Examiner General

INFORMATION

TENNESSEE CENTER *for* PERFORMANCE EXCELLENCE

TNCPE Examiner General Information

1. Welcome

The Tennessee Center for Performance Excellence (TNCPE) is a nonprofit organization committed to advancing organizational excellence across Tennessee and the surrounding region. TNCPE is rooted in the Baldrige Excellence Framework™, a nationally recognized performance management system that helps organizations of all sizes and sectors achieve and sustain high performance.

Through its Award Program, TNCPE engages a volunteer Board of Examiners to assess organizations against the Baldrige Criteria for Performance Excellence. These assessments provide valuable feedback to applicants and support a statewide culture of continuous improvement.

2. Examiner Role

Examiners are essential to the success of the TNCPE Award Program. Each examiner volunteers their time and expertise to help evaluate applicant organizations and provide actionable feedback. In return, examiners gain deep insights into best practices, leadership systems, and performance improvement strategies across sectors.

As part of the Board of Examiners, you will contribute to a mission-driven process that empowers organizations to grow, innovate, and serve their stakeholders more effectively. You'll also grow your own leadership skills, expand your professional network, and play a vital role in strengthening excellence throughout our region.

Master Examiners are selected based on experience and performance. Examiners identified as Master Examiners will serve in various leadership roles during the assessment process and may be asked to participate in TNCPE projects throughout the year. These examiners will attend 3-day training once every three years and will attend a one-day refresher training in the years between. Eligible examiners will be notified of their promoted status as the end of the three-day training in the year they have been selected.

3. Examiner Responsibilities and Time Commitment

Overview of Duties: Examiners review, analyze, and score applications, participate in consensus meetings, conduct site visits, and prepare final feedback reports. They also act as ambassadors for TNCPE by promoting organizational excellence.

Timeline Overview: The role spans from May to November, including training, independent review, consensus meetings, site visits, and final reporting. The peak workload occurs between August and October.

Time Commitment Breakdown:

ACTIVITY	TIME COMMITMENT
ORIENTATION	1 DAY (REQUIRED FOR NEW EXAMINERS)
TRAINING	3 DAYS
INDEPENDENT REVIEW	15-30+ HOURS (AUGUST-SEPTEMBER)
CONSENSUS MEETINGS	1 DAY
SITE VISIT	1-3 DAYS (BASED ON TEAM ASSIGNMENT)
POST-SITE VISIT TEAM MEETING	1 DAY
REPORTING	FINAL FEEDBACK REPORT DUE AFTER SITE VISITS

Examiners are responsible for attending all team meetings and site visits and completing all work by the due date assigned by the team leader.

4. Examiner Training Requirements and Key Dates

Training Overview: All examiners must attend a comprehensive three-day training session. First-year examiners also complete online orientation to familiarize themselves with the expectations and prepare for the case study. Master Examiners, who are high-performing, experienced examiners with a minimum of three years of service, are required to complete the full three-day training every three years to stay current with Baldrige framework updates. In alternate years, Master Examiners attend a one-day refresher training session.

Key Dates for 2025:

EVENT	DATE/DETAILS
APPLICATIONS OPEN	JANUARY 31, 2025
APPLICATION DEADLINE	APRIL 4, 2025
TRAINING SESSIONS	JUNE-JULY 2025 (CLICK FOR EXAMINER TRAINING DATES)
SITE VISIT WINDOW	SEPTEMBER 15 - OCTOBER 10, 2025

5. Examiner Application Process

Applications must be submitted by April 4, 2025. New examiners must include a recommendation form. Selected candidates will be notified within two weeks of the deadline and must confirm participation promptly.

6. Examiner Fees and Reimbursement

Training Fees:

YEAR	MEMBER REGISTRATION	GENERAL REGISTRATION
FIRST YEAR	$600	$1,000
SECOND YEAR	$400	$700
THIRD YEAR	FREE	FREE

Withdrawal Fees:

WITHDRAWAL TIMEFRAME	REFUND POLICY
AT LEAST FOUR BUSINESS DAYS BEFORE	50% REFUND
WITHIN THREE BUSINESS DAYS	NO REFUND

Examiners are responsible for covering all expenses related to training, including fees and travel. Most employers cover these costs, but examiners should confirm arrangements with their employer before committing to the program.

Reimbursement for Site Visits: The examiner is responsible for site visit travel; however, most employers cover this cost. TNCPE offers limited reimbursement for site visits based on the application level for those whose employers do not. To qualify for reimbursement, examiners must submit receipts and reimbursement forms within 14 days of the site visit. Full details, including caps and submission guidelines, can be found in Appendix B: Reimbursement Policies.

7. Ethics and Conflict of Interest

Examiners must uphold TNCPE's Code of Ethical Standards, which includes:

- Confidentiality of applicant information
- Fairness and respect in interactions
- Avoiding conflicts of interest, such as prior employment or consulting relationships with evaluated organizations

For detailed policies, refer to Appendix A: Code of Ethical Standards.

Appendix A: Code of Ethical Standards

Rules of Conduct: The following are established to maintain the confidentiality of TNCPE Award Program application information, including applicants' identities. In addition, these rules preserve fairness in the examination process. The rules pertain to the entire Board of Examiners, including judges, team leaders, and master examiners.

Examiners must agree to a standard code of conduct and non-disclosure and adhere to TNCPE's guidelines, including the following:

- Will conduct themselves professionally, guided by truth, accuracy, fairness, respect, and responsibility in all their interactions.
- Will maintain and safeguard fairness in the examination process and the confidentiality of all award application information, including the identity of applicants.
- Will treat all information about the applicant and the applicant's operations gained through the evaluation process as confidential.
- Will encourage and maintain a professional working environment that promotes respect for award applicants, their employees, and all members of the examiner team.
- Will respect the climate, culture, and values of the organization being evaluated.
- Will not intentionally communicate false or misleading information that may compromise the integrity of the award process or decisions.
- Will not approach an organization they have evaluated for their gain, including establishing an employment or consulting relationship, for three years after the evaluation.
- Will not accept employment or a consulting arrangement from an organization they have evaluated for three years after the evaluation if approached.
- Will adhere to TNCPE's AI Policy, which ensures AI tools' ethical and practical use in the evaluation process. For the full policy, see Appendix D: AI Policy.

Declaration of Principles: Members of the Tennessee Center for Performance Excellence Board of Examiners pledge to uphold their professional principles in fulfilling their responsibilities.

In promoting high standards of public service and ethical conduct, examiners:

- Will avoid representing conflicting, competing interests or placing themselves in a position where their interest may be in conflict, or appear to be in conflict, with the purposes and administration of the TNCPE Award Program.
- Will not review an organization with which they or their family members have an employment relationship.
- Will not serve as examiners of a primary competitor, customer, or supplier of any organization (or subunit of an organization) that employs them, has a financial interest in, or with which they anticipate a consulting arrangement.
- Will not review an organization representing more than 5% of their investments.

- May review an organization they have previously reviewed only after three years.

Disclosure of Conflict of Interest: Those selected to serve on the Board of Examiners must sign and agree to adhere to TNCPE's Conflict of Interest and Non-Disclosure Agreement immediately upon receiving their application assignment(s). Conflict of Interest considers employers, significant ownership, client relationships, and affiliations that may present or seem to present a conflict of interest to the examiner's ability to fulfill their TNCPE duties impartially. Such information will be kept confidential. A Conflict of Interest/Non-Disclosure Agreement must be completed for each application assigned.

Appendix B: Reimbursement Policies

Travel expenses for site visits may be reimbursed for examiners whose employers will not cover the cost, with specific caps based on application levels:

Reimbursement caps for site visits:

APPLICATION LEVEL	REIMBURSEMENT CAP
LEVEL 2	$350
LEVEL 3	$525
LEVEL 4	$700

Submission Requirements:

- Reimbursement requests must include receipts.
- Forms must be submitted within 14 days of the site visit.

Appendix C: Examiner Policies

Duties of Examiners:

- Examiners review, analyze, comment upon, and score written applications and prepare Feedback Reports for applicants.
- Participation is required in independent review, consensus meetings, and site visits.
- Examiners also act as ambassadors for TNCPE through outreach and educational activities.

Adherence to Award Process:

- Examiners must use the award Criteria and scoring system, follow the evaluation process, and fulfill site visit requirements.
- Thorough documentation and clear written communication are essential to the evaluation process.

Completion of Commitments:

TNCPE may assess additional fees for those who attend training but do not fulfill the volunteer requirements of the training fees noted in **4: Examiner Fees and Reimbursement**. These fees will be assessed on a case-by-case basis, ensuring fairness and alignment with TNCPE's mission of promoting organizational excellence through examiner contributions.

The fees outlined in the table below reflect the difference between the subsidized training fees offered in recognition of examiners volunteering their time and the full training program costs of $1,500 for members and $2,000 for nonmembers.

EXAMINER YEAR	MEMBER FEE	GENERAL FEE
FIRST YEAR	$900	$1,000
SECOND YEAR	$1,100	$1,300
THIRD YEAR	$1,500	$2,000

Training Requirements: Examiners must attend a three-day training session and complete a case study evaluation before attending the training. New examiners are also required to complete an online orientation.

Appendix D: TNCPE Examiner AI Usage Policy

Purpose: This policy establishes guidelines for the use of artificial intelligence (AI) tools by Tennessee Center for Performance Excellence (TNCPE) examiners to ensure the protection of applicant-specific data and maintain the confidentiality, integrity, and trust that form the foundation of TNCPE's assessment processes.

Scope: This policy applies to all examiners, judges, and staff who have access to applicant-specific data, including but not limited to feedback reports, application materials, site visit notes, and other proprietary or sensitive information.

Policy Statement: TNCPE examiners are strictly prohibited from inputting, uploading, sharing, or referencing applicant-specific data in any public AI tool or platform. This includes but is not limited to, tools such as:

- OpenAI's ChatGPT (free or subscription versions)
- Google Bard
- Microsoft Copilot
- Jasper AI
- Other publicly accessible generative AI or language models

Definitions:

- **Applicant-Specific Data:** Any information related to TNCPE applicants that is not publicly available, including but not limited to:
  - Application content
  - Results scores
  - Feedback reports
  - Organizational profiles
  - Site visit findings
- **Public AI Tool:** Any AI-based platform that processes user input on shared servers accessible to multiple users or entities, where data may be stored, analyzed, or reused by the service provider.

Examples of Prohibited Uses:

- Inputting an applicant's organizational profile sections into ChatGPT to generate summary analyses or feedback.
- Using a public AI tool to draft or refine feedback comments based on confidential site visit notes.
- Uploading applicant performance data to any generative AI platform to produce graphs, charts, or comparative analyses.

- Using public AI tools to identify potential best practices or benchmarks based on applicant-submitted materials.

Permitted Uses: Examiners may use AI tools for non-applicant-specific tasks, such as:

- General research on public organizational excellence frameworks or methodologies.
- Grammar and style checking for documents containing no applicant-specific data.
- Generating templates or outlines not populated with proprietary information.

Compliance and Monitoring:

- **Acknowledgment:** All examiners must acknowledge receipt and understanding of this policy before participating in the examination process.
- **Audit Rights:** TNCPE reserves the right to audit examiner activities to ensure compliance with this policy.
- **Violation Consequences:** Failure to adhere to this policy may result in:
    - Removal from the Board of Examiners.
    - Notification to the applicant organization.
    - Additional actions, as determined by TNCPE leadership.