Roles and Responsibilities Matrix (Week-by-Week)

Week #/ Activity	NIST Staff	Team Leader (TL)	Team Member and ***Process Checker***	Internal Coach
Week 1 **ASQ sends FedEx packages and e-mails to team members.** **Team conducts 1st planning call.** **Independent Review (IR) begins.**	Provide support through the Award Process Hotline, which is available by toll-free phone at **(877) 237-9064, option 3**, or via e-mail at bossmail@nist.gov as scheduled: Monday through Friday, 9 a.m. to 5 p.m., ET; Saturday from 11 a.m. to 1 p.m., ET and from Sunday, 4 p.m. to 6 p.m., ET.	• Receive assignment e-mail from ASQ. • If assigned an internal coach, set up a call to discuss the support you need. Also, ask the coach to review the proposed timeline you develop based on samples provided at senior training. • Set up a call with the process checker(s) to discuss the support you need and developmental opportunities for them. • Contact other team members individually to welcome them to the team. • Download the Introduction Email and 1st Planning Call Template from the TL Web page on the Examiner Resource Center and revise/send e-mail correspondence and proposed timeline to your team. • Receive copy from ASQ of correspondence that is e-mailed to team members. • Receive evaluation materials by FedEx from ASQ. • **Check for conflicts of interest with applicant. Contact NIST ASAP if you think you may have a conflict.** • Hold a leadership call with the internal coach and process checker(s) to determine roles and review support. • **Begin your IR evaluation following step-by-step instructions.** • Facilitate the team's 1st planning call. **Have personal and work calendars available during call.** • If questions or problems arise, contact your internal coach, if assigned, or the Award Process Hotline.	• Receive assignment e-mail from ASQ. • Review e-mail from TL with the proposed 1st planning call date and time and proposed evaluation timeline. • Check proposed timeline against personal and work calendars. • Receive evaluation materials by FedEx from ASQ. • **Check for conflicts of interest with applicant; then begin your IR evaluation following step-by-step instructions.** • Participate in the 1st planning call. **Have personal and work calendars available during call.** • Contact TL or the Award Process Hotline if process or Criteria questions arise. ***Process Checker***: Talk with the TL about providing support in an additional backup role for each item during consensus: serving as the Criteria cop, (e.g., as well as checking comments and scoring during the initial reviews). • Participate in leadership call with the TL and internal coach.	• Receive assignment e-mail from ASQ. • Contact and determine tasks to support your TL. • Review and provide feedback on TL correspondence to team. • Receive evaluation materials for your assigned team. • **Check for conflicts of interest with applicant; then begin your IR evaluation following step-by-step instructions.** • Participate in leadership call with the TL and process checker.
Weeks 1, 2, 3, and part of 4 **TL provides feedback on initial items.** **Team members complete IR Scorebooks.**	Operate the hotline as scheduled (see above).	• Monitor team's progress on IR via e-mail, telephone, and/or Baldrige Online Scorebook Solution (BOSS). • Provide process or Criteria guidance to team members as needed. **Do not discuss applicant-specific information with team members.** • Download the Weekly Team Email Packet from the TL Web page on the Examiner Resource Center and send weekly e-mail reminders to team on deadlines. • Review and provide feedback on team members' initial drafts of at least one item, and also review their Key Factors (KFs) Worksheets. • Complete IR Scorebook by team's agreed-upon	• Continue with IR evaluation. **Do not discuss applicant-specific information with team members.** • Post your bio to the Team Files on BOSS. • Complete draft KFs and at least one item by team's agreed-upon deadline. • Complete IR Scorebook by team's agreed-upon deadline. Mark as Complete in BOSS. • Contact the TL or the Award Process Hotline if process or Criteria questions	• Continue with IR evaluation. • Complete IR Scorebook by team's agreed-upon deadline. Mark as Complete in BOSS. • Contact the Award Process Hotline if process questions arise.

		deadline. Mark as Complete in BOSS. • If questions or problems arise, contact your internal coach, if assigned, or the Award Process Hotline.	arise.	
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Week 4 **Team conducts 2nd planning call.** **Consensus Review (CR) begins.**	Operate hotline as scheduled (see above).	• Download 2nd Planning Call Communication and Template from the TL Web page on the Examiner Resource Center and establish item assignments and team roles based on biographical information, and review process timeline and agenda for 2nd planning call. • If assigned an internal or external coach, discuss item assignments, team roles, timeline, and agenda for 2nd planning call. • Send e-mail to team with 2nd planning call correspondence and agenda. • Develop consolidated KFs for discussion on 2nd planning call. • Facilitate the 2nd planning call. • If questions or problems arise, contact your internal coach, if assigned, or the Award Process Hotline.	• Review draft KFs Worksheet before 2nd planning call. • Participate in the 2nd planning call. • Contact the TL or the Award Process Hotline if process or Criteria questions arise. ***Process Checker***: Support the team and the TL, as needed.	• Assist the TL with team roles, examiner assignments, process timeline, and agenda for the 2nd planning call. • Be prepared. In case of emergency, you might be asked to lead a team through the CR process.
Weeks 5–7 **Item leads complete 1st draft of CR Worksheets for assigned items.** **Item backups provide feedback. (R-1)** **Item leads complete revisions to CR Worksheets.** **Team members provide feedback on all items for which they are not a lead. (R-2)** **Team conducts**	Operate hotline as scheduled (see above).	• Monitor team's progress against schedule via e-mail, telephone, and/or BOSS. • Provide guidance to team members, if needed. • Send weekly e-mail reminders to team about the deadlines for Reviews 1, 2, and 3 (R-1, R-2, and R-3). • Complete your item lead and item backup duties by the team's agreed-upon deadline. • If questions or problems arise, contact your internal coach, if assigned, or the Award Process Hotline. • Provide feedback on R-2s early as samples for team. • Download the 3rd Planning Call Communication and Template from the TL Web page on the Examiner Resource Center, revise, and send e-mail to team with 3rd planning call correspondence and agenda. • Facilitate the 3rd planning call.	• As item lead, synthesize IR Worksheets for assigned items and complete 1st draft of CR Worksheets by team's agreed-upon deadline. • As item backup, provide R-1 feedback on by team's deadline. • As item lead, incorporate feedback and complete 2nd draft by team's deadline. • E-mail team when your drafts are completed. • Provide feedback on all CR Worksheets Review 2 (R-2). • Participate in 3rd planning call. • Contact the TL or call the Award Process Hotline if process or Criteria questions arise. ***Process Checker***: Serve as an additional backup for each item, using the Comment Guidelines: • Check accuracy of facts: figures, references, abbreviations, etc. • Watch alignment of scores and balance/content of comments	• Each week, contact the TL to lend support.

3rd planning call.			• Watch for comment conflicts, especially across categories • Consider how actionable comments and ensure they are Criteria based. • Suggest bolding and priority of comments, where appropriate.	
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Weeks 7–10 **Item leads complete 3rd draft of assigned items.** **KT lead completes 1st draft of Key Themes (KTs) Worksheet.** **Team members and tech editor provide feedback on all items and KTs. (R-3)** **KT lead completes 2nd draft; item leads integrate changes in worksheets.** **Team prepares scripts for assigned items and reviews other scripts for consensus calls.** **Consensus calls and post-call activities occur.**	Operate hotline as scheduled (see above).	• Ensure that the team's KTs Worksheet draft is completed (by the TL or assigned team member). • Monitor team's progress by e-mail, telephone, and/or BOSS during the preparation period before the consensus calls. • Provide guidance to team members as needed. • Send weekly e-mail reminders to team about preparing for the consensus calls. • If assigned an internal coach, discuss feedback in developing correspondence and agenda for the consensus calls. • Contact assigned Tech Editor to obtain R-3 feedback • Download the Consensus Call Agenda Communication and Template from the TL Web page on the Examiner Resource Center, revise, and send your correspondence and agenda for consensus calls to the team. • Facilitate consensus calls. • After last consensus call, **call ASQ at (414) 765-7205 to inform them that the Score Summary Worksheet is complete and posted in Team Files on BOSS.** • After team's last call, make adjustments to your assigned items. • If questions or problems arise, contact your internal coach, if assigned, or the Award Process Hotline.	• Item leads revise worksheets. • KT lead creates draft KTs Worksheet. • All team members and assigned tech editor review all item worksheets and KTs and provide feedback in preparation for consensus calls. Review 3 (R-3) • Contact the TL or Award Process Hotline with process or Criteria questions as needed. • Fully participate in consensus calls. • After calls, revise comments for assigned items by due date and mark items as "Complete" in BOSS. ***Process Checker***: Ensure that the evaluation process is being followed for each item during the consensus calls: • Ensure that everyone participates and is heard • Ensure full and complete consideration of each item and across the scorebook as a whole. • Double check that the KTs are supported by comments.	• Each week contact the TL to lend support. • Provide feedback on correspondence and agenda for consensus call, if the TL requests help.

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Week 11 **Complete final scorebook. (R-4)**	Operate hotline as scheduled (see above).	• After all item leads have made their final edits and marked their items as "Complete" in BOSS, review (R-4) and edit the CR Scorebook to meet content and style guidelines. Work with scorebook editor to complete final edits to the scorebook. • Inform the Award Process Hotline at **(877) 237-9064, option 3** or via e-mail at bossmail@nist.gov that the final CR Scorebook is finished. Mark the scorebook "FINAL" in BOSS. • If your applicant will not receive a site visit, complete Peer Feedback Forms and send these to your team members after the August 27 Judges' meeting. • Provide feedback on team members' skills and performance as part of examiner development.	• If your applicant will not receive a site visit, complete Peer Feedback Forms and send these to team members after the August 27 Judges' meeting. • Complete the process survey to provide feedback to NIST. ***Process Checker***: Assist the TL in editing the final CR Scorebook: • Validate scores • Check that the balance of comments and their content supports scores • Perform a final detail check of accuracy of figures and facts • Verify that there are no conflicts among items or KTs.	• Assist the TL in editing the final CR Scorebook. • If your applicant will not receive a site visit, complete Peer Feedback Forms and send these to team members after the August 27 Judges' meeting.