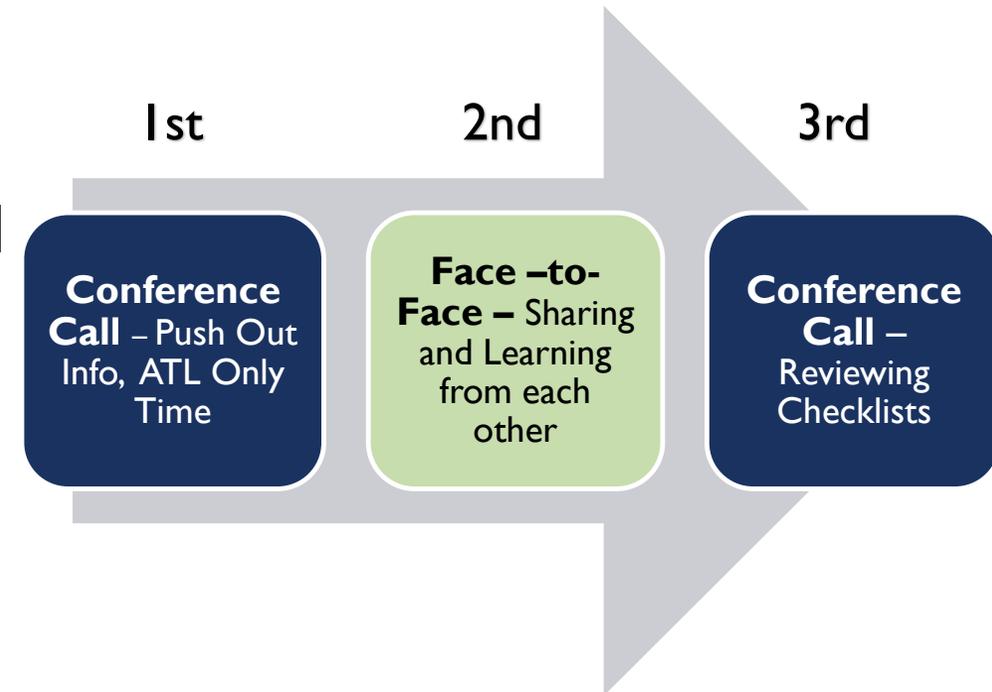
WITH SPECIAL THANKS TO OUR HOSTS:

KERN, INC.

The Partnership for Excellence

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TRAINING OBJECTIVES -

- 2nd of 3 part TL/ATL Training Program

- Preparing Team Leaders and Assistant Team Leaders for the upcoming cycle through collaboration and group/small group discussions

- Sharing Best Practices and Lessons Learned

- Deepening understanding of the Baldrige criteria (FAQs)

1st   **2nd**   **3rd**

Conference Call – Push Out Info, ATL Only Time

Face –to-Face – Sharing and Learning from each other

Conference Call – Reviewing Checklists

INTRODUCTIONS

- Name
- Sector
- Baldrige Experience
  - TPE, National, Internal Organization
  - Year(s) as TL/ATL
- Anything you would like to focus on?

BALDRIGE FAQ #1 – CRITERIA GENERALLY

If an organization has a goal of top 10% performance, and several measures show performance just below the top 10%, is that an OFI or a strength?

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First, it is fair to give an OFI on failure to achieve a stated goal. Strengths for meeting a goal are not always appropriate unless the goals are anchored to objective high performance, such as top-decile performance. Consistent performance around top 10% is a very good performance and likely worthy of strength comments. However, other factors besides achieving or not achieving the top 10%, such as trend data (have the results been improving or not?), competitor performance (are the results better or worse than competitors'?), and the stated importance of achieving the top 10% (are the measures critical ones for the organization?) should influence your feedback.

TL/ATL COMPETENCIES

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

Did anyone have any experiences/ best practices/ lessons learned with any of these competencies last year they would like to share?

DISCUSSION

Team Leaders

- How did you leverage your ATL last year?

- What could you have done differently to enrich the experience for them?

Assistant Team Leaders

- What types of things did you do last year?

- What would you like to do that you didn't get a chance to?

TIMELINES

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

Lets share some of the similarities and differences in our timelines . . .

What were some of your underlying assumptions?

BALDRIGE FAQ #2 – CRITERIA GENERALLY

Do responses to 1.2c(2), Community Support, have to be something beyond the organization's normal operations or mission? If community support is a normal part of operations, does there need to be an external volunteer activity linked to the mission?

- Do responses to 1.2c(2), Community Support, have to be something beyond the organization's normal operations or mission? If community support is a normal part of operations, does there need to be an external volunteer activity linked to the mission?

- 1.2c(2) elicits what an organization is doing above and beyond normal operations to support and strengthen its key communities. In fact, a note in the Business/Nonprofit Criteria speaks to this issue for nonprofit organizations. Does this support have to be a volunteer effort? No. Does it have to be related to the organization's mission? No. Businesses supporting local schools, health care systems providing reading tutors, and schools hosting after-school sports camps are all examples that may not be directly related to mission.

EARLY ROLE MODEL FEEDBACK

- Independent Review
- Consensus Comments

What is role model feedback?
How and when do you give it?
What resources do you have?

TEAM/CONFLICT MANAGEMENT

- Work not being done timely

- Back Up just says "looks OK to me"

- Can't decide between 45% and 50% at Consensus

- Groupthink

- Personality clashes

Have you experienced any of these? What other issues have you had?

How do you resolve them?

BALDRIGE FAQ #3 – INNOVATION

Does innovation mean internal process improvement (for efficiency/effectiveness) or external opportunity (strategic challenges and objectives)?

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Yes to both. Innovation can be found in any aspect of an organization or its operations, from specific processes, to products and services, to work systems, to business models. The Baldrige definition encompasses all this: "making meaningful change to improve products, processes, or organizational effectiveness and create new value for stakeholders." Innovation, though, is more than incremental process improvement. Process innovation means that the process is novel – brand new or new in its application to that type of business/industry.

CHANGES IN THE ORGANIZATION

- New locations

- Mergers/acquisitions

- Different strategy considerations

- Things you thought were important – aren't, while things that are important weren't talked about in the application

What do you do when there are major changes between receiving the application and going on site?

BALDRIGE FAQ #4 – SCORING

What's in and out of bounds regarding expectations for the use of comparative and competitive data?

BALDRIGE FAQ #4 – SCORING

What's in and out of bounds regarding expectations for the use of comparative and competitive data?

The scoring guidelines refer to comparative information, such as benchmarks. They do not specifically call for competitive comparisons. However, results items specifically call for competitive comparisons in areas where they are important for an organization (e.g., 7.1a, 7.1b[1], 7.2a[1]). Even then, sometimes competitive data aren't available. In such a case, we'd still expect the organization to use the best available comparative data.

BALDRIGE FAQS

- Check out all of the FAQS at wsw680p01.nist.gov

- If you get an error start at the nist.gov page, and work through the following links:

    - Baldrige Performance Excellence Program

    - Examiner Resource Center

    - Reference Shelf

    - Baldrige Excellence Framework: Examiners' Frequently Asked Questions

MENTORING SESSION

- Pair returning TL with 1 – 2 new TL & returning ATL with 1 – 2 new ATL
- Returning TL/ATL share lessons learned from experience
- New TL/ATL ask questions to better understand responsibilities

- *20 Minutes*

- Share lessons with larger group

- *10 Minutes*

SCOREBOOK NAVIGATOR (SBN) CONSIDERATIONS FOR TEAM LEADERS

SBN CONSIDERATIONS FOR TEAM LEADERS

- Copy/Paste from Word at your own risk
- Continually stress to team to SAVE & use the DONE boxes
  - Even if all work is complete, you cannot move team forward if Done box is not checked.
  - Until TL moves team forward, Examiners can uncheck Done box if they need to revise
- IR workbooks can be shared
  - Recommended to do this with mentors
- Version control becomes more important in SBN
  - Examiners should not change consensus comments based on observations of a single examiner – provide due dates for all comments to be completed and feedback to be received, and only then should comments/score be updated
- Make sure comment/scoring change rationales after SV are clearly identified (notes, SVIW)
  - Consider having ATL manage this

THANK YOU FOR ALL YOU DO!

QUESTIONS?

FOR FURTHER QUESTIONS/INFORMATION:

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