

Visit [imec.org/excellence](https://imec.org/excellence) for the 2021 Examiner Application.

Serving as a member of the IMEC Recognition Program Board of Examiners provides unparalleled professional development supported by training in the Baldrige Excellence Framework™, our nation's standard of excellence. Examiners gain leadership skills and business acumen, while helping drive enterprise excellence in Illinois. Service as an examiner offers access to an extensive network of quality professionals, as well benchmarking and growth opportunities, and exposure to best practices across a wide range of industries.

The Board of Examiners is made up of leading quality, business, healthcare, manufacturing, and education experts from across Illinois. It includes individuals selected from industry, professional and trade organizations, government agencies, other non-profit groups, and the ranks of the retired.

All examiners must take part in a comprehensive 2-day training course covering the Recognition Program examination process and the Baldrige Excellence Framework®, which includes the Criteria for Performance Excellence®, the Baldrige core values, and the scoring system. Preparation of case study pre-work is required before attending the training session. Those selected to be examiners must have time available to complete pre-work, attend the training course, attend a consensus and site visit training session, conduct reviews and site visits, and complete final feedback reports for the applicants. In addition, new examiners must attend a 2-day orientation to become familiar with examiner expectations and to begin the training pre-work.

### **Selection of Examiners**

Every year, applications are solicited from individuals to serve as examiners. Examiners who served on the board in previous years are required to reapply if they wish to serve again in 2020.

Efforts are made to ensure broad representation and to minimize disproportionate involvement from one industry, sector, or single organization. Coverage and balance of all sectors are important considerations in selection because award applicants come from many types of organizations across the state.

### **Appointments**

Examiners are appointed by the Recognition Program to serve for one recognition cycle (April 2021 to October 2021). Appointments are subject to the Conditions of Involvement and the Code of Ethical Standards & Conduct.

### **Notification Process**

The examiner application deadline is April 15, 2021. Notification will be sent to all Examiner candidates, indicating their selection status. Selected examiners will be notified of their confirmed training dates.

### **Examiner Training**

*All Examiners:* Attend a 2-day virtual training session.

*New Examiners:* In addition to the 2-day training, all first-year examiners must attend the mandatory 2-day virtual New Examiner Training.

*Second- and Third-Year Examiners:* Though not required, the New Examiner Training is recommended for second-year examiners and available for third-year examiners. There is no additional fee to attend this 2-day training.

### **Examiner Qualifications**

Applications for the IMEC Recognition Program Board of Examiners as well as assignment to examiner teams are evaluated on the basis of:

- › *Breadth of experience* – refers to the extent an examiner has in-depth experience in several industrial or service sectors, health care or educational settings, or government entities.
- › *Diversity of experience* – refers to having in-depth experience in multiple sectors, such as manufacturing, service, health care, education, or government. Given the conflict of interest restrictions in assigning examiners to evaluate applicants, the award program seeks candidates with broad experience.
- › *Knowledge of business, industry specialization, or quality practices* – refers to knowledge or skill in an area of high need for the program, such as experience in small business operations, senior management, statistical methods, health care, government, or financial results. Expertise may be demonstrated through relevant job experience, papers or articles written, research conducted, and degrees or certificates earned.
- › *Examiner and team skills* – refers to the interpersonal skills to serve as a good team member and the team-based skills that have proven to be useful as an examiner. These skills include leadership ability, analytical ability (particularly as it applies to evaluating an organization), communication skills (both oral and written), collaboration, time-management skills, and the commitment to meet deadlines.
- › *Demonstrated performance during Examiner Training* – refers to the applicant's successful completion of Examiner Training. Factors include completion of training assignments, leadership and/or active participation in group exercises, ability to work with others, attitude, and skills improvement during the training course.

### **Duties of Examiners**

Examiners review, comment upon, and score written applications and prepare Feedback Reports for applicants. The role of an examiner includes mandatory participation in consensus meetings and site visits. Board members contribute significantly to the Recognition Program process by serving as representatives for the program.

### **Number of Examiners for 2021**

The number of Examiners required for the 2021 award cycle is dependent on several factors, the primary factor being the number of applying organizations. In general, all examiners whose applications are accepted and who successfully complete Examiner Training will receive an assignment on a Tier I (Interest in Excellence), Tier II (Focus on Excellence), or Tier III (Award for Excellence) application. However, it is possible that an examiner may not be selected to participate on a team.

## Terms and Conditions of Appointment

### 1. *Completion of Application*

Examiner applications must be received in the IMEC office no later than Friday, April 10, 2020. Application submission instructions are available on the Recognition Program website ([www.imec.org/excellence](http://www.imec.org/excellence))

Each Examiner application must include approval for participation by the applicant's manager.

Examiner applicants will be informed of their status in the program by April 20, 2021. After submitting an application, if a candidate finds that s/he would be unable to accept an appointment if offered, s/he should immediately notify the IMEC Recognition Program office at [hbender@imec.org](mailto:hbender@imec.org).

### 2. *Code of Ethical Standards & Conduct*

All applicants for the Board of Examiners must sign and submit the Code of Ethical Conduct to [hbender@imec.org](mailto:hbender@imec.org) by the April 15<sup>th</sup> deadline.

### 3. *Disclosure of Conflict of Interest*

Those selected to serve on the Board of Examiners must provide information regarding conflicts of interest as soon as possible after they receive their team's application. Potential conflict of interest includes, but is not limited to employers, significant ownership, financial interests, client relationships, and affiliations that may present or seem to present a conflict of interest to the examiner's ability to impartially fulfill his/her program duties. Such information will be kept confidential.

### 4. *Term of Appointment*

The term of appointment to the Board is one Award cycle. This period extends from completion of the Examiner Training Course through October 2021.

### 5. *Adherence to Award Process*

Examiners are expected to meet all requirements associated with a fair and competent evaluation, including use of the award Criteria and scoring system, adherence to the evaluation process, fulfillment of site visit requirements, and avoidance of conflicts of interest. Thorough documentation and written communication are essential parts of the overall review process.

### 6. *Travel*

Examiners must pay their own travel costs to their team consensus and site visit training meeting.

Travel costs (mileage, train fare, etc) to the site visit (if applicable) will be reimbursed by the Recognition Program by submitting an expense report to the IMEC Recognition Program office upon completion of the applicant site visit. Hotel and meals during site visit will be provided.

### 7. *Assignment of Examiners*

The award program seeks to provide the fairest, most competent evaluation of each application. Accordingly, examiners are assigned to applications on the basis of their knowledge and experience, consistent with the requirements to avoid conflicts of interest, to apportion the application load equitably, and to adhere to agreed-upon schedules.

### 8. *Training Sessions*

Participation by Board of Examiners in all training courses is critical to the success of the program because these courses include a detailed review of the Baldrige Performance Excellence Framework, the evaluation process, the scoring system, consensus development, site visit requirements, and the Code of Ethical Standards & Conduct.

**Training Expectations**

- › All new/first-year Examiners must complete an 2-day Framework training class
- › All Examiners, both new and returning, must attend the 2-day preparation classes. (These two events will be held in consecutive weeks). Individuals who cannot attend the mandatory scheduled sessions may not serve as examiners.
- › Individuals invited to serve as a Senior Examiner will attend a 1-day training to outline their additional responsibilities. This training will be held virtually on April 21<sup>st</sup>.
- › Examiners are required to complete a 4-hour case study evaluation prior to attending the class.
- › No special classes can be provided for those who cannot attend the scheduled classes.

**9. Time Commitment**

Applicants for the Board of Examiners should give careful consideration to the time commitment required to meet the award review schedule. Average of 125 hours is required from April to October 2021.

The actual commitment will depend on the number and levels of applications reviewed. Although the program seeks to accommodate varying schedules, service on the Board of Examiners is a one-year commitment. Examiners must be able to participate in the program's critical review periods detailed in the award program calendar.

Because Interest in Excellence and Focus on Excellence applications are accepted throughout the year, examiners may be asked to serve on a team any time throughout the year. These applications take significantly less time than full award applications.

Review of written award applications may be conducted at the examiner's work location or home. Business is also conducted via email, web conferencing, and telephone.

Event/Stage	2020 Dates	ESTIMATED TIME* FOR BOARD OF EXAMINER ROLES				
		New/First Year Examiner	Examiner	Work Group Lead Examiner	Lead Senior Examiner	Judge
Senior Examiner Training	April 21				8*	8*
New Examiner Training	May 17-18	16*				
Examiner Training Case Study Prep** Class	May 24-25	4 16*	4 16*	4 16*	4 16*	4 16*
Stage 1 – Individual Application Review	June 11 – July 2	20-30+	15-25	15-20	15-20	8-12
Consensus & Site Visit Training/Prep	July 21 - 30	16*	16*	16*	16 *	4-8*

Consensus Feedback Preparation	August 1 - 7			8	12	8
Initial Judges Meeting	August 10					10**
Site Visit Preparation	August 1- Site Visit	8-10	8	10	16	
Site Visits (Sun-Fri)	Weeks of: August 15, August 22, and August 29	32-48+*	32-48+*	32-48+*	32-48*	4-8*
Feedback preparation for Judge's meeting	End of Site Visit – Sept 17			4-8	8-16	8-16
Final Judges Meeting	September 21				1-2	10**
Final Feedback Reports due to IMEC office	October 8				8	8
2022 Conference on Enterprise Excellence	Feb/Mar 2022	8	8	8	8	8
<b>Total Hours (estimation of hours)</b>		<b>125-153+</b>	<b>100-126+</b>	<b>122-152+</b>	<b>153-183+</b>	<b>113-133+</b>

\* Time estimates do not include travel.

\*\* Includes preparation and Judge's meeting time.

### 10. Examiner Training Fees

Registration fees are assessed to offset the cost of training facilitators and materials.

	<b>Fee</b>	<b>Included Training</b>
First year examiner	\$750.00	New Examiner Training   2 days Examiner Training   2 days Consensus meeting & Site Visit Training/Prep   2 days
Second/Third year examiner	\$500.00	Examiner Training   2 days Consensus meeting & Site Visit Training/Prep   2 days <b>Optional:</b> New Examiner Training   2 days
Four+ year examiner	\$0.00	Examiner Training   2 days Consensus meeting & Site Visit Training/Prep   2 days Senior Examine Training   1 day ( <b>by invitation only</b> )
<b>Examiner training only – no application review</b>	\$1000.00	New Examiner Training   2 days Examiner Training   2 days

Payment of training fees is due prior to the start of training (5/16 for new examiners and 5/23 for all others). Submit payment by check payable to:

IMEC – Recognition Program  
1501 W. Bradley Ave, Peoria, IL 61625

To request an invoice, send an email to: [sshrum@imec.org](mailto:sshrum@imec.org)

**Note:** Examiners are expected to fulfill their commitment to the Recognition Program. If an examiner withdraws from the examiner program, a **fee of \$500.00** will be charged to new and returning examiners **who do not finish** the 2021 Award Cycle. An invoice will be sent directly to your manager.

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Direct questions to:

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