

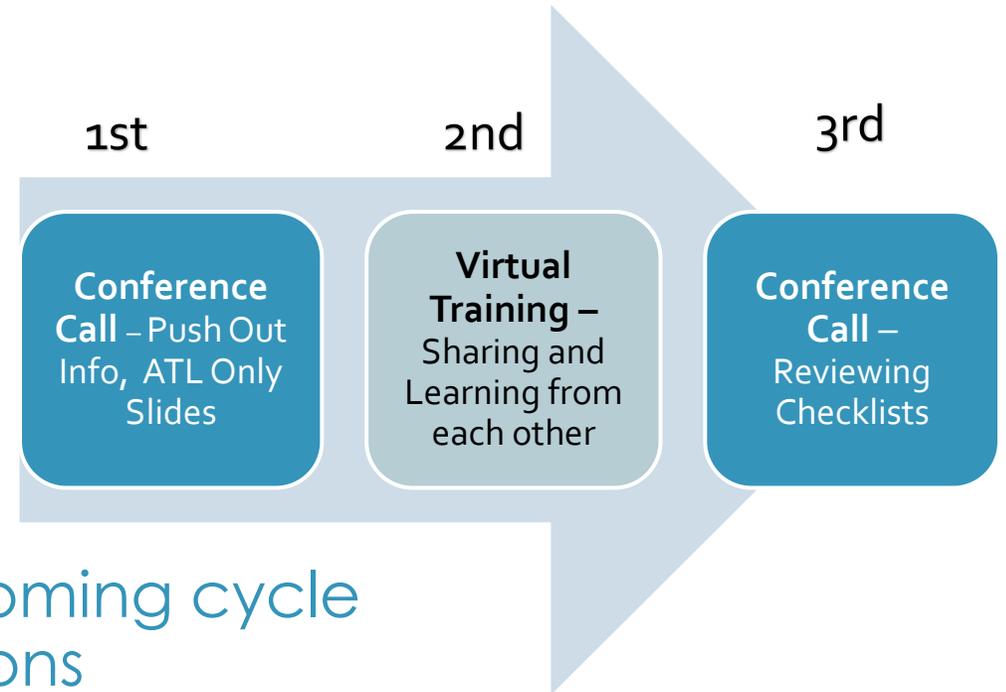


TEAM LEADER – ATL TRAINING

October 26, 2021

Training Objectives

- 2nd of 3-part TL/ATL Training Program
- Preparing Team Leaders & ATLs for upcoming cycle through collaboration & group discussions
- Sharing Best Practices & Lessons Learned
- Preparing for Impacts of COVID
 - Assessing impacted results
- Approaches to Site Visits
- Deepening understanding of the Baldrige criteria (FAQs)



Introductions

- Name
- Sector
- Anything you would like to focus on?



Baldrige FAQ #1 – Comment Writing

How many evaluation factors (ADLI, LeTCI) should be included in a comment?



Baldrige FAQ #1 – Comment Writing

How many evaluation factors (ADLI, LeTCI) should be included in a comment?

It depends. Generally, focus a comment on the one or two factors that are most significant for the applicant in light of its maturity level and key factors. For example, applicants at a high level of maturity may not benefit from reading that their approaches are systematic. On the other hand, this might be a significant strength for an applicant at a low level of maturity. Read and draw on the language in the scoring guidelines to create a useful, actionable comment for the applicant that helps it take the next step in maturity.

Timelines

- Milestones
- Interim Tasks
 - IR Call
- Keeping a Steady Pace
- Team Buy In
- Weekly Team Meetings?
 - PPT templates?

Let's share some of the similarities and differences in our timelines . . .

What were some of your underlying assumptions?

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?



Baldrige FAQ #2 – Criteria Generally

Where in the Criteria would comments on how the organization determines who its competitors are be addressed?



Baldrige FAQ #2 – Criteria Generally

Where in the Criteria would comments on how the organization determines who its competitors are be addressed?

P.2a(1) asks how many and what types of competitors an organization has, but the Criteria don't ask how competitors are determined. As the notes make clear, competition may exist for customers, resources, and visibility, for example. An OFI might relate to Criteria questions that touch on this issue, such as 2.1a(3), on potential blind spots in strategic planning (see the notes to 2.1a[3]), and 3.2a, on market segments.

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?

Early Role Model Feedback

- Independent Review
- Consensus Comments

4A Comment Guidelines are your friend!

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

Preparation for Virtual Consensus Meeting

- Determine connectivity in advance
 - TPE has access to two Zoom accounts or secure donated links from Examiners
 - Some examiners can only use Teams or Webex
- Create a schedule that has breaks about every hour to help avoid screen fatigue
- Verify that all Examiners have the right equipment:
 - Utilize headsets if possible for better audio quality
 - Have a backup Internet source if possible (likely cellular hotspots)
 - Discuss a backup plan to connect by phone/audio if Examiners lose video connection
 - Test connections prior to meeting
- Practice “normal” online video meeting ground rules
- May conduct in one 8-hour meeting or two consecutive 4-hour meetings
- To ensure confidentiality, do not record sessions – note taking is critical
- Other considerations?

Preparing for Impacts of COVID

- Assessing impacted results & performance
 - Considerations due to Impact of COVID
- Potential Approaches to Site Visits
 - Site Visits to be virtual or hybrid
 - To confirm with applicant
 - Virtual Site Visit Guidance
 - Deviations from On-Site Visit Applicant Guidelines
 - Other recommendations?



Baldrige FAQ #3 – Scoring

Give an example in which approach is scored lower than deployment, learning, and integration.



Baldrige FAQ #3 – Scoring

Give an example in which approach is scored lower than deployment, learning, and integration.

Here's an example: an approach is responsive to the overall questions (50–65%). It is well deployed, with no significant gaps, with systematic evaluation and improvement and organizational learning used as key management tools, and it is integrated with current and future organizational needs (70–85%). The organization might well score 70–85% for this item. This scenario may not be very common, but it is certainly possible. Your score should be the result of a holistic assessment of all four factors to determine which range best describes the applicant's maturity level. The approach element may be useful as an indicator of where to begin the conversation of which range to choose, but not as a barrier to higher levels of scoring.

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 #4 – Definitions

What is the Baldrige definition of Transformational Change?



Baldrige FAQ #4 – Criteria Generally

What is the Baldrige definition of Transformational Change?

When the Criteria glossary doesn't include a term, that means the Criteria usage doesn't significantly differ from the common, dictionary definition. "Transformational change" is one of those terms: change that disrupts the status quo in an organization, forcing people out of their comfort zones, and likely causes a change in cultural norms for the organization. It is generally organization-wide and enacted over some time, but it is not the same as looking back over many years of evolutionary change and realizing there has been a transformation. Transformational change is leadership driven. Drivers might be a change in the business model, organizational strategy, or work systems due to dramatic regulatory changes (think health care today), disruptive innovation in the marketplace (think digital cameras), or new market opportunities (think joint ventures).



Baldrige FAQs

Check out all of the FAQs at

[Baldrige Excellence Framework: Examiners' Frequently Asked Questions \(nist.gov\)](http://nist.gov)



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?

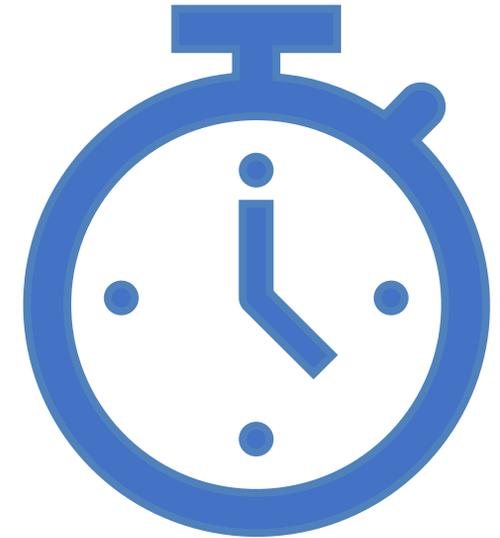
Breakout Session

- Pair up proposed TL/ATL teams
 - Identify potential allocation of responsibilities
 - Identify adjustments to timeline
 - Share lessons learned from previous experiences

20 Minutes

- Share outcomes with larger group

10 Minutes



Stratex Overview

- Lauren Browning to provide demo for TL features
- Lauren is available to conduct training sessions

THANK YOU!

QUESTIONS?

For further questions/information:

Margot Hoffman

614-425-7157

Margot.Hoffman@partnershipohio.org