




EXAMINER TRAINING

Part 2: Independent Review

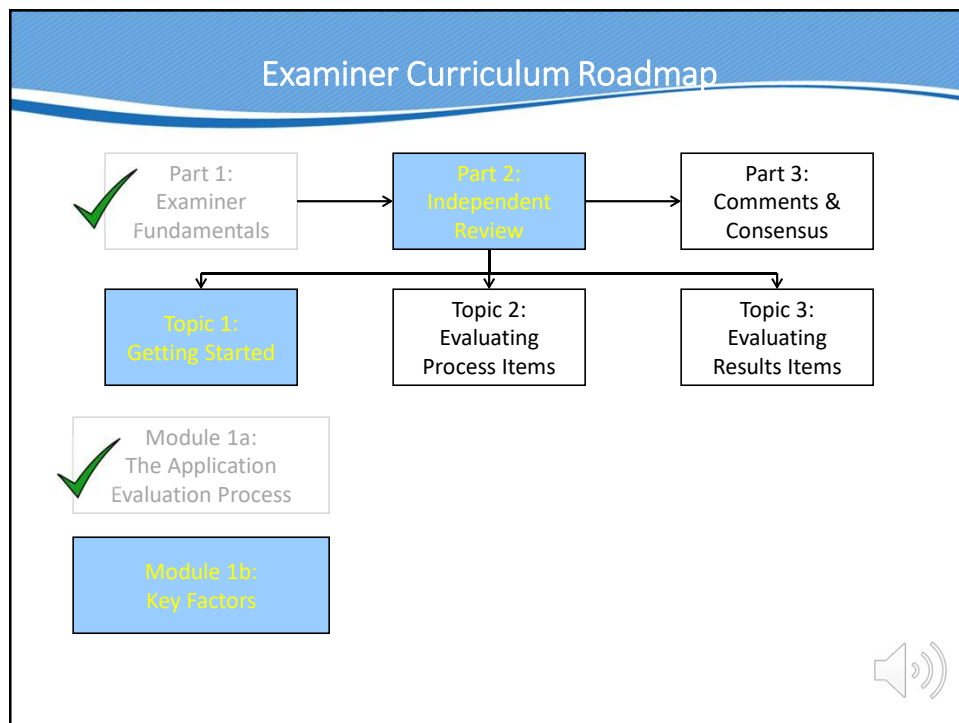
Topic 1: Getting Started

**Module 1b:
Key Factors**

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Topic 1: Getting Started

• Module 1a

- Overview of the 6-Step Item Evaluation
- Check for Conflict of Interest
- Assemble Materials
- Read Application



• Module 1b

- Identify Key Factors
- Document Key Factors



Module objective:
Provide Examiners with an understanding of the first steps in the Application evaluation process

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Getting Started: Key Factors

Check for
Conflict
of Interest

Assemble
Materials
and Read
Application

Draft
Initial
Key Factors

Module 1b

Evaluate Each Criteria Item

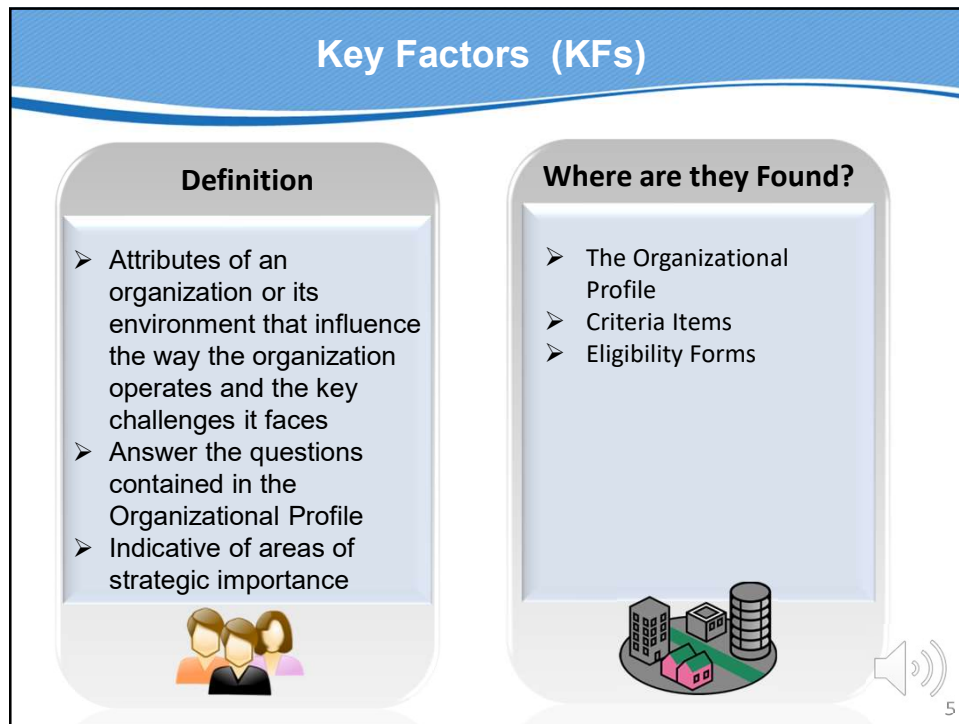


“Turn In”
Completed
Scorebook
after all
Items are
evaluated

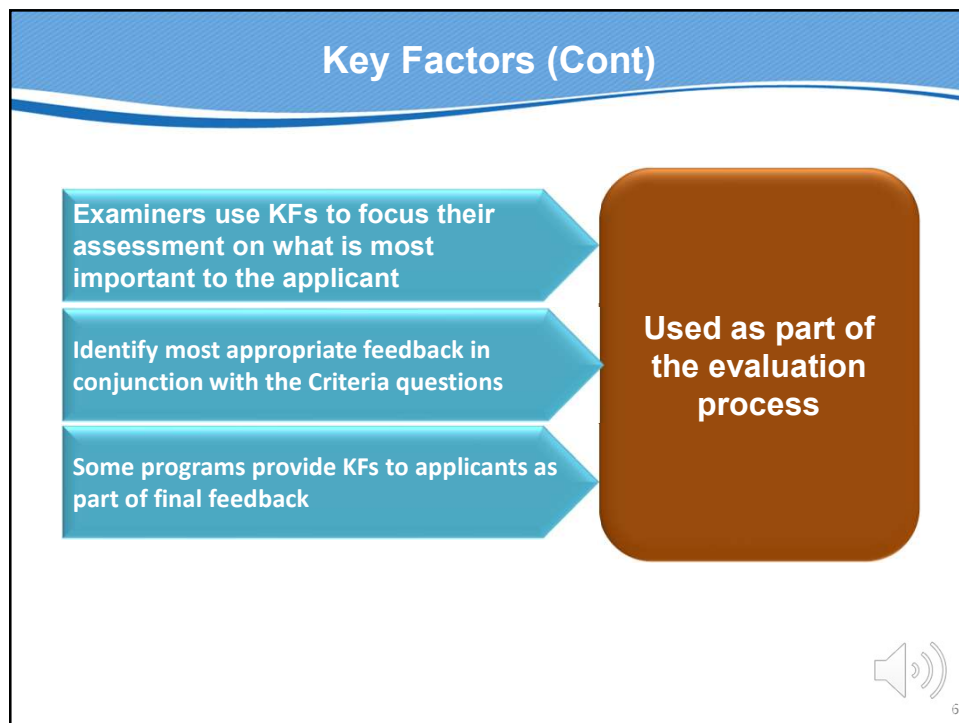


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Key Factors (Cont)

Guidelines

- 1


Group under the five Areas to Address in the Organizational Profile
- 2

Write in phrases rather than complete sentences
- 3

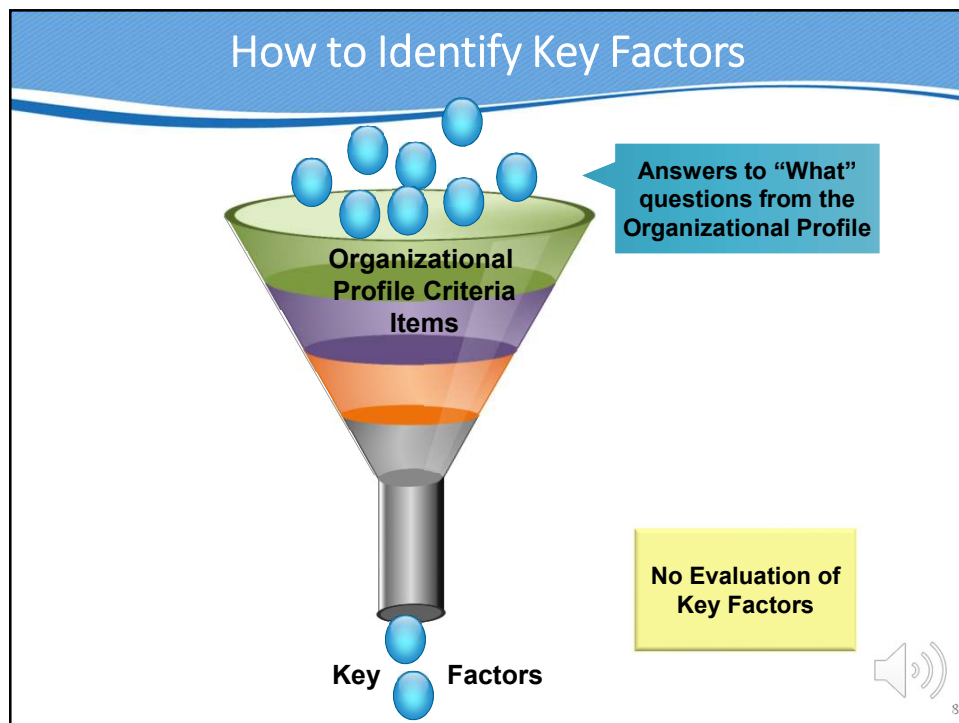
Revise throughout the evaluation process
- 4

Bulleted or numbered*
- 5

Limit to 1-3 pages in length*



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Key Factors: “What” not “How”

Key Factors:

- Mission, vision, values, core competencies
- Employee/staff profile
- Customer segments requirements
- Competitive position and critical success factors
- Strategic challenges & Advantages
- Governance structure

Not Key Factors:

- Strategic planning approach
- Complaint management process
- Rewards and Recognition System
- Methods to promote and ensure ethical behavior

Answers “What” - facts or attributes that affect the way the organization operates

Answers “How” - processes that the applicant uses in managing its work



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Developing Key Factors - example



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P.1 Organizational Description: What are your key organizational characteristics?

a. Organizational Environment

Baldrige Criteria: Organizational Profile

- (1) **Product Offerings** What are your main product offerings (see the note on the next page)? What is the relative importance of each to your success? What mechanisms do you use to deliver your products?
- (2) **MISSION, VISION, VALUES, and Culture** What are your MISSION, VISION, and VALUES? Other than VALUES, what are the characteristics of your organizational culture, if any? What are your organization's CORE COMPETENCIES, and what is their relationship to your MISSION?

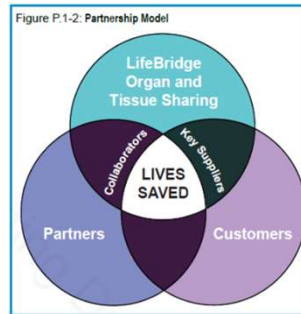
Case Study: LifeBridge Organ & Tissue Sharing Page i

Organizational Profile

P.1a. Organizational Environment

P.1a(1) For more than 25 years, LOTS has served as the regional organ and tissue procurement organization (OPO) for 3.2 million people living within a federally assigned territory inclusive of 62 counties located within the states of North Dakota (NT) and South Dakota (SD). From its founding goal to assist in the coordination of organ donations, LOTS has grown to become a multifaceted, nonprofit organization dedicated to saving and improving lives (Figure P.1-1). Located in Columbia, NT, LOTS is one of the 58 federally designated organizations of its kind in the United States.

LOTS's main service offering is the facilitation of organ and tissue donation, accomplished through the organization's two work systems: Organ and Tissue. The delivery of services for both work systems requires the careful coordination of partners, collaborators, and key suppliers to ensure that organs and tissues are available for use by the organization's key customer groups (Figure P.1-2). Both service lines (organ and tissue) are critical to LOTS's success, which is measured by the number of lives saved and improved. The Partnership Model (Figure P.1-3) highlights the organization's coordination of partners, collaborators, and suppliers to ensure that organs and tissues are always available for the organization's key customers.



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Case Study: LifeBridge Organ & Tissue Sharing Page ii

P.1a(2) The mission of LOTS is to save and improve lives (Figure P.1-1). LOTS's vision is *Organs and tissues are always available*. The vision was developed in light of the belief that the organization's ultimate goal will only be realized when organs and tissue are readily available to patients when they need them. Central to the LOTS culture is a strong drive to meet the mission: *We save and improve lives*. By definition, the mission affirms that LOTS plays a role in the life-saving gift of donation. Whether it is the "literal life save" of an organ recipient or a "quality of life improvement to a tissue recipient," at its core, LOTS is all about transplantation and saving and improving lives. Values of compassion, improvement, honesty, teamwork, and quality serve as a guiding force for how the workforce lives the culture on a daily basis. The vision, mission, and values (V/M/V) of LOTS, validated during the Strategic Planning Process (SPP, Figure 2.1-1), serve as the foundation for the culture and form the basis for how the organization is managed. The mission of LOTS could not be accomplished without the organization's core competency (CC) of a mission-driven workforce.

Figure P.1-1: Vision, Mission, Values

VISION	Organs and tissues are always available
MISSION	We save and improve lives
VALUES	Compassion Teamwork Honesty Quality Improvement

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The Key Factors

Key Factors: a list of Applicant responses to questions in the Organizational Profile.

Key Factors Worksheet

P.1a Organizational Environment

Organizational Context 1 of 58 federally designated, nonprofit, regional organ/tissue procurement organizations (OPO) in U.S. for 25+ years. Serves 3.2 million people in federally assigned territory: 62 counties in North Dakota (NT) and South Dakota (SD). Located in Columbia, NT.

Product Offerings Main offering: facilitation of organ/tissue donation, through two work systems, organ and tissue. Delivery for both requires coordination of partners, collaborators, key suppliers via Partnership Model (P.1-2).

Mission + Core Competency We save and improve lives. Vision: Organs and tissues are always available. Values: compassion, teamwork, honesty, quality, improvement. Culture: strong drive to meet mission. MVV are foundation for culture, basis for how applicant is managed.

Core Competency Mission-driven workforce. Care/compassion delivered by "human touch." Staff actions/behaviors linked to creating positive donation experience for donor family (collaborators).

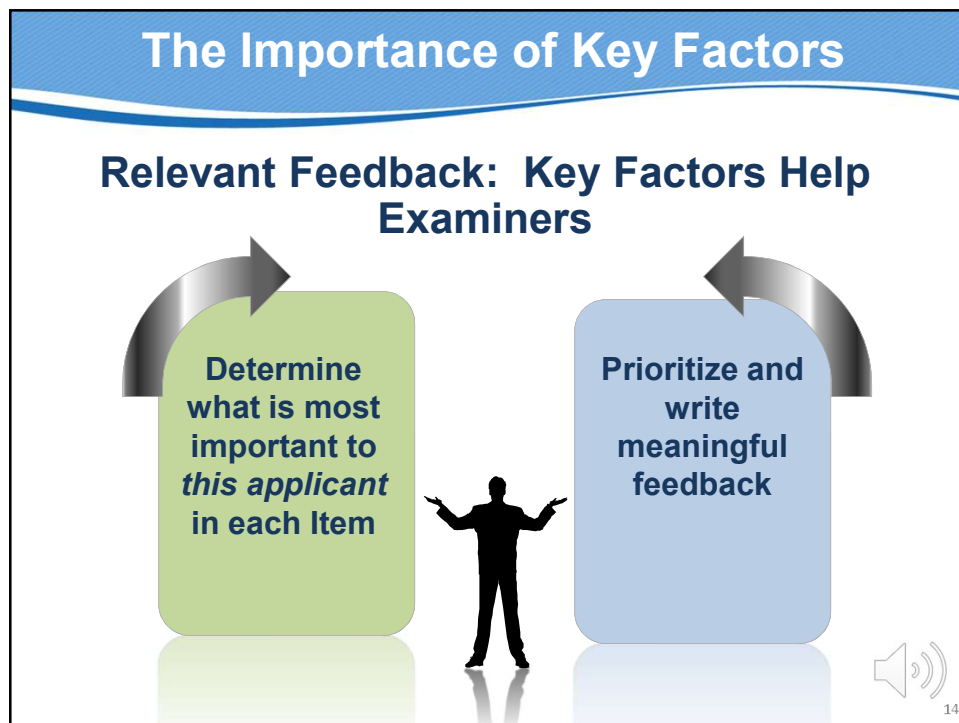
Workforce Profile 150 employees; decentralized, segmented by work system/department. 10% leadership. Tenure: 20% 1 year or less, 41% 2–5 years, 21% 6–10 years, 18% 11+ years. 65% female. Ethnicity: 70% white, 20% African American (DSA 25%), 10% other (DSA 5%). No workforce reductions. No organized bargaining units. Expanding clinical/nonclinical staff due to increased donations. No volunteers. Key requirements: staff connection to mission (VMV), employee benefits, relationships with coworkers.

Assets Custom-built facility with critical care unit and fully equipped operating room (OR). Key clinical technologies/equipment: x-ray, ultrasound, typical OR equipment. Leases plane equipped with medical equipment. Technology: EMR system, reporting services for customized reports.

Regulatory Environment Mandatory: CAP, CMS, EEOC, FDA, DoL, IRS, OSHA; Voluntary: AATB, AOPO, UNOS/OPTN (Figure P.1-5). Local environmental/regulatory for fire/sanitation, biohazard trash disposal local/state regulations.

P.1a(1)
P.1a(2)

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Assignment

Develop Key Factors

Key Factors Worksheet

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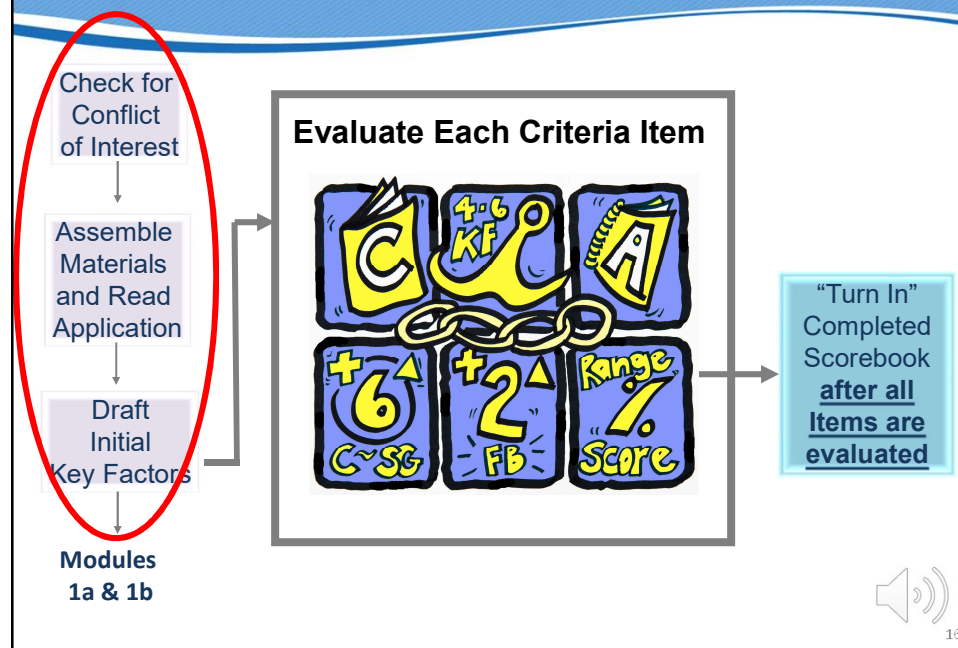
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✓ See your Assignment Sheet for this Module



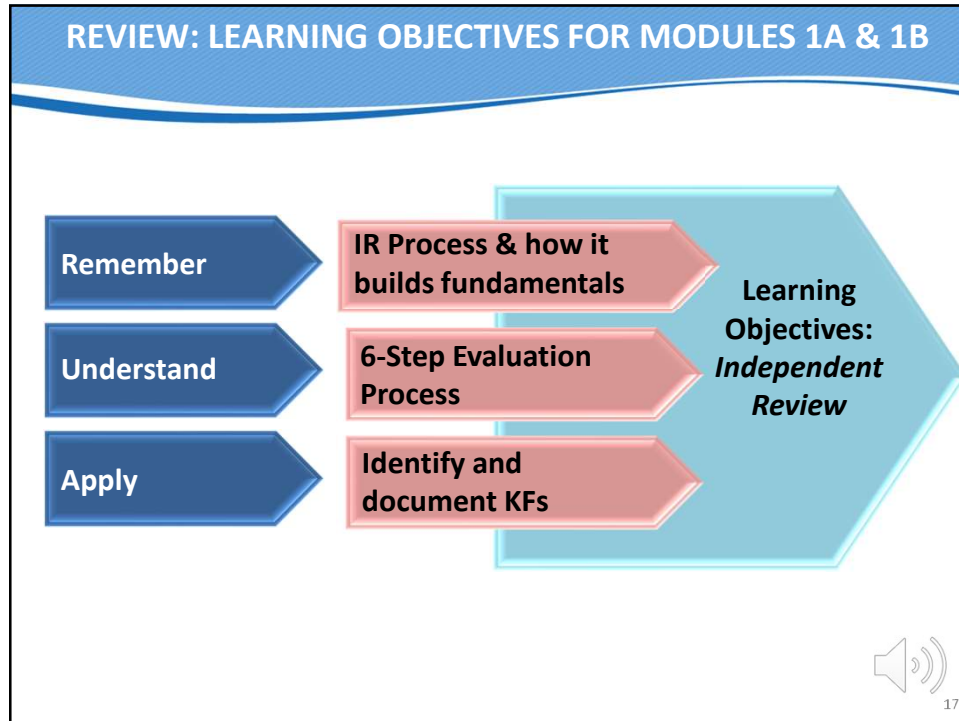
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The Application Evaluation Process: IR

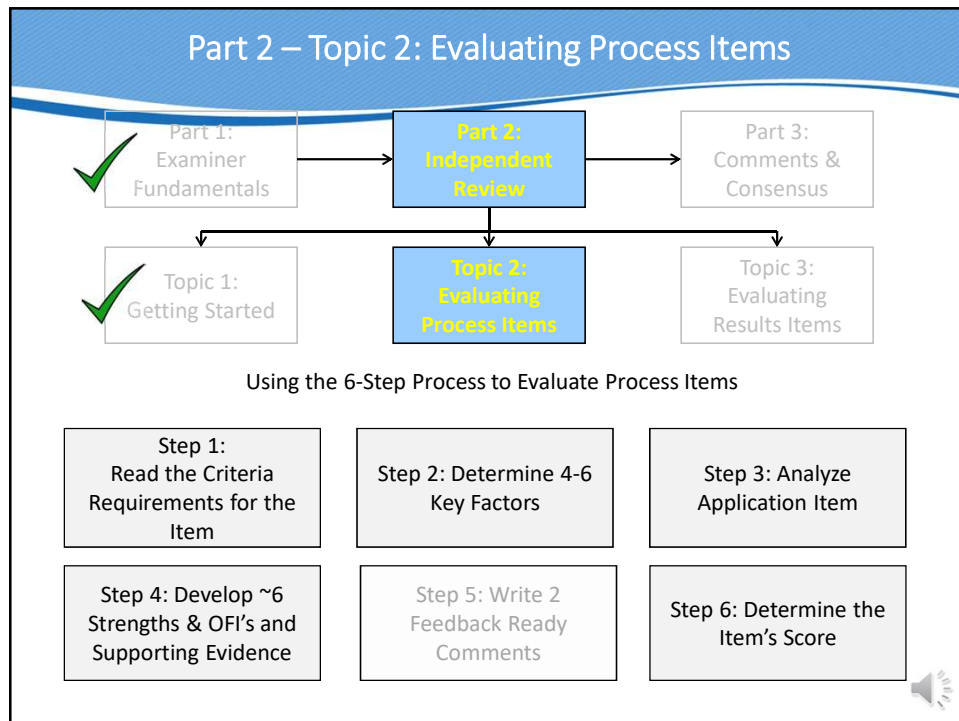


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