Upcoming Events

June 30—July 2—Examiner Training (Las Vegas)
July 8-9—Examiner Stage 2-3 Training (Phoenix)
July 10—Completed Organization & Process Level Applications due to SWAE
July 13—Board of Overseers Meeting
July 17—Lead Examiner Training
July 22—Board of Directors Meeting

August 5—Site Visit workshop “What to Expect from Your Site Visit”
August 10—Board of Overseers Meeting
September 2—Baldrige Regional Conference—Denver
September 14—Board of Overseers Meeting
September 21-October 2—Site Visits
September 25—Baldrige Regional Conference—Nashville
September 30—Board of Directors Meeting
Letter from the Chair of the Southwest Alliance for Excellence Board of Directors

Thank you all for your ongoing support of the Southwest Alliance for Excellence (SWAE) as we continue to “Empower Organizations To Improve Results”! As the first half of 2015 comes to a close, I wanted to share some of the exciting things that are happening at SWAE.

The Board of Directors recently met to strategize and create action plans to sustain and grow our organization in the coming years. Short term and longer term plans are underway and we will be meeting again at the end of July to formalize specific actions required.

The 2015 SWAE Performance Excellence Program is in full swing and our Examiner training is being delivered in June and July. Completed applications are due by July 10, 2015. The SWAE Award Program annually recognizes organizations for their performance excellence. The program has been expanded to offer four application tiers at the Organization Level in addition to the Process Level application. Please check out the changes on the SWAE website: http://www.swae.org/

Lastly, thank you for your continued support and interest in the Southwest Alliance for Excellence and your commitment to quality improvement! Enjoy your summer!

Jean Hammelev
Vice President, Quality & PMO
Sonora Quest Laboratories
Laboratory Sciences of Arizona
Jean.hammelev@bannerhealth.com

“I strongly encourage organization leaders to participate in SWAE. I’m confident that it will strengthen their organization’s awareness of quality performance, enhance their competitive market position, and bring new insights on how other companies outside their industry are raising the bar on quality.”

— David A. Dexter,
President & CEO,
Sonora Quest Laboratories
Performance Excellence Program Update

Our 2015 Performance Excellence Program cycle is already well underway, with Intent to Apply forms submitted and two examiner trainings already completed. The trainings have been going well, and we are enjoying working with 25 examiners from all industries, with 8 joining us from Nevada and 1 from Utah.

We would like to thank our talented and dedicated trainers Carla Carter, Sandy Kube, Stacy Harley and Amanda Freeman for their invaluable service to the program. We would also like to thank the University of Phoenix for generously donating classroom space and MonteVista Hospital in Las Vegas for hosting us.

If you are an organization who submitted an Intent to Apply, remember that applications are due to the SWAE offices by July 10, 2015. Together, let’s continue to make it a fantastic program year!

Meet Sandy Kube

SWAE’s New Performance Excellence Program Manager

Sandy’s education includes a Masters in Administration/Public Management, a Bachelor of Science in Business Administration and is Certified as a Quality Improvement Associate through the American Society for Quality. She has been on the Board of Examiners for the National Baldrige Performance Excellence Program (2011-2013) and has served as an Examiner, Lead Examiner, Trainer, Mentor and Board of Overseers for SWAE since 2009.

Sandy has been with Deer Valley Unified School District since 2000 and has been the Planning Manager, Manager of Quality Services and Manager of Professional Learning.

We look forward to having such an experienced leader working with SWAE’s Performance Excellence Program!

Member Recognition

Phoenix Business Journal ranks Banner Health as the 16th Healthiest Employer in the Large firms category. Congratulations Banner Health!
Upcoming Workshops & Events

Mark Your Calendars for Our Upcoming Workshop

"What to Expect from a Site Visit"

Date: Wednesday, August 5, 2015
Time: 1:00-3:30 PM
Location: Sonora Quest Laboratories
1255 W. Washington Street
Tempe, AZ 85281

Cost to attend: $30 SWAE members/$50 Non-members
RSVP: Register here
Speaker: Cindy Gruben, Director of Risk Management, Sonora Quest Laboratory and Panel of Experts

Brief Overview: This workshop will focus on how a Performance Excellence Program applicant can successfully prepare for a Process Level or Organization Level site visit from an examination team. We will focus on the preparation required by the applicant and tips to ensure a successful visit. Learn more about the site visit process and what to expect. In addition, a panel of past recipients and examiners will share key learnings from their individual perspectives.

Questions? Contact the Southwest Alliance for Excellence office at 480-874-5815 or email Karen Shepard at kshepard@swae.org.

*Though held in the Phoenix Metro Area, we welcome participants from all over Arizona, Nevada and Utah. We can arrange participation via webinar or other appropriate modality. Please contact kshepard@swae.org for more information.*

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3961 E. Chandler Blvd. #111-334, Phoenix, AZ 85048 | Ph: 480-874-5815 | www.swae.org
Register now for the 2015 Baldrige Regional Conferences in Denver, CO and Nashville, TN for a one-day showcase of Baldrige best practices.

Attend and engage in a day dedicated to improving your organization's performance. The dynamic conference schedules include an opening plenary session featuring senior executives from the 2014 Baldrige Award recipients, a luncheon keynote speaker, and 15 interactive management sessions featuring Award recipients from the business, education, health care, and non-profit sectors.

For questions about the conferences, contact us at 301-975-2036 or baldrige@nist.gov. For registration inquiries, contact Experient at 800-310-7554 (Domestic) or 240-439-2554 (International) or e-mail to NIS@experient-inc.com.

The Baldrige Resource Library (BRL)

The BRL is a service of the Alliance for Performance Excellence.

The BRL is a collection of multi-media resources about organizational improvement and performance excellence. Articles, videos, slides and other materials are available for reading and downloading.

IT’S FREE! Use it to broaden your knowledge and improve yourself and your organization. Use it! ... Share it! http://www.baldrigepe.org/brl/
"WHAT DO WE WANT OUR ORGANIZATION TO BE? WHAT WILL SUCCESS FOR OUR ORGANIZATION LOOK LIKE?"

Southwest Alliance for Excellence (SWAE) can help you answer these questions and more through our approach to organizational assessment, performance and the development of best practices. As stated by one of our members, “Participation in SWAE will strengthen your organization’s awareness of quality performance and enhance your competitive market position.” If you want your organization to exude excellence and a progressive culture, then it is important to immerse your organization in a community that works toward the same shared vision. Explore all that Southwest Alliance for Excellence has to offer:

WE ARE YOUR TIMELY RESOURCE FOR ACCURATE AND INNOVATIVE INFORMATION

Access to Best Practices – Southwest Alliance for Excellence focuses on:
- Best practices employed by health care, education, government and private sectors.
- Relevant learning opportunities.
- Benchmarking tours and networking opportunities as well as workshops on the Performance Excellence Program.

Tools you can use:
- Review key points from the Baldrige Criteria and Resource Library.
- Visit the Case Studies and Awards portion of the website to find creative solutions and innovative practices.
- Use our e-learning program as a professional development and training tool for your organization.

EVERYONE IN EVERY DEPARTMENT CAN BENEFIT

Your Entire Organization Belongs – Membership in SWAE is unique, in that:
- Every employee in your organization can benefit from SWAE services.
- We support participation of employees at all levels and from all departments.
- We will help you develop and support a culture of excellence throughout your organization.

Tools you can use:
- Contact SWAE to host a personalized forum about the benefits of belonging.
- Register additional staff so they can begin to receive information and participate.

USE SOUTHWEST ALLIANCE FOR EXCELLENCE SERVICES AND YOU WILL SEE THE DIFFERENCE

Tangible Improvements – You can benefit from measureable organizational improvements by:
- Saving money by completing in-house projects with information that SWAE provides.
- Accessing practical ideas, suggestions and programs in use by progressive organizations.
- Replicating and reinventing service improvements used by other organizations.

Tools you can use:
- Participate in the Performance Excellence Program to improve your organization’s processes.
- Attend the Performance Excellence Program Awards Banquet to hear best practices of award recipients that can be implemented in your organization.

CONNECTING MEMBERS IS WHAT WE DO BEST

Knowledge Network of Members – We are made up of a wide network of organizations:
- Members value receiving information as well as sharing their innovative best practices.
- We connect you to organizations that have similar interests.
- Through SWAE Ambassadors, we focus on you as a unique organization.

Tools you can use:
- Sign up for informational e-blasts and newsletters.
- Contact SWAE to be connected to appropriate members and ambassadors.
Baldrige Insights

People, Process, and Plentiful Passion

Every year, I return from the Baldrige Program’s Quest for Excellence® conference energized and full of pride in the success that can be achieved by people working together to achieve a common set of goals. The 27th Quest for Excellence continued to inspire that sense of energy and pride. Every year, I try to synthesize what I have heard into some key themes that reflect the best practices of America’s new role-model organizations. This year, I will share nine summary impressions, plus a tenth piece of personal advice for good measure.

Nine Key Themes

Category 1 of the Baldrige Criteria for Performance Excellence is “Leadership.” This ordering is intentional. Leaders guide the organization and set the cultural tone that drives success. The attributes and actions that set great leaders apart are exemplified by this year’s Baldrige Award recipient leaders and, as I implied, set the tone for the eight key themes that follow the first theme below.

1. Senior leaders set the tone: What I heard very clearly this year is that senior leaders set the tone right from the start, by being a participant in all new-employee orientations. The leaders emphasized the importance of transparency in all interactions and the need to put their own egos aside to listen and learn from people at all levels of the organization. Each of the four senior leaders of the 2014 Baldrige Award recipients presenting at this year’s conference conveyed how they set the tone for their organizations and achieved these goals. Scott McIntyre of PricewaterhouseCoopers (PwC) Public Sector Practice (PSP) spoke about building a vision, giving employees the tools they need, and carrying responsibility for grooming future leaders. Jayne Pope of Hill Country Memorial said her role was to serve the people who serve the people. If she serves her workforce as a servant leader, they will in turn serve the patients and other customers well. David Huffstutler of St. David’s HealthCare talked about communication, a focus on applying (core) principles, and setting a tone stressing improvement, not a tone stressing winning the Baldrige Award. Finally, Gerry Agnes of Elevations Credit Union talked about listening to employees, creating a safe environment to have honest communication, and setting a vision that says when you reach a fork in the road, don’t choose mediocrity. The words from each leader were different, but the impact was the same—they set the tone for a productive, positively challenging, and safe work environment.

2. Culture, values, and trust: Skills do not matter if there isn’t a cultural fit. This has been articulated and verified before (many times) in “Baldrige organizations,” but this year the linkages among culture, values, and trust were hard-wired and clearly demonstrated by the Baldrige Award recipients and the results they achieved. Culture, values, and trust were at the very foundation of their organizational behavior. Elevations Credit Union presenters talked about hiring to core values and firing to core values. This basic ethical commitment to values was a deal maker and deal-breaker to being part of the organization. Hill Country Memorial and St. David’s HealthCare presenters spoke about building a vision, giving employees the tools they need, and carrying responsibility for grooming future leaders. Jayne Pope of Hill Country Memorial said her role was to serve the people who serve the people. If she serves her workforce as a servant leader, they will in turn serve the patients and other customers well. David Huffstutler of St. David’s HealthCare talked about communication, a focus on applying (core) principles, and setting a tone stressing improvement, not a tone stressing winning the Baldrige Award. Finally, Gerry Agnes of Elevations Credit Union talked about listening to employees, creating a safe environment to have honest communication, and setting a vision that says when you reach a fork in the road, don’t choose mediocrity. The words from each leader were different, but the impact was the same—they set the tone for a productive, positively challenging, and safe work environment.

3. Core competencies: Organizational core competencies have been a key focus of the Baldrige Criteria for numerous years; with each passing year, organizations are getting better at identifying their core competencies (current and future) and using them to build strategic advantage. This year, those core competencies included a new attribute—linkage to organizational values. Organizational core competencies articulated by this year’s Baldrige Award recipients included ethical behavior and Go to Blogrige to read more
Stay. Roll Over. Play Dead.

“The first step towards getting somewhere is to decide that you are not going to stay where you are.” This quote by J.P. Morgan, American financier and banker who arranged the merger of two electric companies to form General Electric along with later mergers of other companies to form the United States Steel Corporation, caught my attention.

What is it that inspires some leaders to take bold actions to move their organizations to a higher level of performance while others are content to accept the status quo? What makes some leaders simply intolerant of “good” when the option of “great” is out there?

When we consider organizations that are on the performance excellence journey, we find some common themes. These include:

1. An intense, constant focus on improving

“A journey is a person in itself; no two are alike. And all plans, safeguards, policing, and coercion are fruitless. We find that after years of struggle that we do not take a trip; a trip takes us.”

John Steinbeck, Pulitzer Prize-winning American author

2. A tolerance for uncertainty, which is required when embarking on a journey without being able to see the whole path/route

"Leadership is all about taking people on a journey. The challenge is that most of the time, we are asking people to follow us to places we ourselves have never been."

Andy Stanley, founder of North Point Ministries

3. An acknowledgment that regular, objective assessment of progress is critical to making mid-course corrections along the way

"We all want progress, but if you’re on the wrong road, progress means doing an about-turn and walking back to the right road; in that case, the man who turns back soonest is the most progressive."

C. S. Lewis, Irish novelist, poet, and academic

4. A thirst to learn from other travelers on the journey

"An organization’s ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage."

Jack Welch, American businessman, former CEO of General Electric

What does all of this have to do with the subject line, “Stay. Roll over. Play dead.”? We believe that organizations that choose to accept their current level of performance (“Stay”) are yielding the advantage to their competitors (“Roll over”). Over the long term, they just might not survive (“Play dead.”) What’s preventing you from starting the journey?
For the second year in a row, the Baldrige Performance Excellence Program (BPEP) has received the first place award in the government and military category of the Leadership 500 Excellence Awards, an annual recognition of the world’s best leadership development programs and initiatives. The honor was announced on March 31, 2015—World Leadership Day—during a dinner at the LEAD 2015 conference in Dallas, Texas.

Rounding out the top three awards in the government and military category were two Texas organizations: the City of Houston Learning and Development Center – The Center for Excellence and the Texas Comptroller of Public Accounts.

Given out by Leadership Excellence Essentials magazine for more than 30 years, the Leadership 500 Excellence Awards rank the top leadership development programs in each of the following organizational types: small, midsize, large, government/military, nonprofits, international, educational, small partners/providers, midsize partners/providers, large partners/providers and international partners/providers. The judges use applications, survey responses and interviews to evaluate each candidate’s programs, ranking them on seven criteria: vision/mission, involvement/participation, accountability/measurement, design/content/curriculum, presenters/presentations/delivery, take-home value and outreach.

Since 2010, BPEP has placed four times in the top 10 of the Leadership 500 Excellence Award’s government/military rankings.

The Baldrige Program raises awareness about the importance of performance excellence in driving the U.S. and global economy; provides organizational assessment tools and criteria; educates leaders in businesses, schools, health care organizations, and government and nonprofit organizations about the practices of national role models; and recognizes those role models with the Baldrige Award.

The complete list of the 2015 Leadership 500 Excellence winners is available on the award’s website. For more about the Baldrige Performance Excellence Program, call (301) 975-2036 or email baldrige@nist.gov.
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Looking for a way to expand your reach to other business professionals for a low cost? Consider purchasing ad space in the Southwest Excellence Quarterly—the Southwest Alliance for Excellence quarterly e-newsletter! Advertising opportunities start at $75.

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For more information, visit www.swae.org or call 480-874-5815.

FALL ISSUE RESERVATION DEADLINE: SEPTEMBER 18, 2015
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<tr>
<td>July 8-9</td>
<td>All Examiners</td>
<td>University of Phoenix - Tempe &amp; Webinar</td>
<td>Examiner Stage 2 &amp; 3 Training Session –2 days / both days mandatory (Offered via webinar)</td>
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<td>July 10</td>
<td>Applicants</td>
<td>SWAE Office</td>
<td>Completed Awards Applications due</td>
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<td>July 13-16</td>
<td>SWAE</td>
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<td>Selection of Examination Teams, Leads, &amp; Mentors</td>
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<td>July 17</td>
<td>SWAE</td>
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<td>Distribute applications and supporting materials to examination teams</td>
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<td>July 17</td>
<td>Lead Examiners &amp; SWAE</td>
<td>Webinar</td>
<td>2-3 hours Lead &amp; Software Training; Site Visit Responsibilities; and initial applicant contact</td>
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<td>July 20-Aug 9</td>
<td>Examiners</td>
<td></td>
<td>Stage 1 - Independent Review of Applications</td>
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<td>Aug 5</td>
<td>Applicants</td>
<td>Sonora Quest Laboratories</td>
<td>Workshop – “How to Prepare for a Site Visit” (1:00pm-3:30pm)</td>
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<td>Aug 10-Sept 13</td>
<td>Examiners &amp; Mentors</td>
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<td>Examiners Stage 2 – Team Meeting (1-2 days) &amp; Consensus report completed</td>
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<td>Sep 14</td>
<td>Lead Examiners</td>
<td>SWAE office</td>
<td>Consensus scorebooks &amp; scoring sheets with mentor review due</td>
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<td>Sep 14-20 or 27</td>
<td>Examiners &amp; Mentors</td>
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<td>Site Visit Preparation</td>
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<td>Sep 21-25 &amp; Sep 28-Oct 2</td>
<td>Examiners/Applicant</td>
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<td>Stage 3 - Site Visits completed (Site Visit time based on applicant type)</td>
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<td>Oct 16</td>
<td>Examiners</td>
<td>SWAE office</td>
<td>Draft Feedback Reports with mentor review due</td>
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<td>Oct 23</td>
<td>Judges</td>
<td>TBD</td>
<td>Panel of Judges Training</td>
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<td>Nov 13</td>
<td>Judges</td>
<td>TBD</td>
<td>Stage 4 - Panel of Judges Meeting</td>
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<td>Nov 14 – 24</td>
<td>Judges &amp; Lead Examiners</td>
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<td>Finalize feedback report</td>
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<td>SWAE</td>
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<td>Stage 5 - Final Due Diligence conducted</td>
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<td>Nov 24</td>
<td>Lead Examiners</td>
<td>SWAE Office</td>
<td>Final Feedback Reports due</td>
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<td>Nov 30 – Dec 3</td>
<td>SWAE</td>
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<td>Applicants notification of selection/non-selection</td>
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<td>Early Dec</td>
<td>SWAE</td>
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<td>News Release distributed reporting Recipients</td>
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<td>Early-Mid Dec</td>
<td>SWAE</td>
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<td>Editing of feedback reports</td>
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<tr>
<td>Mid Dec</td>
<td>SWAE</td>
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<td>Feedback Reports provided to all applicants</td>
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<td>Jan/Feb. 2016</td>
<td>SWAE</td>
<td>TBD</td>
<td>Recognition Banquet for Recipients and Volunteers</td>
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</tbody>
</table>
Southwest Alliance for Excellence—formerly Arizona Quality Alliance—is a non-profit corporation that advances improvement and excellence in organizations, communities and individuals. To achieve our mission we will:

1. Administer the Performance Excellence Awards Program based on the Malcolm Baldrige Criteria; and annually recognize, showcase & highlight outstanding achievement in performance excellence.

2. Train individuals to become experts at assessing and evaluating, entire organizations or individual processes using the Criteria for Performance Excellence.

3. Facilitate programs so organizations can find and implement proven best practices to achieve a competitive advantage.

4. Provide organizations with a comprehensive, cost-effective performance analysis with extensive feedback based on the Malcolm Baldrige criteria.

5. Create and deliver relevant workshops, benchmarking tours and seminars that will develop the skills and knowledge of performance excellence professionals.

6. Provide a dynamic environment for professional networking and knowledge sharing.

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