Award Evaluation Process
Lessons Learned

General

- Commit to meeting the expectations of your team for the evaluation process.
- Do the work while it's still fresh in your mind. You'll be more productive, and you'll meet the deadlines! Don't procrastinate!
- The balance of comments (strengths and OFIs) should be consistent with the score.
- Look for alignment and linkage to what the applicant says is important.

Team Leader/Logistics

- Respond to the team leader's requests for feedback (i.e. bios, availability, confirmation of dates, etc.) in a ***timely*** manner. We recognize that TNCPE examiners are busy people, but please consider that the team leaders are just as busy. It's not easy juggling the preferred schedules of 4-8 examiners as well as the applicant to determine the best dates for consensus and site visit. There are a lot of details that must be resolved for the success of the team. Please respect your team leader's time and take five minutes to respond ASAP.

Independent Review

- Allow twice as much time for a Level 3 or 4 independent review than what you spent on training pre-work (there are at least twice as many sections to complete!).
- When writing observations, remember that your team members are your customers. Mark every observation with a + or – and include enough detail so your team members can understand your thinking.
- Observations should concisely note the strength or opportunity, be actionable and be tied to the Criteria.
- Finish your independent review at least two weeks prior to the consensus meeting to allow time for category leaders to synthesize comments for consensus.
- Look at the whole application for responses to the Criteria. Recognize that the applicant can address the Criteria anywhere, not just in the designated section.
- Tie your observations to the applicant's key factors, the Criteria, and the evaluation factors (approach, deployment, learning and integration for processes; levels, trends, comparisons, and integration for results).
- Make notations of page numbers, reference figures, etc. so that during consensus, you will be able to quickly recall why you thought something was a particular strength or opportunity.
- Remember, processes are not always in the "right" section. Give the applicant credit, no matter where you find the process described.
- Score items in 5% increments.

Consensus Review

- Category/item leaders may be assigned to each of the seven categories. However, another option is to have each person be responsible for the category 7 results that link to their assigned process items/category (7.2 with Customer Focus, 7.3 with Workforce Focus, 7.1 with Operations Focus, and 7.4 with Leadership).
- Don't wait until consensus to try to organize or select important issues from everyone's comments. If you do, it will be a long and painful process!
- Know what your personal "hot button issues" are in the categories for which you are not the lead. This way you can make sure they are discussed and considered for inclusion in the consensus report without getting bogged down over every comment.
- Site visit issues should either ***verify*** strengths or ***clarify*** opportunities for improvement.
- Keep figure references in the comments.
- Key themes should be written like comment statements (paragraphs), not like key factor statements (bulleted list).
- Consensus item scores are based on the consensus comments and the consensus review. They are not an average of the team's Independent Review scores.
- Score items in 5% increments
- Complete the consensus review at least ten days prior to the site visit. The applicant needs to have time to get the appropriate people in place to talk with the team based on the site visit issues that are identified and communicated.

Site Visit

- Note who you get information from during the site visit so that it can be easily returned to the appropriate person when you are done. (see Document Log in Site Visit section of the Training Manual)
- Don't write on the applicant's information, handouts, etc.
- Caucus as a team during the day to see what was observed or found.
- Have blank Site Visit Issue Worksheets with you in case new issues arise while you are on-site.
- **Review the entire application one time through (again) before the site visit so you will be familiar with what you see and hear. *The applicant will expect you to know what they put in the application.***
- Be familiar with the comments and site visit issues for the areas on which you will focus.
- If dividing categories and working in teams, it is easier to resolve all site visit issues from one category before going on to interview/collect information on another. This may mean taking part of the day in the middle of the visit to finalize all issues/ wording on-site so that if issues or questions arise, there is still time to address them. This also aids significantly in the completion of the Final Scorebook.

- Examiners are not permitted to talk to suppliers, partners, or customers. Examiners can interview contract employees provided the applicant agrees and/or provides supervision.
- Some suggested questions while walking around: How do you know when you are doing a good job? How do you handle complaints? Remember: Use open-ended questions and have back-up questions ready.
- For Level 1 applicants: Prepare a list of questions for each category prior to the site visit, and record responses to each question. The notes from these responses can form the foundation for most comments and recommendations.

Final Scorebook

- Schedule the day after site visit for the team to work on the Final Scorebook together (site visit issues, item worksheets and key themes). It's much easier to do this while the site visit is fresh on your mind. It's also much easier to do this with everyone together than it is to finalize once everyone goes back to the daily demands of their jobs.
- While all "clarify" site visit issues should be resolved by the end of the site visit, the applicant expects that the feedback report will offer opportunities to either improve or take their organization to the "next level." We will not meet the expectations of the applicant if we don't provide ANY opportunities for improvement for an Item, particularly if the score reflects otherwise.
- Comments should not contain the words "it is not clear." By the end of the site visit, the team should ***know for sure*** if the applicant does or does not address the issue.
- When determining the award level to recommend, remember that the applicant does not have to meet ***all*** of the requirements. They should meet ***most*** of the requirements, but it is not an exact science.
- The Final Scorebook should have a consistent voice and style. It should read as though it were written by one person.

Other

- Destroy all paper associated with the application at the end of the process (when the team leader indicates it is safe to do so). Think twice before printing out whole reports – or else you'll spend a whole day at the shredder! What do you need on paper to do your part?
- After the Final Scorebook has been submitted to TNCPE, you will be asked to evaluate each person on your team (including yourself) as well as the team as a whole. In order to provide constructive feedback to your fellow examiners, make notes to yourself throughout the process. This is much easier than trying to recall each person's contribution several weeks later.