



# Examiner Overview

*Please read and acknowledge all information below, as changes may occur from year to year*

## APPLICATION CHECKLIST

Applications Due: February 1<sup>st</sup>, 2016

## WHO ARE EXAMINERS?

The Board of Examiners is comprised of volunteers from all sectors and levels of organizations. These individuals have backgrounds in business and industry, health care and education, trade and professional associations, universities, government agencies, and not-for-profit-organizations. Some examiners are self-employed or retired.

## EXAMINER APPLICATION

Individuals who are interested in serving on the Board of Examiners are required to apply/reapply each year. Applicants MUST read all of the provided Examiner Information Document, acknowledging the time requirements, expectations, Code of Ethics, and fee information.

## SELECTION FACTORS

Submitted applications go through a review process by the Award Office staff and Advisory Board. Selection is based upon the candidate's knowledge, experience, and skill. Eligibility does not guarantee selection. No prospective candidate shall be denied consideration on the grounds of race, creed, color, national origin, age, gender, or disability.

Examiners are notified of their selection in late February. After completing training, Examiners will be assigned to Teams to complete the Examination Process. Initial selection guarantees acceptance into training; it does not guarantee team placement.

Placement on an Examiner team is based on several factors including:

- Preparation for training
- Performance in training activities
- Interpersonal skills and the ability to work effectively as a member of a team
- Sector knowledge – ensuring a balance of sector representation on each team
- Number of organizational applications received/need of examiners to support them

### Review the following:

- Examiner Overview
- Time Commitments
- Cycle Calendar
- Code of Ethics

### Complete and Submit:

- Examiner Application
- New Examiner Payment form (if applicable)

### Submit electronically or by mail:

Excellence in Missouri Foundation  
200 N. Keene St. Suite 101  
Columbia, MO 65201

573-817-8310 ext. 310  
contact.us@excellenceinmo.org  
www.excellenceinmo.org

## EXPECTATIONS

Examiners review, write an analysis of, and score written applications from the Tiered and Award Level Programs administered by the Excellence in Missouri Foundation. Examiners are trained on Baldrige Criteria and the application review process. This review is completed individually, as well as with an Examiner team, consisting of a variety of sector and years' experience.

When Examiners accept their selection in February, they are required to:

- Work independently as well as on a team
- Adhere to due dates and assignment instructions
- Adhere to all confidentially and ethics policies
- Attend & participate in all required training  
(listed on the Cycle Calendar: mix of in-person/virtual.  
Some dates TBD as team schedules allow)
- Participate in Team calls/email communications
- Attend/Participate in a Site Visit, if selected

## BENEFITS

Serving as an Examiner is a volunteer position and requires a significant amount of time, effort, and dedication. However, it is a very rewarding experience providing our Volunteers with:

- ✓ Personal growth and professional development
- ✓ Opportunity to learn first-hand innovative approaches utilized by leading organizations
- ✓ Extensive insight into the Baldrige Framework
- ✓ Networking with other quality-minded peers
- ✓ Development of assessment and analytic skills

# Examiner Time Commitments

This is a guide that estimates the time commitment involved for each training, meeting or assignment involved with the Examiner Program. All figures are approximate, as each individual learns and works differently. Timelines may seem vigorous, but they are designed to offer the best training possible in a year's time. There will be plenty of help and support along the way from Award Office staff, Leadership Triad members, and fellow Examiners – we will all be working together!

March	<input type="checkbox"/> <b>2 Day Advanced Examiner Training</b> – 16 hours + travel <i>(by invitation only)</i>  <input type="checkbox"/> <b>Pre Work</b> <i>(for all examiners on own time)</i> – 10-20 hours
April	<input type="checkbox"/> <b>2 Day Examiner Training</b> <i>(required for ALL Examiners)</i> – 16 hours + travel  <input type="checkbox"/> <b>Scorebook Navigator Training/Instruction Videos</b> <i>(own time)</i> – 1-2 hours
May - June	<input type="checkbox"/> <b>Independent Review</b> <i>(own time)</i> – 40-60 hours
June - July	<input type="checkbox"/> <b>Consensus Preparation</b> <i>(own time)</i> – 10-20 hours
July - August	<input type="checkbox"/> <b>Consensus Meeting</b> <i>(day/location mutually chosen by team)</i> – 8-10 hours + travel  <input type="checkbox"/> <b>Consensus Revisions</b> <i>(own time, based on team's chosen schedule)</i> –4-6 hours
<b>TOTAL HOURS FOR TRAINING &amp; APPLICATION REVIEW: 100-150*</b> <i>*all figures approximate</i>	
July - October	<b>Site Visit Training</b> <i>(phone call replaces in person training)</i> –1 hour  <b>Site Visit Preparation</b> <i>(own time)</i> – 10-20 hours  <b>Site Visit</b> <i>(Examiners stay in a hotel with the team for 6 full days, Sunday – Friday)</i> – 60 hours
<b>TOTAL HOURS WITH COMPLETED SITE VISIT (if selected): 170-230*</b> <i>*all figures approximate</i>	

# Cycle Calendar

2016 Cycle Calendar		
Event	2016 Date	Location / Notes
Intent to Apply Forms Due – all tier levels	February 1	
All Examiner Applications Due	February 1	
Advisory Board - Examiner Selection	February 12	Conference Call 1:00-4:00pm
2 Day Advanced Examiner Training (by invitation)	March 1 & 2	Columbia, MO Must attend both days
Examiner pre-work – to be completed prior to 2 Day Examiner Training	Begins March 7	
2 Day Examiner Training (replaces Baldrige 101 and Examiner Preparation Course [EPC]) <ul style="list-style-type: none"> <li>REQUIRED for ALL Examiners</li> </ul>	April 18 & 19 OR April 25 & 26	Columbia, MO Must attend both days
Expedition Level and MQA/EiH Award Applications Due		
Compass Level Applications – can be submitted throughout the year. For questions: <a href="mailto:contact.us@excellenceinmo.org">contact.us@excellenceinmo.org</a>	April 25	
Advisory Board – Team Selection	April 28	Conference Call 1:00-4:00 pm
Independent Review	May 3 – June 24	
Consensus Preparation	June 27 – July 12	(exact prep. window determined by teams depending on Consensus date selected by team)
Consensus Day – 1 day team meeting	July 13 – August 3	1 day – full day in-person team meeting – time/date/location TBD by team
Consensus Results Due to Office	7 days after meeting	
Judges Site Visit Selection Meeting	August 12	Conference Call 9:00 – 10:00am
Site Visit Training Call by team	August 15 - 19	Formerly in person training, now conference call, date TBD by team
Site Visit Preparation	Aug 22 – Sept 9	
Site Visit Weeks (MQA/EiH/Expedition)	SV#1: Sep 11-16 SV #2: Sept 18-23 SV #3: Sept 25-30 SV#4: Oct 2 -Oct 7	Locations TBD
Judges Final Review – 1 day meeting	October 26	Columbia, MO
Advisory Board – Recipient Selection Meeting	October 27	Columbia, MO

## Dates/Time Commitment Details:

**Required Trainings** – Examiners must attend all required trainings, as indicated on the Cycle Calendar, to be eligible for team selection. At this time, only the dates indicated on the calendar will be offered.

**Consensus Meeting** – A one day meeting with all team members to discuss and agree on findings of your application review. There will be time to gather and prepare your information for this meeting (see calendar dates above), and the one day meeting/location will be chosen by you and your team. These meetings can be 8-10 hours (excluding travel), so please plan appropriately.

**Site Visit** – An Award Level Site Visit is a 5 or 6 day on-site event (excluding travel) where you and your team will visit the applicant’s location. You will stay in a hotel and work together to verify and clarify your findings from the Consensus Meeting. You must stay on location at the applicant’s organization and/or the hotel during the Site Visit week. When choosing your availability for Site Visit week preference(s), please keep as many week options open as possible.

Assignments marked **“on own time”** will be completed within the date window marked on the Cycle Calendar.

Any due date/virtual training/meeting marked as **“TBD by team”** will be determined mutually by the team and held during the date window marked on the Cycle Calendar.

For any questions on Cycle Calendar or Time Commitments, please contact the Award Office.

## Code of Ethics

The Award Program is administered under a strict Code of Ethics, which ensures no applicant names are released unless they receive the award. In addition, any commentary and scoring information developed during the review are kept strictly confidential. Such information is available only to those individuals directly involved in the examination and only on those applications to which they are assigned.

All participants in the Award Process are expected to adhere to the highest level of ethical performance, including not engaging in sexual, ethnic, racial, age or other discrimination against other members of the Board, applicants, or in interactions with other individuals or organizations on behalf of the Excellence in Missouri Foundation.

All breaches of ethics shall be reported to the Award Office: 573-817-8310 ext. 310

### RULES OF CONDUCT

The following Rules of Conduct are established to maintain the confidentiality of all Award application information, including the identity of applicants, and to preserve fairness in the examination process. The rules pertain to all persons involved in the process.

1. All information about the applicant and business gained through the evaluation process shall be treated as confidential. The following precautions shall be taken:
  - Applicant information shall not be discussed with anyone, including other Examiners, with the exception of designated team members, and Award office representatives. This applies to the written application as well as to any information obtained during a site visit.
  - Names of applicants shall not be disclosed during or after the application review process.
  - Applications, scorebooks, and worksheets will exist on an electronic basis – Any copies of these, as well as all other Examiner notes and related material, must be destroyed (shredded, incinerated; erased from computers, flash drives, etc.).

2. Each Examiner is responsible for personally and independently scoring their assigned application.
3. Prior to Site Visit Review, no Examiner shall communicate with the applicant organization, or in any manner seek additional information, documentation, or clarification. This includes Internet searches. If questions arise, contact the Award Office.
4. Examiners shall not at any time independently give feedback to applicants regarding scoring or overall performance.
5. Examiners advising or participating with an organization in the preparation of an Award application shall not reveal or discuss that participation with other Examiners during the training or evaluation process.

## CODE OF ETHICAL CONDUCT

In promoting high standards of public service and ethical conduct, Board of Examiner Members:

- Shall conduct themselves professionally, with truth, accuracy, fairness, and responsibility to the public
- Shall not represent conflicting or competing interests, nor place themselves in such a position where the Examiner's interest may be in, or appear to be in conflict, with the purposes and administration of the Award
- Shall safeguard the confidences of all parties involved in the judging or examination of present or former applicants, including such information disclosed in the context of communications relating to an anticipated professional relationship with potential applicants
- Shall not serve any private or special interest in fulfillment of the duties of a Judge or Examiner, therefore excluding, by definition, the examination of any organization or subunit of an organization of which he/she is employed or of which a consulting arrangement is in effect or anticipated
- Shall not serve as an Examiner of a primary competitor, customer, or supplier of any company, division, or business unit, of which he/she is an employee, holds significant shares of stock or is involved in, or anticipates, a consulting arrangement
- Shall not intentionally communicate false or misleading information, which may compromise the integrity of the Award process decisions, therein
- Acknowledge the use of trademarks owned by the Excellence in Missouri Foundation, including the MQA/EiH logo etc.
- Shall never approach an organization they have evaluated for their personal gain, including the establishment of an employment or consulting relationship; and if approached by an organization they have evaluated, shall not accept employment from an organization for a period of three years after the evaluation
- Upon completion of the Examiner Training, Examiners may use the following designation: Examiner, Missouri Quality Award (MQA), or Excellence in the Heartland (EiH) along with the year(s) served. However, they shall not use the EiMF/MQA/EiH logo in any advertising or promotion, nor shall business cards include the Examiner designation or logo
- Shall encourage and maintain a professional working environment that promotes respect of the Award applicants, their employees, and all members of the Examiner Team, during the consensus and site visit processes
- Shall respect the climate, culture, and values of the organization being evaluated, when participating in a site visit
- Furthermore, it is pledged that as a member in good standing of the Board of Examiners, each member shall strive to to enhance and advance the Award/Tiered Program as it serves to stimulate companies and organizations to improve quality and productivity through performance