

***What has happened so far:***

Assignment to a Team	You receive a calendar with information placing you on a team to review an application. You check for conflicts of interest with the applicant. You send an email to your TL and QTF stating you have no conflicts and will join the team agreeing to the timelines presented in the calendar.
Planning Call 1	The TL holds the first planning call to review the entire calendar/timeline, the details of the Consensus Review process, and the ground rules for working with the team. Your participation and buy-in on the timeline, process, and ground rules were essential to a successful process. You also provided a brief bio to your TL.
Begin IR with Key Factors	Each individual on the team will begin to list the key factors from the organizational profile and place the comments into QTF Template.
Team Leader will consolidate Key Factors and tell team to proceed	Team waits until TL consolidates the team Key Factors into a set of Key Factors. The TL then tells the team to move forward with their Independent Review (IR) of the entire application.
Completion of the Independent Review Scorebook	You completed the IR Scorebook as an input to Consensus Review.
Moving to Consensus Review	At the end of Independent Review, the TL: <ul style="list-style-type: none"> <li>• Moves team to the Consensus Review (CR) and completes draft consensus Key Factors (KF)</li> <li>• Notifies team members the consolidated KFs has been accomplished and the team is ready to begin IR</li> <li>• Reminds you about planning call 2</li> <li>• Assigned your consensus roles by email</li> </ul>

***Where we are now:***

Your Team's Goal	Overall: write a feedback report detailing areas of strength and opportunities for performance improvement that will help your team's designated applicant move to the next level of performance excellence. During Consensus Review: create a scorebook based on the requirements of the Criteria for Performance Excellence. This CR Scorebook, comprising comments and scores, represents the collective knowledge and analytical skills of a team of examiners using a systematic review process and is the basis for the feedback report.
Your Role	As the <i>lead</i> for one or more items, synthesize feedback from the entire team and develop comments. You must take the team's collective comments and bring your evaluation of which comments are the most appropriate.  As a <i>backup</i> , provide feedback to an item lead on one or more items. As a team member, participate in discussions on all items to build consensus on the comments and scoring that the applicant ultimately receives.

<b>STEPS</b>	<b>ACTIONS</b>
	Become familiar with the Consensus Review (CR) process.
<b>Review the draft consensus KF Worksheet</b>	Carefully review the Key Factor worksheet and recommend changes or additions by email or during the second planning call.
<b>Participate in 2<sup>nd</sup> Planning Call</b>	Your TL will finalize consensus assignments, review and ask for feedback on the KFs, describe the consensus process, highlight next steps, and answer your questions.
<b>Open the Word document for your assigned item</b>	Your TL has assigned you one or more criteria items.
<b>Select the most relevant four to six KFs for the item</b>	<p>Considering the Criteria requirements and the consensus KF Worksheet, determine the most relevant four to six KFs for this item.</p> <p>The KFs, considered in relation to the key Criteria requirements, should help guide your expectations in evaluating the applicant’s response.</p>
<b>Review the inputs from your teammates’ Independent Review and begin to determine commonalities and note conflicts</b>	Keeping the application, KFs, and Criteria in mind, look for multiple comments around the same area to address, and look for conflicts between strengths and OFIs. Also, consider the outliers—those comments made by only one examiner which sometimes provide significant insights into the applicant’s performance based on an examiner’s sector or criteria knowledge.
<b>Synthesize around six of the most relevant and important strengths and OFIs. Prioritize the strengths and OFIs.</b>	<p>Determine the most important strengths and OFIs, <i>around six</i> in number. Note that more mature organizations may benefit from additional strengths and OFIs, while fewer strengths and OFIs may be more appropriate for less mature organizations. List the item reference(s) along with each one.</p> <p>If a strength or OFI is particularly significant in the evaluation of the applicant, mark it as bolded (strength or OFI).</p> <p>When you have completed the strengths and OFIs, rank them in order of importance to the applicant with the most important being higher in the feedback report.</p> <p><i>As you are determining the “around six” strengths and OFIs, consider where it is appropriate to give the applicant the benefit of doubt.</i></p>

TAB E1 Consensus Review Step-by-Step

<p><b>Develop feedback-ready comments.</b></p>	<p>Record actionable, feedback-ready bullets for each strength and OFI on the CR Worksheet.</p> <p>Tell the applicant the “nugget” or main point of the feedback. Choose one or two examples that best support the main point, considering their relevance and importance to the applicant.</p> <p>For both strengths and OFIs, show relevance by tying the main point to one of the applicant’s important KFs. You can also ask, “What evaluation factor is relevant to that strength or OFI?” Thinking this way may further help you focus the comment on the importance to the applicant (e.g., if the important element of the comment is deployment, there may be no need to add text on approach, learning, and integration).</p>
<p><b>Finalize your comments using the Comment Guidelines</b></p>	<p>Using the Comment Guidelines, review your comments against the guidelines, and modify them as needed. Remember to use bullets.</p>
<p><b>Determine and record a scoring range and score for the item.</b></p>	<p>To score the item, start by reviewing the comments for the item, noting the balance and importance relative to the item requirements and KFs.</p> <p>Review the range descriptions in the Scoring Guidelines and choose the scoring range that is, overall, <i>most descriptive</i> of the organization’s achievement level.</p> <p><i>Remember, that the applicant does not need to demonstrate all characteristics in the selected range; rather, the score is based on a holistic view of the characteristics. All evaluation factors are to be considered in the selection of the scoring range.</i></p> <p>As a check, read the descriptions of the ranges above and below the selected range to determine where the applicant’s score falls within that range.</p> <p>Finally, determine a percentage score (a multiple of 5) for the item.</p>
<p><b>Follow the instructions for consensus.</b></p>	<p>Follow the process for consensus on the next page.</p>
<p><b>All team members provide feedback on CR Worksheets.</b></p>	<p>Provide feedback on all items and KT’s for which you are not the lead.</p>
<p><b>Consensus call planning</b></p>	<p>Sample agenda:</p> <ul style="list-style-type: none"> <li>• Welcome</li> </ul>

TAB E1 Consensus Review Step-by-Step

	<ul style="list-style-type: none"> <li>• Agenda review</li> <li>• Round-robin process for the team to use in capturing feedback on all items</li> <li>• KTs</li> <li>• Review of item scores</li> <li>• Next steps</li> </ul>
<b>Item leads: prepare to present items.</b>	Prepare to review the Criteria requirements and KFs and to clarify any areas of disagreement. This will get the team ready to discuss the item. Be prepared to serve in additional assigned roles (e.g., Criteria cop, scorekeeper) and to provide specific points and recommendations on other items.
<b>Participate in the consensus call</b>	<p><b>ALL team members must be present, or the call cannot proceed.</b></p> <p><i>Team members:</i> Listen for changes that may impact or conflict with other item- or KT-level comments and bring them to the team’s attention.</p> <p><i>Item leads:</i> Ensure that changes in your CR Worksheets are correctly reflected in the KT Worksheet.</p> <p><i>Item backups:</i> Take notes for item leads. At the end of each topic, you may want to restate what you have heard.</p> <p><i>Item leads:</i> Confirm that all team members agree on each item score and that the score is recorded correctly on each CR Worksheet.</p>
<b>Review scoring.</b>	<p><i>Scorekeeper:</i> Ensure that the scores on the Score Summary Worksheet document are consistent with the scores agreed on during the consensus calls.</p> <p><i>Team Leader:</i> Confirm scoring bands on the Score Summary Worksheet. The feedback report will reflect the band chosen by the team. Provide the scoring band consensus to QTF CEO.</p>
<b>Item and KT leads revise comments to reflect consensus decisions.</b>	<p><i>Item backups:</i> Review the item lead’s CR Worksheet to help ensure that the revised comments and scores accurately represent the consensus discussion.</p> <p><i>Team Leader:</i> Review the KTs to ensure that all changes or updates have been made.</p>
<b>Complete the scorebook by the deadline.</b>	<p><i>Item leads:</i> Finalize the CR Worksheets.</p> <p><i>Team Leader:</i> Review and edit the final CR Scorebook and inform QTF that the scorebook is final.</p>