

Sample Team Leader Planning Letter

Date:

To: Team Members – Applicant #####, (Level 3)

From: Butch Jones

Welcome to Team #####! Having spoken with each of you, I am happy to report that TNCPE has assembled a team with great experience and diversity. I look forward to working with you and providing valuable feedback to our applicant.

Thank you for providing your bio with category preferences and your calendar of unavailable dates. I have spoken with the applicant. Here is our schedule:

Event	Due Date
Independent review completed	Monday, September 5
Consensus meeting at Joe's office: XYZ Company 124 Main St Knoxville, TN	Friday, September 16 8:30 a.m. – 5:00 p.m.
Consensus Scorebook finalized	Friday, September 23
Site Visit	Mon.–Tues., October 3-4
Wrap-up meeting and Final Scorebook preparation at Joe's office	Wednesday, October 5

Based on our discussions and the biographical information you sent, I tried to balance your preferences, experience, and industry knowledge with team needs. I have made the following assignments

Examiner	Category/Item Lead	Backup	Other
Butch (TL)	1.1, 1.2, 7.4	2, 4	
Joe (Scorebook Editor and back-up TL)	6.1, 6.2, 7.1	3, 5	Key factors Key themes
Sandy	2.1, 2.2, 4.1, 4.2, 7.5	1	Timekeeper
Mary	3.1, 3.2, 7.2, 5.1, 5.2, 7.3	6	Criteria Cop

As category leader, your specific responsibilities are:

1. ***Before the consensus meeting*** – Using the work of your teammates, synthesize the strength, OFI and “gap” observations into comments. Determine a score and identify potential site visit issues for all of your assigned items. Share your work with your backup and incorporate his/her feedback as appropriate. Complete your work at least three days before the consensus meeting so the other team members have time to review it. Be prepared to explain your rationale for the comments you have written and the score you have selected.
2. ***During the consensus meeting*** – You should come to the consensus meeting prepared to lead the discussion for your assigned items. During the meeting we will focus on areas of disagreement, so if everyone agrees with your comments and score, no discussion is necessary. In preparing for the meeting, remember to consider the Criteria requirements, key factors, key strengths, OFIs, gaps, scoring (by evaluation factor), rationale for your comments and score, site visit issues and major areas of disagreement. At the consensus meeting we will also discuss potential key themes, so come prepared with your key theme ideas.
3. ***Immediately after the consensus meeting*** – Modify your consensus comments for your assigned items based on our meeting. Also prepare separate Site Visit Issue Worksheets with strategies for each agreed upon site visit issue for your assigned items. Ensure that your Site Visit Issue Worksheets are complete.
4. ***After the site visit*** – Lead our wrap-up discussion of your assigned items to identify the final changes that will be made to the Final Scorebook, which will become the applicant’s Feedback Report. Finalize your Site Visit Issue Worksheets.

If you have any questions, comments or suggestions, please feel free to call me at work or home phone or e-mail me at the address listed on the team roster. I look forward to a productive team experience!