**Step-by-Step Instructions for Tech Editing, Part 2**

| **Steps** | **Resources and Detailed Instructions** | **Notes/Tips** |
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| **1. Arrange a date to begin your Part 2 tech edit (the final review of the technical content of the feedback report).** | A BPEP editor will notify you by email after the August judges’ meeting to let you know whether the scorebook you reviewed during Consensus Review will need a Part 2 tech edit by you.  You will next be asked when you would like to begin your tech edit (between late August and early October).  On the scheduled date, a Baldrige staff member will send you the feedback report (Word file) via the secure system called 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 N-file password for when you are ready to return the edited file to the Baldrige Program (at step 5 below). |
| **2. Assemble your resources.** | * Computer with Microsoft Word (This software is necessary because the Baldrige Program needs your edits to be shown using “Track Changes” in the Review menu.) * Feedback report (Microsoft Word file downloaded through the secure website [https://nfiles.nist.gov](https://nfiles.nist.gov/)\*) * Application and sector-appropriate Baldrige Excellence Framework booklet (including Criteria and Scoring Guidelines) * The Consensus Review team leader’s contact information—you are encouraged to discuss significant changes you consider necessary with him or her to support potential learning and ensure that you understand what the team was trying to convey if it was not clear.   Additional Job Aids (+see files online in the [Examiner Resource Center](http://www.nist.gov/baldrige/examiners/resource_center)):   * Technical Editor Preparation Reference Guide+ * Comment Guidelines+ * Scoring Band Descriptors+ * Pen, pencil, sticky notes, flags, and highlighters, as 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 | Flag the glossary for quick reference. |
| **4. Edit the item-level comments**, **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 Criteria. Edit and flag comments 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), comments don’t need to include large amounts of explicit Criteria language. If the point of the comment is clear without such language, strip it out.   ***Task 3: Check for appropriate content and organization.***  Read all the comments against the Comment Guidelines. Edit the comments—without changing their meaning—so that they follow the guidelines. In particular,   * Ensure that comments 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 comment language with the score and for balance of comments.***  Take an overall look at the comments and scores as an applicant would look at them. For example, the applicant may be confused if   * comments 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” comments in each item does not mean exactly six and that boldface comments 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 comments.  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 comments are clear to the applicant and adhere to the Criteria and Comment Guidelines. If possible, avoid extensive rework. Don’t rewrite a comment just because you don’t like the scorebook writer’s style.  Reminder: Make sure comments give specific examples to illustrate the main point. If a comment contains an exhaustive list of examples, summarize them, or include only the ones that are most relevant to the point of the comment.  Misalignment of comments and score has been an issue reported by some past applicants. Please note that we can’t change the scores assigned by the consensus team. However, as a tech editor, you may be able to   * increase or decrease the number of comments by merging or splitting them * add scoring range language to a comment to show how the comment aligns with a particular score * make adjustments based on the priority and relevance of comments (e.g., delete a comment that is not the most relevant for the applicant)   If you’re not sure whether you’re infringing on the examiner team’s role, particularly since the report is a consensus effort, please contact the team leader and discuss your planned revisions. If you have additional questions after talking to the team leader, contact Baldrige staff members Christine Schaefer or Dawn Bailey. |
| **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 comments from which the key theme originates. (A key theme must link to a comment or comments in the feedback report.) Check that any data in the key theme match the data in the item comment. * 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 CEO, superintendent, or other senior leaders. Ensure that the key themes contain enough facts and data to stand alone from the item-level comments from which they originate. You may want to review key themes *after* you have reviewed all of the item-level comments.  The Comment Guidelines also apply to key themes. |
| **6. Turn in the report within five business days.** | * *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 [examinerlogistics@nist.gov](mailto:examinerlogistics@nist.gov) to notify Baldrige staff members that you are finished. * Promptly return to ASQ the feedback folder containing the application in the prepaid mailing envelope provided. All applications must be returned to ASQ to protect applicant data. | Save your file with the name “FB17[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 the BPEP staff member who sent you the file if you have questions. |