

Sample Team Leader Planning Letter 2018

Date:

To: Team Members – Applicant #####, (Level 4)

From: Team Leader Name

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	Thursday, August 30
Consensus meeting at Joe's office: XYZ Company 124 Main St Knoxville, TN	Friday, September 14 8:30 a.m. – 5:00 p.m.
Consensus Scorebook finalized	Monday, September 17
Site Visit	Wednesday – Friday October 3-5
Wrap-up meeting and Final Scorebook preparation at Joe's office	Saturday, October 6

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 suggested strengths and OFIs into 6-10 final comments per item. Follow the TNCPE protocol to construct each comment:
 - Be sure your comment is criteria-based.
 - Be sure your comment is insightful.
 - State the main point in a topic sentence (usually ties to an evaluation factor).
 - Provide one or two examples from the application to support the comment.
 - Explain why this is relevant to the applicant (“so what”) by linking the comment to a key factor.

Determine a score based on the new consensus set of comments 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 3-5 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 complete the site visit forms in Scorebook Navigator for your identified SVI issues. Complete the site visit issue, documents requested, and requested interviewees no later than XXXXX so I can share our issues with the applicant prior to the site visit. You will then have time to go back and complete your SVI worksheets in Word.
4. ***After the site visit*** – Lead our wrap-up discussion of your assigned items to identify the changes that will be made to the Final Scorebook, which will become the applicant’s Feedback Report. Complete SVI forms showing the resolution of each site visit issue in Scorebook Navigator.

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!