

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 and prepare for consensus.

The TNCPE Level 1 Scorebook is a word document found on the Examiner Resources page of the TNCPE website www.tncpe.org. Using the Level 1 Scorebook:

- Identify key factors
- Refer to the sheet entitled "Linkage between Organizational Profile and Process Categories"
- Identify potential site visit questions and education points for your assigned sections of the Criteria using the *Baldrige Excellence Builder*. Focus on the basic item requirements.

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

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

Agree on a final list of key factors for the applicant (usually prepared by the team leader).

Discuss the questions and education points that have been prepared for each Criteria category. 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.

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 Baldrige Excellence Framework
- Discussion and education with respect to:
 - 1 Leadership
 - 2 Strategy
 - 3 Customers
 - 4 Measurement, Analysis and Knowledge Management
 - 5 Workforce
 - 6 Operations
 - 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 have a positive tone, while recognizing the organization's accomplishments and describing those actions, processes or system 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, and observations and recommendations

Remember, your assessment will become the final Feedback Report that is sent to the applicant. It will be formatted and made uniform in structure and presentation. Although it will be edited, 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 easy to understand, Criteria-based, and linked to the applicant's key factors.**