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**JOIN THE PARTNERSHIP for EXCELLENCE**

**2023 – 2024 BOARD OF EXAMINERS**

***INTRODUCTION***

Organizations of all sizes and from all sectors of the economy – business, education, government, healthcare, and non-profit participate in The Partnership for Excellence (TPE) awards program to receive an objective external evaluation and detailed feedback report. TPE oversees a rigorous evaluation process to assist organizations that have written a 50-page application responding to the Baldrige Excellence Framework® from the ­­­­­Baldrige Performance Excellence Program to seek organizational improvement and recognition. Through this annual assessment cycle, TPE provides organizations with a team of examiners who review the application, conduct a site visit, and provide a cost-effective and comprehensive performance assessment. Each applicant receives a feedback report written by the examining team at the conclusion of the review process.

***WHAT IS AN EXAMINER?***

The Board of Examiners is composed of professional volunteers trained to use the Baldrige Excellence Framework® and assess organizations that apply to the TPE awards program. Examiners include volunteers from all sectors and geographical locations in Ohio, Indiana, West Virginia, and Illinois. Examiners develop passion and aptitude for performance excellence and improvement through training and networking with others and through their own examiner experience.

The “typical” examiner applicant seeks a challenge and has a desire to grow both personally and professionally. Most importantly, examiners understand the key role they can play in making our communities a better place to live and work by helping businesses and organizations become more effective and efficient.

***WHY BECOME AN EXAMINER?***

Serving on the Board of Examiners offers tremendous growth and is an intense learning opportunity. Examiners enjoy:

* Formal training in the Baldrige Excellence Framework®
* Networking with professionals from all sectors
* Seeing best practices in action first-hand
* Developing leadership, consensus, and team skills
* Benchmarking with world-class organizations
* Gaining hands-on experience, which can increase their value to their employer
* Formal certification as a TPE Examiner

The hours you spend during independent review, preparing for your site visit and contributing to our most valued product, the “feedback report,” showcase TPE’s commitment to performance excellence. It is exciting to know that people like you truly embody our mission, “To cultivate organizational performance excellence and continuous improvement in Ohio, Indiana, West Virginia and Illinois.”

Your hard work, sacrifice, and dedication are inspirational. Examiners create a better community and state by improving processes, systems, and management practices of the organizations with which they work. The results are higher quality education, improved healthcare for citizens in need, a stronger economy and more efficient and effective government. Your service is “community service” with enormous impact on the lives of thousands.

***HOW DO EMPLOYERS BENEFIT?***

Employers also benefit when they have a TPE examiner on staff. Examiner training empowers employees to apply the Baldrige Excellence Framework® in their own workplace, improving processes and results along the way. Employers may also benefit from:

* Economic growth as the organization applies examiners’ knowledge and experiences
* Recognition as an organization that values performance excellence
* Access to experienced in-house examiners who can lead internal improvement efforts
* Recognition as a good corporate citizen
* Examiners' personal growth in logic, reasoning, analysis, and writing skills

Employers have the unique opportunity of contributing to the competitiveness of their organizations and the significant leadership development experience of their staff by supporting the time and travel needs for those appointed to the Board of Examiners.

***EXAMINER RESPONSIBILITIES and COMMITMENT***

The role of an examiner is to evaluate, along with their team members, an organization's self-assessment based on the Baldrige Excellence Framework®. Then, write an analysis of strengths and opportunities for improvement of the organization's processes and results, score the assessment, and prepare the feedback report to the applicant. Examiners also participate in a consensus team meeting, and a site visit of the applicant.

Examiners are appointed by TPE’s President /CEO to one Award cycle, and must reapply each year. Applicants should give careful consideration to the time commitment required and the timeline (*see below*). Examiners should anticipate these responsibilities and plan accordingly.

Examiners pay for expenses incurred while serving as a TPE examiner or ask their employer to pay those expenses. Although every effort is made to assign examiners to an applicant in their geographical area, such expenses may include travel, meals, and lodging during site visits. Such expenses incurred by you, on behalf of TPE, are considered in-kind donations and are tax-deductible. TPE is recognized by the IRS as a 501c (3) non-profit organization. In the rare case where an examiner will require reimbursement or partial reimbursement to participate, the examiner should contact the President/CEO to discuss those options.

***TIME INVOLVED***

Below is a *tentative* timeline for examiners. The estimate of time required *will vary* depending on your experience. Estimate of time does *not* include any travel that may be necessary.

**2023-2024 Examiner Timeline**

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| --- | --- | --- |
| **Timeframe** | **Responsibilities** | **Estimated Time Required** |
| September 16, 2023 | Examiner Applications Due - Acceptance is determined within 72 hours of receipt |  |
| October 3, 2023October 10, 2023 | New Examiner Orientation, Central Ohio**OR**New Examiner Orientation, virtual session | 8 hours/1 day8 hours/1 day |
| October & November 2023 | Completion of Case Study Assignment & learning modules via Bridge LMS (Learning Management System) | 33-43 hours |
| November 2023 | Attend a two half-day virtual Examiner Training session (three offerings to select from) OR Attend the one-day Examiner Training session | 8 hours/2 days |
| December 2023 - January 2024 | Independent Review and completion of Independent Review Scorebook  | 30-45 hours |
| February 2024 | Consensus Review & Meeting, Site Visit Planning (Virtual Meeting - one full day or two consecutive half days) | 25-35 hours |
| March 2024 | Three-day Site Visit\* and completion of Site Visit Scorebook | 25-30 hours |
| April 2024 | Comment writing/finalizing (strengths and opportunities for improvement) for the Feedback Report  | 4-6 hours |
|  | **Estimated hours Required** | **125-175 hours** |
| September 2024 | Examiners honored at TPE Quest for Success Conference  |  |

\* **Note: Site Visit may be a hybrid approach of virtual and onsite meetings or entirely virtual**

**The Partnership for Excellence Board of Examiners**

**Code of Ethical Conduct**

Members of The Partnership for Excellence Board of Examiners pledge to uphold, and be guided by, these professional principles in the fulfillment of their responsibilities: integrity, professional conduct, confidentiality, and respect for intellectual property. In promoting high standards of public service and ethical conduct they will:

1. Conduct themselves professionally, guided by truth, accuracy, fairness, respect, and responsibility in all their interactions.
2. Avoid representing conflicting or competing interests, or placing themselves in such a position where their interest may be in conflict—or appear to be in conflict—with the purposes and administration of the award.
3. Safeguard the confidences of all parties involved in the judging or examination of present or former applicants.
4. Protect confidential information and avoid disclosures that may in any way influence the award integrity or process, currently or in the future.
5. Not serve any private or special interest in their fulfillment of the duties of an examiner, therefore excluding by definition the examination of any organization or subunit of an organization that employs them or has a consulting arrangement in effect or anticipated with them.
6. Not serve as examiners of a primary competitor or customer or supplier of any organization (or subunit of an organization) that employs them, that they have a financial interest in, or with which they anticipate a consulting arrangement, or are otherwise involved.
7. Not intentionally communicate false or misleading information that may compromise the integrity of the award process or decisions therein.
8. Make it clear, when establishing links from their own websites to the TPE website that users will be taken to the official TPE website.
9. Never approach an organization they have evaluated for their personal gain, including the establishment of an employment or consulting relationship.
10. Maintain and safeguard fairness in the examination process and the confidentiality of all award application information, including the identity of applicants.
11. Treat as confidential all information about the applicant and the applicant’s operation gained through the evaluation process, and take the following precautions:
	1. Applicant information is not discussed with anyone, including other examiners, with the exceptions of designated team members, judges, the TPE president/CEO and staff, and TPE Board of Trustees. This includes information contained in the written application as well as any additional information obtained during a site visit.
	2. Names of applicants are not disclosed during or after the application review process.
	3. No copies of application information are made or retained.
	4. No notes, written or electronic, pertaining to the application are retained. (*TPE or your Team Leader will notify examiners when to destroy all notes*.)
	5. No applicant information is adapted and/or used subsequent to the review process, unless the information is publicly released by the applicant (*at the annual Quest for Success Conference, for example*).
	6. Examiners do not reveal or discuss with other examiners, either during training or during the application review phases, their participation with an organization in the preparation of an award application.
	7. Ensure that no photos of examiners are taken during site visit, or any advertisement that includes examiners names are used by the applicant.
12. Personally and independently score all assigned applications.
13. During independent and consensus reviews, not communicate with the applicant organization, unless instructed by the Team Leader, or in any manner seek additional documentation, information, or clarification about the applicant’s organization. This restriction includes internet searches.
14. During the entire evaluation cycle, use only applicant-specific information provided by the applicant. Not at any time use independently gathered information on the applicant, e.g. from the press, web sites, or other social media.
15. Not at any time (*during or after the evaluation cycle*) independently give feedback to applicants regarding scoring or overall performance.
16. Upon completion of the examination cycle and appointment to the TPE Board of Examiners, be able to use the following designation: Examiner, The Partnership for Excellence, and year(s) served.
17. During the consensus and site visit processes, encourage and maintain a professional working environment that promotes respect for the award applicants, their employees, and all members of the examiner team.
18. When participating in a site visit, respect the climate, culture, and values of the organization being evaluated.

Furthermore, examiners serve as ambassadors for The Partnership for Excellence to promote performance excellence in U.S. companies and organizations to improve quality and productivity. **All applicants to the TPE Board of Examiners must pledge to abide by this Code of Ethical Conduct.**

**Examiner Application - 2023-2024**

**Returning Examiners:**

Complete this Examiner Application, scan and email (2-Pages ONLY) to margot.hoffman@partnershipohio.org

**New Examiners**: There is a $125.00 New Examiner Orientation Fee payable by credit card or check:

* BY CREDIT CARD: Complete this Examiner Application, scan and email (2-Pages ONLY) to margot.hoffman@partnershipohio.org An electronic invoice will be emailed to you for online payment.
* BY CHECK: Print and complete application, then scan and email (2-Pages ONLY) to margot.hoffman@partnershipohio.org and mail the completed application with your check to: The Partnership for Excellence, 829 Bethel Road #212, Columbus, Ohio 43214.

Last Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ First Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Middle Initial \_\_\_\_\_\_

Home Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Employer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Your Position Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employer Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Zip \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Sector You Work in – *check one***

Work Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_Business \_\_Nonprofit

Home Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_Health Care \_\_Education

Cell Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_Government

My phone contact preference is (*check one*) home work cell no preference

Years of Prior Examiner Experience

TPE examiner: \_\_\_\_\_\_ years National Baldrige Examiner: \_\_\_\_\_\_ years

Other State/Type Examiner: \_\_\_\_\_\_ years/ State/Type Program: \_\_\_\_\_\_\_

We plan to send your supervisor/employer a thank you letter. Please provide the following information:

Supervisor’s Name/Position \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor’s Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor’s Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TRAINING**

New Examiners must attend the New Examiner Orientation at one of two locations:

 Ohio - (OCT. 3, 2023) Baldrige Foundation, 250 West Old Wilson Bridge Rd, Worthington, OH

Virtual Session - (OCT. 10, 2023) To be conducted via Zoom

**New Examiner Fee = $125.00**

* Check here if you are a new examiner and will be attending the **Oct. 3** session in Ohio.
* Check here if you are a new examiner and will be attending the **Oct. 10** virtualsession.
* Check here if you have included a check or money order with this application.
* Check here if you are paying by credit card. An electronic invoice will be emailed for online payment.

All Examiners (new and returning) must complete a case study and remote learning modules in a LMS (Learning Management System) and attend one virtual session consisting of two consecutive half-days of Examiner Training or one full day of in-person Examiner Training in November. There is no fee for this portion of training; however, a *non-completion of responsibilities* fee of $550 will be charged to any examiner who does not complete the entire TPE examining cycle through site visit and final feedback report.

Please indicate the **one** Examiner Training session you prefer to attend: (*Note: specifics- hours, video conference links, etc.- will be sent to each Examiner later*)

* November 2 – 3, 2023 (two ½ day virtual sessions, 8:00-12:00 EST)
* November 6 – 7, 2023 (two ½ day virtual sessions, 8:00-12:00 EST)
* November 9 (one full day, in person session, 9:00-4:30 EST), Columbus, Ohio
* November 13 – 14, 2023 (two ½ day virtual sessions, 8:00-12:00 EST)

**ADDITIONAL INFORMATION**

Please indicate your highest level of education:

\_\_\_\_Associate degree \_\_\_\_Undergraduate degree \_\_\_\_Master’s degree

\_\_\_\_Doctorate degree \_\_\_\_Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name You Prefer on Your Examiner Badge: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name You Prefer on Your Certificate: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***I understand and agree to the responsibilities of being a TPE examiner***

***and I agree to adhere to TPE’s Code of Ethical Conduct.***

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 SIGNATURE REQUIRED DATE