

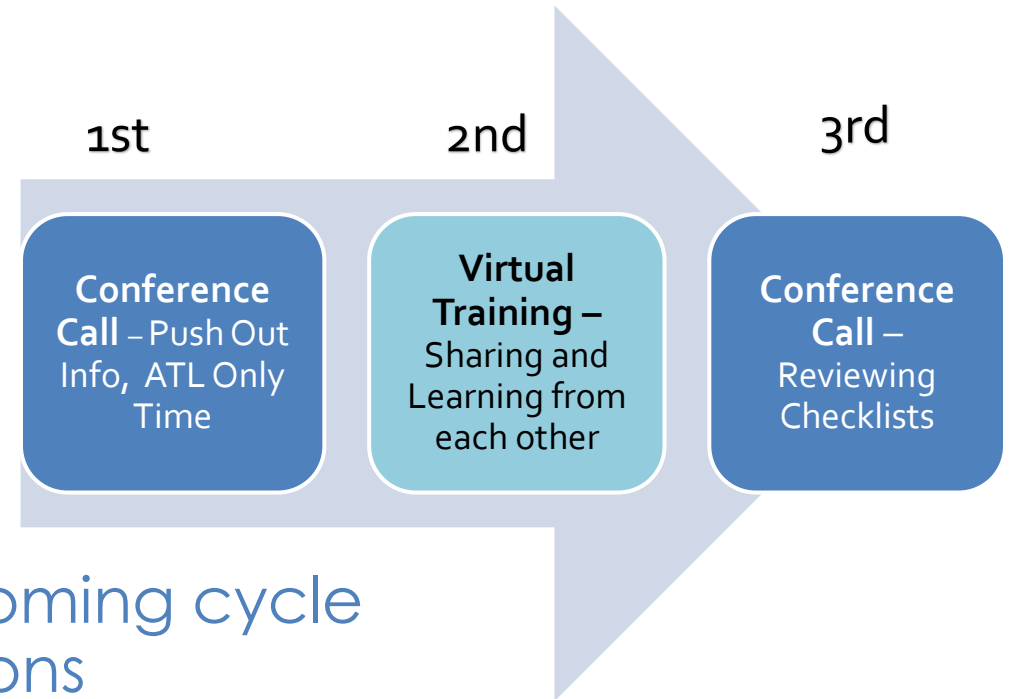


TEAM LEADER – ATL TRAINING

October 27, 2020

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
 - Considerations for Virtual Consensus Meeting
 - Assessing impacted results
 - Potential Virtual Site Visits
- Deepening understanding of the Baldrige criteria (FAQs)





Introductions

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

Baldrige FAQ # 1 – Criteria Generally

How would I write an OFI related to agility without being prescriptive?



Baldrige FAQ #1 – Criteria Generally

How would I write an OFI related to agility without being prescriptive?

You would relate the OFI to a Criteria question, such as those found in 1.1c(1), 2.1a(1), 2.2b, 4.1a(4), and 6.1a(3). The Criteria don't treat agility like a process. It's a characteristic (related to a core value). The Criteria ask how organizations do the things that enable organizational agility. So an OFI would be around the relevant process and how it could improve in creating, addressing, or enabling agility. That said, note that this is a prime example of how key factors can influence the relative importance of Criteria questions. Some industries and organizations have a much greater need for agility than others.

Timelines

- Milestones
- Interim Tasks
 - IR Call
- 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?

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 – Results

Can I use results to determine the effectiveness of a process?



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Can I use results to determine the effectiveness of a process?

To a limited degree. Note the definition of “effective”: “How well a process or a measure addresses its intended purpose. Determining effectiveness requires (1) evaluating how well the process is aligned with the organization’s needs and how well is it deployed, or (2) evaluating the outcome of the measure as an indicator of process or product performance.” Performance certainly is an indicator that something is working well or not so well, but other factors also impact performance. You should not assume that unfavorable results come only from ineffective processes, any more than you would assume that favorable results automatically mean that processes are systematic, well deployed, regularly evaluated and improved, and well integrated and aligned. If results performance were due only to the maturity and effectiveness of processes, there would be no need to evaluate anything other than results.



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?

Considerations for Virtual Consensus Meeting

- Determine connectivity in advance.
 - TPE has access to two Zoom accounts or secure donated links from Examiners.
- 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
- To ensure confidentiality, do not record sessions – note taking is critical
- Other considerations?

Preparing for Impacts of COVID

- Assessing impacted results
 - Considerations due to Impact of COVID
 - Other considerations?
- Potential Virtual Site Visits
 - TPE Virtual Site Visit Guidance
 - Deviations from On-Site Visit Applicant Guidelines
 - Other recommendations?



Baldrige FAQ #3 – Scoring

Give an example of how using one evaluation factor as a gate might result in a less accurate score.



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Give an example of how using one evaluation factor as a gate might result in a less accurate score.

Often, the evaluation factors that seem to (wrongly) hold back scores are deployment and learning. For example, an organization may have a systematic approach that is integrated with organizational needs, but deployment to a remote location or a recently acquired unit is in the early stages. Some examiners may (wrongly) keep the applicant out of a higher range because of these minor cases of lack of deployment. Similarly, an approach may be effective and systematic, well deployed, and integrated with organizational needs, but there is no innovation associated with it. To allow this factor to depress the score is also inaccurate. Comments support and supplement the score. Together, they tell the applicant where it stands. (The national program & TPE DO NOT ask you to identify "blocking OFIs" that can capitate scores.)



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 – Criteria Generally

How should diversity be carried into areas/categories outside of Category 5, Workforce?



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How should diversity be carried into areas/categories outside of Category 5, Workforce?

First, note that diversity denotes more than race, ethnicity, religion, gender, and national origin. It also includes age, skill characteristics, ideas, thinking, academic disciplines, and perspectives. Also note that diversity in the Criteria is relative, not absolute. The Criteria ask about diversity in relation to the organization's hiring and customer (student, patient) communities. Because the workforce does all the work, having an appropriately diverse workforce benefits the organization in everything it does, across all categories. It also impacts workforce engagement, customer engagement, community engagement, organizational learning, innovation, and agility.



Baldrige FAQs

- Check out all of the FAQs at <https://www.baldrigeresources.nist.gov/tools/examinercriteriafaqs#top>
- 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

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?

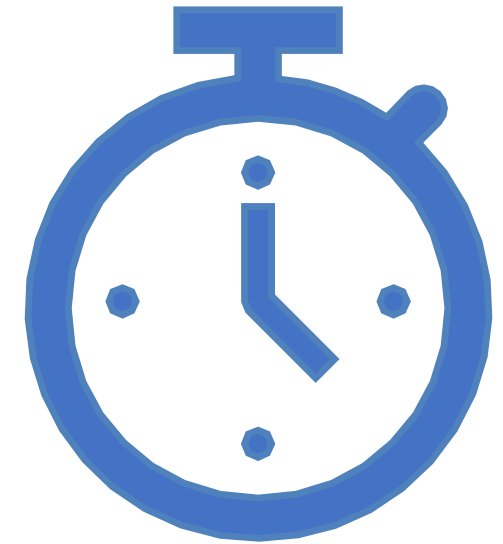
Breakout Session

- 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



THANK YOU!

QUESTIONS?

For further questions/information:

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