**2017 Step-by-Step Instructions for Tech Editing**, **Part 1**

1. **Attend training via a 1-hour conference call in mid-June.** BPEP editors will send you specific information in advance of the call. These step-by-step instructions, as well as tasks and examples in the Technical Editor Preparation Reference Guide (available as a PDF on the same web page), will be a key focus of the training. In addition, participants will have opportunities to ask questions and share solutions.

1. **Call or email the team leader to introduce yourself.** You will receive the team leader’s contact information with your assignment from BPEP editors. Remind the team leader that your role is to be an advocate for the applicant (not a member of the team; therefore, you will not be doing an independent review of the application). Just prior to the team’s consensus call, you will provide in-process feedback on how the draft scorebook may be perceived by the applicant. The team leader can choose how to share that feedback with the team.
2. **Read the Organizational Profile of the team’s application** (and additional sections if time allows).
3. **Scan\* categories 1 through 7 of the team’s draft Consensus Review Scorebook** (the R-3/pre-consensus-call version); in scanning the team’s draft items, focus on these keyareas:
	* Comments that conflict with each other (or may sound to the applicant like they do)
	* Alignment of comments with scoring
	* Consideration of applicant’s view (e.g., might comments appear to be harsh/prescriptive/deny benefit of the doubt?)
	* Other quality issues that may be recurring across the scorebook

**\***In part 1, tech editors are not expected to check application data or thoroughly check all comments for adherence to the Criteria requirements (if tech editors see glaring violations in these areas, however, they should notify the team leader). This review is intended as a relatively high-level in-process check on whether the scorebook is likely to meet applicant expectations for high-quality feedback.

1. **Review the key themes**, checking whether they generally appear to align with the scoring bands, reflect item-level scores and bolded comments in the rest of the scorebook, and clearly summarize the scorebook.
2. **Share your input with the team leader (and possibly the entire team)**. Do this by first calling the team leader and giving feedback verbally and discussing what (if anything) to put in writing for the team to view; next you may upload (if appropriate) constructive feedback in writing for the team. Please ensure that you provide at least some input to the team leader based on your review in order to advance the team’s learning and/or sense of its progress. Please aim to provide a balance of observations about the key strengths and opportunities for improvement you see in the team’s work so far; use a professional, encouraging tone when describing any critical issues that may need the team’s attention in order to ensure a high-quality scorebook for the applicant.
3. **Return the application** to ASQ when requested (if the applicant does not proceed to Site Visit Review, you will return the application after completing Part 2 tech editing); instructions will be provided by a BPEP editor. All applications must be returned by the end of the process.

**Notes:**

* In past years, most tech editors have found it is *not* a beneficial use of their time to be silent observers on teams’ consensus calls. So this practice is allowed but not encouraged by the Baldrige Program.
* Given the extremely limited time for the Part 1 tech editor to review the draft scorebook and give feedback (i.e., about 1 week between the team’s deadline for posting R-3 items and its first consensus call), the Baldrige Program recommends tech editors focus on the key issues listed above (point #3). Part 1 tech editors are welcome to coordinate with team leaders to also assist, as time allows, with a few other key issues with which particular team members may be struggling, such as grounding comments in the applicant’s key factors (crafting strong relevance pieces).