**Team Leader Checklist**

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| **STEPS** | **ACTIONS** |
| **Getting Started** | * Send team welcome email and request Biography Forms and Calendar Forms from team members; ensure no conflicts of interest * Contact applicant for introductions and to determine site visit dates * Set and distribute team calendar * Host a team call to cover team introductions, calendar, and independent review instructions * Begin logistics planning for consensus and site visit (location, hotels, etc.) |
| **Stage 1 – Managing Independent Review** | * Consider reviewing key factors and item 1.1 for each team member during the first week to make sure everyone is on track * Check in with new examiners and those who may be struggling throughout independent review * Monitor work and follow up with any stragglers |
| **Stage 2 – Consensus Review *w/o* Site visit** | * Host a team call to review instructions and expectations for consensus * Monitor work and follow up with any stragglers * Distribute consensus meeting agenda and consensus script * Manage consensus meeting, including identification of key themes. * Set final due date for team members to finalize item comments. * Read and edit the final scorebook before turning in to TNCPE * Forward all final documents to KyCPE. |
| **Stage 2 – Consensus Review *with* Site visit** | * Host a team call to review instructions and expectations for consensus * Monitor work and follow up with any stragglers * Distribute consensus meeting agenda and consensus script * Manage consensus meeting, including identification of key themes and site visit issues * Notify KyCPE when consensus scorebook is final. * If site visit is not conducted, * Watch just-in-time site visit preparation video with team |
| **Stage 3 – Site Visit (Preparation)** | * Collect site visit **questions** and document requests from team members * Provide applicant site visit agenda, questions, and document requests 1-2 weeks prior to site visit * Collect and review completed site visit issue **worksheets** from team members |
| **(On Site)** | * Conduct opening meeting, daily caucus meeting(s), and closing meeting * 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) * Maintain interview and document logs on site |
| **Stage 4 – Finalize Feedback Report** | * Manage wrap up meeting, including finalizing all item comments and key themes * Complete Summary of Site Visited, Score Summary Worksheet with scoring band descriptors, and Award Recommendation Form with team * Set final due date for team members to finalize item comments and hand in completed site visit issue worksheets * Read and edit the final scorebook before turning in to TNCPE * Forward all final documents to KyCPE, including team hours tracking sheet |