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| **Florida Sterling Council** |

**2020-2021 Case Study**

**Scorebook**

Do not change formats or forms; this includes font style (Arial) and size (10), paragraph spacing, section breaks, etc.

1. Schedule adequate time to complete the entire assignment by **Wednesday, October 14, 2020**.
2. To start, “Save As**”** this documentto a secure location that you will not lose or forget!   
   Title the file with your initials added to the document title (*2018-2019 Case Study Scorebook-ABC.docx*).   
   We recommend that you save frequently and in multiple locations.
3. Double click on the Header above.   
   Enter “Case Study” in the Applicant Code, and your name behind “Examiner Name:”,then close the header.   
   The document is setup to carry the same Header from start to finish.   
   Review all pages to ensure every page contains the completed header information.  
   If you do not see the header, go to View and choose Print Layout.
4. Worksheets are formatted with bullets and easy-to-use tables (follow instructions below).
5. Item Worksheets and other Scorebook elements are separated using Section Breaks - do not delete them!   
   If you want a page break within a section, use the “control-enter” key combination (or, *Insert* / *Break* / *Page Break* on the tool bar).   
   This will maintain the specific Item sections.
6. Allow text to wrapas you type.   
   Tab to move from one column to the next; tab from the final column to begin the next row.
7. Add, Copy/Move, or Delete rows as needed.
   1. To add a row: Tab from the final column; or use Copy/Paste to preserve pre-typed content.
   2. To Copy/Move a row**:**  From the left-hand margin, highlight the row, Copy (Ctrl “C”);   
      place cursor where you want the copied row and Paste (Ctrl “V”).
   3. Delete unused rows(save a tree!)**:** from the left-hand margin, highlight the row and Cut (Ctrl “X).
8. When you complete the scorebook:
   1. Go to the Deliverables page and validate your completion.
   2. Double click on the checkboxes and change the default value from “not checked” to “checked” and click “OK”.
   3. Enter the number of hours worked.
   4. Email your completed Case Study to [examiner@floridasterling.com](mailto:examiner@floridasterling.com)

**Deliverables**

* Ensure you have completed the following:

Item Worksheets for Items: 2.1, 3.1, 4.1, 5.1, and 6.1

* + 4-6 most relevant Key Factors for that Item
  + 5-8 total Comments (Strengths and OFIs) for each Item
  + Any Innovations found are noted
  + Results correlation is completed

Scoring Matrix & Score Range for Items: 2.1, 3.1, 4.1, 5.1, and 6.1

Header has your name on every page

Case Study Debrief questions (last page) completed

Hours Worked:.

* Email your completed Case Study Scorebook to the Sterling Office at [examiner@floridasterling.com](mailto:examiner@floridasterling.com)   
  by Wednesday, October 14, 2020.

**Instructions / Samples**

**Sample Key Factors**

**Key Factors**: Copy/paste only the 4-6 most important Key Factors relevant to this Item. Enter one Key Factor and its number per row.

|  |  |
| --- | --- |
| **1** | **Organizational Environment:** Regional organ and tissue procurement organization (OPO) for 3.2 million people living within a federally assigned territory inclusive of 62 counties location within two states. Multi-faceted, non-profit organization dedicated to saving and improving lives. Is one of fifty-eight (58) federally, designated organizations within the United States. |
| **3** | **Mission, Vision, and Values:** (1) Mission—We save and improve lives.; (2) Vision—Organs and tissues are always available.; (3) Values—Compassion; Quality; Teamwork; Innovation; Honesty  **Culture:** Strong focus to meet the mission**;** environment that encourages and supports accountability; employee and organizational learning, innovation, agility, intelligent risk taking; healthy, safe, and secure work environment; continuous process improvements; supporting strategies, systems, and methods for achieving performance excellence |
| **10** | **Organizational Structure:** (1) Board of Directors—Validate Vision, Mission, Values; Establish Accountability; (2) Leadership Team (ELT and LT)—Create the Environment; Operationalize the Strategy; Monitor the Performance; (3) Workforce—Support and Facilitate Organ & Tissue Donation |
|  | Etc. |

**Comment Instructions**

| **Criteria** | **Evidence** | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Criteria Statement**  **Approach** | **Deployment** | **Learning** | **Integration** | **Innovation** | **Results** |
| **Instructions:**   * Do not delete any of the criteria in this column. * Copy/Paste criteria as needed for your comments. | **Strength  Instructions:**  A Strength comment will always have an Approach.  Therefore, the Criteria Statement is always in the Approach column (what), followed by explanation of the approach (how). | **Strength Instructions:**  Example(s) of who, where, when | **Strength Instructions:**  Example(s) of cycle(s) of improvement | **Strength Instructions:**  The **single, most relevant** Key Factor | **Strength Instructions:**  Example(s) of innovation, if identified | **Strength Instructions:**  Results related to the comment |
|  | **OFI Instructions:**  OFI comment Criteria Statement is included in the A, or D, or L column.  All Text is Red. |  |  | **OFI Instructions:**  The **single, most relevant** Key Factor |  | **OFI Instructions:**  Results related to the comment |

Refer to Comment Samples on the following page.

You may want to print pages 4 and 5 for reference as you write your comments.

**Sample Comments**

**Sample Strength Comment:**

| **Criteria** | **Evidence** | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Criteria Statement**  **Approach** | **Deployment** | **Learning** | **Integration** | **Innovation** | **Results** |
| **1.1a(1)**  **Vision, Values, and Culture:**  How do senior leaders set your organization’s vision values, and culture through your leadership system?  How do senior leader’s personal actions reflect commitment to the vision, values, and culture?  How do senior leaders deploy the vision, values, and culture through your leadership system, to the workforce, to key suppliers and partners, and to customers and other stakeholders, as appropriate? | The vision/values (V/V) are set as part of the organization’s Leadership System (LS) in step #1, Create the Environment.  The Leadership Team (LT) serve as role models and demonstrate their commitment to the core values by setting the culture via the Leadership System which consists of 1) Create the Environment, 2) Operationalize the Strategy, and 3) Monitor the Performance. | The Leadership Team (LT) deploys the vision and values through multiple communication mechanisms as managed by the Communication process such as reviewing and emphasizing the V/M/V during board, staff, and department meetings; and incorporating donor family, recipient, and patient stories into multiple communication methods.  The LT’s commitment is demonstrated by setting the culture; and displayed through daily practice, during staff and departmental meetings, and in Rounding for Outcomes (RFO) conversations. | The LT’s 360-degree review process provides systematic feedback to all LT members, including exhibiting behaviors consistent with the V/V. | KF #3 – Culture: Strong focus to meet the mission | Incorporating stories of donor families, recipients, and patients waiting for a transplant into multiple communication mechanisms. | Figure 7.4-1 – Perception of Leadership – Deploy vision and values  Favorable Trends for Workforce and Customer Surveys  Favorable Level for Donor Family Survey |

**Always complete the *Integration* and *Results* columns; either a comment/note**

**Sample OFI Comment:**

| **Criteria** | **Evidence** | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Criteria Statement**  **Approach** | **Deployment** | **Learning** | **Integration** | **Innovation** | **Results** |
| **– 1.1a(2)** | It is not clear how the organization monitors and responds to breaches of ethical behavior. For example, the organization encourages employees and stakeholders to report any questionable behavior, including a hotline reporting system to ensure confidentiality; however, it is not clear how the organization monitors and responds to these reported issues. |  |  | KF #3 – Culture: environment that encourages and supports accountability |  | Figure 7.4-5 – Corporate Compliance Hotline Issues  Unfavorable Trend |

**Each OFI is for only one Evaluation Factor: Approach, or Deployment, or Learning.**

**All OFIs start with, “It is not clear…”, “It is not evident… “, or “it is not apparent…”.**

**Always complete the *Integration* and *Results* columns.**

**Do not write OFI comments for *Innovation* or *Results*.**

**Item 1.1 Worksheet—Senior Leadership**

**Key Factors**: Copy/paste only the 4-6 most important and relevant Key Factors relevant to this Item. Enter one Key Factor and its number per row.

|  |  |
| --- | --- |
| **1** | **Organizational Environment:** Regional organ and tissue procurement organization (OPO) for 3.2 million people living within a federally assigned territory inclusive of 62 counties location within two states. Multi-faceted, non-profit organization dedicated to saving and improving lives. Is one of fifty-eight (58) federally, designated organizations within the United States. |
| **3** | **Mission, Vision, and Values:**  Mission: We save and improve lives  Vision: Organs and tissues are always available  Values: Compassion, Quality, Teamwork, Innovation, Honesty  **Culture:** strong focus to meet the mission; environment that encourages and supports accountability; employee and organizational learning, innovation, agility, and intelligent risk taking; healthy, safe, and secure work environment; continuous process improvements; supporting strategies, systems, and methods for achieving performance excellence |
| **10** | **Organizational Structure:**  Board of Directors: validate Vision, Mission, Values; establish accountability  Leadership Team (ELT and LT): create the environment, Operationalize the Strategy, Monitor the Performance  Workforce: Support and Facilitate Organ & Tissue Donation |
| **13** | **Key Stakeholder Groups / Requirements:** Communities within Service Area – Requirements: Comply with legal, ethical, and regulatory requirements while providing quality organs and tissues; education, transparency, and accessibility  Workforce – Requirements: Connection with V/M/V, excellent benefits; coworkers/teamwork  Board of Directors – Requirements: Strategic Planning, administration, financial management |
| **21** | **Strategic Challenges:**  SC01 – Business / Industry Changes SC02 – Operational – Authorization SC03 – Societal Responsibility – Increase Registry SC04 – Workforce Retention |
| **23** | **Performance Improvement System:** Plan, Do, Study, Act  **Evaluation / Review Processes:**  (1) Identify the Problem (What is the problem?)  (2) Set the Aim (What are we trying to accomplish?)  (3) Select the Change (What changes could we make to improve?)  (4) Select the Measure (How will we know we have improved?)  (5) Test the Change |

| **Criteria** | **Evidence** | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Criteria Statement Approach** | **Deployment** | **Learning** | **Integration** | **Innovation** | **Results** |
| **1.1a(1)**  **Vision, Values, and Culture:**  How do senior leaders set your organization’s vision values, and culture through your leadership system?  How do senior leader’s personal actions reflect commitment to the vision, values, and culture?  How do senior leaders deploy the vision, values, and culture through your leadership system, to the workforce, to key suppliers and partners, and to customers and other stakeholders, as appropriate? | The vision/values (V/V) are set as part of the organization’s Leadership System (LS) in step #1, Create the Environment.  The Leadership Team (LT) serve as role models and demonstrate their commitment to the core values by setting the culture via the Leadership System which consists of 1) Create the Environment, 2) Operationalize the Strategy, and 3) Monitor the Performance. | The Leadership Team (LT) deploys the vision and values through multiple communication mechanisms as managed by the Communication process such as reviewing and emphasizing the V/M/V during board, staff, and department meetings; and incorporating donor family, recipient, and patient stories into multiple communication methods.  The LT’s commitment is demonstrated by setting the culture; and displayed through daily practice, during staff and departmental meetings, and in Rounding for Outcomes (RFO) conversations. | The LT’s 360-degree review process provides systematic feedback to all LT members, including exhibiting behaviors consistent with the V/V. | KF #3 – Culture: Strong focus to meet the mission | Incorporating stories of donor families, recipients, and patients waiting for a transplant into multiple communication mechanisms. | Figure 7.4-1 – Perception of Leadership – Deploy vision and values  Favorable Trends for Workforce and Customer Surveys  Favorable Level for Donor Family Survey |
| **– 1.1a(1)** |  |  | It is not clear how the organization evaluates its vision/values (V/V) to determine when modifications may need to be made. For example, during a recent Strategic Planning Session, it was determined its value of Improvement needed to be changed to Innovation. However, it is not clear if there is a method to systematically review the V/V to remain current. | KF #2 – Vision: “Organs and tissues are always available” and Values: Compassion, Quality, Teamwork, Innovation, Honesty |  | N/A |
| **1.1a(2)**  **Promoting Ethical Behavior**:  How do senior leaders’ personal actions promote and demonstrate ethical behavior in all interactions?  How do they promote, ensure, and measure ethical behavior throughout the organization; and in interactions with the workforce, customers, partners, suppliers, and other stakeholders?  How do they monitor and respond to breaches of ethical behavior? | The LT’s actions personally demonstrate the highest standards of ethical behavior by promoting the principles and ideas reflected in the vision/values (V/V).  The LT adheres to workplace policies including the Code of Professional Conduct, Donor/Recipient Confidentiality, and Conflict of Interest (COI) with a signed, annual disclosure.  Through the Corporate Compliance Program (CCP), leaders promote an atmosphere that encourages employees and stakeholders to report any questionable behavior. | Behavior is on display and visible to the staff, work system, and department meetings as well as regularly through Rounding for Outcomes (RFO) conversations.  The organization’s entire workforce, including the LT and Board of Directors (BoD) is trained annually on the CCP policy. | The LT reviews the CCP using the Plan, Do, Study, Act (PDSA) methodology to identify and implement opportunities for improvement.  Compliance policies are reviewed by the organization’s quality staff. | KF #3 – Culture: environment that encourages and supports accountability |  | Figure 7.4-5 – Corporate Compliance Hotline Issues  Unfavorable Trend |
| **– 1.1a(2)** | It is not clear how the organization monitors and responds to breaches of ethical behavior. For example, the organization encourages employees and stakeholders to report any questionable behavior, including a hotline reporting system to ensure confidentiality; however, it is not clear how the organization monitors and responds to these reported issues. |  |  | KF #3 – Culture: environment that encourages and supports accountability |  | Figure 7.4-5 – Corporate Compliance Hotline Issues  Unfavorable Trend |
| **1.1b**  **Communication:**  How do senior leaders communicate with and engage the entire workforce, key partners, and key customer?  How do they:   * encourage frank, two-way communication; * communicate key decisions and needs for organizational change; and * take a direct role in motivating the workforce toward high performance and a customer and business focus? | To encourage two-way communication with employees, the LT uses the Communication Process which supports an open-door policy and the Rounding for Opportunities (RFO) which enables the consistent practice of asking specific questions to obtain actionable information.  The CEO hosted group lunch, Café CEO, allows employees to have access and conversations with the CEO in small-group settings.  A customer and business focus and motivation for high performance are also accomplished using the Communication Process. | Feedback is provided at staff meetings via the Stoplight Report, which collects information obtained in rounding and identifies suggestions, actions in progress, or suggestions not taken.  Personal notes of recognition can be written by any member of the LT, including the CEO, to acknowledge special achievements. | The Leadership System (LS) – which includes the Communication Process - has gone through several cycles of improvement, including the addition of new mechanisms to communicate with the workforce and more opportunities for interaction with the LT.  LT members round with workforce members to gain knowledge, including the support needed to help the workforce member achieve his/her goals, additional resource needs, and peer recognition. | KF #3 – Values: Teamwork, Honesty | The Stoplight Report gathers information collected through Rounding for Opportunities. In addition to closing the feedback loop, it serves as possible input to organizational improvements. | Figure 7.3-13 – My Opinion Seems to Count Favorable Trends by organization, LT, and staff  Figure 7.4-1 – Perception of Leadership – Encourage 2-way communication  Favorable Trends by workforce and customers  Favorable Level for Donor Family Survey  Figure7-4-2 – Monthly Leader Rounding with Staff  Favorable Trends  Lags Comparison |
| **– 1.1b** |  |  |  |  |  |  |
| **1.1c(1)**  **Creating an Environment for Success:**  How do senior leaders create an environment for success now and in the future?  How do they:   * create and reinforce your organizational culture, and a culture that fosters customer and workforce engagement; * cultivate organizational agility, accountability, organizational and individual learning, innovation, and intelligent risk taking; * participate in succession planning and the development of future organizational leaders? | The LT creates a successful organization now and in the future through the Strategic Planning Process (SPP) and the Leadership System (LS) which allows the organization’s planning and key processes to create integrated work systems.  Step #1 of the Leadership System ensures the organization is able to create and reinforce an organizational culture that fosters workforce and customer engagement.  The LT develops succession plans for leadership development to ensure there are opportunities for future leaders to grow within the organization and appropriate leadership is available should a vacancy occur. | To ensure sustainability, processes are mapped and documented, and succession plans are developed to ensure accomplishment of the mission.  Key strategic and operational decisions are communicated to the workforce and key partners through the Communication Process.  An environment for agility and achievement of the mission is done by setting clear expectations of accountability for achieving strategies, tactics, and actions as part of systematically deploying performance reviews linked to the vision/values (V/V) and mission.  Succession plans are aligned with the annual performance evaluations to ensure current and future leaders are receiving needed leadership training.  LT development includes attendance at state and national industry conferences and attendance at nation-wide, non-industry conferences. | The Operational Management Process (OMP) is utilized to review, analyze, improve, and prioritize the organization’s internal and external key processes.  The organization’s performance is monitored by the Leadership Team (LT) using the Performance Measurement System (PMS)  Leadership and employee performance are monitored via the Performance Evaluation Process (PEP).  A 360-degree feedback review is used to identify specific improvement opportunities for current and future leaders. | KF #13 – Key Stakeholder Groups / Requirements:  Communities within Service Area: Transparency  Workforce: Connection with V/M/V  Board of Directors: Strategic Planning, Administration, and Financial Management |  | Figure 7.4-1 – Perception of Leadership – Deploy vision and values  Favorable Trends for Workforce and Customer Surveys  Favorable Level for Donor Family  Figure 7.4-1 – Perception of Leadership – Encourage 2-way communication  Favorable Trends by workforce and customers  Favorable Level for Donor Family  Results not provided for succession planning or development of future leaders |
| **– 1.1c(1)** | * It is not clear how senior leaders cultivate organizational agility, innovation, and intelligent risk taking. For example, the organization stays aware of industry knowledge and best practices. However, it is not apparent how the organization systematically cultivates innovation. |  |  | KF #3 Culture:organizational innovation, agility, and intelligent risk taking |  | Results not provided |
| **1.1c(2)**  **Creating a Focus on Action:**  How do senior leaders create a focus on action that will achieve the organization’s mission?  How do senior leaders:   * identify needed actions in setting expectations for organizational performance; * include a focus on creating and balancing value for customers and other stakeholders; and * demonstrate personal accountability for the organization’s actions? | Through the Leadership System (LS), the LT creates a focus on accomplishing the organization’s objectives, improving performance, and achieving the vision/values (V/V) and mission through the Leadership System.  Step #1 of the LS identifies opportunities;  Step #2 establishes a focus on actions; and Step #3 monitors the performance.  Senior leader accountability for the organization’s actions is accomplished through annual goal plans.  The LT uses the Plan; Do; Study; Act (PDSA) methodology to continually take the LS to the next level in pursuit of the vision. | Cascading scorecards are integrated into work systems, departments, and many individual metric levels and incorporated into the web-based Performance Management System (PMS). | The cascading scorecards are a key piece of the Performance Measurement System (PMS) and are reviewed at each work system meeting.  This review ensures the ability to recognized the need to modify or implement action plans (APs) as priorities change.  Systematic reviews of the APs, via one-on-one meetings with managers, provide workforce accountability and opportunities to ensure organizational performance is progressing to plan.  AP progress is reviewed at all LT meetings.  The Corporate Compliance Program (CCP) has been through three cycles of evaluation and improvement in the last four years.  This resulted in greater engagement with employees and stakeholders and changes in annual compliance policy training. | KF# 21 – Strategic Challenges: SC01 – Business / Industry Changes |  | Figure 7.4-1 – Perception of Leadership – Create a focus on action  Favorable Trend for Workforce Survey  Flat for Customer Survey  Favorable Level for Donor Family Survey |
| **– 1.1c(2)** |  |  |  |  |  |  |

**Item 1.1 Scoring Matrix: Use H (high), M (mid), or L (low)** to indicate relative position in the scoring band.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Factor** | **0–5%** | **10–25%** | **30–45%** | **50–65%** | **70–85%** | **90–100%** |
| **Approach** | No systematic approach to Item questions evident; information is anecdotal. | The beginning of a systematic approach to the basic questions of the Item is evident. | An effective, systematic approach, responsive to the basic questions of the Item, is evident. | An effective, systematic approach, responsive to the overall questions of the Item, is evident. | An effective, systematic approach, responsive to the multiple questions of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple questions of the Item, is evident. |
|  |  |  | **M** |  |  |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic questions of the Item. | The approach is deployed, although some areas or work units are in the early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
|  |  |  | **M** |  |  |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
|  |  |  | **H** |  |  |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is aligned with overall organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
|  |  |  | **H** |  |  |

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| **Independent Evaluation Overall Item Score Range:**  🡻 Place “H, M, or L” in appropriate box | |
|  | 0-5% |
|  | 10-25% |
|  | 30-45% |
| **M** | 50-65% |
|  | 70-85% |
|  | 90-100% |

**Item 2.1 Worksheet—Strategy Development**

**Key Factors**: Copy/paste only the 4-6 most important and relevant Key Factors relevant to this Item. Enter one Key Factor and its number per row.

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| **Criteria** | **Evidence** | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Criteria Statement Approach** | **Deployment** | **Learning** | **Integration** | **Innovation** | **Results** |
| **2.1a(1)**  **Strategy Development Process**  How do you conduct your strategic planning process, including key process steps?  How does your strategic planning process include addressing your strategic challenges, organizational agility, and leveraging your strategic advantages?  How does your strategic planning process address the potential need for transformational change, prioritization of change initiatives, and organizational agility? |  |  |  |  |  |  |
| **– 2.1a(1)** |  |  |  |  |  |  |
| **2.1a(2)**  **Innovation:**  How does your strategy development process stimulate and incorporate innovation?  How do you identify strategic opportunities?  How do you decide which strategic opportunities are intelligent risks to pursue? |  |  |  |  |  |  |
| **– 2.1a(2)** |  |  |  |  |  |  |
| **2.1a(3)**  **Strategy Considerations:**  How do you collect and analyze relevant data and develop information for use in your strategic planning process?  How do you include these key elements of risk:   * Your Strategic Challenges and Strategic Advantages * Potential changes in your regulatory and external environment * Potential blind spots in your strategic planning process and information * Your ability to execute the strategic plan |  |  |  |  |  |  |
| **– 2.1a(3)** |  |  |  |  |  |  |
| **2.1a(4)**  **Work Systems and Core Competencies:**  How do you consider your strategic objectives, work systems, and core competencies to decide which key processes will be accomplished by your workforce and which by external suppliers, partners, and collaborators?  How do you determine what future organizational core competencies and work systems you will need? |  |  |  |  |  |  |
| **– 2.1a(4)** |  |  |  |  |  |  |
| **2.1b(1)**  **Key Strategic Objectives:**  How does your strategic planning process identify your key strategic objectives and your timetable for achieving them?  What are your organization’s key strategic objectives, and goals for achieving them? |  |  |  |  |  |  |
| **– 2.1b(1)** |  |  |  |  |  |  |
| **2.1b(2)**  **Strategic Objective Considerations:**  How do your strategic objectives achieve appropriate balance among varying and potentially competing organizational needs?  How do your strategic objectives:   * address your strategic challenges; * leverage your core competencies, strategic advantages, and strategic opportunities; * balance short- and longer-term planning horizons; and * consider and balance the needs of all key stakeholders? |  |  |  |  |  |  |
| **– 2.1b(2)** |  |  |  |  |  |  |

**Item 2.1 Scoring Matrix: Use H (high), M (mid), or L (low)** to indicate relative position in the scoring band.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Factor** | **0–5%** | **10–25%** | **30–45%** | **50–65%** | **70–85%** | **90–100%** |
| **Approach** | No systematic approach to Item questions is evident; information is anecdotal. | The beginning of a systematic approach to the basic questions of the Item is evident. | An effective, systematic approach, responsive to the basic questions of the Item, is evident. | An effective, systematic approach, responsive to the overall questions of the Item, is evident. | An effective, systematic approach, responsive to the multiple questions of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple questions of the Item, is evident. |
|  |  |  |  |  |  |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic questions of the Item. | The approach is deployed, although some areas or work units are in the early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
|  |  |  |  |  |  |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
|  |  |  |  |  |  |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is aligned with overall organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
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| **Independent Evaluation Overall Item Score Range:**  🡻 Place “H, M, or L” in appropriate box | |
|  | 0-5% |
|  | 10-25% |
|  | 30-45% |
|  | 50-65% |
|  | 70-85% |
|  | 90-100% |

**Item 3.1 Worksheet— Customer Expectations**

**Key Factors**: Copy/paste only the 4-6 most important and relevant Key Factors relevant to this Item. Enter one Key Factor and its number per row.

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| **Criteria** | **Evidence** | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Criteria Statement Approach** | **Deployment** | **Learning** | **Integration** | **Innovation** | **Results** |
| **3.1a(1)**  **Current Customers:**  How do you listen to, interact with, and observe customers to obtain actionable information?  How do your listening methods vary for different customers, customer groups, or market segments?  How do you listening methods vary across the customer lifecycle?  How do you seek immediate and actionable feedback from customers on quality of products and services, customer support, and transactions? |  |  |  |  |  |  |
| **– 3.1a(1)** |  |  |  |  |  |  |
| **3.1a(2)**  **Potential Customers**:  How do you listen to potential customers to obtain actionable information?  How do you listen to former customers, competitors’ customers, and other potential customers to obtain actionable information on products and services, customer support, and transactions, as appropriate? |  |  |  |  |  |  |
| **– 3.1a(2)** |  |  |  |  |  |  |
| **3.1b(1)**  **Customer Segmentation:**  How do you determine your customer groups and market segments?  How do you:   * use information on customers, markets, and product offerings to identify current and anticipate future customer groups and market segments; and * determine which customers, customer groups, and market segments to emphasize and pursue for business growth? |  |  |  |  |  |  |
| **– 3.1b(1)** |  |  |  |  |  |  |
| **3.1b(2)**  **Product Offerings:**  How do you determine product offerings?  How do you   * determine customer and market needs and requirements for product offerings and services; * identify and adapt product offerings to meet the requirements and exceed the expectations of your customer groups and market segments; and * identify and adapt product and service offerings to enter new markets, to attract new customers, and to create opportunities to expand relationships with current customers, as appropriate? |  |  |  |  |  |  |
| **– 3.1b(2)** |  |  |  |  |  |  |

**Item 3.1 Scoring Matrix: Use H (high), M (mid), or L (low)** to indicate relative position in the scoring band.

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| **Factor** | **0–5%** | **10–25%** | **30–45%** | **50–65%** | **70–85%** | **90–100%** |
| **Approach** | No systematic approach to Item questions is evident; information is anecdotal. | The beginning of a systematic approach to the basic questions of the Item is evident. | An effective, systematic approach, responsive to the basic questions of the Item, is evident. | An effective, systematic approach, responsive to the overall questions of the Item, is evident. | An effective, systematic approach, responsive to the multiple questions of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple questions of the Item, is evident. |
|  |  |  |  |  |  |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic questions of the Item. | The approach is deployed, although some areas or work units are in the early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
|  |  |  |  |  |  |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
|  |  |  |  |  |  |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is aligned with overall organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
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| **Independent Evaluation Overall Item Score Range:**  🡻 Place “H, M, or L” in appropriate box | |
|  | 0-5% |
|  | 10-25% |
|  | 30-45% |
|  | 50-65% |
|  | 70-85% |
|  | 90-100% |

**Item 4.1 Worksheet—Measurement, Analysis, and Improvement of Organizational Performance**

**Key Factors**: Copy/paste only the 4-6 most important and relevant Key Factors relevant to this Item. Enter one Key Factor and its number per row.

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| **Criteria** | **Evidence** | | | | | |
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| **Criteria Statement Approach** | **Deployment** | **Learning** | **Integration** | **Innovation** | **Results** |
| **4.1a(1)**  **Performance Measures:**  How do you track (select, collect, align, and integrate) data and information on daily operations and on overall organizational performance?  How do you track progress on achieving strategic objectives and action plans? |  |  |  |  |  |  |
| **– 4.1a(1)** |  |  |  |  |  |  |
| **4.1a(2)**  **Comparative Data:**  How do you select comparative data and information to support fact-based decision making? |  |  |  |  |  |  |
| **– 4.1a(2)** |  |  |  |  |  |  |
| **4.1a(3)**  **Measurement Agility:**  How do you ensure that your performance measurement system can respond to rapid or unexpected organizational or external changes and provide timely data? |  |  |  |  |  |  |
| **– 4.1a(3)** |  |  |  |  |  |  |
| **4.1b**  **Performance Analysis and Review:**  How do you review your organization’s performance?  How do you use your key organizational performance measures, as well as comparative data, in these reviews?  What analyses do you perform to support these reviews and ensure that conclusions are valid?  How do your organization and its senior leaders use these reviews to:   * assess organizational success, competitive performance, financial health; * progress on achieving your strategic objectives and action plans; and * respond rapidly to changing organizational needs and challenges in your operating environment? |  |  |  |  |  |  |
| **– 4.1b** |  |  |  |  |  |  |
| **4.1c(1)**  **Future Performance:**  How do you project your organization’s future performance?  How do you use findings from performance reviews and key comparative and competitive data in your projections? |  |  |  |  |  |  |
| **– 4.1c(1)** |  |  |  |  |  |  |
| **4.1c(2)**  **Continuous Improvement and Innovation:**  How do you use comparative data and findings from performance reviews to develop priorities for continuous improvement and opportunities for innovation? |  |  |  |  |  |  |
| **– 4.1c(2)** |  |  |  |  |  |  |

**Item 4.1 Scoring Matrix: Use H (high), M (mid), or L (low)** to indicate relative position in the scoring band.

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| **Factor** | **0–5%** | **10–25%** | **30–45%** | **50–65%** | **70–85%** | **90–100%** |
| **Approach** | No systematic approach to Item questions is evident; information is anecdotal. | The beginning of a systematic approach to the basic questions of the Item is evident. | An effective, systematic approach, responsive to the basic questions of the Item, is evident. | An effective, systematic approach, responsive to the overall questions of the Item, is evident. | An effective, systematic approach, responsive to the multiple questions of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple questions of the Item, is evident. |
|  |  |  |  |  |  |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic questions of the Item. | The approach is deployed, although some areas or work units are in the early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
|  |  |  |  |  |  |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
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| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is aligned with overall organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
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| **Independent Evaluation Overall Item Score Range:**  🡻 Place “H, M, or L” in appropriate box | |
|  | 0-5% |
|  | 10-25% |
|  | 30-45% |
|  | 50-65% |
|  | 70-85% |
|  | 90-100% |

**Item 5.1 Worksheet— Workforce Environment**

**Key Factors**: Copy/paste only the 4-6 most important and relevant Key Factors relevant to this Item. Enter one Key Factor and its number per row.

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| **Criteria** | **Evidence** | | | | | |
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| **Criteria Statement Approach** | **Deployment** | **Learning** | **Integration** | **Innovation** | **Results** |
| **5.1a(1)**  **Capability and Capacity Needs:**  How do you assess your workforce capability and capacity needs?  How do you assess the skills, competencies, certifications, and staffing levels you need? |  |  |  |  |  |  |
| **– 5.1a(1)** |  |  |  |  |  |  |
| **5.1a(2)**  **New Workforce Members:**  How do you recruit, hire, and onboard new workforce members?  How do you ensure:   * your workforce represents the diverse ideas, cultures, and thinking of your hiring and customer communities; and * the fit of new workforce members with your organizational culture? |  |  |  |  |  |  |
| **– 5.1a(2)** |  |  |  |  |  |  |
| **5.1a(3)**  **Workforce Change Management:**  How do you prepare your workforce for changing capability and capacity needs?  How do you   * balance the needs of your workforce with your organization to ensure continuity, prevent workforce reductions, and minimize the impact of any necessary reductions; * prepare for and manage any periods of workforce growth; and * prepare your workforce for changes in organizational structure and work systems, when needed? |  |  |  |  |  |  |
| **– 5.1a(3)** |  |  |  |  |  |  |
| **5.1a(4)**  **Work Accomplishment:**  How do you organization and manage your workforce to:   * accomplish your organization’s work, * capitalize on your organization’s core competencies, * reinforce a customer and business focus, and * exceed performance expectations? |  |  |  |  |  |  |
| **– 5.1a(4)** |  |  |  |  |  |  |
| **5.1b(1)**  **Workforce Environment:**  How do you ensure workplace health, security, and accessibility for the workforce?  What are your performance measures and improvement goals for your workplace environmental factors?  What significant differences are there in these factors and the performance measures or targets to different workplace segments? |  |  |  |  |  |  |
| **– 5.1b(1)** |  |  |  |  |  |  |
| **5.1b(2)**  **Workforce Benefits and Policies:**  How do you support your workforce via services, benefits, and policies?  How do you tailor the needs of a diverse workforce and different workforce groups and segments? |  |  |  |  |  |  |
| **– 5.1b(2)** |  |  |  |  |  |  |

**Item 5.1 Scoring Matrix: Use H (high), M (mid), or L (low)** to indicate relative position in the scoring band.

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| **Factor** | **0–5%** | **10–25%** | **30–45%** | **50–65%** | **70–85%** | **90–100%** |
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|  | 30-45% |
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|  | 70-85% |
|  | 90-100% |

**Item 6.1 Worksheet—Work Processes**

**Key Factors**: Copy/paste only the 4-6 most important and relevant Key Factors relevant to this Item. Enter one Key Factor and its number per row.

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| **Criteria** | **Evidence** | | | | | | | | | | | |
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| **Criteria Statement Approach** | | **Deployment** | | **Learning** | | **Integration** | | **Innovation** | | **Results** | |
| **6.1a(1)**  **Determination of Product and Process Requirements:**  How do you determine key product and work process requirements? |  | |  | |  | |  | |  | |  | |
| **– 6.1a(1)** | |  | |  | |  | |  | |  | |  | |
| **6.1a(2)**  **Key Work Processes:**  How do you determine your key work processes?  What are your organization’s key work processes?  What are the key requirements for these work processes? |  | |  | |  | |  | |  | |  | |
| **– 6.1a(2)** | |  | |  | |  | |  | |  | |  | |
| **6.1a(3)**  **Design Concepts:**  How do you design your products, services, and work processes to meet requirements?  How do you incorporate:   * new technology, * organizational knowledge * product and service excellence, * customer value, * consideration of risk, and * the potential need for agility into these products, services, and processes? |  | |  | |  | |  | |  | |  | |
| **– 6.1a(3)** | |  | |  | |  | |  | |  | |  | |
| **6.1b(1)**  **Process Implementation:**  How does your day-to-day operation of work processes ensure that they meet key process requirements?  What key performance measures or indicators and in-process measures do you use to control and improve your work processes?  How do these measures relate to end-product quality and performance measures? |  | |  | |  | |  | |  | |  | |
| **– 6.1b(1)** |  | |  | |  | |  | |  | |  | |
| **6.1b(2)**  **Support Processes:**  How do you determine your key support processes?  What are your key support processes?  How does your day-to-day operations of these processes ensure that they meet key business requirements? |  | |  | |  | |  | |  | |  | |
| **– 6.1b(2)** | |  | |  | |  | |  | |  | |  | |
| **6.1b(3)**  **Product, Service, and Process Improvement:**    How do you improve your work processes and support processes to:   * improve products and services, * improve process performance, * enhance your core competencies, and * reduce variability? |  | |  | |  | |  | |  | |  | |
| **– 6.1b(3)** | |  | |  | |  | |  | |  | |  | |
| **6.1c**  **Supply-Network Management:**  How do you manage your supply network?  How do you select suppliers that:   * are qualified and positioned to meet your operational needs, * enhance your performance, * support your strategic objectives, and * enhance your customers’ satisfaction?   How do you:   * promote alignment and collaboration within your supply network; * communicate performance expectations, * measure and evaluate suppliers’ performance, * provide feedback to help them improve, and * deal with poorly performing suppliers? |  | |  | |  | |  | |  | |  | |
| **– 6.1c** | |  | |  | |  | |  | |  | |  | |
| **6.1d**  **Innovation Management:**  How do you pursue your opportunities for innovation?  How do you pursue the strategic opportunities that you determine are intelligent risks?  How do you make financial and other resources available to pursue these opportunities?  How do you decide to discontinue pursuing opportunities at the appropriate time? |  | |  | |  | |  | |  | |  | |
| **– 6.1d** |  | |  | |  | |  | |  | |  | |

**Item 6.1 Scoring Matrix: Use H (high), M (mid), or L (low)** to indicate relative position in the scoring band.

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**Case Study Debrief**

Once you’ve finished your case study, please answer the following questions.

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| 1. What did you struggle with in completing the Case Study? |
| 2. What were your key learnings while completing the Case Study? |
| 3. What questions about the Independent Evaluation process do you have? |
| 4. Share any insights or tips that you had when completing the Case Study? | |