**Week 2—Team-Leader-to-Team E-Mail**

**E-Mail Highlights:**

**—Checking for Conflicts of Interest**

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

**—Learning about BOSS**

**—Learning about the Award Process Hotline**

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 **green 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 Hotline ***immediately*** at (877) 237-9064 and choose 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 e-mails 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 as soon as possible. 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 “2016 Step-by-Step Instructions for Independent Review” available in the Independent Review Toolkit on the Examiner Resource Center, as you begin your evaluation. You may want to schedule blocks of time on your calendar to ensure that you have enough time to complete your Independent Review by our agreed upon deadline.

* Finally, if you have any questions about the process or the Criteria, please feel free to contact me at your telephone number or by e-mail. If I am not available to answer your questions, please contact the Award Process Hotline (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 hotline 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 will be closed on Monday, May 30th and Monday, July 4th. Please note the Award Process Hotline contact information below.

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

Award Process Hotline E-Mail: [bossmail@nist.gov](mailto:bossmail@nist.gov)

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

**Week 3—Team-Leader-to-Team E-Mail**

**E-Mail 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**

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

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 e-mail 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 e-mail 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.
* 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. *Note:* *TL has the discretion of making the 2 feedback-ready comments optional for New Examiners only*
* Score Summary Worksheet
* Please make sure that you schedule enough time to provide a full evaluation of the applicant, typically between 40-60 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 “2016 Step-by-Step Instructions for Independent Review” on the Baldrige Program’s Web site at <http://www.nist.gov/baldrige/examiners/resource_center/>, or feel free to contact me at your telephone number or by e-mail. If I am not available to answer your questions, please contact the Award Process Hotline. Remember, until we have all completed our independent evaluations, we may not have any discussions concerning the applicant.

The hours of the hotline 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 hotline will be closed on Monday, July 4th. Please note the Award Process Hotline contact information below.

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**Week 4—Team-Leader-to-Team E-Mail**

**E-Mail 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 Review Step-by-Step Instructions and Toolkit**

Well, 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. It is very important that you have all of your materials, as well as your business and personal calendars, on hand for the 2nd planning call. **The materials and instructions to prepare for the 2nd planning call, as well as the agenda, are included in the attachment.**

* 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 e-mail 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 Key Factors Worksheet in BOSS in advance of our 2nd planning call.** This consolidated version in BOSS 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 virtual review of 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)] , so please make sure that you review the “2016 Step-by-Step Instructions for Consensus Review” and the “Item Backup Comment and Scoring Checklist” located in the Consensus Review Toolkit on the Examiner Resource Center at <http://www.nist.gov/baldrige/examiners/resource_center/> before the call. Also download and review the “Examiner Role in Consensus” process chart. If you have not participated in Consensus Review before, or simply wish to reacquaint yourself with the process, please review the e-learning module *The Power of Consensus* located in the Consensus Review Toolkit on the Examiner Resource Center.
* 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 Step-by-Step Instructions for Independent Review and/or Consensus Review. Feel free to contact me at your telephone number. You may also contact the Award Process Hotline. Remember that until we have all completed our independent evaluations, we may not discuss anything that is applicant-specific.

The hours of the hotline 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 hotline will be closed on Monday, July 4th.) Please note the Award Process Hotline contact information below.

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**Week 5—Team-Leader-to-Team E-Mail**

**E-Mail Highlights:**

**—Reviewing Sample CR Worksheets**

**—Reviewing My Review 1 (R-1) Feedback of Item x.x**

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

**—Using the “Item Backup 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 completed 5.1 and 7.3 CR Sample Worksheets available on the Examiner Resource Center Consensus Review Toolkit. These samples contain the type of details, such as feedback-ready comments and rationales, needed on Consensus Review (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 e-mail to your item backup, 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 and process facilitators can provide their feedback on your CR worksheets. Also, as an item backup/process facilitator, 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 “Item Backup 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 [http://www.nist.gov/baldrige/examiners/resource\_center/.](http://www.nist.gov/baldrige/examiners/resource_center/.\)
* I have completed my Review 1 (R-1) of item x.x. I would encourage you to look at my work, as it contains the type of feedback that is most helpful to item leads.
* If you have any questions about the process, the Criteria, or the CR Worksheets, please review the “2016 Step-by-Step Instructions for Consensus Review” and/or the “Item Backup Comment and Scoring Checklist.” Also, feel free to contact me at your telephone number or contact the Award Process Hotline.

The hours of the hotline 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 hotline will be closed on Monday, July 4th. Please note the Award Process Hotline contact information below.

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**Week 6—Team-Leader-to-Team E-Mail**

**E-Mail 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 E-Mail 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 e-mail 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 “2016 Step-by-Step Instructions for Consensus Review” located in the Examiner Resource Center at <http://www.nist.gov/baldrige/examiners/resource_center/>. 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 “Step-by-Step Instructions for Consensus Review” and feel free to contact me at your telephone number or contact the Award Process Hotline.

The hours of the hotline 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 hotline will be closed on Monday, July 4th.) Please note the Award Process Hotline contact information below.

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**Week 7—Team-Leader-to-Team E-Mail**

**E-Mail 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 E-Mail 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. Again, 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.

All R-2 feedback on items for which you are not a lead must be completed by xx/xx.

I appreciate all of your work in reviewing other CR worksheets and providing feedback to your team members. 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 “2016 Step-by-Step Instructions for Consensus Review,” and feel free to contact me at [your telephone number] or the Award Process Hotline.

The hours of the hotline 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 hotline will be closed on Monday, July 4th.) Please note the Award Process Hotline contact information below.

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**Week 8—Team-Leader-to-Team E-Mail**

**E-Mail Highlights:**

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

**—Notifying the Team by E-Mail**

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

**—Review the Draft Key Themes Worksheet**

**—Review 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 e-mail 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. If you have not done so already, be sure to block the time on your calendar. **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 provide R-3 feedback for all the other items, and you will 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 <http://www.nist.gov/baldrige/examiners/resource_center/>. 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 “2016 Step-by-Step Instructions for Consensus Review,” and feel free to contact me at your telephone number or contact the Award Process Hotline.

The hours of the hotline 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 Hotline contact information below.

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**Week 9—Team-Leader-to-Team E-Mail**

**E-Mail 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 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 be ready to open them up for Review 3 (R-3) feedback.

Remember to notify all team members via e-mail 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. If you have not done so already, be sure to block the time on your calendar. Please review and be prepared to discuss **all** item comments, scores, and key themes.

To prepare for the consensus calls, you will review all the other items (R-3), and you will 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 Examiner Resource Center at <http://www.nist.gov/baldrige/examiners/resource_center/>. 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 “2016 Step-by-Step Instructions for Consensus Review,” and feel free to contact me at your telephone number or contact the Award Process Hotline.

The hours of the hotline 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 Hotline contact information below.

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**Week 10—Team-Leader-to-Team E-Mail**

**E-Mail 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 e-mail 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 <http://www.nist.gov/baldrige/examiners/resource_center/>.

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 Hotline.

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

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

**Week 11—Team-Leader-to-Team E-Mail**

Team,

Thank you all for the great call(s) we had last week! This e-mail 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 17th, I will notify you via email of the outcome.

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.