

Consensus Review Tip Sheet

Welcome to Consensus Review! During this phase of the process, your team will create a collaborative scorebook that identifies the most significant strengths and OFIs and scores each item using the work completed by all team members during independent review. The Consensus Scorebook, which will be reviewed by the team during the consensus meeting to determine site visit discussion topics, is the basis of the feedback report sent to the applicant.

Examiner Roles

Each of the 17 Criteria Items are assigned team members to serve as Item Lead and Item Back-Up.

- The **Item Lead** synthesizes observations from the examiner team and develops feedback-ready comments for his/her assigned items. The Item Lead will incorporate feedback from the Item Back-Up into his/her comments prior to the consensus meeting.
- The **Item Back-Up** provides feedback to the Item Lead prior to the consensus meeting related to comments' structure and consistency with the Criteria.

Scorebook Navigator

You will use Scorebook Navigator to synthesize your team members' observations from Independent Review, develop feedback-ready comments, and determine a score for each of your assigned items. A detailed Scorebook Navigator manual is available on the TNCPE [Examiner Resources](#) page.

- Access Scorebook Navigator at <https://scorebooknav.org> with the same username and password you used for independent review.
- Save your work after every entry using the "Save" icon. Scorebook Navigator will time out after a period of inactivity and your work will not be saved if you did not click the "Save" icon.
- You have access to "Spell Check" and "Copy/Paste" features and can change the font size using the same icons and controls available during Independent review.

Getting Started

- The team leader assigns each examiner responsibility to serve as Item Lead and Item Back-Up on one or more items.
 - To view the items for which you are the lead, view the "Scorebooks" screen in Scorebook Navigator and locate your assignments in the "Stage 2" panel. **Note:** Once your team has moved to Consensus in Scorebook Navigator (Stage 2), the Independent Review scorebooks are locked, and no additional edits can be made.
 - The team leader will set a due date for examiners to complete consensus review of the items for which they are assigned Item Lead. This will allow time for the Item Back-Up to provide feedback and the Item Lead to incorporate that feedback into his/her comments prior to the consensus meeting.

- Review the Criteria requirements for your assigned item. This will help you focus on evaluating the applicant against the Criteria.
- Decide on 4-6 key factors that you believe are most relevant to the item.
 - The team leader, or an examiner assigned by the team leader, will provide a consolidated master list of key factors to be used by the entire team during Consensus Review.
 - Use the drop down boxes in the “Key Factor References” panel to select the relevant key factors.
- Access your team members’ independent review observations for the item using the “Stage 1 Feedback” icon ().
 - Scroll down to the “Strengths” or “Opportunities for Improvement” sections, or click on the tabs, to see the independent review comments in the gold panels.
 - **Pro Tip:** Click on the “Print Preview” icon () to open your teammates’ comments in a table. You may then sort the strength and OFI comments by clicking on the “Item Reference” text in blue. **You will have to sort the strengths table and OFI table separately.**

Synthesize Comments

- Review your team members’ reviews. Identify where there is agreement and disagreement and determine which comments will have the greatest value.
- Based on the Criteria, your team members’ independent reviews, and the applicant’s key factors, determine around 6 combined strength and OFI topics that you will develop into feedback-ready comments that deliver the greatest value to the applicant.
 - **Pro Tip:** The most valuable observations may not always be the ones with the most agreement. Be sure the topics you select are consistent with the Criteria questions and are aligned with what the applicant has identified as important to the organization.

Develop Feedback-Ready Comments

- Write a feedback-ready comment for each of the around 6 selected topics in the “Strengths” and “Opportunities for Improvement” panels, as appropriate. Comments should respond to the Criteria questions and include the following three components:
 - **Topic Sentence** – The topic sentence should link to the evaluation factors (A-D-L-I or Le-T-C-I) that are the focus of the comment. It should also be clear to which Criteria question the comment is responding.
 - **Evidence** – Provide one or two supporting examples from the application.
 - **“So What?”** – The “so what” statement tells the applicant why the comment is relevant to the organization and is often linked to one of the applicant’s key factors. It may also be linked to an element of the Baldrige Excellence Framework, such as one of the Baldrige Core Values.
 - **Pro Tip:** You can review sample strength and OFI feedback-ready comments for each process and results item on the [Examiner Resources](#) page of the TNCPE website.
- Provide your reasoning for selecting each comment in the “Rationale” field.
 - Identify if the comment is responding the Criteria questions at the basic, overall, or multiple level.

- Include the initials of team members that identified the comment in their independent review.
- If there were comments from other team members that conflict with the comment you selected, explain why you did not use them.
- Complete the remaining fields in the row for each comment.
 - Use the check box to select a key factor reference for each item from the list of 4-6 identified for the Criteria item.
 - Use the check box in the (++) or (- -) field to identify any role model strengths or significant OFIs.
 - Select an item reference to indicate which part of the Criteria your comment addresses.
 - Use the check box under the “Key Factor” icon () to recommend your comment topic as a potential key theme, if applicable.

Score the Item

- Review the new strength and OFI comments you have developed.
 - Ask yourself, “Do my comments reflect a response to the questions at the basic, overall, or multiple level?”, “Which comments address factors the applicant has identified as most significant”, “What is my ratio of strengths to OFIs?”, “Do I have any ++ strengths or - - OFIs?”
 - Review the scoring range descriptors found on page 32 for process items and page 33 for results items. Ask yourself, which scoring range is the best fit from a holistic perspective.
- In the “Scoring” panel at the bottom of each “Item Evaluation” screen, select the scoring range that is most appropriate based on the distribution of strengths and OFIs at the basic, overall, and/or multiple level.
 - The applicant does not need to demonstrate all the characteristics in the selected range; rather, the score should be based on a holistic view of the four evaluation factors in aggregate.
 - **Pro Tip:** *Begin by reading the 50-65% scoring range described in the displayed scoring guidelines. Consider whether this accurately describes the applicant’s **A-D-L-I** or **Le-T-C-I**, as appropriate, for each item. Move up or down the ranges until you find the “best fit”.*
- Below the selected scoring range, select a percentage score (in multiples of 5) for the item.

Requesting Feedback

- Once you have completed developing comments and scoring the item, email the Item Back-Up to request feedback.
 - **Pro Tip:** *Feedback can be entered and viewed in the “Observation” field to the right of the comment.*
- Update your comments based on the feedback provided by your back-up, as appropriate, before the consensus meeting.

Providing Observations and Revisions as a Back Up Item Lead

- Respond promptly with feedback for the items in which YOU are Item Back-Up. Your feedback to the Item Lead should be focused on the following:
 - If the comment is clearly based on/related to the Criteria.
 - If the comment provides meaningful feedback based on what the applicant has identified as important (e.g., the key factors).
 - If the strength comment reflects where the applicant is today in relationship to Basic/Overall/Multiple and the OFIs reflect that the applicant needs to do to get better tomorrow.
 - If the comment uses the evaluation factors (A-D-L-I or Le-T-C-I) to provide insight on the organization's level of maturity or on specific areas where maturity may be enhanced.
 - If the comment includes a clear "so what" statement (most often linked to a key factor) that demonstrates why the comment is important to the applicant.
 - If any processes named, figures cited, and/or results described are correct.
 - If the scoring reflects the maturity of the applicant based on A-D-L-I and B/O/M.
- **Enter your observations/comments in the "Observation" field in Scorebook Navigator. Click the "Add" button, then click "Save" icon to save the observation.**

Prepare for the Consensus and attend the Consensus Meeting

- Be prepared to discuss:
 - Changes to the language of a comment that affect:
 - The meaning of the comment
 - The A-D-L-I or Le-T-C-I assessment factors that pertain
 - Basic/Overall/Multiple level of a comment
 - Distribution of strengths and OFIs at B/O/M
 - The score
 - Comments that are not "key" or Criteria-based
 - If a "key" area to address is missed
 - Conflicts between strengths & OFIs, or comments in different categories
 - Potential site visit issues
- During the consensus meeting, each item lead will review their strength and OFI comments, as well as the selected scores, for their assigned items with the team.
 - The team will discuss any conflicting views related to the comments, if applicable, and come to agreement on the final strengths and OFIs for each item for the Consensus Scorebook.
 - The team will come to agreement on the scoring range and score for each item for the Consensus Scorebook.

- **Pro Tip:** A list of topics that should and should not be discussed during the consensus meeting can be found on the “Sample Consensus Meeting Schedule and Topics” document on the [Examiner Resources](#) page of the TNCPE website.
- **Pro Tip:** Work with your item back up to have them take notes during the meeting. This will help you capture any updates you need to make to the comments or score.
- The team will identify potential key themes related to the applicant’s strengths and OFIs, therefore you will need to be prepared to provide examples from your items that relate to any potential key themes.

Prepare Site Visit Issue Worksheets

- Within 24 hours of the consensus meeting, complete a Site Visit form in Scorebook Navigator for every comment in your items that the team agreed are site visit issues.
 - Select the lowercase "v" in the far right-hand column of the comment line.
 - Complete the Documents, Interviewees and Potential Questions to Clarify/Verify boxes and save.
- Next, prepare a [Site Visit Issue \(SVI\) Worksheet](#) for every OFI comment and every role model (++) strength.
 - Develop clarifying questions for the evaluation factors (A-D-L-I or Le-T-C-I), as appropriate, for each OFI.
 - Develop questions to verify the evaluation factors (A-D-L-I or Le-T-C-I), as appropriate, for each role model strength.