2015 Roles and Responsibilities Matrix (Week-by-Week)

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| **Week #/ Activity** | **QTF Staff** | **Team Leader (TL)** | **Team Member and Process Coach** |
| Week 1  E-mails to team members  Team conducts 1st planning call  Independent Review (IR) begins | Provide support at 512-656-8946 Dr. Mac or 512-818-3901 Ms. Lin or email at [drmac@quality-texas.org](mailto:drmac@quality-texas.org) | • Receive assignment e-mail.  • Set up a call with Process Coach to discuss the support you need. Also, ask the coach to review the proposed timeline you develop based on samples provided on the Examiner Resources page.  • Contact other team members individually to welcome them to the team.  • Send 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.  • Check for conflicts of interest with applicant. Contact QTF ASAP if you think you may have a conflict. Begin your IR evaluation following step-by-step instructions.  • Conduct the team’s 1st planning call. Have personal and work calendars available during call.  • Develop consolidated KFs for discussion on 2nd planning call.  • If questions or problems arise, contact QTF or Process Coach. | • 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.  • Check for conflicts of interest with applicant; then begin your IR evaluation following step-by-step instructions. Contact QTF 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 QTF if process or Criteria questions arise.  **Process Coach**: Talk with the TL about providing support as needed for the team, in one or more of the following roles: serving as another back-up 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 the TL mentor the newer examiners, checking comment accuracy during virtual consensus, serving as the team’s scorebook editor, and/or writing Key Themes.  • Participate in a call with the TL and internal coach to determine specific expectations.  • Complete all activities delineated above for team members.  • Contact and determine tasks to support your TL.  • Review and provide feedback on TL correspondence to 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(s). |
| Weeks 1, 2, 3, and part of 4 | Monitor and support team as scheduled (see above).  Monitor teams progress in SN. | • Monitor team’s progress on IR via e-mail, telephone, and Scorebook Navigator.  • Provide process or Criteria guidance to team members as needed. Do not discuss applicant-specific information with team members.  • Continue with IR evaluation. Do not discuss applicant-specific information with team members.  • Post your bio to the Team Files on  • Continue with IR evaluation  • Complete IR Scorebook by feedback on initial items. 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 deadline. Mark as “Complete” in SN.  • If questions or problems arise, contact your process coach, if assigned, or QTF. | • Continue with IR evaluation. Do not discuss applicant-specific information with team members.  • 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 SN.  • Contact the TL or QTF if process or Criteria questions arise.  Process Coach: Complete the same activities delineated above for team members.  • Assist the TL with team member issues, as needed. |
| Week #/Activity Week 4  Team conducts 2nd planning call.  Consensus Review (CR) begins. | QTF Staff  Monitor and support team as scheduled (see above).  Monitor teams progress in SN. | Team Leader (TL)  • Make 2nd Planning Call 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 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.  • Conduct the 2nd planning call.  • If questions or problems arise, contact your process coach or the QTF. | Team Member and Process Facilitator Internal Coach  • Review draft KFs Worksheet before 2nd planning call.  • Participate in the 2nd planning call.  • Contact the TL or the QTF if process or Criteria questions arise.  Process Facilitator: Support the team and the TL, as assigned.  • 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 and process coach 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 3rd planning call. | QTF Staff  Monitor and support team as scheduled (see above).  Monitor teams progress in SN. | • Monitor team’s progress against schedule via e-mail, telephone, and/or SN.  • Provide guidance to team members, if needed.  • Send weekly e-mail reminders to team about the deadlines for completion of IR/CR  • Complete your item lead and item backup duties by the team’s agreed-upon deadline.  • If questions or problems arise, contact your process coach or the QTF.  • Provide feedback on 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.  • Conduct 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 feedback on by team’s deadline.  • As item lead, incorporate feedback and complete 2nd draft by team’s deadline.  • E-mail team when you are completed.  • Provide feedback on all CR Worksheets Review 2.  • Participate in 3rd planning call.  • Contact the TL or call QTF.  **Process Coach**: If not assigned as a lead or back-up for specific items, serve as an additional backup for each item, 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.  • Each week, contact the TL to lend support. |
| Week #/Activity 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.  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. | QTF Staff  Monitor and support team as scheduled (see above).  Monitor teams progress in SN. | • 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 SN 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.  • With process coach, discuss feedback in developing correspondence and agenda for the consensus calls.  • 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.  •Ensure that the Score Summary Worksheet is complete and posted in Team Files on SN.  • After team’s last call, make adjustments to your assigned items.  • If questions or problems arise, contact your process coach or QTF. | • 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.  • Contact the TL or QTF 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 SN.  **Process Coach**: Complete the activities delineated above 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  • Each week contact the TL to lend support.  • Provide feedback on correspondence and agenda for consensus call, if the TL requests help. |
| Week #/Activity Week 11  Complete final scorebook. | QTF Staff  Monitor and support team as scheduled (see above).  Monitor teams progress in SN. | • After all item leads have made their final edits and marked their items as “Complete” in SN, review 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 QTF that the final CR Scorebook is finished. Mark the scorebook “FINAL” in SN.  • If your applicant will not receive a site visit, complete Peer Feedback Forms and send these to your team members.  • 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 your team members.  • Provide feedback on team members’ skills and performance as part of examiner development.  **Process Coach**: 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. If your applicant will not receive a site visit, complete Peer Feedback Forms and send these to your team members.  • Assist the TL in editing the final CR Scorebook, if requested.  • If your applicant will not receive a site visit, complete Peer Feedback Forms and send these to team members later. |