2017-2018 Examiner Training Requirements
Examiner Training Overview

The Florida Sterling Council’s goal is to ensure the Board of Examiners includes broad representation from many industries, companies, and organizations in the for-profit, non-profit, and public sectors. This ensures expertise to evaluate Assessment process applications from all 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 evaluation process and is designed to help participants interested in building internal Sterling expertise in their organization. Examiners participate in comprehensive training on the Sterling Criteria, how to evaluate organizational performance against the requirements of the Criteria, how to prepare feedback comments, and how to score. Examiner training simulates the examiner team experience, including the Independent Evaluation stage, the Consensus stage, and the Site Visit stage, through lectures, individual work, team work, a case study, exercises, and group discussions to facilitate the learning experience.

Members of the Board of Examiners assess organizations relative to the *Sterling Criteria for Performance Excellence* and provide feedback that helps organizations move to the next level of organizational maturity and improved business results. As team members, Examiners develop key organizational competencies, including: Systems Thinking, Business Acumen, Analytical Skills, Critical Thinking, Project Management, Performance Measurement, Communication Skills/Listening, and Teamwork. Examiner applicants must possess a high level of expertise in performance excellence, and must conform to requirements for ethical conduct and integrity.

Individuals who are undergoing Examiner training for the first time are considered Examiner Candidates until successful completion of all training.

**Examiner Candidates (new examiners) are required** to complete three pre-requisite courses: a one-day *Sterling Criteria 101 class using the case study*, the six modules in the *Criteria 102 virtual course*; and a one-day regional *Evaluating Applications Workshop*.

**All Examiners must** successfully complete the case study requirements. All Examiners are required to submit the case study scorebook to the Sterling Office no later than Friday, October 20, 2017, and attend one of the *Examiner Training* sessions in Largo, Florida (November 1 through 3, 2017 or November 7 through 9, 2017). All examiners must attend a Criteria 101 workshop or complete all six modules in the Criteria 102 workshop during a Criteria change year (2017-2018 is a Criteria change year). During others years, second and third year examiners are strongly encouraged to participate in the Criteria 101 workshops and complete the Virtual Criteria 102 modules to deepen their criteria expertise. There are no costs for these trainings for return examiners.
It is also highly recommended that Return Examiners attend the Evaluating Applications Workshop to understand process changes and case study content; share their knowledge with new examiners; and receive the take-aways (completed pre-work assignments). This level of participation is a consideration when the Examination Committee is deciding on examiner promotions.

The Florida Sterling Council also offers Six Sigma Yellow Belt training at a discounted rate for examiners. We strongly encourage examiners to participate in this workshop, which will strengthen examiners’ knowledge of performance improvement which will assist you in the assessment process.

Upon completion of the Examiner training, Examiners will be assigned to teams based on their overall performance and the need for sector expertise. Additional Just-In-Time training on the Consensus and Site Visit processes is delivered by the assigned Team Leader.

Details on all examiner training modules are outlined below:

**Criteria 101:**

Pre-work assignment **required** prior to attending the Criteria 101 training:

*Download* the files from the Sterling website [www.floridasterling.com](http://www.floridasterling.com) (located under the Examiner tab, Document Downloads)

2017 Case Study (Arroyo)
Sterling Code of Conduct
2017-2018 Examiner Training Requirements
2017-2018 Examiner Designation Classification
2017-2019 Case Study Scorebook
Introduction to Key Factors PPT
2017 Arroyo Case Study Consensus Key Factors
2017-2018 101 Agenda
2017-2018 EA Agenda
2017-2018 Largo Training Agendas

**Schedule** two-three hours to read the entire Arroyo Case Study **prior to** the Criteria 101 workshop.

Bring a copy of the Arroyo Case Study to the Criteria 101 training.
Criteria 102:

It is suggested that you complete the six modules in Criteria 102 prior to the Evaluating Applications Workshop. Each module contains a Reflections survey which must be completed to receive credit for the module. You must complete all six modules prior to October 20, 2017 to be admitted to the Examiner training.

Evaluating Applications Workshop

This workshop is required for new examiners, recommended for return examiners and is designed to prepare participants to complete the case study, a prerequisite for attending Examiner training. The case study simulates the Independent Evaluation stage of the examination process, using lectures and exercises to gain the skills needed to complete the case study. Upon completion of the workshop, participants will receive as a take-away two completed item worksheets.

Through lectures and in class exercises, participants will gain an understanding of the Sterling assessment process used to evaluate management practices; gain a working knowledge of the basic steps to apply the Sterling Criteria in evaluating an application; understand the tools and forms used throughout the case study process; and have a clear understanding of how deliverables should be completed.

During this workshop, participants will learn how to:

- Use key factors in the evaluation process;
- Evaluate an application, based on the Sterling Criteria, to identify strengths and opportunities for improvement in Approach, Deployment, Learning, and Integration for the six Process Categories;
- Identify correlating Results and Innovations related to feedback;
- Complete Item Worksheets within the Scorebook

Pre-work assignment required prior to attending the Evaluating Applications training.

- Complete the Key Factors on-line training on the Sterling website and bring the completion certificate to the Evaluating Applications Workshop.
- Re-read Category 1 (Evaluating Applications focuses on Leadership)
- Bring hard copies of all Examiner Downloads files to the Evaluating Applications Workshop.
Examiner Training (Largo)

This intensive 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 work in a team environment to learn and improve their skills. Through lectures, individual tasks, team assignments, simulations and large group exercises, participants will receive reinforcement of preliminary training, and build skills in evaluation, consensus, and feedback formulation.

Pre-work assignment required prior to attending training:
*Note: if you attended Evaluating Applications, you have already completed these steps.

- *Download the files from the Sterling website [www.floridasterling.com](http://www.floridasterling.com) (located under the Examiner tab, Document Downloads).

- Complete Item Worksheets to document your evaluation of Items 1.1*, 1.2*, 2.1, 2.2, 4.1, 4.2, 6.1 and 6.2.
  - Each worksheet includes 4-6 Key Factors for that Item, 5-8 Independent Evaluation comments (a combination of Strengths and OFIs), and a scoring range for each element of ADLI.

- You are not required to evaluate Categories 3 and 5 but must carefully review the case study responses to these categories to understand integration of these processes in other categories.
  - Email your case study scorebook to examiner@floridasterling.com by no later than Friday, October 20, 2017. These will not be accepted by fax!

- Bring one (1) copy of your completed scorebook to the Largo Examiner Training (please copy one-sided as these copies are used in multiple exercises).

- Contact your mentor or the Sterling Office if you have any questions or need assistance.
Examiner Designations

Once Examiner Candidates have successfully completed all training, they will receive the designation as Examiner. Examiner designations are only valid for the year in which they are received. Examiners may only represent themselves as an Examiner in any verbal or written statements, including Social Media, using the specific designation for that year. For example, new examiners may represent themselves as a Florida Sterling Examiner for 2017-2018. An Examiner who has served multiple years may list those years (e.g. Examiner from 2015 through 2018).

Any examiner who does not complete a required assessment may not claim that year of service. For example, if you successfully complete training in 2017 but choose not to serve on an assessment team during the 2017-2018 cycle, you may no longer represent yourself as an examiner for that cycle.

Experienced Examiners who are unable to participate in an examination cycle will be referred to as an Alumni Examiner for the next two examiner cycles. These individuals are required to represent themselves as Alumni Examiners. If the Alumni Examiners returns within two examination cycles, the Alumni Examiner may retain their previous examiner designation. Examiners who return after two examination cycles will be evaluated during the case study training process and the Examiner designation will be dictated by performance.

All examiners are given an opportunity to serve on at least one of the following assessment processes. Additional detail about these assessment processes will be providing during training:

- Sterling Manufacturing Business Excellence Award
- Sterling Challenge
- Sterling Collaborative
- Governor's Sterling Award
- Governor's Sterling Sustained Excellence Award