What has happened so far:

Assignment to a Team	You received a calendar with information placing you on a team to review an application. You have talked to the Team Leader about your Category to be the Category Lead for the Team.
Planning Call 1	The team leader 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.
Completion of the Independent Review Scorebook	You completed the IA Scorebook as an input to Consolidation (Consensus) Review.
Moving to Consolidation (Consensus) Review	At the end of Independent Analysis, the Team Leader: • Moves team to the Consolidation Review (CR) • Notifies team members the team is ready to begin Consolidation Review (CR) • Reminds team member about planning call 2 • Assigned your consensus roles by email

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 the Consolidation Review: create a scorebook based on the requirements of the Baldrige Framework. This initial draft 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	You have been assigned a Category Lead and Back up in Independent Analysis and this will continue in Consolidation Review. As the *lead* for a Category and one or more items, synthesize feedback from the entire team and develop comments. You must take the team's collective comments and being your evaluation of which comments are the most appropriate. As a *backup*, 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.

STEPS	ACTIONS
	Become familiar with the Consolidation Review (CR) process.
Participate in 2nd Planning Call	Your team leader will describe the consensus process, highlight next steps, and answer your questions. On the second call, walk the team through what you and your group has found for your particular Category/Item assigned and ask for comments and conflicts with others.
Select the most relevant four to six KFs for the Category/Item assigned	Considering the Baldrige Framework requirements and the consensus KF if changes are made from IA, determine the most relevant four to six KFs for this item. The KFs, considered in relation to the key Framework requirements, should help guide your expectations in evaluating the applicant's response.
Review the inputs from your teammates; begin to determine commonalities and note conflicts	Keeping the application, KFs, and Framework 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 Framework knowledge. REMEMBER: KEEP ALL COMMENTS, THOSE USED AND NOT USED, FOR THE SITE VISIT.
Synthesize around six of the most relevant and important strengths and OFIs. Prioritize the strengths and OFIs.	As you consolidate the comments from all members into the most critical 4 to 6, be sure to place the initials of the members of your team so they can see you have used some of their comments correctly. 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. If a strength or OFI is particularly significant in the evaluation of the applicant, mark it as bolded (strength or OFI). 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. *As you are determining the "around six" strengths and OFIs, consider where it is appropriate to give the applicant the benefit of doubt.*

Develop full sentence comments	Tell the applicant the "finding" (formerly known as the "nugget") or main point of the feedback. Choose one or two examples (evidence/example) that best support the main point, considering the relevance and importance to the applicant. For both strengths and OFIs, show Potential Impact (formerly known as relevance) by tying the main point to one of the applicant's important KFs. Make sure you link the Key Factors or specific verbiage from the Baldrige Framework into the Potential Impact statement. 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). Remember: Use the Key Factors, Applicant Application, Baldrige Core Values, and examination dimensions (Approach, Deployment, Learning, and Integration in Process Categories; Levels, Trends, Comparisons, and Integration in Results Categories) as potential Strengths, and Opportunities for Improvement.
Finalize your comments using the Comment Guidelines and input from your team	Using the Comment Guidelines, review your comments against the guidelines, and modify them as needed.
Determine and record a scoring range and score for the item. This will be known as the suggested score going toward site visit. If there is no site visit, this will be the applicant's final score.	To score the item, start by reviewing the comments for the item, noting the balance and importance relative to the item requirements and KFs. Decide if other comments from the team may increase or lessen your current draft scores. Review the range descriptions in the Scoring Guidelines and choose the scoring range that is, overall, *most descriptive* of the organization's achievement level. *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.* 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.

	Finally, determine a percentage score (a multiple of 5%) for the item.
Follow the instructions for Consolidation.	Follow the process for Consolidation on the next page.
All team members provide feedback on CR Worksheets.	Provide feedback on all items and KTs for which you are not the lead.
Consolidation call planning	Sample agenda: • Welcome • Agenda review • Make sure you have the new Consolidation Comments to follow along with as the Category Leads walk through of summarizing the comments on the CR Scorebook • Round-robin process for the team to use in capturing feedback on all items (do not read all the comments; just hit the high points as the team can read faster than you can discuss) • Stick to the schedule as much as possible (as an example) • Team Leader 10 minutes to set the stage • Category 1 and 7.4 • Category 2 and 7.5 • Category 3 and 7.2 • Category 4 • Category 5 and 7.3 • Category 6 and 7.1 • Backup Category Leads will take notes for Category Leads walking through findings • Identify Potential KTs • Identify a Criteria Cop to make sure we are following the Criteria requirements • One member should keep a running list of scores and then review of item scores at the conclusion of the day • Next steps

Item leads: prepare to present items.	Prepare to review the Framework 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, timer) and to provide specific points and recommendations on other items.
Participate in the Consolidation call	**Team Leaders/Process Coaches: ALL team members must be present, or the call cannot proceed. Contact Dr. Mac/Lin for questions or concerns.** *Team members*: Listen for changes that may impact or conflict with other item- or Key Theme-level comments and bring them to the team's attention. *Item leads*: Ensure that changes in your CR Worksheets are correctly reflected in the KT Worksheet. *Item backups*: Take notes for item leads. At the end of each topic, you may want to restate what you have heard. *Item leads*: Confirm that all team members agree on each item score and that the score is recorded correctly on each CR Worksheet.
Review scoring.	*Scorekeeper*: Ensure that the scores on the Score Summary Worksheet document are consistent with the scores agreed on during the consensus calls. *Team leader:* Confirm scoring bands on the Score Summary Worksheet. The feedback report will reflect the band chosen by the team. Provide the scoring band descriptor consolidation to QTFRP CEO along with the report.
Item and KT leads revise comments to reflect Consolidation (consensus) decisions.	*Item backups*: Review the item lead's CR Worksheet to help ensure that the revised comments and scores accurately represent the consensus discussion. *Team leader*: Review the KTs to ensure that all changes or updates have been made.
Complete the scorebook by the deadline.	*Item leads:* Finalize the CR Worksheets. *Team leader*: Review and edit the final CR Scorebook and inform QTF that the scorebook is final.