

Team Leader Checklist



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

	<input type="checkbox"/> Download, save, and review opening and closing meeting slides from Examiner Resources page (1 – 3 days before site visit) <input type="checkbox"/> Collect hours spent on site visit preparation for each examiner
Stage 3b – Site Visit (During Site Visit)	<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
Stage 4 – Post-Site Visit	<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. Set due date for 2-3 days after wrap-up meeting <input type="checkbox"/> Review Final Scorebook (after Scorebook Editor completes work) <input type="checkbox"/> Submit Final Scorebook Checklist with Final Scorebook and other required documentation to TNCPE (1 week after site visit, or November 1st if earlier)