TEAM LEADER / ATL WEBINAR

October 12, 2022

Training Objectives - What is unique to TLs/ATLs

Preparing Team Leaders & Assistant Team Leaders for the upcoming cycle
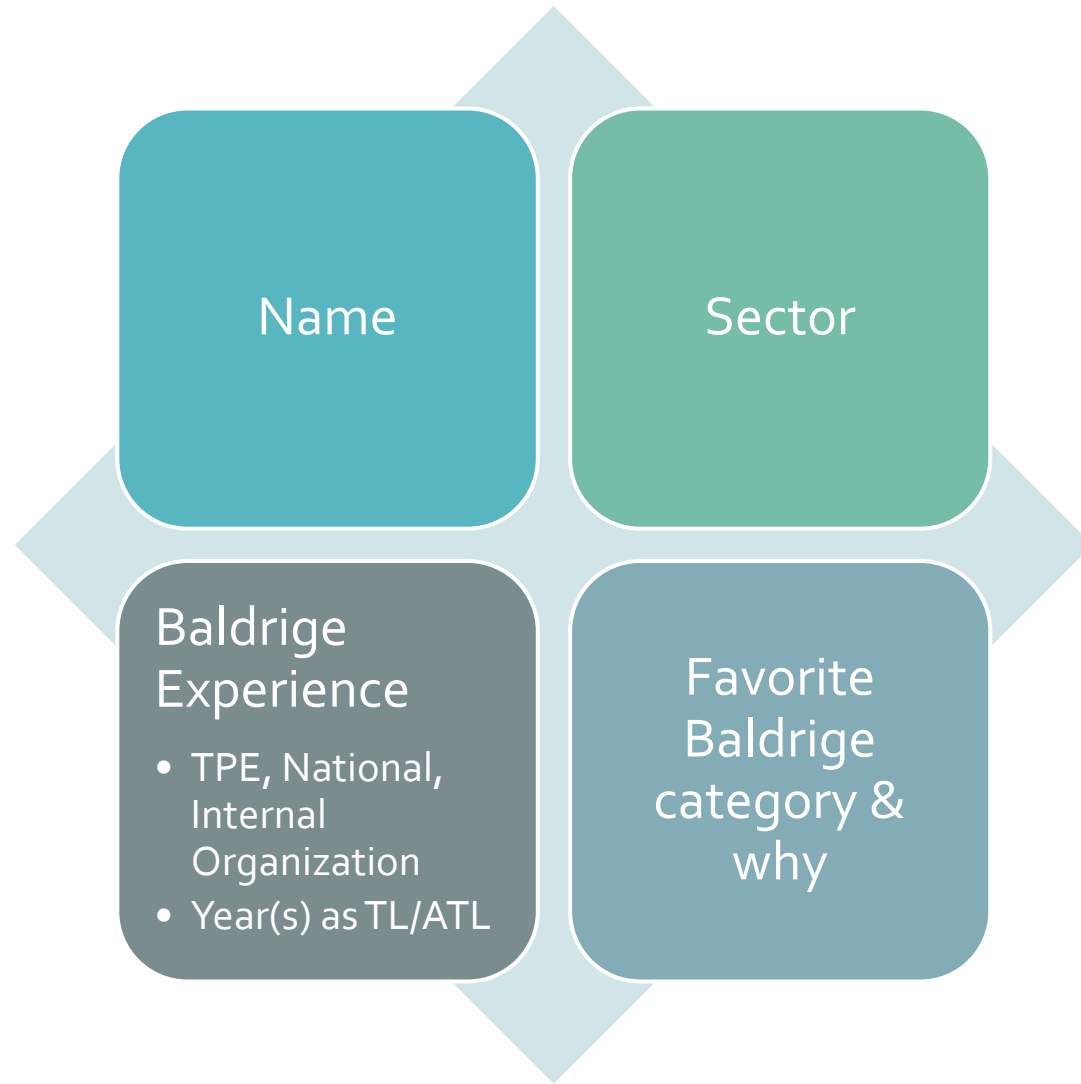
Expectations

Deliverables

Today

Sharing Best Practices & Lessons Learned (training session on **10/26/2022**)

Working our way through the checklists together (**11/29/2022** webinar)

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Name

Sector

Baldrige Experience
- TPE, National, Internal Organization
- Year(s) as TL/ATL

Favorite Baldrige category & why

Introductions

3

Team Leader – Assistant Team Leader
(THE MOST IMPORTANT ROLES WITHIN TPE)

Applicant

TL/ATL   TPE CEO

T R U S T

TPE Values:
- i.   **Excellence**
- ii.   **Diversity & Inclusion**
- iii. **Integrity**
- iv.   **Visionary Leadership**
- v.   **Professionalism**
- vi.   **Agility**

Our Regional Program:

1. we all know each other (*or will*) (iii)
2. we *walk the talk*...(v)
3. we are *encouraging*...(vi)
4. we are *helpful*...(ii)
5. we *exceed customer expectations*...(i)
6. we are *growing together*...(iv)
7. we trust each other..

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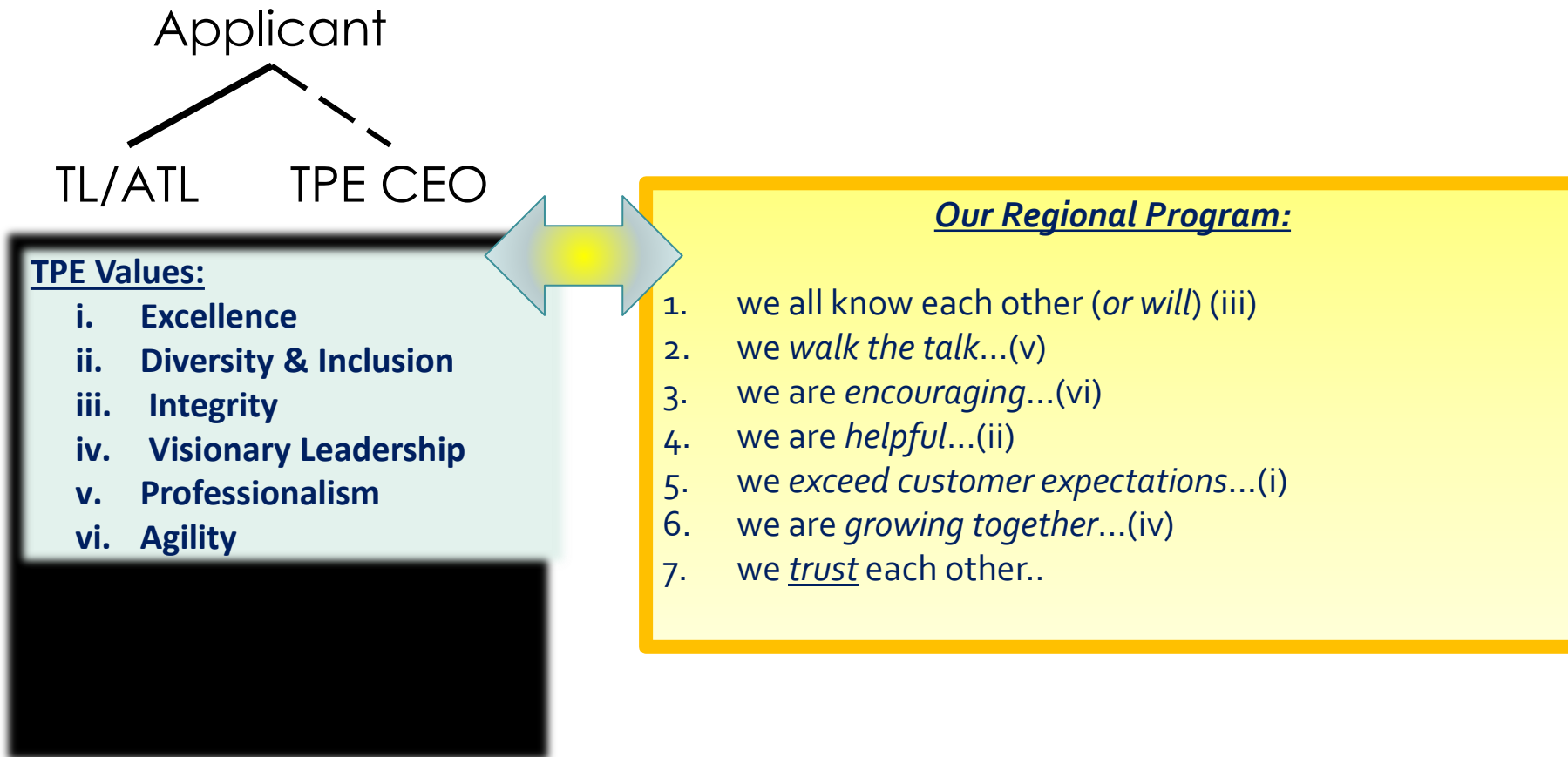*Helping organizations see improved results*
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Exhibit TPE's Values at All Times
Excellence – Diversity & Inclusion – Integrity – Visionary Leadership – Professionalism - Agility

- 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

2022 - 2023 Cycle

1. Read the Criteria Item.

2. Determine the most relevant Key Factors for the item.

3. Analyze the application item.

4. Identify around six combined strengths and OFIs.

5. Draft a feedback-ready strength and a feedback-ready OFI.

6. Determine the scoring range and the score for the item.

All training conducted virtually except NEO
    Pre-work assignment for NEO
    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
    No applicants using software
    Applicant documents

2022 - 2023 Cycle (cont)

1. Read the Criteria Item.

2. Determine the most relevant Key Factors for the item.

3. Analyze the application item.

4. Identify around six combined strengths and OFIs.

5. Draft a feedback-ready strength and a feedback-ready OFI.

6. Determine the scoring range and the score for the item.

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 3.1 Copansburg Regional Health System Case Study)
Nugget	A concise opening statement of the main idea	Use multiple methods to listen to patients and other customers to obtain actionable information across the stages of the customer relationship.
Evidence	One or two examples that support the **Nugget**	Develop customer listening posts based on PDCA …, followed by focus group interviews …, testing the draft method, gathering feedback, refining the design, and checking to assess effectiveness (Figure 3.1-2); Sample of Key Patient, Family Member, and Other Customer Listening Methods (Figure 3.1-1).
Relevance	Describe the importance of the **Nugget** to the applicant	May enable applicant to learn from patients and meet key requirements as it is striving to perform at the top-decile level.
Done	Quit writing!!!	

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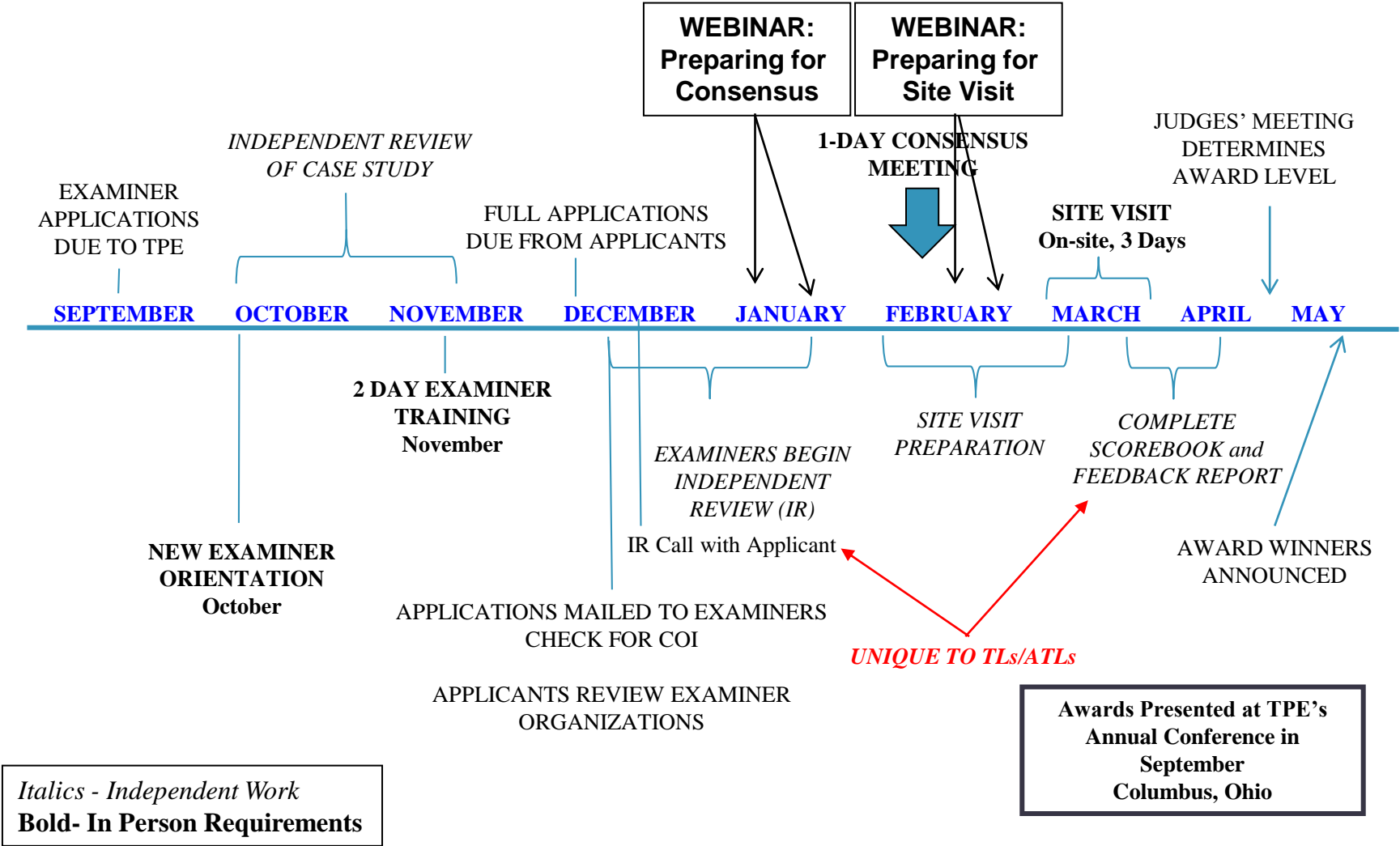
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Safety Briefing
For Site Visits (if in-person)

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

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The Examination Cycle & Awards Process Timeline

WEBINAR: Preparing for Consensus

WEBINAR: Preparing for Site Visit

JUDGES' MEETING DETERMINES AWARD LEVEL

INDEPENDENT REVIEW OF CASE STUDY

1-DAY CONSENSUS MEETING

EXAMINER APPLICATIONS DUE TO TPE

FULL APPLICATIONS DUE FROM APPLICANTS

SITE VISIT On-site, 3 Days

SEPTEMBER **OCTOBER** **NOVEMBER** **DECEMBER** **JANUARY** **FEBRUARY** **MARCH** **APRIL** **MAY**

2 DAY EXAMINER TRAINING November

SITE VISIT PREPARATION

COMPLETE SCOREBOOK and FEEDBACK REPORT

EXAMINERS BEGIN INDEPENDENT REVIEW (IR)

IR Call with Applicant

NEW EXAMINER ORIENTATION October

AWARD WINNERS ANNOUNCED

APPLICATIONS MAILED TO EXAMINERS CHECK FOR COI

UNIQUE TO TLs/ATLs

APPLICANTS REVIEW EXAMINER ORGANIZATIONS

Awards Presented at TPE's Annual Conference in September Columbus, Ohio

Italics - Independent Work
Bold- In Person Requirements

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Comprehensive Timeline – Key Components

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

Key Factors

Initial Entry

Back Up Review

Independent Review

Revisions

Consensus Comments

Team Review

Site Visit Issue Worksheets

More Revisions

Course Correction

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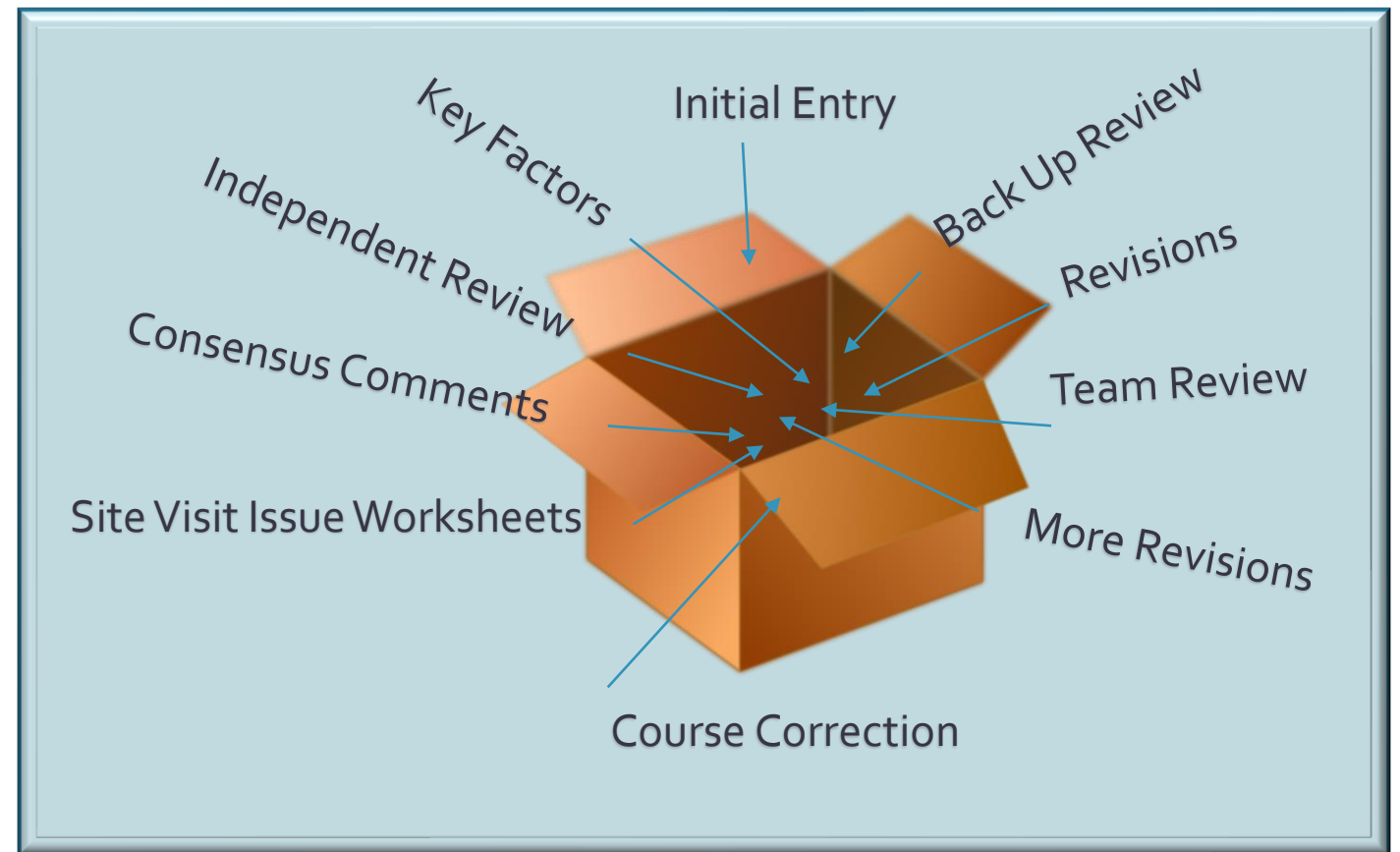
Completing Examination Process Timeline (1 of 3)

- **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**

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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

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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**

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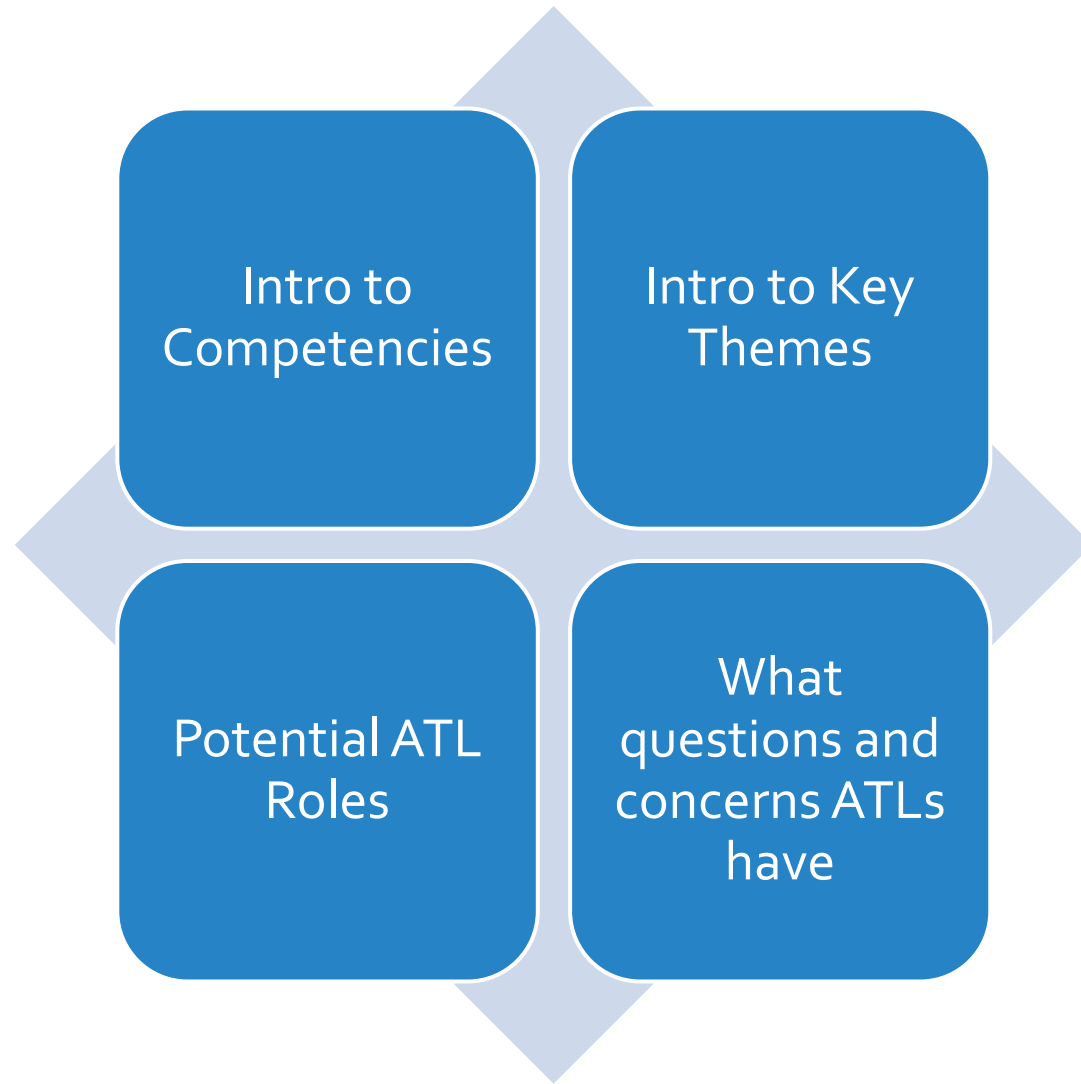
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Pre-work for 10/26/2022 Training Session

TL and ATL to work together to develop draft schedule for assigned Site Visit

- Matt Browning & Ashlie Fritz
- Kent Holloway & Kathleen Shoemaker
- Sarah Klotz & Bob Pastva
- Adriana Pust & Alycia Taylor

The next few slides are for new ATLs

Team Leaders are welcome to contribute

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Intro to Competencies

Intro to Key Themes

Potential ATL Roles

What questions and concerns ATLs have

Assistant Team Leader Topics

TL/ATL Competencies

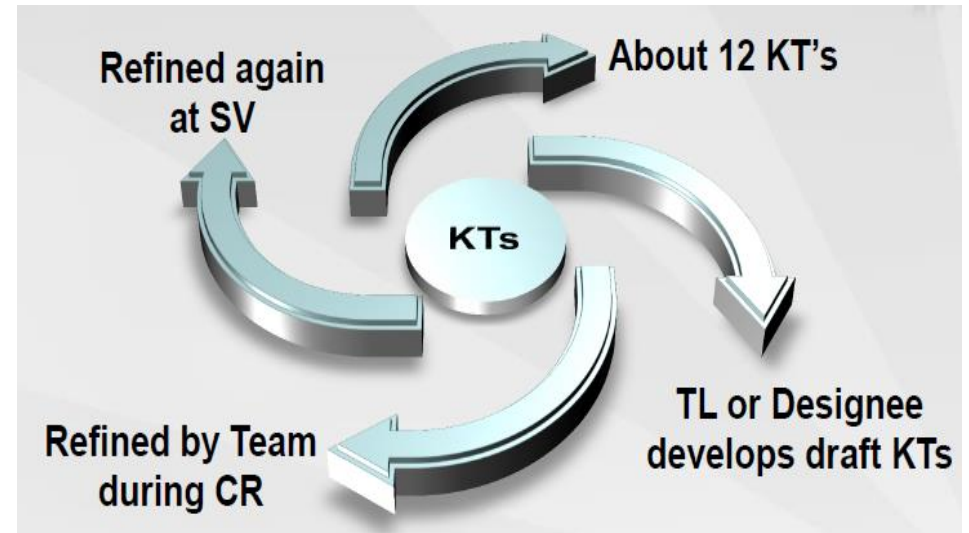|		
Planning	Process Management	Conflict Management
Team Development	Understanding Others	Even Temperedness

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"?
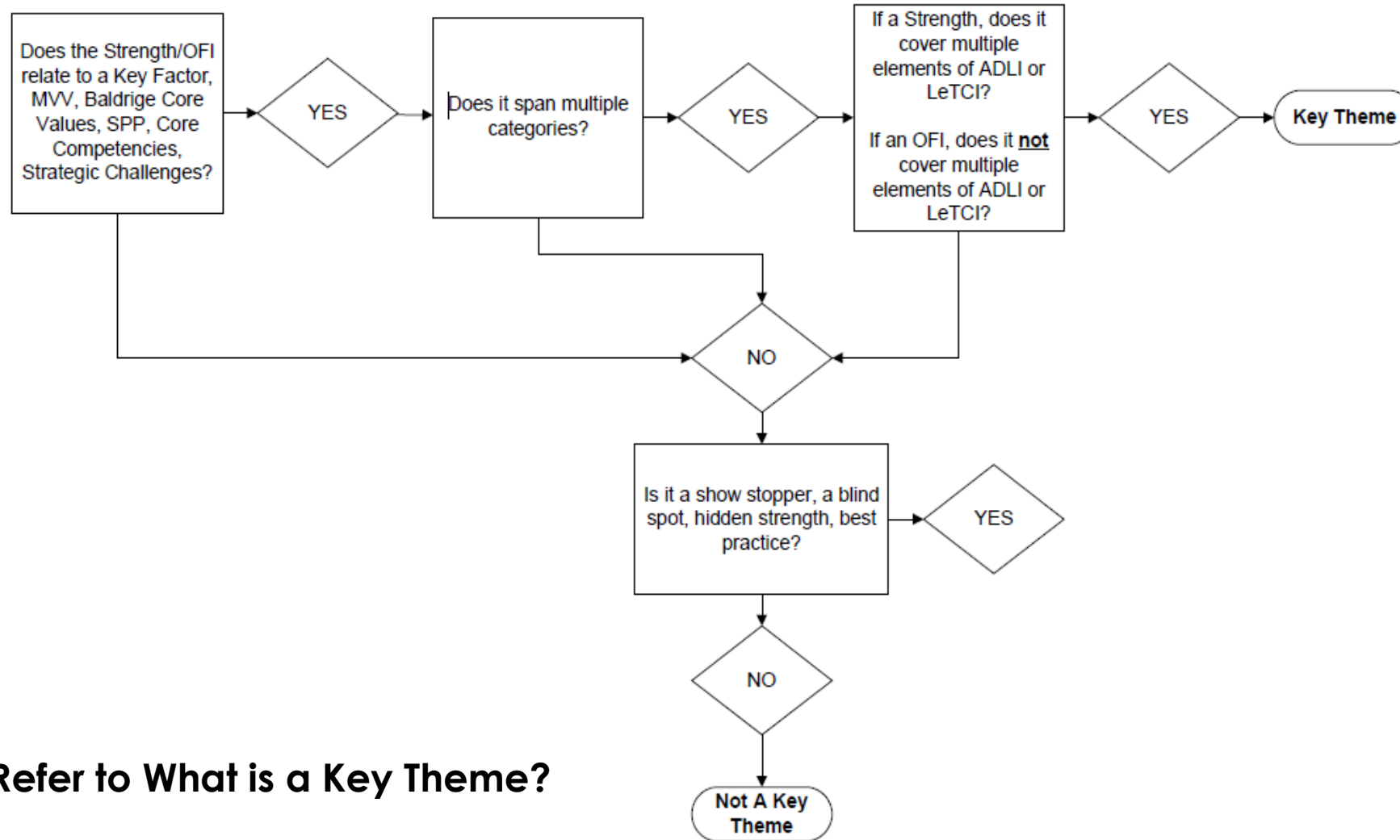

Refined again at SV

About 12 KT's

KTs

TL or Designee develops draft KTs

Refined by Team during CR

HOW do you identify initial key themes?

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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

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REMEMBER – if anything happens to the TL, the ATL needs to step in and finish the process

THANK YOU!
SEE YOU ON 10/26/2022

QUESTIONS?

For further questions/information:
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