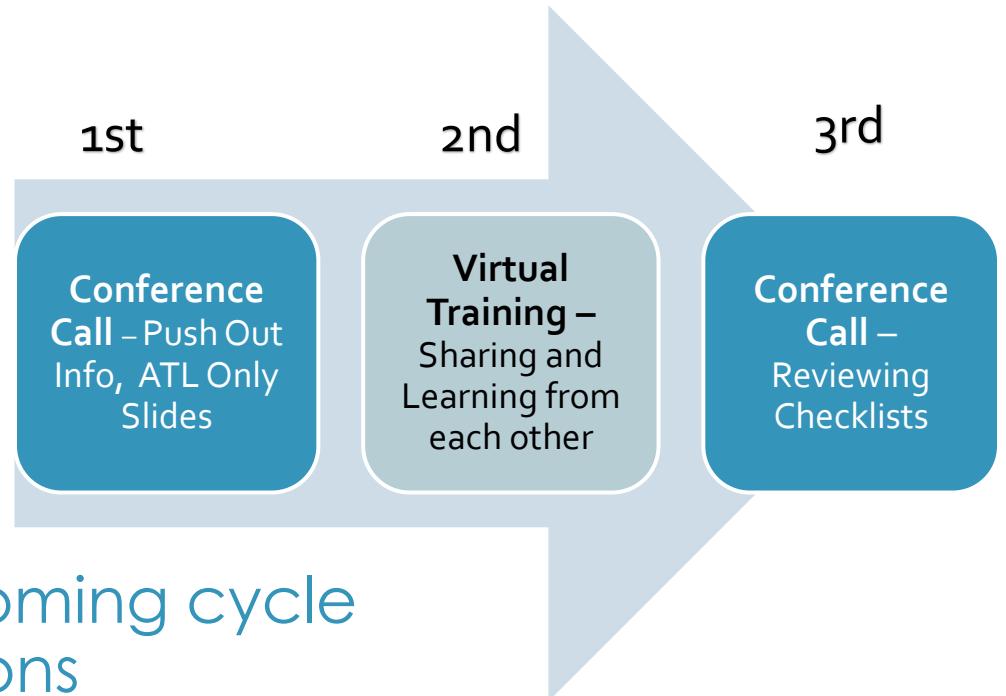


TEAM LEADER – ATL TRAINING

October 26, 2022

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?



Baldridge FAQ #1 – Comment Writing

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Starting an OFI comment with a long “although/while” statement focused on a strength can send a mixed message to the applicant (“Although you do A, B, C, D, you don’t do E Is this a strength or an OFI?”). Instead, we recommend making the comment immediately actionable by pinpointing the OFI. For example, instead of “The applicant uses comparative data to assess its performance. However, it is not evident how organizations and performance dimensions are selected for comparisons,” we recommend something like this: “It is not evident how the applicant selects organizations and performance dimensions to include in the comparative data it uses.” That way, the OFI is upfront and clear, and the other information is simply the background for the OFI.

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 – Results

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



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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?

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 other video conference software
- 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 (i.e. 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?

IR Call

- Review document – IR Call with Applicant

Site Visits

- Approaches to Site Visits
 - Site Visits to be virtual, hybrid or in-person
 - Confirm with applicant & team members
 - On-Site Visit Applicant Guidelines
 - Virtual Site Visit Guidance
 - Deviations from On-Site Visit Applicant Guidelines – TPE Virtual Site Visit Guidelines



Baldridge FAQ #3 – Comment Writing

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



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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.



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?

Baldridge FAQ #4 – Benefit of the Doubt

How much benefit of the doubt do you give a subunit for things that are mandated by the parent? Is the parent a stakeholder?



Baldrige FAQ #4 – Benefit of the Doubt

How much benefit of the doubt do you give a subunit for things that are mandated by the parent? Is the parent a stakeholder?

To answer in reverse: yes, the parent is a stakeholder. The significance of that relationship will vary from organization to organization. Having a parent organization can be a mixed blessing. The parent may provide resources, support, and processes that the subunit needs; the parent may also require the subunit to use a corporate process that is less than ideal. Ultimately, the applicant is responsible for the efficacy and outcomes of the processes it uses. Therefore, sometimes a subunit will deserve a strength for something the parent prescribes, and sometimes the subunit has to accommodate a challenging process. Before you say that this isn't fair, keep in mind that examiners can't exclude parts of the Criteria from consideration just because the parent has a strategy or process that requires a subunit to do something a certain way. The applicant is being evaluated against the standard of excellence. If the applicant uses a less-than-optimal process, it should do everything it can to optimize it, including working upstream with the parent organization. But also keep in mind the relative importance of that process. Whether you write an OFI, and how strong that OFI is, should reflect how important that part of the operation is to success and sustainability.

Baldrige FAQs

Check out all of the FAQS at

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



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?

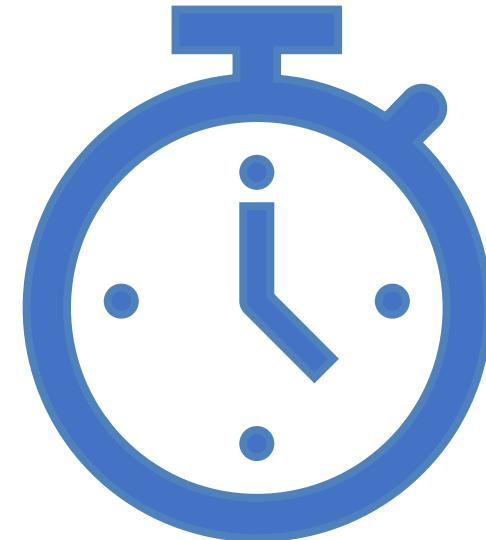
Breakout Session

- 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:

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