

Education and Evaluation Process

Level 1

1. Review the five-page Organizational Profile.

Thoroughly understand the applicant's key business factors including:

- Organizational environment
- Organizational relationships
- Competitive environment
- Strategic context
- Performance improvement system

2. Complete your independent review.

Using the TNCPE Level 1 Scorebook:

- Identify key factors
- Refer to the sheet entitled "Linkage between Org Profile and Process Categories"
- Identify potential strengths, OFIs, recommendations, and site visit questions in the seven categories of the Criteria

3. As a team, hold a Consensus meeting prior to the scheduled site visit.

(This may be done in person or via teleconference).

Use the TNCPE *Criteria for Performance Excellence* to plan the key education points and the specific questions for each category. Focus on the basic item requirements. Use the applicant's Organizational Profile to develop specific teaching points and the specific questions you will use to assess current practices. Write down examples of approaches role-model companies use to fulfill Criteria requirements. During the site visit, team members should alternate asking questions and reinforcing educational points.

The team leader will determine who will lead each category and who will serve as category back-up. As you create your site visit agenda, keep the four-hour site visit time frame in mind, setting time limits for discussion of each category. **The team leader should provide a site visit agenda and representative questions to the applicant at least one week before the site visit.**

4. Conduct the Level 1 site visit using the planned agenda and questions.

As noted above, providing the list of questions in advance of the site visit is helpful to the applicant. Make sure the applicant understands that the questions presented in advance are *representative* of the questions and information that will be covered during the site visit. During the site visit, your category back-up will document the answers to your questions.

A Level 1 site visit should be designed to meet the needs of the applicant. The format of a typical site visit is as follows:

- Introductions
- Overview of the TNCPE process
- Overview of the *Criteria for Performance Excellence* as a management framework
- Discussion and education with respect to:
 - 1 Leadership
 - 2 Strategic Planning
 - 3 Customer Focus
 - 4 Measurement, Analysis and Knowledge Management
 - 5 Workforce Focus
 - 6 Operations Focus
 - 7 Results
- Final questions
- Wrap-up and explanation of the next steps

5. After the site visit, the examining team writes a category-level feedback report.

Include an assessment of current practices for each category (strengths and opportunities for improvement). Also include specific observations and/or recommendations. The report should recognize the organization's accomplishments and describe those actions, processes or systems improvements that would be of most benefit.

6. Within two weeks of the site visit, the team leader should send the Final Scorebook to the TNCPE office, including:

- Key factors and key themes
- The assessment by category including strengths, opportunities for improvement, observations and recommendations

Remember, your assessment will become the feedback report that is sent to the applicant. It will be formatted and made uniform in structure and presentation, but it will **not be rewritten**. Since this document will be reviewed closely by the applicant for the helpful feedback it contains, **be sure all comments are clear, Criteria-based and objective.**