

**Florida Sterling Council**

**Board of Examiners**

**2018-2019**

**Training Requirements**

**Examiner Training Overview**

The Florida Sterling Council’s goal is to ensure the Board of Examiners includes broad representation from many industries, companies, and organizations in the for-profit, non-profit, and public sectors. This ensures expertise to evaluate Sterling Assessment Process applications from all sectors. The Examiner training process used by the Florida Sterling Council, in collaboration with the Examination Committee, is meant to prepare every Examiner to be successful during each step of the evaluation process and is designed to help participants interested in building internal Sterling expertise in their organization.

Members of the Board of Examiners assess organizations relative to the Sterling Criteria for Performance Excellence and provide feedback that helps organizations move to the next level of organizational maturity and improved business results. As team members, Examiners develop key organizational competencies, including: Systems Thinking, Business Acumen, Analytical Skills,

Critical Thinking, Project Management, Performance Measurement, Communication

Skills/Listening, and Teamwork. Examiner applicants must possess a high level of expertise in performance excellence and must conform to requirements for ethical conduct and integrity.

Individuals who are undergoing Examiner training for the first time are considered Examiner Candidates until successful completion of all training. Examiner Candidates are required to complete three pre-requisite courses: a one-day Sterling Criteria 101 class, the six modules in the Criteria 102 virtual course; and a one-day Evaluating Applications Workshop.

All Examiners mustsuccessfully complete the Case Study requirements; and are required to submit the Case Study Scorebook to the Sterling Office by the designated due date and attend an Examiner Training session. All Examiners must attend a Criteria 101 workshop or complete all six modules in the Criteria 102 virtual workshop during a Criteria change year (odd years such as 2015, 2017, etc.). During others years, second and third year Examiners are strongly encouraged to participate in the Criteria 101 workshops and complete the virtual Criteria 102 modules to deepen their criteria expertise. There are no costs for these trainings for return Examiners.

It is also highly recommended that return Examiners attend the Evaluating Applications Workshop to understand process changes and Case Study content and share their knowledge with new Examiners. This level of participation is a consideration when the Examination Committee is deciding on Examiner promotions.

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

**Examiner Candidate Mentor**

Examiner Candidates will be assigned an experienced Examiner as a mentor to assist them throughout the pre-requisite trainings and workshops. Mentors will help Examiner Candidates successfully prepare for Examiner Training, by:

* providing clarification of the Independent Evaluation stage,
* enhancing the Examiner Candidate’s understanding of Key Factors, Evaluation Factors (A-D-L-I), Innovation, and Results
* reviewing prework
* providing feedback on the Examiner Candidate’s strengths and opportunities for improvement
* embracing Candidate Examiners into the Florida Sterling Council

**Examiner Training Details**

**Criteria 101**

We are excited to launch the new Criteria 101 – A Management System for Performance Excellence content in 2018. This workshop will focus on how the components of the Sterling Management System enable organizational performance excellence through this integrated system.

**This workshop is required for Examiner Candidates, and is highly recommended for all Return Examiners.**

Through lectures and in-class exercises, participants will gain an understanding of:

* the key elements of the Organizational Profile, Process Categories and their Evaluation Factors, and the Results Category and associated Analysis Factors;
* Scoring Guidelines and apply them to examples; and
* the Core Values and Concepts, and how they are integrated with the Criteria and Scoring Guidelines.

Prework is not required for the Criteria 101 workshop.

**Criteria 102**

It is suggested that Examiners complete all modules of the online Criteria 102 training prior attending the Evaluating Applications Workshop. Each module contains a Reflections survey which must be completed to receive credit for that module. You must complete all modules and Reflections surveys prior to the required due date to be admitted to Examiner training (please refer to the Examiner Training Schedule on the Florida Sterling website).

**Evaluating Applications Workshop**

This workshop is required for Examiner Candidates and recommended for Return Examiners. The Evaluating Applications Workshop:

* is designed to prepare participants to complete the Case Study,
* simulates the Independent Evaluation stage of the examination process, and
* is a prerequisite for attending Examiner Training.

Through lectures and in-class exercises, participants will:

* gain an understanding of the Sterling assessment process used to evaluate management practices,
* gain a working knowledge of the basic steps to apply the Sterling Criteria in evaluating an application,
* understand the tools and forms used throughout the Case Study process,
* and have a clear understanding of how deliverables should be completed.

Prework is required prior to attending the Evaluating Applications training:

* Read the entire Case Study.
* Complete the online Key Factors training, located on the Sterling website  
  (bring the completion certificate to the Evaluating Applications Workshop).
* Re-read Category 1, as the Evaluating Applications Workshop will focus on the Leadership Category.
* Bring hardcopies of all Examiner Download files to the Evaluating Applications Workshop.

Upon completion of the Evaluating Applications Workshop, participants will receive a completed Item worksheet as a take-away.

To obtain the materials required to complete the prework assignments, download the required files from the Sterling website at [www.floridasterling.com](http://www.floridasterling.com).

**Examiner Training**

This interactive training is a key element in the development of Sterling Examiners and required for all Examiners. Participants will complete an abbreviated Independent Evaluation using a Case Study and submit their Case Study Scorebook to the Florida Sterling Office by the required due date.

This interactive learning will focus on the development of Examiner Competencies. Examiners will continue to develop their business acumen by learning a comprehensive systems approach to managing an organization, build capacity to assess organizations, and develop feedback to focus improvement efforts for optimal impact.

Prework is required prior to attending Examiner Training:

* Download all files listed on the Sterling website.
* Completion of all required Category Items, as instructed in the Case Study Scorebook.
* Submission of the Case Study Scorebook to the Florida Sterling Office by the designated date.

Participants must bring the appropriate hardcopies of their completed Case Study Scorebook to Examiner Training, as instructed in the Case Study Scorebook.

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

**Lean Six Sigma Silver Belt**

Examiner Candidates and Return Examiners now have an opportunity to obtain certification as a Lean Six Sigma Silver Belt. To meet certification requirements, the Examiner Candidates and Return Examiners must complete:

* Criteria 101
* Criteria 102
* Evaluating Applications
* Lean Six Sigma Yellow Belt Training
* Examiner Training

Please see the Florida Sterling website, Six Sigma Process Management Series for Lean Six Sigma Yellow Belt training offerings in your area.

For Examiner Candidates and Return Examiners that have already received Lean Six Sigma Yellow Belt, or a higher level belt certification, please contact the Sterling Office to determine eligibility for a Lean Six Sigma Yellow Belt training waiver.

**Examiner Designations**

Once Examiner Candidates have successfully completed all training, they will receive the designation as Examiner. Examiner designations are only valid for the assessment cycle in which they are received. Examiners may only represent themselves as an Examiner in any verbal or written statements, including Social Media, using the specific Examiner Designation for that assessment cycle. Examples include:

* A new examiner, may represent themselves as “Florida Sterling Examiner, 2018-2019”.
* An Examiner with an Examiner Designation of Master Examiner may represent themselves as “Florida Sterling Master Examiner 2018-2019”.
* An Examiner who has served multiple cycles may list all years entailed in those cycles; such as “Florida Sterling Examiner, 2015-2018”.

Any Examiner who does not complete a required assessment may not claim that year of service. For example, if you successfully complete training in 2017 but choose not to serve on an assessment team during the 2018-2019 cycle, you may no longer represent yourself as an examiner for that cycle.

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

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

* Sterling Manufacturing Business Excellence Award
* Sterling Explorer
* Sterling Challenge
* Sterling Collaborative
* Governor’s Sterling Award
* Governor’s Sterling Sustained Excellence Award

For more information regarding Examiner Designations, please refer to the Examiner Designation Criteria found on the Florida Sterling website.