

INSTRUCTIONS FOR COMPLETING THE PARTNERSHIP FOR EXCELLENCE (TPE) PREWORK/CASE STUDY ASSIGNMENT

The purpose of the prework/case study assignment is to prepare you for a successful classroom experience. The goal is to familiarize you with the Independent Review (IR) portion of the application evaluation process through the completion of a partial IR Scorebook.

STEP ONE: Go to TPE's Examiner Learning Resource Center (ELRC)
http://www.thepartnershipforexcellence.org/resources_training.html

Locate and become familiar with these resources on the ELRC:

All Examiners

1. **Review the following 4 e-learning modules**
 - a. *Code of Ethical Conduct (6 min)*
 - b. *Evaluating Process Items (11 min)*
 - c. *Evaluating Results Items (10 min)*
 - d. *Elements of a Well-Written Comment (10 min)*

2. **Review the following documents**
 - a. *Comment Guidelines*
 - b. *Writing Concise Process Comments*
 - c. *Writing Concise Results Comments*
 - d. *Examples of IR worksheets: Process Item 5.1 & Results Item 7.3*

STEP TWO: Access Scorebook Navigator.

1. You will receive an email from TPE with your user ID, password information, and instructions on how to access Scorebook Navigator.
 2. Sign on to Scorebook Navigator and become familiar with the navigation and functionality.
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STEP THREE: Gather the materials from your Case Study Prework (emailed to returning examiners/included in the NEO Notebook for new examiners).

1. FitHabits Case Study
2. 2015-2016 Baldrige Excellence Framework – Business/Nonprofit/Government
3. TPE 2016 *Step-by-Step* for Independent Review
4. Refer to completed Independent Review (IR) Worksheets for Items 5.1 and 7.3 as models in completing your own IR worksheets.

STEP FOUR: Complete the Prework.

1. Evaluate FitHabits Case Study Items 1.1, 2.1, 7.1, and 7.5 using Scorebook Navigator

- a. Read the 2015-2016 *Baldrige Excellence Framework* for Business/Nonprofit/Government
- b. Read the FitHabits case study, highlighting and/or making notes on anything you feel may be important to the evaluation of this award applicant.
- c. Using the **Step-by-Step for Independent Review (IR)** as a guide, complete Key Factors and IR Worksheets in *Scorebook Navigator* for four Items: 1.1, 2.1, 7.1, and 7.5. For help in completing, refer to completed examples of IR Process Item Worksheet 5.1 and IR Results Item Worksheet 7.3.
- d. Print 2 copies of each of your completed IR Worksheets – Items 1.1, 2.1, 7.1, and 7.5

STEP FIVE: Take These Documents to Class.

1. **Your prework materials** (FitHabits case study, Baldrige Excellence Framework Business/Nonprofit/Government booklet, and all other case study packet materials)
2. **Two** copies of each of your completed IR Worksheets for Items 1.1, 2.1, 7.1, and 7.5

Contacts

For Scorebook Navigator account set-up & login:

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For Scorebook Navigator software/technology/how-to questions:

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For All Other Questions:

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