



INTENT TO APPLY Overview

INTENT TO APPLY OVERVIEW

The Ohio Partnership for Excellence (OPE) is the premier performance excellence and quality program in the state of Ohio. We invite you to join with the hundreds of individuals and organizations that have already discovered this system for achieving exceptional results.

Whether you are an executive, a manager, or an employee committed to improving your organization, the Ohio Partnership for Excellence Criteria for Performance Excellence can help you prepare for the challenges occurring in today's global marketplace. Every organization is seeking to improve its results and competitive position. For more than two decades, the Criteria for Performance Excellence of the Malcolm Baldrige National Quality Award, have been a significant tool used by thousands of U.S. businesses, educational institutions and health care organizations to assess, and then improve, performance on the critical factors that drive their overall success. In addition to business, health care and education, the OPE serves government and not-for-profit organizations with sector-specific Criteria.

The Criteria are an extraordinarily comprehensive framework for understanding and managing your organization. With this robust systems perspective, you will assess and measure performance through the key business indicators that are most important to your organization. The Criteria for Performance Excellence are also built upon a foundation of Core Values that are vital to your organization. These include: visionary leadership, customer focus, organizational and personal learning, valuing employees and partners, agility, focusing on the future, managing for innovation, management by fact, public responsibility and citizenship, focusing on results and value creation, and a systems perspective. The Criteria will also help you align resources, improve communications, and boost productivity and effectiveness. Baldrige Award recipients, and OPE Award recipients alike, report outstanding results. As a group, those who report productivity as income per employee have reported an average compounded annual growth rate of over nine percent.

As well as assisting your organization in the writing of an application, we invite you to consider joining us as an examiner. It is one of the best ways to learn the Criteria and act as an internal "change agent" for your place of work. If in the course of reviewing the Criteria, you make a decision to join us as an Examiner, please find an examiner application in the back of this Criteria book.

We look forward to working with you, and partnering with your organization in the pursuit of performance excellence.

Sincerely,

A handwritten signature in blue ink that reads "Elaine".

Elaine D. Edgar PhD
Executive Director
Ohio Partnership for Excellence

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NOTE: Annual Timeline and Program Requirements are summarized on the last two pages.

Applicants are responsible for adhering to all deadlines – please pay specific attention to the filing deadlines!

Intent to Apply forms for Bronze Applicants can be submitted at anytime throughout the year.

INTRODUCTION

The Ohio Partnership for Excellence helps organizations see improved results through education, facilitation and recognition. By providing a framework for performance excellence, with the use of the Malcolm Baldrige Criteria, organizations have a greater focus on customer relationships, operational performance, competitive advantage, stakeholder value and organization-wide results.

Active partnerships between the private, public and education sectors, and their involvement in continuous performance improvement and excellence are fundamental to making Ohio renowned for the quality of goods, services, education and overall quality of life.

To ensure the continued growth and success of the Ohio Partnership for Excellence, each of the following groups and individuals play an important and key role in the organization:

MEMBERSHIP

The Ohio Partnership for Excellence (OPE) is a membership organization, offering both individual and organizational memberships on an annual basis. Membership benefits include: *The Journey*, a quarterly quality digest, access to web-based Criteria training, the opportunity for professional networking, discounts on all OPE events and activities throughout the year, and other special program offerings.

Individual membership is \$75 annually, and is renewable in December of each year.

Organizations can join the Ohio Partnership for Excellence at \$10 per full-time employee with a \$500 minimum and \$5,000 maximum. All full-time employees are then entitled to receive all membership benefits.

Interested in joining? For further information visit www.partnershipohio.org.

BOARD OF TRUSTEES

The Ohio Partnership for Excellence Board of Trustees is responsible for the oversight, evaluation and improvement of all aspects of the organization, including the adequacy of the Criteria and the process through which the award recipients are determined.

The Board ensures the integrity, currency and relevancy of the OPE assessment process.

ADVISORY BOARD

The Ohio Partnership for Excellence Advisory Board is comprised of a diverse group of volunteers from around the state, who provide operational support and guidance.

BOARD OF EXAMINERS

Examiners are vital to the success of the Ohio Partnership for Excellence. Each year, close to 200 examiners dedicate hundreds of hours of time, energy and dedication to the mission of promoting performance excellence in Ohio.

The Ohio Partnership for Excellence Board of Examiners evaluates applications, prepares feedback reports and makes award recommendations through the Panel of Judges. The Board consists of experienced professionals from all sectors, selected by the OPE Executive Director through a voluntary application process. Collectively, the Board of Examiners contributes over 26,000 hours of volunteered time each year.

ADMINISTRATION

The Ohio Partnership for Excellence administrative staff consists of the Executive Director, Operations Director, and an Administrative Assistant. The administrative staff coordinates all activities, working closely with all volunteer groups.

Please visit the Ohio Partnership for Excellence website at www.partnershipohio.org for more information.

WHAT IS THE BASIS FOR THE CRITERIA?

Criteria are developed from the state-of-the-art learning of private- and public-sector organizations that are working to achieve organizational performance excellence. The Criteria reflect validated, leading-edge practices for achieving performance excellence.

HOW DO THE APPLICANTS BENEFIT FROM APPLYING FOR THE AWARD?

Each applicant gains an outside perspective on its organization based on 300 to 1,000 hours of review by members of the Board of Examiners. The results of this review are synthesized in a feedback report outlining

strengths and opportunities for improvement based on the Criteria. Feedback reports are often used by organizations as part of their strategic planning process to focus on their customers and to improve results, as well as to help energize and guide their organizational improvement efforts.

HOW ARE AWARD RECIPIENTS SELECTED?

Award applications are reviewed by a team from the Board of Examiners. It is the job of the Examiner Team to review the Application relative to the criteria and seek out facts and information that can provide the Panel of Judges with sufficient information to evaluate the Applicant's progress on their journey. All Applicants receive an evaluation at both Stage One (Independent Review) and Stage Two (Consensus). Based upon a statistical model approved by the Panel of Judges, the higher scoring Applicants receive site visits, while lower scoring Applications are provided the opportunity to engage in a coaching session (for a fee). The Panel of Judges recommends Award recipients from among the site-visited organizations.

WHAT DOES AN ORGANIZATION RECEIVE IF IT IS AN AWARD RECIPIENT?

Each applicant will receive an award. A Bronze Award is given to those Applicants who write an organizational profile, participate in an organization-wide survey, and submit an action plan based upon a high-level feedback report provided to them by a small team of experienced examiners. Applicants who submit a full application are eligible to receive either Platinum, Gold or Silver recognition. Award recipients are honored at the annual Quest for Success Conference in September. Award recipients may publicize and advertise their Awards.

IS THE IDENTITY OF APPLICANTS AND THE INFORMATION SUBMITTED MADE AVAILABLE TO THE PUBLIC?

The identity of all applicants remains confidential until the applicant is selected as an Award recipient. Information submitted by applicants is always treated as confidential.

WHAT IS EXPECTED OF AWARD RECIPIENTS?

Award recipients are required to share information about their exceptional performance practices with other Ohio organizations. However, recipients are not required to share proprietary information, even if such information was a part of their Award application. The principal mechanism for sharing information is the annual Quest for Success conference. Sharing beyond the Quest for Success Conference is on a voluntary basis.

HOW DO ORGANIZATIONS APPLY?

Applying for the Award is a two-step process. The first step is eligibility certification, when the organization certifies that it meets eligibility requirements. Instructions and forms certifying eligibility begin on page xi.

Once eligibility has been certified, the second step consists of preparing and completing an Application Package, including an application form and an application report. The application report must summarize the organization's practices and results in response to the requirements delineated in the Items of the Criteria for Performance Excellence. Instructions and forms for applying for the Award begin on page iii.

APPLICATION PROCESS

The application process for organizations applying to the Ohio Partnership for Excellence has changed, beginning with the 2006-2007 cycle. Significant changes have been made based upon feedback, data and suggestions from stakeholder groups, and have been incorporated in an effort to serve all applicant organizations more effectively. Beginning with this cycle, the Ohio Partnership for Excellence will offer **two levels of application, Bronze and Full**, which result in the awarding of **Platinum, Gold or Silver** recognition.

Bronze Applicants (previously known as Level One) are responsible for writing the organizational profile portion of the Criteria and participating in an organization-wide survey. This level involves a more hands-on approach with a team of two examiner-coaches. The Bronze applicant's senior leadership team then works with the coaches in an action-planning workshop after receiving their feedback report. The Bronze applicant is recognized at the Quest for Success conference in September after submitting a completed action plan to the Ohio Partnership for Excellence. Bronze applicants can be from one of five sectors: Business, Government, Not-for-Profit, Healthcare or Education.

To participate in the Ohio Partnership for Excellence program at the **Full Application** level, an applicant organization must submit an application package that addresses Criteria relevant to the sector in which they operate. Applicants at this level are expected to provide information and data on the organization's key processes and results. The information and data must be adequate to demonstrate the applicant's approaches are effective and yield desired outcomes.

Full Application will result in three levels of recognition. Applications will be judged after the consensus process, in which a consensus score will be produced. A panel of judges will determine which applicants have scored high enough to receive site visits. Those not chosen for a site visit will receive a consultative on-site visit. They will be awarded the **Silver Award** and given a full feedback report.

Organizations chosen by the judging panel to receive site visits will be visited by a team of examiners who will conduct on-site verification and clarification of the

application package. Following the site visit, the team will prepare the feedback report and submit their feedback and scores to the Panel of Judges. The judges will determine the applicant's recognition level at either a **Silver or Gold Award** level, or the highest award, the **Platinum Award** level. All recipients will receive a full feedback report.

EXPECTATIONS OF AWARD RECIPIENTS

The Ohio Partnership for Excellence depends upon organizations that support its mission and have a greater understanding of performance excellence.

OPE expects all award recipients to:

- Provide examiners in the following year's cycle.
- Use the Ohio Partnership for Excellence logo on all written materials for two years following the Award cycle year.
- Share information about their successful quality strategies and performance excellence with other Ohio organizations.
- Platinum Award recipients are expected to present at the Ohio Partnership for Excellence's annual Quest for Success conference.

GENERAL ELIGIBILITY REQUIREMENTS

It is the responsibility of the applicant to meet the following general eligibility requirements:

- Applicant must have employees in Ohio.
- Applicant must be located in Ohio for at least one year.
- All subordinate elements of the applicant must be included in the application.
- Subunits of a larger organization must be self-sufficient enough to be examined in all seven Criteria categories.
- Ownership location does *not* restrict eligibility.
- Submission of a Baldrige or similar application in the same year does *not* restrict eligibility.
- Recipients of the Platinum Award for Excellence are ineligible to receive recognition from OPE for the following three years; however, these organizations may submit an application for the purpose of receiving feedback without award recognition.

SECTOR ELIGIBILITY GUIDELINES

Organizations or subunits (a unit or division of a larger organization) of larger entities are eligible to apply for the Ohio Partnership for Excellence program. Subunits (business unit, division) of the same organization may apply individually. Links to the parent organization (the larger organization that owns or has organizational or financial control of a subunit) must be presented.

Units of the same organization at different geographic locations are eligible if they are stand-alone facilities capable of answering each category of the Criteria.

Organizations which may potentially qualify under the definition of more than one sector may apply in the sector of their choosing.

HOW TO APPLY

Potential applicants must submit an Intent to Apply form to the Ohio Partnership for Excellence (OPE), indicating the organization's intended application level and sector. OPE encourages organizations to review the application levels and their requirements carefully in order to choose the appropriate, and most beneficial, level for the organization. Any questions concerning the appropriate level for an organization to apply for may be discussed at any time with the Executive Director of OPE.

Applicants must submit a complete Intent to Apply form by the program deadline. Applicants will be notified of the receipt of the form within approximately two weeks of the filing deadline.

Bronze Award applicants may submit an Intent to Apply form at anytime throughout the year. Applicants will be notified of the receipt of the form no later than two weeks after the submission date. While the Bronze Award process is on a continuous cycle, the completed action plan must be received by OPE no later than the first day of the month before OPE's Quest Conference in order to be included in that year's class of OPE award recipients. Any completed action plans received after this deadline, will be recognized in the following year's class.

All Intent to Apply forms must be accompanied by at least \$250 of the full application fee, with checks payable to

Ohio Partnership for Excellence. The Intent to Apply fee is non-refundable.

If the applicant is found ineligible to apply or if the applicant fails to submit an application package, the application fee is reimbursed minus the \$250 non-refundable Intent to Apply fee.

INTENT TO APPLY INSTRUCTIONS

A potential applicant should submit the Intent to Apply form only if the applicant intends to apply in the next award cycle. All information should be typed. Forms may be duplicated as necessary. (Intent to Apply Form is available on-line.)

Send a letter of intent on official letterhead with a completed Intent to Apply form, Site Descriptors form if applicable, and \$250 fee to OPE.

Item 1 – Applicant: Provide the official name and mailing address of the applicant organization.

Item 2 – Application Level: Full or Bronze Award.

Item 3 – Award Sector: Check the appropriate box corresponding to the sector of the applicant organization.

Item 4 – Headquarters Location: Indicate whether or not the applicant organization's headquarters is located in Ohio.

Item 5 – Size of Applicant: Give the estimated number of current worldwide full-time employees of the applicant organization. Indicate the number of full-time employees in the state of Ohio, and give the percentage of assets based in Ohio. (Use full-time equivalents for part-time employees.)

Item 6 – Subunit Designation: If the applicant organization is *not* a subunit or subsidiary, check "No," and proceed to Item 7.

If the applicant is a subunit or subsidiary, check "Yes," and identify the parent organization, number of worldwide full-time employees of the parent organization and all subunits, and the percentage of sales or services provided by the applicant organization to the parent. If no sales or services are provided to the parent organization, indicate 0%.

Item 7 – Site Listing: For applicants who have multiple sites, attach the *Site Listing and Descriptors Form*. All sites in Ohio should be addressed. Additionally, address

sites located in other states or internationally may be described in the application package.

On the *Site Listing and Descriptors Form*, provide a physical address, number of employees, percentage of sales or services, and major products or services for each site.

While there will not be any site visits to locations outside of Ohio, the application package must show how the applicant addresses its activities outside of Ohio.

Item 8 – Highest-Ranking Official: The applicant's highest-ranking official or designee. (Signature is required in Item 10).

Item 9 – Contact for Further Information: List the name, address (if different from Item 1) and telephone number of the official contact person. This person will be the coordinator of all correspondence with OPE.

Item 10 – Applicant's Signature and Authorizing Signature: The signature of the authorizing official for the applicant confirms that the organization meets eligibility requirements, agrees to participate in the evaluation process, agrees to facilitate an open and unbiased examination, and agrees to reimburse any unusual expenses incurred by the site visit team. The person whose name appears in Item 8 must affix his/her signature and date Item 10.

APPLICATION REQUIREMENTS

Applicants submit an application package that consists of two key parts:

- Organizational Profile
- Response to the Criteria

APPLICATION INSTRUCTIONS

The application must be submitted in Adobe® Portable Document Format (PDF). Documents can be published in this format by visiting <http://createpdf.adobe.com> free of charge (or) by purchasing the Adobe® Professional software. The application package must be submitted electronically via email dated no later than the deadline or sent on CD-ROM and postmarked no later than the deadline. All applicants are asked to submit their application packages electronically. However, it is recognized that email is not secure and if the applicant is concerned about the security of the information, the mail option is available.

Whether submitted electronically or on CD-ROM, all outstanding fee balances must be received by the same deadline as required for the application package.

If the application report exceeds the required page limits, the applicant organization will be contacted to determine which pages to exclude.

First-time applicants, and those wanting to improve their application-writing skills, are strongly encouraged to attend OPE offered training on how to write an Application. Please visit www.partnershipohio.org for further information.

Overview of Application Package

A complete application package contains the following components:

- Title Page
- Table of Contents
- Intent to Apply form
- Site Listing and Descriptors form (if applicable)
- Organization chart(s)
- Glossary of terms and abbreviations
- Organizational Profile
- Response to the Criteria

Specific Application Package Requirements

- In order to ensure readability, use 10 point font-size or larger for all text, figures and graphs. Use no more than 60 lines per page, including headers and page numbers.
- The Organizational Profile is limited to five pages; its content is described in the Criteria.
- Table of Organization Chart(s) should provide sufficient information for examiners to understand the relationships between departments or other organizations mentioned in your Criteria responses.
- The Response to the Criteria contents is described in the Criteria Response Guidelines section of the Criteria. Consecutively number this section from page 1 to 50.
- The Response to the Criteria will address each category and item of the Criteria in the order shown in the sector-specific Criteria. Criteria questions may be in 8 point font-size. Include the title and number of each item's area to address in the text (i.e., 1.1a Senior Leadership Direction).

- Pictures, graphs, figures and tables should be integrated into the Response to the Criteria text or shown directly after that item response.
- The Title Page, Table of Contents, Organization chart(s), Intent to Apply form, Site Listing and Descriptor Form (if applicable), and Glossary of Terms and Abbreviations sections do *not* count against page limits for either the Organizational Profile or the Response to the Criteria sections.
- Do *not* attach appendices, booklets, brochures, or other materials to the application package. Do *not* include video or audio with the application package.
- All components of the application package should be in Adobe® Portable Document Format (PDF), submitted electronically or on CD-ROM.
- All application packages must be postmarked **by the deadline**. Application packages must be mailed or emailed. Hand deliveries are not accepted.

APPLICATION REVIEW PROCESS

Applications are reviewed and evaluated by members of the Ohio Partnership for Excellence Board of Examiners. Board members are assigned to a team made up of a cross-section of examiner expertise and experience. Examiner assignments are made in accordance with strict rules regarding conflict of interest.

The name of the applicant, individual application, commentary and scoring information developed during the review of the application are regarded as proprietary and are kept in strictest confidence by the Ohio Partnership for Excellence. Such information is available only to those individuals directly involved in the assessment and evaluation process.

Unless otherwise notified, the Ohio Partnership for Excellence destroys all written and electronic copies of applications and feedback reports 60 days after final feedback reports are issued to the applicant organization.

Stage 1 (Individual Review) involves the independent review of the application package by trained examiners.

Stage 2 (Consensus Review) involves a consensus review by a team of examiners, facilitated by a team leader.

Stage 3 (Site Visit) of the review process involves the examiner team, led by a team leader, conducting an on-site verification and clarification of the application package. The team then develops a feedback report for the OPE Panel of Judges. Beginning with the 2006-2007 cycle, the Panel of Judges will review applicants after consensus to determine which will be selected to receive a site visit. Those not receiving a site visit will receive the Silver Award along with an on-site coaching session.

Stage 4 (Judging) is the award recommendation process by the OPE Panel of Judges who conduct a final review of all feedback reports, ensuring consistent, easy-to-understand, and actionable reports. The Panel of Judges then recommends award levels to the OPE Board of Trustees.

APPLICATION INSTRUCTIONS – BRONZE AWARD

Applicant organizations may submit an Intent to Apply form, along with a \$250 non-refundable deposit, to the Ohio Partnership for Excellence (OPE).

While the organizational profile does not have to accompany the Intent to Apply form, examiner teams will not be assigned until the profile is received.

It is preferred that the organizational profile is submitted in Adobe Portable Document Format (PDF) electronically or on CD-ROM. However, for the Bronze Level Award, printed copies on 8½ X 11 standard white paper will be accepted. If the organizational profile exceeds the five-page limit, the applicant organization will be contacted to determine which pages to exclude.

The remaining application fee balance must be received before the first site visit.

Overview of Application Package – Bronze Award

A complete application package contains the following components:

- Title Page
- Table of Contents
- Intent to Apply form
- Site Listing and Descriptors form (if applicable)
- Organization chart(s)
- Glossary of terms and abbreviations
- Organizational Profile

Specific Application Package Requirements

- In order to ensure readability, use 10 point font-size or larger for all text, figures and graphs. Use no more than 60 lines per page, including headers and page numbers.
- The Organizational Profile is limited to five pages.
- Table of Organization chart(s) should provide sufficient information for examiners to understand the relationships between departments or other organizations.
- The Title Page, Table of Contents, Organization chart(s), Intent to Apply form, Site Listing and Descriptor Form (if applicable), and Glossary of Terms and Abbreviations sections do *not* count against page limits for the Organizational Profile.
- Do *not* attach appendices, booklets, brochures, or other materials to the application package. Do *not* include video or audio with the application package. Do *not* refer to external references such as web sites.
- All components of the application package can be submitted electronically in Adobe® Portable Document Format (PDF), submitted on diskette or CD-ROM, or, if necessary, on 8½ X 11 paper.

APPLICATION REVIEW PROCESS – BRONZE AWARD

A team of two senior Ohio Partnership for Excellence examiner-coaches will review the applicant's organizational profile and survey results. (Examiner assignments are made in accordance with strict rules regarding conflict of interest.)

The name of the applicant, individual application (including the organizational profile and survey results),

and commentary developed during the Bronze Award process are regarded as proprietary and are kept in strictest confidence by the Ohio Partnership for Excellence. Such information is available only to those individuals directly involved in the assessment and evaluation process.

Unless otherwise notified, the Ohio Partnership for Excellence destroys all written and electronic copies of applications and feedback reports 60 days after final feedback reports are issued to the applicant organization.

Stage 1 involves a half-day site visit by the examiner – coaches and the applicant's senior leadership. This first site visit introduces the Ohio Partnership for Excellence, the Criteria and the Bronze Award process to the organization. The examiner team will also lead a question and answer session.

Stage 2 involves the entire organization completing the on-line survey tool. At its completion, the Ohio Partnership for Excellence aggregates this survey data.

Stage 3 involves a full-day site visit by the examiner-coaches and applicant's senior leadership. This second, and final, site visit presents the organization with both the aggregate survey data summary and the feedback report. The examiner team will then facilitate an action-planning workshop, using the information presented through the data summary and feedback report.

Stage 4 involves the Applicant completing and submitting to the OPE office an action plan that indicates their activities, actions, and commitment to the continuation of their Quality Journey.

APPLICATION INFORMATION

	Bronze Application	Full Application
Intent to Apply form	Yes – Completed On-Line	
Organizational Profile	Yes (5 pages maximum)	
Number of Criteria items that apply	None	All Items
Response to the Criteria	None	50 pages maximum
Site Visit	1.5 days	1-4 days
Feedback Report	Yes	
Number receiving recognition	Unlimited – All Applicants completing the process receive recognition at the Annual Conference	
Copies of application packages	Electronically submitted via Email or CD-ROM	
Email Address for Submission	Operations@PartnershipOhio.org	

APPLICATION FEES (Include All Evaluation and Site Visit Fees)

Organization Size	Bronze Application	Full Application	Site Visit Fees*
Small (less than 100 employees)	\$1,250	\$3,500	\$1,000
Medium (100 to 500 employees)	\$1,750	\$5,000	\$1,500
Large (over 500 employees)	\$3,000	\$6,500	\$2,000
Non-Profit K-12 Education (any size)	\$1,000	\$1,500	\$1,000

*The Site Visit Fee is an additional Fee only for those Applicants receiving a standard Site Visit from a Full Application. Those organizations receiving an abbreviated site visit will be charged a fee equal to one-half the normal site visit fee.

The remaining application fee balance (minus the \$250 non-refundable Intent to Apply fee) is due at the time of submission of the application package. The Ohio Partnership for Excellence will *not* evaluate applications if fees are not paid by that time. Organizations that do not submit an application package will be reimbursed all fees, minus the Intent to Apply fee of \$250.

Group discounts are available for Bronze Level Applicants only. If multiple Bronze Applications are submitted from one Parent organization (representing the Parent and/or sub-organizations), a discount is available if all Applications are submitted and all fees paid at the same time and can be managed as one unit with concurrent schedules for the coaching team. Contact the OPE office for more details on the discount program.

APPLICATION CHECKLIST

- Title Page and Table of Contents is included.
- The Intent to Apply form and Site Listing Descriptor Form (if applicable) have been included.
- Table of Organization chart(s) is included.
- Organizational Profile (5 pages or less) is included.
- Response to the Criteria is included.
- Pages in the Response to Criteria are consecutively numbered from one.
- Response to the Criteria addresses all items.
- Response to the Criteria does not exceed 50 pages.
- Type size and number of lines per page meet requirements (see Specific Application Package Requirements).
- Sufficient number of copies included: 2 electronic copies via Email or on CD-ROM in Adobe PDF.
- Check enclosed for remaining fees, payable to the Ohio Partnership for Excellence.

AWARD PROCESS TIMELINE

Award Pre-Application

Full Award Intent to Apply form must be completed by **October 15, 2007** and OPE must receive at least \$250 (non-refundable) fee. Bronze Level Intent to Apply form can be completed at any time throughout the year prior to submitting the Application.

Award Application

Package received by OPE no later than December 15, 2007

The package must be received electronically by **December 15, 2007**. The application fee, which must be received by OPE by that same date, covers expenses associated with the review of applications and the development of feedback reports.

Stage 1: Independent Review

January 4 – January 31, 2008

The Application Package is reviewed independently by members of the Board of Examiners. At the conclusion of this review, applicants advance to Stage 2: Consensus Review. At each stage, applicants receive every reasonable consideration to advance to the next stage.

Stage 2: Consensus Review

February 4 – February 25, 2008

The Application Package is reviewed jointly by a team of Examiners, led by a Senior Examiner. At the conclusion of this review, the Panel of Judges determines which applicants will receive site visits.

Stage 3: Site Visit Review

March 3 – April 14, 2008

A team from the Board of Examiners, led by a Senior Examiner, conducts on-site verification and clarification of the Application Package. Site visits consist primarily of a review of pertinent records and data and interviews with senior leaders and employees. Following the site visit, the site visit team submits its report to the Panel of Judges.

If an organization is chosen for a site visit, the organization is responsible for paying a site visit fee which helps cover expenses associated with the site visit. Additionally, the organization is expected to provide updates for all results provided in the application. These updates will become part of the official application.

Judges Review

April – May 2008

The Panel of Judges conducts final reviews and recommends Award recipients to the Executive Director of OPE.

Feedback Reports

May 30, 2008

Each applicant receives a feedback report. Feedback reports are prepared and distributed after it is determined either that the applicant will not move to the next stage of consideration for the Platinum Award or that the applicant is a Platinum Award recipient. Feedback reports are prepared by members of the Board of Examiners based on applicants' responses to the Criteria for Performance Excellence. The feedback reports contain applicant-specific descriptions of strengths and opportunities for improvement based on the Criteria for Performance Excellence.

Award Ceremony

September 2008

An integral part of the annual Quest for Success conference.