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| **Week 1****ASQ sends FedEx packages and emails to team members.****Team conducts 1st planning call.****Independent Review (IR) begins.****TL contacts applicant OCP to schedule IR call** | **NIST Staff**Provide support through the Award Process Helpline, which is available by toll-free phone at (**877) 237-9064, option 3**, or via examdepo@nist.gov as scheduled:Monday through Friday, 9 a.m. to 5 p.m.; Saturday from 11 a.m. to 1 p.m., and from Sunday, 4 p.m. to 6 p.m., Eastern (ET). Helpline will be closed on May 27th and July 4th**.****Team Leader (TL)*** Receive assignment email from ASQ. Receive evaluation materials from ASQ via FedEx.
* Set up and conduct a call with your backup team leader (BUTL) to discuss the support you need. Also, ask the BUTL to review the proposed timeline you develop based on samples provided on the Team Leader Resources Web page. *Refer to the roles identified in the rows below.*
* 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 email correspondence and proposed timeline to your team.
* Receive copy from ASQ of correspondence that is emailed to team members.
* Receive emails from BOSSAdm@nist.gov with username and temporary password to access Baldrige Online Scoring System (BOSS).
* Check for conflicts of interest with applicant. Contact NIST ASAP if you think you may have a conflict. Begin your IR evaluation following the IR instructions.
* Within 5 days of receiving FedEx package, contact the applicant OCP (contact information listed on page A-1 of application form) to schedule the IR call. Post the date/time of the call and provide contact info for the applicant, TL, and BUTL in the Team Files in BOSS.
* Conduct the team’s 1st planning call. Have personal and work calendars available during call.
* If questions or problems arise, contact your BUTL or the Award Process Helpline.

**Backup Team Leader (BUTL)*** Receive assignment email from ASQ. Receive evaluation materials for your assigned team from ASQ via FedEx.
* Contact and determine tasks to support your TL (such as coaching if TL is new to the role). Talk with the TL about providing support as needed for the team, in one or more of the following roles: serving as another backup for *each* item during the initial reviews [R-1], serving as the Criteria cop throughout virtual consensus, checking comment and scoring alignment during virtual consensus, helping mentor the newer examiners, checking comment accuracy during virtual consensus, serving as the team’s scorebook editor, and/or writing Key Themes.
* Review and provide feedback on TL correspondence to team.
* Receive emails from BOSSadm@nist.gov with username and temporary password to access BOSS.
* Check for conflicts of interest with applicant; then begin your IR evaluation following the IR instructions.
* Coordinate availability for applicant IR call w/ TL.
* Participate in a call with the TL to determine specific expectations.
* Participate in the 1st planning call. Have personal and work calendars available during call.

**Team Member*** Receive assignment email from ASQ. Receive evaluation materials from ASQ via FedEx.
* Review email from TL with the proposed 1st planning call date and time and proposed evaluation timeline. Check proposed timeline against personal and work calendars.
* Receive emails from BOSSAdm@nist.gov with username and temporary password to access BOSS.
* Check for conflicts of interest with applicant; then begin your IR evaluation following the IR instructions. Contact NIST ASAP if you think you may have a conflict.
* Participate in the 1st planning call. Have personal and work calendars available during call.
* Contact TL or the Award Process Helpline if process or Criteria questions arise.
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| **Weeks 1, 2, 3, 4, and part of 5****TL provides feedback on initial items.****Team members complete IR Scorebooks.****TL conducts IR call w/ applicant** | **NIST Staff** Operate the helpline as scheduled (see Week 1). Helpline will be closed on May 27th and July 4th.**Team Leader*** Monitor team’s progress on IR via email, telephone, and/or BOSS*.* Notify NIST of any issues with examiners not completing their IR scorebooks.
* 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 email reminders to team on deadlines.
* Post your bio in Team Files in BOSS
* 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 deadline. Mark scorebook as “**Complete**” in BOSS. [Do NOT mark scorebook “Final”]
* Conduct the applicant IR call by the end of Week 3. Share information learned from applicant IR Call with the team via Team Files.
* If questions or problems arise, contact your BUTL or the Award Process Helpline.

**Backup Team Leader (BUTL)*** Continue with IR evaluation. **Do not discuss applicant-specific information with team members.**
* Complete IR Scorebook by team’s agreed-upon deadline. Mark scorebook as “**Complete**” in BOSS. [Do NOT mark scorebook “Final”]
* Post your bio to the Team Files in BOSS.
* Contact the Award Process Helpline if process questions arise.
* Assist the TL with team member issues, as needed.
* Participate in IR call w/ applicant and TL

**Team Member*** Continue with IR evaluation. **Do not discuss applicant-specific information with team members.**
* Post your bio to the Team Files in 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 scorebook as “**Complete**” in BOSS. [Do NOT mark scorebook “Final”]
* Contact the TL or the Award Process Helpline if process or Criteria questions arise.
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| **Week 5****Team conducts 2nd planning call.****Consensus Review (CR) begins.** | **NIST Staff** Operate the helpline as scheduled (see Week 1). Helpline will be closed on July 4th. **Team Leader*** 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. Review process timeline and agenda for 2nd planning call.
* Discuss item assignments, team roles, timeline, and agenda for 2nd planning call with BUTL

**Backup Team Leader (BUTL)*** Assist the TL with team roles, examiner assignments, process timeline, and agenda for the 2nd planning call.
* Be prepared. In case of an emergency, you might be asked to lead a team through the CR process.
* Support the team and the TL, as assigned.

**Complete the same activities delineated for *Team Members* below.Team Member*** Review draft KFs Worksheet before 2nd planning call.
* Participate in the 2nd planning call.
* Contact the TL or the Award Process Helpline if process or Criteria questions arise.
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| **Weeks 6–8****Item leads complete 1st draft of CR Worksheetsfor assigned items.****Item backups/process facilitator(s) provide feedback. (R-1)****Item leads complete revisions to CR Worksheets (Draft 2).****Team members provide feedback on all items for which they are not a lead. (R-2)****Team conducts 3rd planning call.** | **NIST Staff**Operate the helpline as scheduled (see Week 1). Helpline will be closed on July 4th.**Team Leader*** Monitor team’s progress against schedule via email, telephone, and/or BOSS.
* Provide guidance to team members, if needed.
* Send weekly email 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 assigned. (R-1)
* If questions or problems arise, contact your BUTL or the Award Process Helpline.
* 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 email to team with 3rd planning call correspondence and agenda.
* Conduct the 3rd planning call.

**Backup Team Leader*** Each week, contact the TL to lend support

If not assigned as a lead or backup for specific items, serve as an additional backup for each item (beginning in R-2), using the Comment Guidelines:* Check accuracy of facts: figures, references, abbreviations, etc.
* Watch for alignment of scores with balance/content of comments
* Watch for comment conflicts, especially across categories
* Consider whether comments are actionable and ensure they are Criteria based.
* Suggest bolding and priority of comments, where appropriate

**If assigned as item leader or backup, complete the same activities delineated for *Team Members* below.****Team Member*** 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 by team’s deadline.
* As item lead, incorporate feedback and complete 2nd draft by team’s deadline.
* Email 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 Helpline if process or Criteria questions arise.
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| **Weeks 9-11****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 (TL) 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** | **NIST Staff*** Operate helpline as scheduled (see Week 1).

**Team Leader*** Ensure that the team’s KTs Worksheet draft is completed.
* Monitor team’s progress by email, telephone, and/or BOSS during the preparation period before the consensus calls.
* Provide guidance to team members as needed.
* Send weekly email reminders to team about preparing for the consensus calls.
* Discuss feedback in developing correspondence and agenda for the consensus calls with BUTL
* 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.
* Encourage team members to prepare written scripts for assigned items.
* Facilitate consensus calls. Contact assigned NIST On-Call Assistant, if needed, during consensus calls.
* After last consensus call, **ensure that the Score Summary Worksheet (Excel spreadsheet) is complete and posted in Team Files on BOSS. Make sure agreed upon process and results band scores are included.**
* After team’s last call, make adjustments to your assigned items.
* If questions or problems arise, contact your BUTL or the Award Process Helpline.

**Backup Team Leader*** Each week contact the TL to lend support.
* Provide feedback on correspondence and agenda for consensus call, if the TL requests help.

**Complete the activities delineated for *Team Members*** and ensure that the evaluation process is 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.
* Ensure alignment between comments and scores for each item and across all items.

**Team Member*** 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 Helpline with process or Criteria questions as needed.
* Item leads prepare scripts for consensus calls and post in Team Files.
* Fully participate in consensus calls.
* After calls, revise comments for assigned items by due date and mark items as “Complete” in BOSS.
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| **Week 12****Complete final scorebook.****(R-4)** | **NIST Staff**Operate helpline as scheduled (see Week 1).**Team Leader*** 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. Ensure that the item scores match the Score Summary Worksheet posted in the Team Files.
* Inform the Award Process Helpline at (**877) 237-9064, option 3** or via email at examdepo@nist.gov that the final CR Scorebook is finished*.* Mark the scorebook “FINAL” in BOSS.
* If your applicant does not receive a site visit, complete Peer Feedback Forms and send these to your team members after the August 21st Judges’ meeting.

Provide feedback to the program on team members’ skills and performance via the TL survey, as part of examiner development.**Backup Team Leader*** Assist the TL in editing the final CR Scorebook, if requested.
* If your applicant does not receive a site visit, complete Peer Feedback Forms and send these to team members after the August 21st Judges’ meeting.

If assigned as Scorebook Editor, 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.

Provide feedback to the program on Team Leader’s performance via the Team Member survey (SurveyMonkey).Complete the process survey to provide feedback to NIST.**Team Member*** If your applicant does not receive a site visit, complete Peer Feedback Forms and send these to team members after the August 21st Judges’ meeting.
* Provide feedback to the program on Team Leader’s performance via the Team Member survey.

Complete the process survey to provide feedback to NIST. |