

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 training experience during Examiner Training. 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: Access Stratex Apex examiner software.

1. You will receive an email from TPE with login information and instructions on how to access the Stratex Apex examiner software.
2. Sign on to Stratex Apex and become familiar with the navigation and functionality.

STEP TWO: Review documents in Stratex Apex software and view video in Vimeo.

Please note: Much of this is a refresher for new examiners, who attended an orientation.

1. **Review the following documents**
 - a. *The Role of a TPE Examiner*
 - b. *4A Comment Guidelines*
 - c. *Guidelines for Writing FB Ready NERD Comments*
 - d. *Item Evaluation Process for Independent Review*
 - e. *Key Factors Fact Sheet*
2. **View the video TPE Independent Review process (27 minutes) at the following link:**
<https://vimeo.com/manage/461504384/general>

STEP THREE: Gather the materials from your Case Study Prework (emailed to returning examiners/included in the NEO for new examiners).

1. LifeBridge Year 2 Case Study
2. 2019-2020 Baldrige Excellence Framework – Non-profit
3. TPE *Step-by-Step* for Independent Review

STEP FOUR: Complete the Prework.

1. Evaluate LifeBridge Case Study Items 2.1, 6.2, 7.1, and 7.5 using Stratex Apex examiner software.

- a. Read the 2019-2020 *Baldrige Excellence Framework* for Non-profit.
- b. Read the LifeBridge Year 2 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 in the Word template and IR in *Stratex Apex examiner software* for four Items: 2.1, 6.2, 7.1, and 7.5.
- d. Complete your work for Items 2.1, 6.2, 7.1, and 7.5 in the Stratex Apex software by 9:00 p.m. the evening before the Examiner Training session you will be attending

STEP FIVE: Have the following documents available during Examiner Training.

1. **Your prework materials** LifeBridge Year 2 case study, Baldrige Excellence Framework Non-profit booklet, and all other case study packet materials.
2. A hard copy or access to an electronic copy of your completed pre-work of Items 2.1, 6.2, 7.1, and 7.5.

Contacts

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