



TEAM LEADER / ATL WEBINAR

October 13, 2021

Training Objectives - What is unique to TLs/ATLs

- Preparing Team Leaders & Assistant Team Leaders for the upcoming cycle
 - Expectations
 - Deliverables
- Sharing Best Practices & Lessons Learned (training session on **10/26/2021**)
- Working our way through the checklists together (**11/22/2021** webinar)



Introductions

- Name
- Sector
- Baldrige Experience
 - TPE, National, Internal Organization
 - Year(s) as TL/ATL
- One word to describe you

Team Leader – Assistant Team Leader

(THE MOST IMPORTANT ROLES WITHIN TPE)

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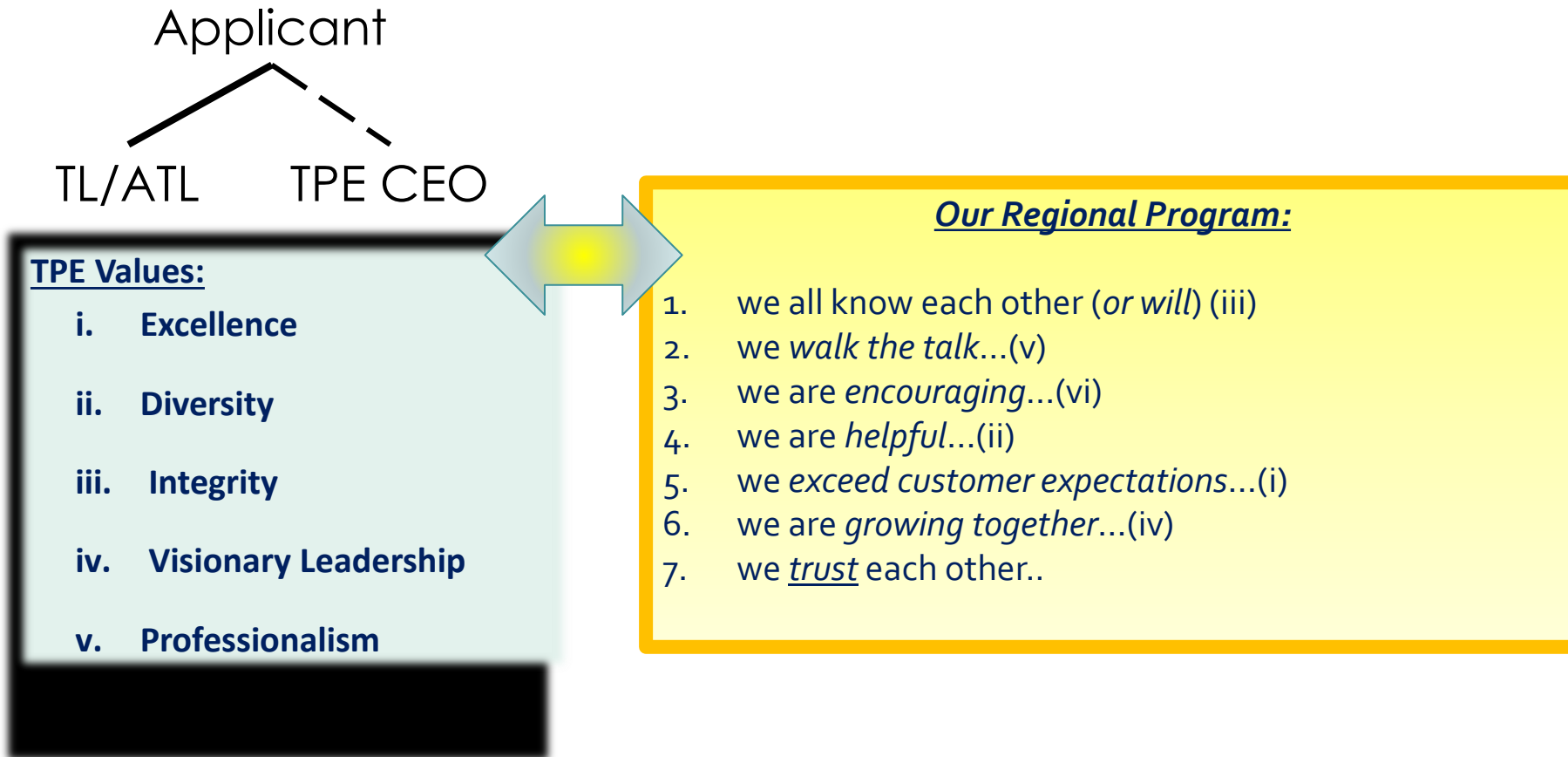


Exhibit TPE's Values at All Times

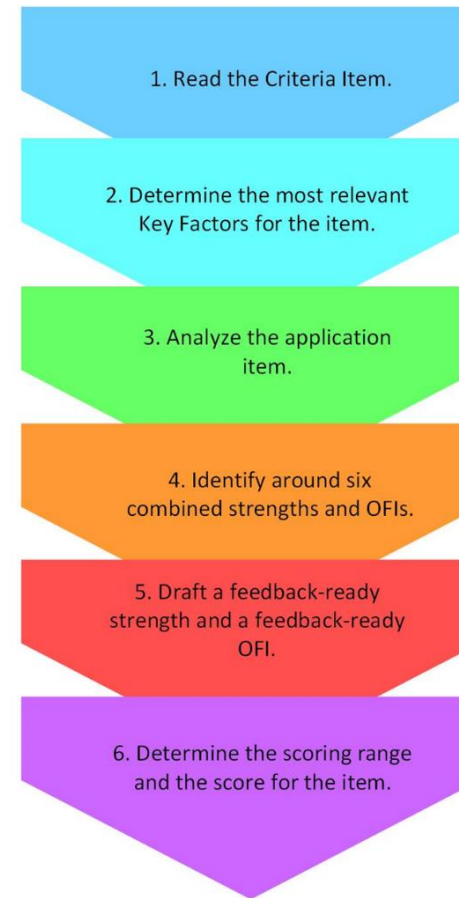
Excellence – **Diversity & Inclusion** – Integrity – Visionary Leadership – Professionalism - **Agility**

- Examiners are often the primary face of TPE
 - Adhere to code of conduct
 - Respect team members & 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



2021 - 2022 Cycle

- All training conducted virtually except 1 NEO
 - Pre-work assignment for NEO
 - New videos to supplement training
 - LMS for Examiner Training pre-work
 - 2X/week open forum for pre-work support
- Consensus Meetings
 - Virtual?
 - Protocol
 - Access to Zoom
- Site Visits
 - In-person? Hybrid? Virtual?
- Stratex Apex software
 - 3? of 5 applicants using software
 - Applicant documents



2021 - 2022 Cycle (cont.)

- Examiner Tool
 - NERD Template
- Examiner Software – Stratex Apex
 - Key Factors
 - Team Leader enters own KF as common list for team
 - Team Members upload Word document of their KF to APEX
 - Review TL's KF and alert of glaring omissions
 - In text box, label “Nugget” & “Evidence” for Strength/OFIs and “FB Ready” for Feedback Ready Comments

NERD Template – from NEO

What I need...	What it means...	An example is... (from Item 1.1 Lifebridge Case Study)
Nugget	A concise opening statement of the main idea	Multiple integrated processes enable senior leaders to create a focus on action.
Evidence	One or two examples that support the Nugget	Examples include the integration of cascading scorecards in work systems, departments, and individual metrics; and the accountability for those actions through the Performance Evaluation Process (PEP) and annual goal plans.
Relevance	Describe the importance of the Nugget to the applicant	These approaches reflect the values of teamwork, quality, and improvement in support of the mission to save and improve lives.
Done	Quit writing!!!	



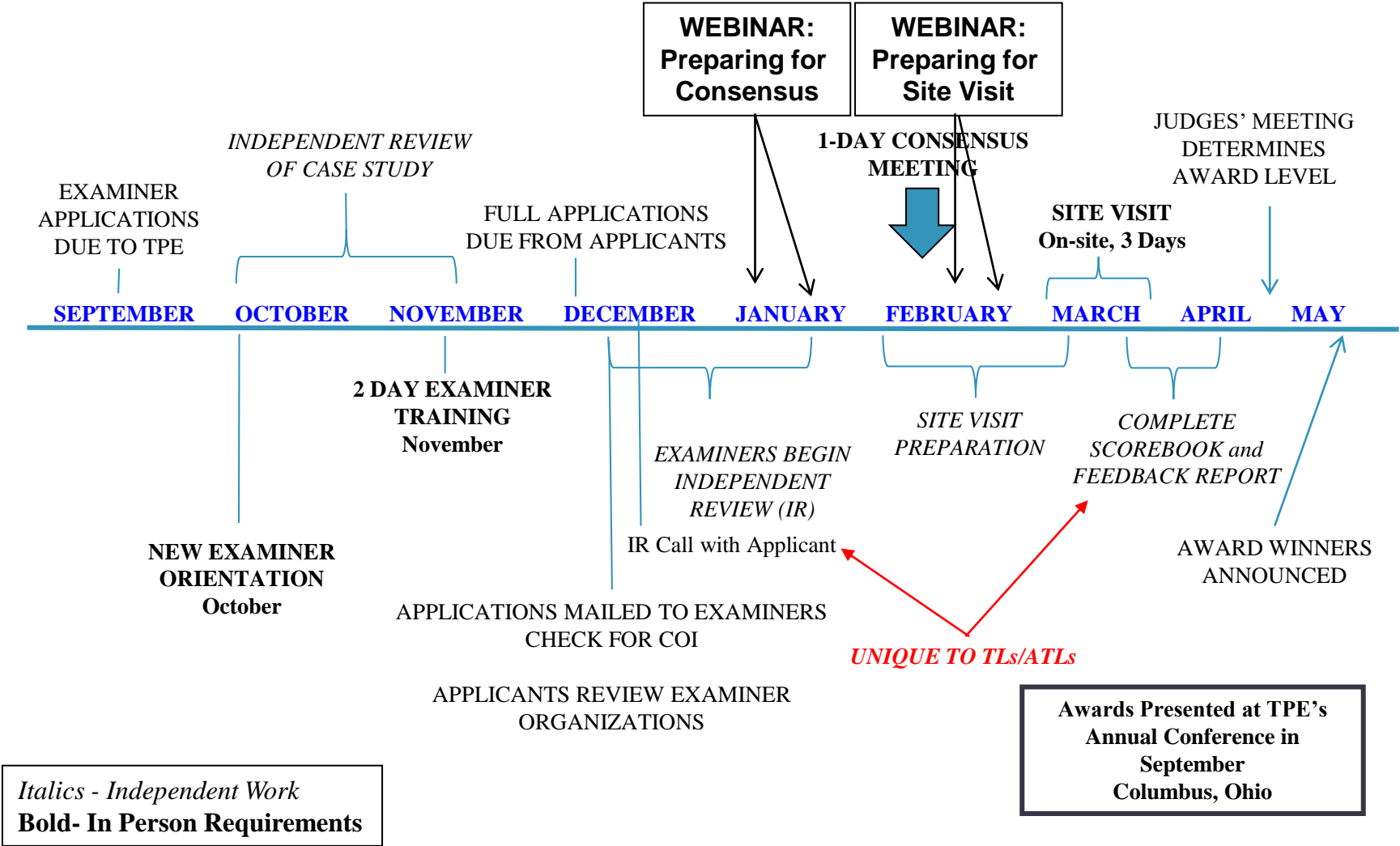
Safety Briefing

For Consensus Meetings & Site Visits (if in-person)

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

The Examination Cycle & Awards Process Timeline

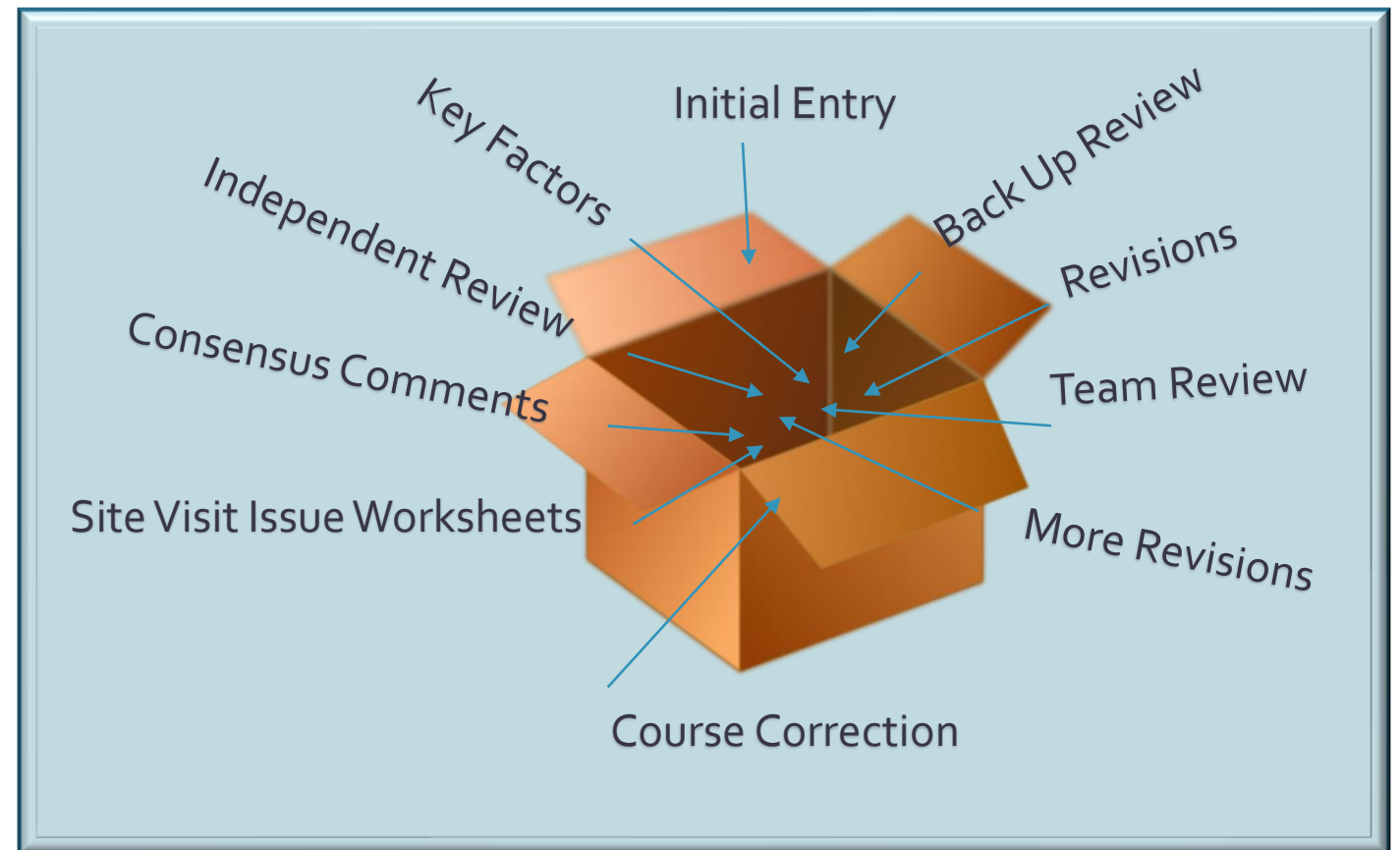


Italics - Independent Work
Bold- In Person Requirements



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 Lauren Browning
 - TL receives all team members' completed bio forms (use to identify Item Leads)
 - TL holds initial conference call with team
 - TL enters Key Factors into APEX
 - Team members complete Key Factors in Word template & upload to APEX Team Files
 - TL conducts IR call with applicant, ATL takes notes
 - Team members complete one IR item in APEX, TL/ATL provide feedback on draft item via phone or posted in APEX Team Files
 - TL determines date & location for Consensus Meeting (to be held in February)
 - Team members continue independent evaluation & enter into APEX
 - Team members each complete IR Scorebooks in APEX
- **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 APEX & item leads begin their 2nd drafts
- Item leads complete 2nd drafts and ask for feedback from team members (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 KTs.
- Item leads incorporate feedback and ask for feedback (R-3).
- Team members prepare feedback on issues to discuss during the Consensus Meeting
- Item leads review feedback and prepare 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**

Pre-work for 10/26/2021 Training Session

- TL and ATL to work together to develop draft schedule for assigned Site Visit
 - Bob Pastva & Kathleen Shoemaker
 - Kent Holloway & Suresh Nirody
 - Adriana Pust & Nathan Perkins
 - Matt Browning & Luke Reed
 - Carl Whittenburg & Mary McGuire
- The next few slides are for new ATLs
 - Team Leaders are welcome to contribute

Assistant Team Leader Topics

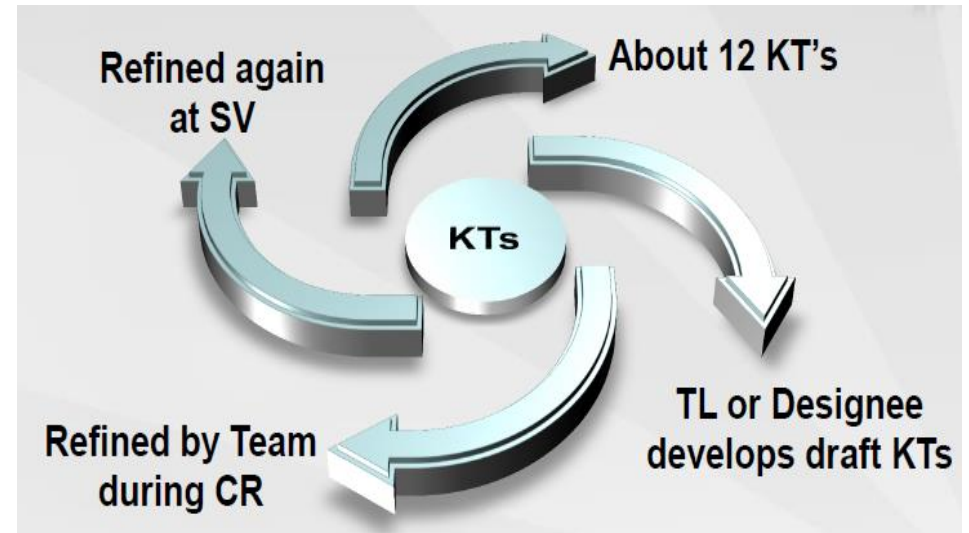
- Intro to Competencies
- Intro to Key Themes
- Potential ATL Roles
- What questions and concerns ATLs have

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”?

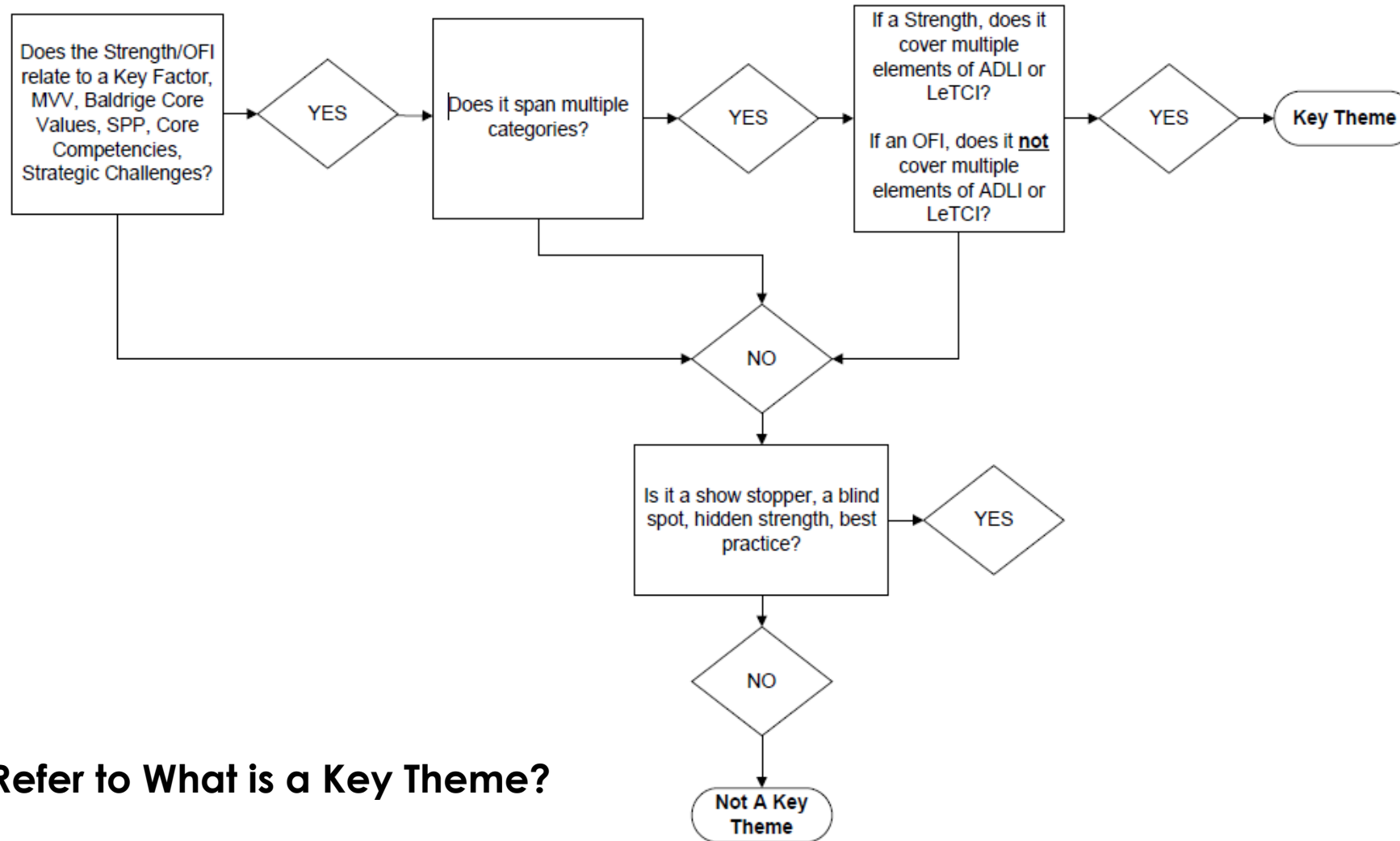


HOW do you identify initial key themes?

The
Partnership
for
Excellence

Helping organizations
see improved results
Ohio * Indiana * West Virginia

Is it a Key Theme?



Also Refer to What is a Key Theme?

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

THANK YOU!
SEE YOU ON 10/26/2021

QUESTIONS?

For further questions/information:

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