



2012 Examiner Training Requirements



2012 Sterling Board of Examiners Training

Examiner Training Overview

The Florida Sterling Council's goal is to ensure the Board of Examiners includes a broad representation from many industries, companies, and organizations in the for-profit, nonprofit, and public sectors. This ensures expertise to evaluate Governor's Sterling Award and Sterling Challenge applications from these sectors. The Examiner training process used by the Florida Sterling Council in collaboration with the Examination Committee is meant to prepare every examiner to be successful during each step of the process. Examiners participate in comprehensive training on the Sterling Criteria, how to evaluate performance against the requirements of the Criteria, how to write feedback reports, and how to score. This detailed training prepares Examiners for their roles through the Independent Evaluation Stage, to become team members for the Consensus Stage, and to be high performing team members at the Site Visit Stage of the Sterling Examination process. All Examiner training includes lecture, individual tasks, table assignments, and group exercises to facilitate the learning experience.

New Examiners are required to attend *Sterling Criteria I* training; attend a regional *Evaluating Applications Workshop*; complete the case study and submit to the Sterling Office no later than Friday October 14, 2011; and attend *3-Day Examiner Training* October 26 - 28, 2011 or November 2 - 4, 2011 in Largo, Florida.

It is recommended that Return Examiners attend the *Evaluating Applications Workshop* to understand process changes and case study content; share their knowledge with new examiners; prepare to serve as a table lead during the 3-Day Examiner Training; and receive the take-aways (completed pre-work assignments). Return Examiners are also required to complete a case study prior to the *3-Day Examiner Training*.

Note: The 2012-2013 Baldrige/Sterling Criteria for Performance Excellence has continued to evolve and improve as today's best business practices have evolved. There are many significant changes from the 2011 Criteria; therefore, all Examiners are strongly encouraged to participate in the *Sterling Criteria I* workshop.

In addition, an optional *Sterling Criteria II: Connections & Integration* workshop is available for all Examiners to provide a more in-depth understanding of the Sterling Management System and its requirements. All New and Return Examiners are strongly encouraged to participate. This training, based on the revised Criteria, will immerse participants in examining the connections between the Organizational Profile, the six approach categories, and the results category using examples from Governor's Sterling Award and Baldrige Award recipient role model organizations.

Upon completion of the Examiner 3-Day training (see Page 3), Examiners receive team assignments and additional Just-In-Time training on the Consensus and Site Visit processes, which is delivered by the assigned Team Leader.



Evaluating Applications Workshop

This case study-based workshop is required for new examiners, recommended for return examiners, and designed to help participants interested in building internal Sterling expertise in their organizations. Through lecture and in class exercises, participants will examine the Sterling assessment process used to evaluate management practices; gain a working knowledge of the basic steps to apply the Sterling Criteria to evaluate an application, which mimics the Independent Evaluation process; understand the tools and forms used throughout the process; and have a clear understanding of how deliverables should be completed. Upon completion of the workshop, participants will take-away completed worksheet samples.

As a result of this workshop, participants will learn how to:

- Identify key success factors from the Organizational Profile and how these key factors shape the evaluation process;
- Evaluate an application to identify strengths and opportunities for improvement in Approach, Deployment, Learning, and Integration for the six Process Categories;
- Identify Results (Category 7) that correlate to each of the Process Items; and
- Complete Item Worksheets within the Scorebook.

Pre-work assignment required prior to attending the workshop:

- Download the following files from the Sterling website www.floridasterling.com (located under the Examiner tab, 2012 Examiner Training Downloads)
 - TriView National Bank case study
 - 2012 Case Study Scorebook
 - 2012 Sterling Criteria Questions (formatted in Arial 11 font for copy and paste)
 - TriView National Bank Consensus Key Factors
- Additional files available on the web site (located under Performance Improvement, Sterling Award) include the Sterling Criteria (if you do not have a hard copy).
- Schedule 3 - 4 hours to complete the pre-work assignment.
- Read the Organizational Profile and answer the five (5) questions found in the Case Study Scorebook to understand the organization. If you are a first year Examiner, your mentor will ask you to submit your response to the 5 Questions for review prior to attending the workshop.
- Read the entire case study to become familiar with the organization.
- Complete the Key Factors on-line training on the Sterling website.
- **Bring** hard copies of all files to the Evaluating Applications Workshop.



Examiner 3-Day Training

This intensive 3-Day training is a requirement for all Examiners and a key element in the development of Sterling Examiners. Participants will have completed an abbreviated Independent Evaluation of a case study and will be working with a variety of teams to learn and improve their skills. Through lecture, individual tasks, table assignments, and large group exercises, participants will receive reinforcement of preliminary training, skill building in the consensus processes, and an overview of the site-visit process.

Pre-work assignment required prior to attending training:

***Note:** if you attended Evaluating Applications, you have already completed these steps.

- *Download the following files from the Sterling website www.floridasterling.com (located under the Examiner tab, 2012 Examiner Training Downloads)
 - TriView National Bank case study
 - 2012 Case Study Scorebook
 - 2012 Sterling Criteria Questions (formatted in Arial 11 font for copy and paste)
 - TriView National Bank Consensus Key Factors
- *Read the Organizational Profile and answer the five (5) questions found in the Case Study Scorebook file to understand the organization.
- *Read the entire case study.
- *Complete the Key Factors on-line training on the Sterling website.
- Complete Item Worksheets to document your evaluation of Items 1.1*, 2.1, 3.1, 4.1, 5.1, and 6.1.
 - Each worksheet includes 4-6 Key Factors for that Item, 5-8 Independent Evaluation comments (combination of Strengths and OFIs), and supporting Results correlation.
- Complete the Case Study Item Summary Worksheets for Items 1.2*, 2.2, 3.2, 4.2, 5.2, and 6.2.
 - Each worksheet includes questions relating to the Criteria and the applicant's response to the Criteria for that Item.
- Make three (3) paper copies of your completed Case Study Scorebook.
 - **Mail one (1) set to the Sterling Office to arrive no later than Friday, October 14, 2011. No fax! No email!**
 - **Bring** two (2) sets to the 3-Day Examiner Training.

Mailing Address

Overnight Address

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