

# Team Leader Checklist



Steps	Actions
Getting Started	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Within 24 hours of receiving team assignment</b>, send team welcome email with Biography and Calendar Request Forms. <b>Set due date of 2-3 days to return forms.</b></li> <li><input type="checkbox"/> Use team Calendar Request Forms to identify potential consensus meeting and site visit dates</li> <li><input type="checkbox"/> Contact the applicant for introductions and to determine site visit dates (<b>Within 5 days of receiving team assignment</b>)</li> <li><input type="checkbox"/> Finalize due dates and meeting dates for team calendar (<b>Within 24 hours of determining site visit dates</b>)</li> <li><input type="checkbox"/> Send an email to the team with the calendar and IR instructions; send a copy of the calendar to TNCPE (<b>As soon as calendar is finalized</b>)</li> <li><input type="checkbox"/> Begin logistics planning for consensus and site visit (meeting spaces, hotels, etc.)</li> </ul>
Stage 1 – Managing Independent Review	<ul style="list-style-type: none"> <li><input type="checkbox"/> Monitor ongoing work in Scorebook Navigator and follow up with any examiners who are not making progress (<b>Weekly at first, then daily as IR due date approaches</b>)</li> <li><input type="checkbox"/> Remind everyone to check “Done” in Scorebook Navigator (<b>In every communication</b>)</li> <li><input type="checkbox"/> Collect hours spent on IR from each examiner</li> </ul>
Stage 2a – Consensus (Review)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Move team to consensus review in Scorebook Navigator; notify TNCPE when you move the team to consensus. Consolidate key factors (<b>Within 24 hours of IR due date</b>)</li> <li><input type="checkbox"/> Assign item leads and back-ups in Scorebook Navigator and notify team of assignments (<b>Within 24 hours of IR due date</b>)</li> <li><input type="checkbox"/> Communicate with team (email or call) to review instructions and expectations for consensus (<b>Within 24 hours of IR due date</b>)</li> <li><input type="checkbox"/> Monitor ongoing work in Scorebook Navigator and follow up with any examiners who are not making progress; leave comment feedback as necessary</li> <li><input type="checkbox"/> Email team. Remind examiners to leave feedback on the items for which they are the back-up and distribute consensus meeting agenda and script (<b>5 days before Consensus Meeting</b>)</li> <li><input type="checkbox"/> Collect hours spend on CR from each examiner</li> </ul>
Stage 2b – Consensus (Meeting)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Facilitate consensus meeting, including identification of key themes and site visit issues; review instructions for documenting site visit issues in Scorebook Navigator and on worksheets</li> <li><input type="checkbox"/> Set due dates for amending consensus comments and entering site visit issues in Scorebook Navigator. <b>Set a due date that ensures you will be able to send the site visit agenda and issues to the applicant no less than 10 days before site visit.</b></li> <li><input type="checkbox"/> Consider watching the just-in-time site visit video as a group during the consensus meeting (or assign it as homework)</li> <li><input type="checkbox"/> Document the number of hours at the Consensus Meeting for each examiner</li> </ul>
Stage 3a – Site Visit (Preparation)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Remind team to watch just-in-time site visit video, if not done at consensus meeting</li> <li><input type="checkbox"/> Collect site visit questions and document requests from team members’ entries in Scorebook Navigator (<b>3 – 5 days after consensus meeting</b>)</li> <li><input type="checkbox"/> Notify TNCPE when consensus comments are amended and Consensus Scorebook is complete</li> <li><input type="checkbox"/> Provide applicant with agenda, questions, and document requests (<b>No less than 10 days before site visit</b>)</li> <li><input type="checkbox"/> Collect and review team members’ completed site visit issue worksheets (in Word); remind team to share worksheets with their back-up (<b>3 – 5 days before site visit</b>)</li> <li><input type="checkbox"/> Finalize the site visit agenda with the applicant. Distribute final agenda to team and print copies</li> <li><input type="checkbox"/> Download, save, and review opening and closing meeting slides from Examiner Resources page (<b>1 – 3 days before site visit</b>)</li> </ul>

	<input type="checkbox"/> Collect hours spent on site visit preparation for each examiner
<b>Stage 3b – Site Visit (During Site Visit)</b>	<input type="checkbox"/> Conduct opening meeting, daily caucus meeting(s), and closing meeting <input type="checkbox"/> Manage site visit, including checking in with applicant daily and monitoring team member progress (make sure there are solid strengths and OFIs for each item) <input type="checkbox"/> Maintain interview and document logs <input type="checkbox"/> Document number of hours spent at site visit for each examiner
<b>Stage 4 – Post-Site Visit</b>	<input type="checkbox"/> Facilitate post-site visit wrap-up meeting, including finalizing key themes, item comments, item scoring ranges, and selecting final scoring bands on the Score Summary Worksheet <input type="checkbox"/> Collect Site Visit Issue Worksheets from all team members <input type="checkbox"/> Complete Award Recommendation Forms with team <input type="checkbox"/> Set due date for team members to finalize item comments and site visit issue forms in Scorebook Navigator. <b>Set due date for 2-3 days after wrap-up meeting</b> <input type="checkbox"/> Review Final Scorebook <b>(after Scorebook Editor completes work)</b> <input type="checkbox"/> Submit Final Scorebook Checklist with Final Scorebook and other required documentation to TNCPE <b>(1 week after site visit, or November if earlier)</b>