

Week 1—Team-Leader-to-Team Email

- Re-familiarize yourself with the process [\(insert the IQC website with timeline of IRPE process here\)](#)
- **This is very important**—do not wait to start your independent review of the applicant. In fact, I highly recommend that you begin now because our timeline is tight. To help you get started, I suggest that you first review the Baldrige Excellence Framework, including the Criteria, particularly if this applicant is in a different sector than your own. Then, read the whole application. After completing your read of the application, log into and start evaluating the items. **Refer to the 6 step process** as you begin your evaluation.
- If you have any questions about the process or the Criteria, please feel free to contact me at [your telephone number](#) or by email. If I am not available to answer your questions, please contact the IRPE Office (see contact information below). Remember, until we have all completed our independent reviews, team members may not have any discussions concerning the applicant.

I am looking forward to embarking on this journey with each of you.

Week 2,—Team-Leader-to-Team Email

Email Highlights:

- Completing Independent Review (IR) Worksheets by [x/xx](#)
- Completing Your IR Scorebook by [x/xx](#)
- Reviewing the Elements of a Complete IR Scorebook

We are off to a great start, and I want to remind you of the following:

- We agreed that each of you will complete an Independent Review (IR) Worksheets for items [x.x and 7.x](#) by [mm/dd](#). Please remember to email me when these are complete.
- I will meet my commitment and provide feedback on your [x.x and 7.x](#) Worksheets by [mm/dd](#). I will email you when I have completed my feedback, or I will call you to discuss the feedback on your items.
- In the meantime, I encourage you to continue evaluating the applicant. **You do not need to wait for my feedback to proceed with your evaluation.**
- If you have not already done so, please upload your biographical information to SOREBOOK NAVIGATOR in the team files area. A blank template for this information is available on the Examiner Resource Center Independent Review Toolkit. I will use this information to plan assignments for Consensus Review.
- A complete IR Scorebook includes the following:
 - Conflict of Interest Determination Worksheet
 - Key Factors Worksheet
 - 17 Item Worksheets – each including KFs, around 6 strengths/OFIs, 2 feedback-ready comments, and scores.
 - Score Summary Worksheet
- As you complete your IR, please make note of potential key theme(s) [topics]. I will consolidate everyone's inputs into one list that will then be used to draft the key themes.
- Please make sure that you schedule enough time to provide a full evaluation of the applicant, typically between 50–70 hours. The complete IR Scorebook is scheduled to be completed in SOREBOOK NAVIGATOR by [x/xx](#), and our 2nd planning call is scheduled for [Day of the Week, x/xx, xx:xx a.m./p.m., CST](#). For your convenience, I've included [or attached the calling instructions](#).

Finally, if you have any questions about the process or the Criteria, please review the "2018 Instructions for Independent Review" on the Baldrige Program's Web site at [\(insert IQC website\)](#), or feel free to contact me at [your telephone number](#) or by email. If I am not available to answer your questions, please contact _____ . Remember, until we have all completed our independent evaluations, we may not have any discussions concerning the applicant.

Email Highlights:

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- We agreed that each of you will complete an Independent Review (IR) Worksheets for items x.x and 7.x by mm/dd. Please remember to email me when these are complete.
- Our next planning call is scheduled for Day of the Week, x/xx, xx:xx a.m./p.m., CST. For your convenience, I've included **or** attached the calling instructions.

Finally, if you have any questions about the process or the Criteria, please review the "2018 Instructions for Independent Review" on the Baldrige Program's Web site at (insert IQC website), or feel free to contact me at your telephone number or by email.

Remember, until we have all completed our independent evaluations, we may not have any discussions concerning the applicant.

Site Visit Logistics

We are getting close to site visit. In preparation for site visit plan to arrive at ENTER HOTEL NAME by HH:MM to begin to review documentation and Walk the Wall.

To be the most prepared be sure to:

- Read the application again
- Review your site visit worksheets
- Review the Examiner Quick Reference Guide for comment and key theme writing

I look forward to seeing you at site visit.