# Weekly Team Emails

**Week 2—Team-Leader-to-Team Email**

**Email Highlights:**

**—Checking for Conflicts of Interest**

**—Participating on the 1st Planning Call and Starting the Evaluation**

**—Learning about BOSS**

**—Learning about the Award Process Helpline**

By now, you have each received a FedEx package from ASQ that contains your evaluation materials. It is critical that you read the instructions and, if you have not yet done so, determine if you have a conflict of interest with the applicant. To help you determine if you have such a conflict, the **Conflict of Interest Determination Worksheet** contains questions for you to answer. This was sent to you by ASQ as part of your evaluation materials. If you believe you have such a conflict, please call the Award Process Helpline ***immediately*** at (877) 237-9064, option 3.

Our 1st planning call will take place on DAY OF THE WEEK, 6/xx, xx:xx a.m./p.m., ET. Following are some related reminders:

* During our 1st planning call, it is critical that you have in hand all the materials listed in the correspondence that I sent you a few days ago. These include your business and personal calendars. Other than getting to know each other, our main tasks on this call are to review the process and agree on the evaluation timeline, as well as update our contact information.
* ASQ has sent each of you the calling instructions for our calls; please dial in several minutes before the start of the call. For your convenience, I’ve included or attached the calling instructions.
* Re-familiarize yourself with BOSS at <https://www-s.nist.gov/boss>. Follow-up emails for accessing BOSS were sent to all team members last week.We want to be proactive by ensuring—before our first deadline—that no team member will have difficulty getting started in BOSS.
* **This is very important—**you do not need to wait until the team’s 1st planning call to start your independent review of the applicant. In fact, I highly recommend that you begin now because our timeline is tight. To help you get started, I suggest that you first review the Baldrige Excellence Framework, including the Criteria, particularly if this applicant is in a different sector than your own. Then, read the whole application. After completing your read of the application, log into BOSS and start on the Key Factors Worksheet. When the Key Factors Worksheet is complete, start evaluating the items. Refer to the “2019 Instructions for Independent Review” available in the Independent Review Toolkit on the Examiner Resource Center, as you begin your evaluation. **NOTE: all examiners must complete their IR scorebook by the deadline to remain on the team and receive credit for serving on the Board.**
* Finally, if you have any questions about the process or the Criteria, please feel free to contact me at your telephone number or by email. If I am not available to answer your questions, please contact the Award Process Helpline (see contact information below). Remember, until we have all completed our independent reviews, we may not have any discussions concerning the applicant.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. The Award Process Helpline will be closed on July 4th. Please note the Award Process Helpline contact information below.

 Award Process Helpline Telephone: (877) 237-9064, Option 3

 Award Process Helpline Email: examdepo@nist.gov

I am looking forward to embarking on this journey with each of you.

**Week 3—Team-Leader-to-Team Email**

**Email Highlights:**

**—Completing the Key Factors Worksheet and Independent Review (IR) Worksheets by 6/xx**

**—Completing Your IR Scorebook by 6/xx**

**—Reviewing the Elements of a Complete IR Scorebook**

It was great talking to each of you last week. We are off to a great start, and I want to remind you of the following:

* We agreed that each of you will complete a Key Factors Worksheet and Independent Review (IR)Worksheets for items x.x and 7.x by 6/xx. Please remember to email me when these are complete.
* I will meet my commitment and provide feedback on your x.x and 7.x Worksheets by 6/xx. I will email you when I have completed my feedback, or I will call you to discuss the feedback on your items.
* In the meantime, I encourage you to continue evaluating the applicant. **You do not need to wait for my feedback to proceed with your evaluation.**
* If you have not already done so, please upload your biographical information to BOSS in the team files area. A blank template for this information is available on the Examiner Resource Center Independent Review Toolkit. I will use this information to plan assignments for Consensus Review.
* Your IR Scorebook must be completed by the deadline for you to remain on the team. A complete IR Scorebook includes the following:
* Conflict of Interest Determination Worksheet
* Key Factors Worksheet
* 17 Item Worksheets – each including KFs, around 6 strengths/OFIs, 2 feedback-ready comments, and scores.
* Score Summary Worksheet
* As you complete your IR, please make note of potential key theme(s) [topics]. I will consolidate everyone’s inputs into one list that will then be used to draft the key themes.
* Please make sure that you schedule enough time to provide a full evaluation of the applicant, typically between 50–70 hours. The complete IR Scorebook is scheduled to be completed in BOSS by x/xx, and our 2nd planning call is scheduled for Day of the Week, x/xx, xx:xx a.m./p.m., ET. For your convenience, I’ve included **or** attached the calling instructions.

Finally, if you have any questions about the process or the Criteria, please review the “2019 Instructions for Independent Review” on the Baldrige Program’s Web site at <https://www.nist.gov/baldrige/examiners/independent-review> , or feel free to contact me at your telephone number or by email. If I am not available to answer your questions, please contact the Award Process Helpline. Remember, until we have all completed our independent evaluations, we may not have any discussions concerning the applicant.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. The helpline will be closed on July 4th. Please note the Award Process Helpline contact information below.

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**Week 4**

**Email Highlights:**

**—Completing Your IR Scorebook by 6/xx**

**—Reviewing the Elements of a Complete IR Scorebook**

**—Participating on the 2nd Planning Call Scheduled on 6/xx**

As you continue your evaluation of the applicant, I want to remind you of the following:

* Our deadline for completing a Key Factors Worksheet and Independent Review Worksheets was 6/xx. I will meet my commitment and provide feedback on your x.x and 7.x Worksheets by 6/xx. I will email you when I have completed my feedback, or I will call you to discuss the feedback on your items.
* In the meantime, I encourage you to continue evaluating the applicant. **You do not need to wait for my feedback to proceed with your evaluation.**
* Your IR Scorebook must be completed by the deadline for you to remain on the team. A complete IR Scorebook includes the following:
* Conflict of Interest Determination Worksheet
* Key Factors Worksheet
* 17 Item Worksheets – each including KFs, around 6 strengths/OFIs, 2 feedback-ready comments, and scores.
* Score Summary Worksheet
* Continue making notes of potential key themes. I will be consolidating everyone’s inputs into one list which will be used to draft the key themes
* Please make sure that you schedule enough time to provide a full evaluation of the applicant, typically between 50–70 hours. The complete IR Scorebook is scheduled to be completed in BOSS by x/xx, and our 2nd planning call is scheduled for Day of the Week, x/xx, xx:xx a.m./p.m., ET. For your convenience, I’ve included **or** attached the calling instructions.

Finally, if you have any questions about the process or the Criteria, please review the “2019 Instructions for Independent Review” on the Baldrige Program’s Web site at <https://www.nist.gov/baldrige/examiners/independent-review> , or feel free to contact me at your telephone number or by email. If I am not available to answer your questions, please contact the Award Process Helpline. Remember, until we have all completed our independent evaluations, we may not have any discussions concerning the applicant.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. The helpline will be closed on July 4th. Please note the Award Process Helpline contact information below.

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**Week 5—Team-Leader-to-Team Email**

**Email Highlights:**

**—Participating on the 2nd Planning Call Scheduled for x/xx**

**—Completing the full IR Scorebook by x/xx**

**—Completing Draft Consolidated Key Factors Worksheet by x/xx**

**—Reviewing the Consensus Instructions and Toolkit**

Folks, we are almost ready for our 2nd planning call. Before the call, I want to remind you of the following:

Our 2nd planning call is scheduled on day of the week, x/xx 00:00 a.m./p.m., ET. For your convenience, I’ve included or attached the calling instructions. Please have the attached materials, as well as your business and personal calendars, on hand for this planning call.

* We agreed that each of you will complete your Independent Review (IR) Scorebook by xx/xx. Meeting your time commitments is critical; the transition from Independent Review to Consensus Review can’t be accomplished unless all IR Scorebooks are completed. This scorebook includes the following:
	+ Conflict of Interest Determination Worksheet
	+ Key Factors Worksheet
	+ 17 IR Worksheets—each including KFs, around 6 strengths/OFIs, 2 feedback-ready comments, and scores
	+ Score Summary Worksheet
* Please remember to email me when you have completed your IR Scorebook and be sure to mark your IR scorebook “Complete” in BOSS.
* Once all IR Scorebooks are marked as complete in BOSS, I will be able to build the consolidated Key Factors Worksheet; I will do soby our agreed-upon timeline of xx/xx. **Please review the draft consolidated Key Factors Worksheet in BOSS in advance of our 2nd planning call.** This version will be the basis for our Key Factors Worksheet discussion.
* We will discuss in depth the process of synthesizing IR inputs, developing draft CR item worksheets, and virtually reviewing those worksheets in BOSS by assigned item back-ups and process facilitators [Review 1 (R-1)], followed by worksheet revisions and reviews by the entire team [Review 2 (R-2)]. Please make sure that you review the “2019 Instructions for Consensus Review” and the “Comment and Scoring Checklist” located in the Consensus Review Toolkit on the Examiner Resource Center at <https://www.nist.gov/baldrige/examiners/consensus-review> before the call.
* As we will also revisit our process timeline on the call, please have your business and personal calendars handy so that we can make any needed adjustments.

If you have any questions about the process, the Criteria, the IR Worksheets, or the 2nd planning call, please review the instructions for Independent Review and/or Consensus Review. Feel free to contact me at your telephone number. You may also contact the Award Process Helpline. Remember that until we have all completed our independent evaluations, we may not discuss anything that is applicant-specific.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. The helpline will be closed on July 4th. Please note the Award Process Helpline contact information below.

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**Week 6—Team-Leader-to-Team Email**

**Email Highlights:**

**—Reviewing Sample CR Worksheets**

**—Finishing Your Work for R-1 by xx/x**

**—Using the “Comment and Scoring Checklist”**

Team,

We had a great call last week. Thank you for your participation.

I am writing to let you know the following:

* I would encourage you to review the 2019 LifeBridge Organ and Tissue Sharing Consensus Review Scorebook available in the Examiner Resource Center Consensus Review Toolkit for Consensus Review (CR) worksheet samples. These samples contain the type of details, such as feedback-ready comments and rationales, needed on CR Worksheets in this process.
* As a reminder, please finish all work on your draft item worksheets by our agreed-upon deadline of xx/xx. So that folks do not have to check BOSS several times a day, please send an email to your item backup, the process facilitator(s), and me when you have completed your first item drafts. Item leads, please remember to open the feedback pane in BOSS so that your item back-up can provide their feedback on your CR worksheets. Also, as an item backup, please observe the same courtesy toward the item lead when you have completed your feedback in BOSS.
* As an item backup/process facilitator, remember to use the “Comment and Scoring Checklist” to conduct your Review 1 (R-1) of the CR Worksheets. The checklist is part of the Consensus Review Toolkit located in the Examiner Resource Center at <https://www.nist.gov/baldrige/examiners/consensus-review> .
* If you have any questions about the process, the Criteria, or the CR Worksheets, please review the “2019 Instructions for Consensus Review” and/or the “Comment and Scoring Checklist.” Also, feel free to contact me at your telephone number or contact the Award Process Helpline.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. The helpline will be closed on July 4th. Please note the Award Process Helpline contact information below.

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**Week 7—Team-Leader-to-Team Email**

**Email Highlights:**

**—Completing Your R-1 Feedback for Your Back-up Item Assignments in BOSS by xx/xx**

**—Finishing Your 2nd Drafts by Team’s Deadline**

**—Notifying the Team by Email of Work Completion**

**—Participating on the 3rd Planning Call Scheduled on xx/xx xx:xx a.m./p.m., ET**

**—Reviewing the Attached 3rd Planning Call Agenda**

Team,

It’s been a busy week. Please note the following:

As a reminder, please finish your 2nd drafts of assigned items by our team’s agreed-upon deadline of xx/xx, and then open the items for feedback in BOSS. So that folks do not need to check BOSS several times a day, please notify the team via email when your 2nd drafts are complete in BOSS.

The 3rd planning call is scheduled to take place on xx/xx at xx:xx a.m./p.m., ET. We will discuss the key themes process and the steps that lead us to the consensus calls. Before the 3rd planning call, please make sure that you review the “2019 Instructions for Consensus Review” located in the Examiner Resource Center at https://www.nist.gov/baldrige/examiners/consensus-review. We will also revisit our process timeline, so please have your business and personal calendars available so that we can make any needed adjustments. **The materials and instructions to prepare for the 3rd planning call, as well as the agenda, are included in the attachment.**

If you have any questions about the process, the Criteria, or the CR Worksheets, please review the “Instructions for Consensus Review” and feel free to contact me at your telephone number or contact the Award Process Helpline.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. The helpline will be closed on July 4th. Please note the Award Process Helpline contact information below.

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**Week 8—Team-Leader-to-Team Email**

**Email Highlights:**

**—Completing Your Review 2 (R-2) Feedback**

**—Reviewing the 3rd Planning Call Agenda and Participating in the 3rd Planning Call**

**—(If team has had 3rd planning call) Reviewing the Draft Key Themes Worksheet**

**—Sending Email Notifications of Your Progress**

Team,

I am writing to let you know the following:

To prepare for the consensus call(s), I have completed my R-2 feedback of items x.x, x.x, etc. I encourage you to review my work, which provides a sample of the type of detail needed on the Consensus Review (CR) Worksheets.

So that folks do not need to check BOSS several times a day, please email the team when your 2nd draft CR Worksheet is completed and open the feedback pane for your items for R-2.

I appreciate all of your work in reviewing other CR worksheets and providing feedback to your team members.

All R-2 feedback on items for which you are not a lead must be completed by xx/xx. Although I have provided my R-2 feedback, every team member is expected to provide their feedback. This will help make our consensus calls more efficient by having raised concerns earlier and will help create a better product for our applicant.

**(If team has not had 3rd planning call and/or agenda was not sent the week before)** I look forward to talking with you later this week on the 3rd planning call. We can address any questions you have there. **The materials and instructions to prepare for the 3rd planning call, as well as the agenda, are included in the attachment.**

**(If team has had 3rd planning call)** As a reminder, the draft Key Themes Worksheet will be completed in BOSS by xx/xx. Please notify me when you have provided feedback on the draft Key Themes Worksheet.

If you have any questions about the process, the Criteria, or the CR Worksheets, please review the “2019 Instructions for Consensus Review,” and feel free to contact me at [your telephone number] or the Award Process Helpline.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. The helpline will be closed on July 4th. Please note the Award Process Helpline contact information below.

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**Week 9—Team-Leader-to-Team Email**

**Email Highlights:**

**—Completing Feedback on Items for Review 2 (R-2) (if not already completed)**

**—Notifying the Team by Email**

**—Revising Your Draft Item Worksheets (Draft 3)**

**—Reviewing the Draft Key Themes Worksheet**

**—Reviewing the Attached Consensus Call Agenda**

Team,

Here are a few reminders:

You will use the R-2 feedback to determine if any changes to your assigned items are needed before the consensus calls. Make needed revisions to your draft item worksheets (3rd draft) and open your items for Review 3 (R-3) feedback.

Remember to notify all team members via email when you have completed your 3rd draft and are ready for R-3 feedback in BOSS.

Our consensus calls are coming up soon. The dates and times of the calls are xx/xx, xx:xx a.m./p.m., ET, and xx/xx, xx:xx a.m./p.m., ET. **See the consensus call agenda attachment.** Please review and be prepared to discuss **all** item comments, scores, and key themes.

To prepare for the consensus calls, you will:

1) provide R-3 feedback for all the other items

2) prepare “call scripts” for each of your items to facilitate discussion. Call scripts for item leads are to be completed by xx/xx. A template can be found in the Consensus Review Toolkit on the Examiner Resource Center at <https://www.nist.gov/baldrige/examiners/consensus-review>. These scripts contain the talking points for your assigned items. My item x.x script is available for your review in the BOSS team files section as an example of what we need to cover on the call(s).

If you have any questions about the process, the Criteria, or the Consensus Review Worksheets, please review the “2019 Instructions for Consensus Review,” and feel free to contact me at your telephone number or contact the Award Process Helpline.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. Please note the Award Process Helpline contact information below.

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**Week 10—Team-Leader-to-Team Email**

**Email Highlights:**

**—Finishing Your 3rd Drafts of Items in Preparation for Review 3 (R-3)**

**—Reviewing and Providing R-3 Feedback for all Other Items**

**—Reviewing the Consensus Call Agenda**

**—Downloading Consensus Call Script Template and Preparing Your Script for Assigned Items**

**—Participating on the Consensus Call(s) Scheduled on xx/xx, xx:xx a.m./p.m., and xx:xx a.m./p.m., ET**

Team,

Here are a few reminders:

By now you should have finished the draft 3 revisions to your item worksheets and are ready to open them up for Review 3 (R-3) feedback.

Remember to notify all team members via email when you have completed your work and are ready for R-3 feedback in BOSS.

As a reminder, our consensus calls are coming up soon. The dates and times of the calls are xx/xx, xx:xx a.m./p.m., ET, and xx/xx, xx:xx a.m./p.m., ET. Please review and be prepared to discuss **all** item comments, scores, and key themes.

Finish your review all the other items (R-3), and finalize your “call scripts” for each of your items.

Call scripts for item leads are to be completed by xx/xx. The template can be found in the Examiner Resource Center at <https://www.nist.gov/baldrige/examiners/consensus-review>. These scripts contain the talking points for your assigned items. My item x.x script is available for your review in the BOSS team files section as an example of what we need to cover on the call(s).

If you have any questions about the process, the Criteria, or the Consensus Review Worksheets, please review the “2019 Instructions for Consensus Review,” and feel free to contact me at your telephone number or contact the Award Process Helpline.

The hours of the helpline are 9 a.m. to 5 p.m., ET, Monday through Friday. Saturday hours are 11 a.m. to 1 p.m., and Sunday hours are 4 p.m. to 6 p.m., ET. Please note the Award Process Helpline contact information below.

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**Week 11—Team-Leader-to-Team Email**

**Email Highlight:**

**—Participating on the Consensus Call(s), Scheduled on xx/xx, xx:xx a.m./p.m., ET , and xx/xx, xx:xx a.m./p.m., ET**

Team,

Well, folks, we are nearing the end of the game.

Following are some reminders about our agreed-upon deadlines:

* Our consensus call(s) is/are scheduled for xx/xx and xx:/xx a.m./p.m., ET. I’ve attached or included the calling instructions.
* Remember to notify team members via email as work is completed in BOSS.
* All Review 3 (R-3) feedback must be completed by xx/xx.
* If you have not already done so, complete the call scripts for the items you are leading by xx/xx. A template can be found in the Examiner Resource Center at <https://www.nist.gov/baldrige/examiners/consensus-review>.

If you have any questions at this point, particularly about the Criteria or the consensus call process, please contact me at your telephone number or contact the Award Process Helpline.

The hours of the Award Process Helpline are from 9 a.m. to 5 p.m., ET, Monday through Friday. Please note the Award Process Helpline contact information below.

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I am looking forward to our call(s) this/next week.

**Week 12—Team-Leader-to-Team Email**

Team,

Thank you all for the great call(s) we had last week! This email is intended to remind you to have all revisions to your Consensus Review Worksheets (4th drafts) completed in BOSS by xx/xx. When you have finished the worksheets, please mark each of them “complete” in BOSS.

Following the Judges’ meeting on August 21st, BPEP will notify you of the outcome via email no later than close of business August 22nd.

Thank you also for all your hard work! I have enjoyed working with you and take pride in knowing that we will be providing very valuable feedback for this applicant.