**2022 Step-by-Step Instructions for Tech Editing**

| **Steps** | **Resources and Detailed Instructions** | **Notes/Tips** |
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| **1. Arrange a date to begin your technical edit (the final review of the technical content of the feedback report).** | Once assigned as a technical editor for a 2022 Baldrige Award applicant’s feedback report, you will be asked about your availability between late August (after the Judges Panel meeting) and early October in order to set the date when you can complete your review and technical editing of the feedback report. You are encouraged to select a week that is most convenient for your schedule.  On the scheduled date, a staff member of the Baldrige Performance Excellence Program (BPEP) will send you the feedback report (Microsoft Word file) via NIST’s secure file-transfer system (Kiteworks, aka N-files). When you log in to download the file, you will be prompted to set up a password. | Ensure that you can schedule blocks of time and find a quiet work space.  Save your Kiteworks/N-file password for when you are ready to return the edited file to BPEP (at step 5 below). |
| **2. Assemble your resources.** | * Computer with MS Word: This software is necessary because BPEP needs your edits to be saved/shown using “Track Changes” in the Review menu.) * Feedback report (MS Word file downloaded through secure NIST email [https://nfiles.nist.gov](https://nfiles.nist.gov/)) * Application: a BPEP editor will also send this file (as a PDF) via NIST’s secure email system. * 2021-2022 Baldrige Excellence Framework booklet (which includes the Criteria for Performance Excellence and the Scoring Guidelines) in sector of applicant * 2022 Virtual Evaluation team leader’s contact information: You are encouraged to discuss significant changes you consider necessary with him/her to support the team’s learning and ensure that you understand what the team was trying to convey if it was not clear. * 2022 Feedback Guidelines and other resources on BPEP’s web page for scorebook and technical (“tech”) editors at <https://www.nist.gov/baldrige/examiners/advanced-feedback-editing-and-tech-editing> * Pen, pencil, sticky notes, flags, and highlighters, if needed | Consider arranging a date in advance to talk to the team leader about any questions you may have about the feedback report after your review. |
| **3. Refresh your understanding and/or learn about the applicant.** | Skim these sections of the application:   * Eligibility Form * Organizational Profile * Glossary (you may find it helpful to flag this for quick reference) | If you have a question about the organization’s business model or key factors, the Virtual Evaluation team leader may be able to share or clarify info. based on his/her call with the applicant in June. |
| **4. Edit the item-level findings**, **completing the first four of the five key tasks of comprehensive tech editing (described in the middle column here).** | ***Task 1: Check the facts.***  Read the feedback report against the application. Ensure that the report matches the application in these areas: the spelling and capitalization of process names, the use of acronyms, references to figure numbers, and references to data/results.  ***Task 2: Review the Criteria requirements.***  Read the feedback report against the 2021-2022 Baldrige Criteria. Edit and flag findings for discussion with the team leader that go beyond the Criteria (i.e., fault the applicant for not doing or providing something that the Criteria don’t ask for). Since the feedback report retains Criteria item references from the scorebook (a change in recent years), findings don’t need to include large amounts of explicit Criteria language. If the point of the finding is clear without such language, cut it.   ***Task 3: Check for appropriate content and organization.***  Read all the findings against the 2022 Feedback Guidelines. Edit the findings—without changing their meaning—so that they follow the guidelines. In particular,   * Ensure that findings begin with a unified, coherent sentence expressing a single main point, or “nugget”; include one or two specific examples; and be sure to express the relevance of the nugget to the applicant (i.e., by referencing key factors from the Organizational Profile). * Edit out prescriptive language such as “should” or “would”; judgmental language such as “bad” or “inadequate”; and language that passes judgment on the applicant’s style of writing or data presentation rather than on the content of the application.   ***Task 4: Check for alignment of finding language with the score and for balance of findings.***  Take an overall look at the findings and scores as an applicant would look at them. For example, the applicant may be confused if   * findings contain words such as “innovation” and “integration,” which are found in the higher ranges of the Scoring Guidelines, but the item score is very low * ratio or number of strengths and OFIs do not fit the score (e.g., 5 strengths and 1 OFI, but a score of 45%)   Keep in mind that the guideline of “around six” findings in each item does not mean exactly six and that boldface findings have more weight in the overall evaluation of an item. | As you consider any significant edits, keep in mind that the team leader is an important resource—with whom you can communicate to learn more about the team’s decisions and to provide feedback that may help him/her gain new insight into how the applicant may view the team’s findings.  You may be able to perform the five key tech-editing tasks simultaneously, or you may want to perform each during a separate “pass.”  Always keep in mind that your customer is the applicant; therefore, your primary goal is to ensure that findings are clear to the applicant and adhere to the Criteria and 2022 Feedback Guidelines. If possible, avoid extensive rework. Don’t rewrite a finding just because you don’t like the scorebook writer’s style.  Reminder: Make sure findings give specific examples to illustrate the main point. If a finding contains an exhaustive list of examples, summarize them, or include only the ones that are most relevant to the point of the finding.  Misalignment of findings and score has been an issue reported by some past applicants. NOTE: DO NOT CHANGE ANY SCORES DURING TECH EDITING! However, as a tech editor, you may be able to correct a misalignment by increasing or decreasing the number of findings by merging or splitting findings (as well as by editing language.   * add scoring range language to a finding to show how the finding aligns with a particular score * make adjustments based on the priority and relevance of findings (e.g., delete a finding that is not the most relevant for the applicant) |
| **5. *Edit the key themes*—the fifth key task of tech editing. (There are four key theme sections in the feedback report: a, b, c, and d.)** | * Read the key themes for sense and to ensure that they are unified, coherent, aligned with the major findings of the rest of the scorebook, and relevant and actionable for the applicant. * Track the item findings from which the key theme originates. (A key theme must link to a finding or findings in the feedback report.) Check that any data in the key theme match the data in the item finding. * Ensure that the balance and content of the key themes correspond to the identified scoring band descriptors (e.g., strengths typically refer to the identified scoring band; OFIs may refer to the next higher scoring band). * Use Baldrige core value language, where appropriate, as foundations for the key themes. | The key themes may be the only part of the feedback report read by the organization’s senior leaders. Ensure that the key themes contain enough facts and data to stand alone from the item-level findings from which they originate. You may want to review key themes *after* you have reviewed all of the item-level findings.  The 2022 Feedback Guidelines also apply to key themes. |
| **6. Complete your review and any edits and send back the report file within approximately 1 week. (If you need more time, please let us know.)** | * BPEP encourages you to contact the Virtual Evaluation team leader to summarize or discuss significant revisions. If you have additional questions after talking to the team leader, contact a Baldrige editor. * *Keep the Word file in tracked-edit format to show any changes you have made*, then upload the report to the secure site, and send it to a BPEP editor and [examinerlogistics@nist.gov](mailto:examinerlogistics@nist.gov) to notify BPEP staff members that you are finished. * Promptly SHRED/DELETE the application and any related electronic files and printouts. | Save your file with the name “FB22[your report number] B tech edit.docx.” Log back into the secure website ([https://nfiles.nist.gov](https://nfiles.nist.gov/)) using the password you created at step 1, upload the feedback report. Contact a BPEP editor if you have questions. |