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THE ALLIANCE FOR PERFORMANCE EXCELLENCE NEWSLETTER

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“Enhancing the Growth and Sustainability of Baldrige Focused Programs”

www.baldrigepe.org



A Message from the Chairman

Brian Lassiter, Chair
Alliance for Performance Excellence
(Minnesota, North & South Dakota)

November, 2013

The Alliance Continues to Move Forward

Hello fellow Alliance members:

First, I wanted to start by saying that I am honored to serve as the Alliance's chair for a second two-year term. The board recently also elected Liz Menzer (WI) as Vice Chair, Geri Markley (MI) as Treasurer, and Anne Warner (NH) as Secretary. Congratulations to the new officers; I look forward to working with you all to guide the Alliance into the future. I also sincerely thank Katie Rawls for her leadership as Vice Chair the last two years, and Karen Shepard for her support as Secretary. You both contributed in so many ways to the Alliance's accomplishments.

I mentioned in Chicago several times that I believe the Alliance is at a crossroads. I am committed now more than ever to facilitating the board's creation of a unifying vision and a strategy to move the Alliance and all of our member programs forward.

Along those lines, the Alliance board will meet for a full day retreat in late January to plan our future. We have made good progress on our 2013 plan (completing the membership restructuring, researching and launching a committee to provide alternatives to SWOP—both mentioned below—providing input into the BPEP director hire, and other activities). However, I view our 2014 (and long-range) plan as critical to building Alliance infrastructure, accelerating our work on collaborative fundraising, and increasing the value we provide to our member state/local/regional programs. In short, the Alliance is ready—and now requires—a more robust plan and resources to execute that plan to move us forward. Watch for more information before and after our January planning retreat.

I also wanted to mention again (in case you missed it in Chicago or in my last email update) that your Alliance board approved a new membership structure recently. Why change Alliance membership structure? As noted in the January 2013 member survey, we really need to increase the value of membership; the Alliance needs to grow and diversify its membership to sustain operations and further increase the value it provides; and the Alliance is in a unique position to represent the full network of organizations and individuals interested in Baldrige-based performance excellence. So a Task Force (lead by Bill Denney and including Donn Fisher, Wayne Foraker, Mari Maldonado of ASQ, Katie Rawls, Anne Warner, and myself) – and building off of the work of a Task Force lead by Donn Fisher earlier this year – recommended several key changes to Alliance membership.

Philosophically, the changes will get rid of membership classes (where one class of member is more important than the others), and instead move to “equal but different types” of membership, where: A) all members pay membership dues; B) all members have voting rights (1 membership, 1 vote); C) all members are eligible to participate on the board of directors; and D) all members enjoy the benefits of membership. However, the structure will recognize a sub-segment of members – Founding Members – which are the state, local, regional, and sector-based Baldrige programs for which the Alliance was originally created.

Message from the Chairman

The Task Force recommended three major changes, involving 1) expansion of member benefits, 2) solidifying the requirements of membership, and 3) changing dues structure. On the latter, Founding Members will now be asked to contribute \$500/year (for programs under \$500K in revenue) and \$1000/year (for programs over \$500K), and all other members (domestic or international) will contribute \$5000/year (for individuals/organizations of under 500 employees) and \$10,000/year for organizations over 500 employees). The board approved these changes, which will go into effect January 1, 2014. A complete outline of the recommendations are included in the new Alliance library.

So as we wrap up this year, I reflect on the great progress the Alliance has made and the opportunities and imperatives we have before us. I look forward to working with each of you to move the Alliance forward, as we work to sustain and grow each of our programs.

Brian Lassiter, Chair (MN)

Brian Lassiter
Chair, Alliance for Performance Excellence (Minnesota)

“Enhancing the Growth and Sustainability of Baldrige Focused Programs”

www.baldrigepe.org

Baldrige National Quality Award Recipients

THREE U.S. ORGANIZATIONS HONORED WITH THE 2013 BALDRIGE NATIONAL QUALITY AWARD

WASHINGTON, D.C.—U.S. Commerce Secretary Penny Pritzker announced on November 13, 2013 that three U.S. organizations will receive the 2013 Malcolm Baldrige National Quality Award, the nation's highest Presidential honor for performance excellence through innovation, improvement and visionary leadership. All of this year's winners are from the health care and education sectors.

The 2013 Baldrige Award recipients—listed with their category—are:

[Pewaukee School District](#), Pewaukee, Wis. (education)

[Baylor Regional Medical Center at Plano](#), Plano, Texas (health care)

[Sutter Davis Hospital](#), Davis, Calif. (health care)

"I am happy to congratulate the 2013 Baldrige Award recipients, three organizations that are leading innovative practices, dynamic management, sound financial performance, outstanding employee and customer satisfaction, and a solid commitment to excellence and proven results," said Secretary Pritzker. "The Baldrige program has had a tangible impact on the success of thousands of organizations worldwide and our nation's economy, and the winners announced today will undoubtedly continue that legacy and serve as role models for their peers in the health care and education sectors."

The 2013 Baldrige Award recipients were selected from a field of 22 applicants that were evaluated rigorously by an independent board of examiners in seven areas defined by the Baldrige Criteria: leadership; strategic planning; customer focus; measurement, analysis and knowledge management; workforce focus; operations focus; and results. An organization may compete for the award in one of six categories: manufacturing, service, small business, health care, education and nonprofit (including government agencies).

The Baldrige judges also recognize best practices in one or more of the Baldrige Criteria categories by organizations that are candidates for the award but are not selected as a winner. This year, the judges have chosen to honor two health care organizations for their best practices in the leadership criterion:

- **Duke University Hospital**, Durham, N.C.
- **Hill Country Memorial**, Fredericksburg, Texas

The 2013 Baldrige Award will be presented in April 2014 during the Quest for Excellence conference in Baltimore, Md. For more information, including profiles of the 2013 Baldrige Award recipients, visit www.nist.gov/baldrige.

Alliance for Performance Excellence

Upcoming Dates

Leadership Committee Meeting.....2nd Thursday of every month, 3-5:00 PM Central Time
(December 12, 2013; 2014—February 13, March 13, May 8, June 12, August 14, October 9, November 13, December 11)

Board Meetings.....January 17, 2014 (Las Vegas, NV), April 6-9, 2014 (Quest for Excellence),
July (Teleconference), Sept. (Regional Conference—Minnesota)

Alliance Meetings.....September TBD (Regional Conference, Bloomington, MN)

Regional Conferences.....September 9, 2013 (Los Angeles, CA), September 23, 2014 (Bloomington, MN)

Alliance Member Represents Baldrige in Abu Dhabi

Submitted by Donald C. Fisher



MSQPC CEO PRESENTS ON BEST PRACTICES FOR CORPORATE SUSTAINABILITY AT WORLD CONFERENCE IN ABU DHABI

Donald C. Fisher, Ph.D.—the executive director and CEO of the Mid-South Quality Productivity Center (MSQPC) and director of the Baldrige-based Regional Memphis Chamber Quality Cup Award—represented the United States and the Alliance for Performance Excellence at the Sheikh Khalifa Excellence Award’s Share Best Practice Conference in Abu Dhabi of the United Arab Emirates (UAE) in late September.

The conference consisted of Quality Award Administrators and Quality Award Winners in business excellence from around the world to present to UAE and other Middle Eastern organizations on how to succeed economically and in a sustainable and socially-responsible manner.



Fisher described his time in Abu Dhabi as a unique experience, networking with people from Jordan, Saudi Arabia, Singapore, Russia, and India, in addition to other parts of the world.

“The whole conference was a very elegant affair and the Awards Ceremony was held at the Emirates Palace Hotel,” Fisher said. “The best part was watching the Crown Prince (Mohammed bin Zayed Al Nahyan) give out the National Quality Award for Abu Dhabi.”

Fisher gave a presentation on how The Alliance for Performance Excellence supports the overall Baldrige Enterprise as a viable member which also includes the National Baldrige office, the Baldrige Foundation, and the American Society for Quality (ASQ). In addition, he presented a self-assessment process that he created for corporate sustainability, a method which aligns Baldrige Performance Excellence Criteria with the Triple Bottom Line of the Global Reporting Initiative (GRI) Index. This means the criteria for the Baldrige Award, a national honor that recognizes organizations for performance excellence, can also include the three pillars of corporate sustainability: economic, environmental and social performance.

“The conference organizers asked Quality Award Administrators from all over the world to explain how they presented the award for their country,” Fisher said. “Corporate sustainability is the trend for the future because it makes realistic business sense. Reducing waste and inefficiency within an organization can save money and protect the environment.”

Local Memphis companies are also benefiting from the methods in Fisher’s presentation. Methodist Le Bonheur Healthcare is currently working with Fisher to create an internal Baldrige-based award for corporate sustainability called the Chairman’s Quality Award for Corporate Sustainability, using the self-assessment process he created.



Alliance Resources

Submitted by Brian Lassiter and Brian Loebig

Turnkey Baldrige Outreach Program for Alliance Members

The SBDC Think Tank invites Alliance Members to participate in the Small Business Breakthrough Project. (www.BreakthroughProject.com) The Breakthrough Project features a turnkey outreach program that helps Startups and Stage 2 companies begin their Baldrige Journeys. The Project includes books, a teacher's guide, workshops, classroom teaching plans, marketing materials, adviser training, and cloud-based ManageHub management software. All Breakthrough Project resources are provided at no cost to entrepreneurship programs, businesses, and advisers. Please use the Breakthrough Project to increase the visibility of your State Quality Award Program and extend its reach to tens of thousands of small business leaders who need Baldrige to *break through*.

Breakthrough Project Mission

The mission of the Breakthrough Project is to make Baldrige accessible to smaller organizations. To accomplish this mission the Breakthrough Project developed a step-by-step deployment approach that any leader can use to turn Baldrige theory into practice. The Breakthrough approach was first introduced as a manual system consisting of eight management tools that are explained in the "Small Business Breakthrough Book." To date, over 10,000 copies of the Breakthrough Book have been distributed.

On July 4, 2013 the Breakthrough Project introduced ManageHub Software. ManageHub automates the Breakthrough Approach. It is free, cloud-based management software that creates a ready-to-use Baldrige leadership framework. Any leader can visit www.ManageHub.com and create their company's account. Once created, they can customize their private ManageHub workspace with their company's departments, processes, people, projects, strategies, ideas, problems, and operational knowledge. Then, with consistent use, ManageHub helps optimize and transform the company, as only Baldrige can.

ManageHub works by organizing employees into process teams who standardize and improve the work they perform. ManageHub features a familiar social-network interface that encourages employees to report inefficiencies, customer complaints, and improvement ideas. It uses asynchronous-collaboration to help employees work together to resolve their issues, improve products, and increase customer satisfaction.

ManageHub helps every employee learn how to be a leader of their own areas of responsibility. It helps create a culture of innovation, collaboration, and continuous learning. It helps eliminate bottlenecks. It helps make the organization scalable so it can grow without risking quality or customer satisfaction.

Simple setup and deployment instructions are provided in the ManageHub book, which is available for free download at www.ManageHub.com.

Breakthrough-ManageHub Training Certification

The Breakthrough Project launched a business adviser training certification course in April 2013. Currently we are training our first cohort of approximately 30 SBDC adviser, and independent business consultants/coaches. Most participants in our first cohort, although highly trained and/or educated professionals, do not have a background in Baldrige. It has become clear that we need to create a second cohort of Baldrige Professionals who can ultimately assume a leadership role in our training program and help institutionalize a Baldrige culture. Our goal is to train 1000 business advisers in 2014. We want to create an army of professionals who can help smaller organizations embrace Baldrige quality management. Currently, training is also free. Though this may change once we need to employ outside instructors.

Why Free?

ManageHub and all Breakthrough resources are free. It is our goal to keep it this way. We do not want a small business owner to have any excuse for not adopting Baldrige quality management. Breakthrough and ManageHub materials are designed for DIY (do it yourself) implementation. For example, a self-motivated, bootstrapped startup could read the Breakthrough and/or ManageHub books and achieve a lot of success without direct support. However, many entrepreneurs, and managers of Stage 2 companies, will want the guidance of a trained business professional. Already, members of our first training/certification program are successfully selling their ManageHub services. Alliance members, advisers, partners, and affiliates can also decide how to charge for their ManageHub services. In fact, the SBDC Think Tank launched the Breakthrough Project in part to provide Small Business Development Centers with a new, and predicable source of revenue that did not rely on grants or government funding. Alliance members can also leverage ManageHub to create a new revenue stream.

Why Now?

In 2011, the Breakthrough Project initiated a multi-year research study to investigate attitudes and impact of Baldrige quality management on small business. Preliminary findings show, "Although organizations report that they are *focusing on business basics* they do not seem to be engaging in process or strategic improvement. In other words, there seems to be a disconnect between their intentions and appropriate action." The research also shows that, "...many small businesses require more direction in practical implementation of Baldrige best practices. Many are struggling with a lack of guidance."

So far the Breakthrough Project research indicates that small business success is random and unpredictable. The Breakthrough Project believes application of Baldrige can change this. Our hypothesis is that small business success can become more predictable if they apply appropriate best management practices (as defined by Baldrige) earlier in their life cycle.

If it is true that small businesses are the backbone of the U.S. economy, then they deserve support. Too many are failing for the wrong reasons. The Breakthrough Project is currently helping hundreds *and* thousands of small businesses. With your help we can help hundreds *of* thousands using Breakthrough Projects systematic approach.

What Can You Do?

Over the last three years the Breakthrough Project has grown and matured into a exciting turnkey outreach program. The heavy lifting is complete. Now, we invite Alliance Members to get involved using and improving the Breakthrough and ManageHub resources:

Use the Turnkey Breakthrough Curriculum: <http://www.smallbusiness-breakthrough.com/breakthrough-curriculum-link-list>

Encourage Alliance partners and consultants to sign up for Breakthrough-ManageHub Training Certification: <http://eepurl.com/FLwnX>

Contact Mike Kramer: Mike is founder of the Breakthrough Project. Explore ways you would like to use the Breakthrough Project by contacting him at 847-675-8211 or mike@smallbusiness-breakthrough.com.

Florida

Submitted by Pat Sciarappa, Organizational Development Director

2014 Sterling Performance Summit & Yellow Belt Certification

The Florida Sterling Council is excited to be offering two unique events in Tallahassee in January and February 2014.

Lean Six Sigma Yellow Belt Certification

On January 9 and 10, the Florida Sterling Council will be providing the opportunity to become Sterling Lean Six Sigma Yellow Belt certified. This incredible training provides you with a fundamental understanding of Lean Six Sigma and its benefits to an organization, the ability to prioritize processes for improvement, approaches and tools to immediately improve processes in the workplace, and Lean Six Sigma Yellow Belt certification.

Registration for the certification is \$195. By registering for the Lean Six Sigma Yellow Belt certification, you will also receive a credit towards Green Belt training with the Florida Sterling Council.

Sterling Performance Summit

On February 13, the Sterling Performance Improvement Summit will offer educational sessions that directly focus on the key issues driving jobs in our economy. According to Gallup, "out of approximately 100 million full-time workers, there are 20 million actively disengaged employees in the United States." In conjunction, the other most important factor driving employee engagement is the role that a great boss or leader plays to support and encourage employee engagement.

This Summit will focus critical learning around both leadership and employee engagement as combined drivers of our country's economic future. We will also share approaches to help you lean your work processes to continue to drive efficiency and productivity into the workplace.

Early registration for the Summit is \$295. Registration for both the Lean Six Sigma Yellow Belt certification and the Sterling Performance Summit can be combined for \$399. You will also receive \$100 off your 2014 Florida Sterling Conference registration price by registering for the Sterling Improvement Summit.

More information and registration for the Summit can be found at <http://www.floridasterling.com/assets/pdf/2014/2014TLHSummitFlyer-Registration.pdf>.

Maryland Performance Excellence Award Program (MPEA)

Submitted by LaWanda Burwell, MPEA Board President

The Maryland Performance Excellence Foundation culminated its 2013 Performance Excellence Award cycle with its partner, the American Society for Quality--Baltimore Section, on October 15, 2013. Robert Fangmeyer, Acting Director of the Baldrige Performance Excellence Program was a guest at this annual Celebration of Excellence event, at which MedStar St. Mary's Hospital of Leonardstown, Maryland received a Gold MPEA award and Greater Baltimore Medical Center HealthCare System of Towson, Maryland received a Silver MPEA award.

The Partnership for Excellence (Indiana, Ohio & West Virginia)

Submitted by Al Faber, President & CEO

PROGRAM HIGHLIGHTS

- TPE conducted a state-wide workshop for the Ohio Certified Public Manager Society on October 17, getting more than 12 state agencies on the path to creating an organizational profile and introducing them to the Baldrige Criteria for Performance Excellence.
- In meeting with the Indiana Governor's Office of Small Business and Entrepreneurship, TPE is beginning to coordinate a state-wide deployment of Baldrige services to small business development centers across the state. We will be conducting a conference for Regional Program Directors in early 2014 and a series of regional presentations throughout the year.
- TPE is in the final stages of development and will soon announce online Lean and Six Sigma training region-wide. We have partnered with the world's most recognized Lean and Six Sigma training organization to offer the "gold standard" in all Lean and Six Sigma certifications. Our new training services will be discounted for individual and organizational members, and available to all others at very competitive prices.
- We are also working with the Indiana Governor's office to strengthen our relationship with education and have worked in partnership with them to reach Indiana public school systems across the state. We will be presenting "Excellence in Education" opportunities throughout 2014 at local, regional, and state-wide conferences.
- On November 13th, TPE will co-present with national and state-program Baldrige award recipients at the 2013 Indiana Healthcare Executives Network annual symposium in Indianapolis, IN. The focus of the presentation will be the success of Baldrige hospitals using the Criteria for Performance Excellence and the value of starting your Baldrige Journey with a state program.

WEBINARS

Watch for more details on TPE's popular webinar series for December 12, 2013. Our December Webinar will feature Bill Self from the Leadership Factor, Inc. The Leadership Factor is a leading customer survey specialist. They conduct over 500 surveys a year to help organizations improve their customers' experience, satisfaction and loyalty.

The Leadership Factor specializes in measuring customers' satisfaction and loyalty, and we have vast experience in:

Data Collection Methods

- Telephone Interviews
- Face to Face Interviews
- Web Surveys
- Panel Research
- IVR (Interactive Voice Response) Surveys
- Text (SMS) Surveys
- Postal Surveys

Reporting

- Web Reporting
- Dashboards
- Workshops
- Board Presentations

Benchmarking data

- We manage the UKCSI (UK Customer Satisfaction Index) for the Institute of Customer Service and have a comprehensive database for benchmarking developed with the data from the hundreds of surveys carried out annually.

EXAMINER TRAINING

The 2013-2014 Examiners have five choices to attend two-day examiner training in November 2013:

- Northwest Ohio, Nov. 4-5, in Leipsic, OH
- West Virginia, Nov. 6-7, in Charleston, WV
- Central Ohio, Nov. 12-13, in Columbus, OH
- Indiana, Nov. 13-14, in Indianapolis, IN
- Southwest Ohio, Nov. 14-15, in Cincinnati, OH

A rural hospital within our region has sent 4 Examiners to training this year, led by the hospital's President and CEO. As she told us, "If Baldrige is how we choose to lead our organization, then I must lead the way." Others include the CNO, VP of Quality and a physician. This organization will certainly serve as a role model for performance excellence within our region over the next several years.

For more information please visit our website at: www.thepartnershipforexcellence.org.

Southwest Alliance for Excellence (Arizona, Nevada & Utah)

Submitted by Karen Shepard, Executive Director

Intel/SWAE Mentoring Program in the News

Southwest Alliance for Excellence (SWAE) and our Mentoring and Planning Services (MAPS) program partnership with the Intel Corporation has been making waves in local Arizona news outlets. See below videos and a news article highlighting the program.



The MAPS program matches skill-specific volunteers from the Intel Corporate Quality group as mentors to small and medium-sized organizations throughout Arizona. Through Intel's "Skills-based Volunteering" Program, Intel Quality employees are matched to organizations based upon their experience, skill sets, passion and certifications. These volunteers provide mentoring and assist organizations with training in quality skills and accomplishment of quality objectives.

This program is designed for nonprofits, educational entities and government agencies and there is no cost to the organizations that participate.



[Watch a segment](#) on the Intel Mentoring Program featured on the PBS program "Arizona Horizon."



[Watch a video](#) about FIREDOX-- software created from the Gilbert Fire Department's mentoring partnership with Intel.

SWAE/Intel Mentoring and Planning Services (MAPS) Program Highlighted in Newspaper

On October 7, the East Valley Tribune featured an article on the SWAE/Intel MAPS Program.

A lackluster volunteer opportunity several years back was what inspired Intel Corporate Manager of Operational Excellence Rudy Hacker to find a more efficient way to volunteer his services while providing a greater benefit to local communities. That, in turn, led to the creation of Intel's MAPS program in Chandler. Through the program--short for Mentoring and Planning Services--employees of the company work with local agencies using their professional skills to better the agencies' operations in the short and long run.

"You want to set up your improvement plan so it has some longevity," Hacker said.

Since then, Intel employees have applied their talents for a total of 40 projects over the course of five years--although Hacker pointed out 34 of those projects have come in the last three years--and the program is spreading across the many Intel offices. Local employees have volunteered with a broad swath of organizations ranging from police and fire departments to Rio Salado College in Tempe and the East Valley Institute of Technology in Mesa.

[Read the full story.](#)

AHCA/NCAL

Submitted by Courtney Krier, Director, Quality & Quality Award Program, AHCA

Recruiting Examiners for the Largest Baldrige-based Program in the Country!

The American Health Care Association/National Center for Assisted Living (AHCA/NCAL) is a professional trade association representing providers of post-acute and long term care. As the nation's largest association of these care providers, AHCA/NCAL advocates for quality care and services for frail, elderly, and disabled Americans. Our members provide essential care to approximately one million individuals in 12,000 not-for-profit and proprietary member facilities.

In 1996 AHCA/NCAL launched the [AHCA/NCAL National Quality Award](#) program. The program is based on the Baldrige Health Care Criteria for Performance Excellence. The program recognizes achievement at three levels; Bronze (Organizational Profile), Silver (Basic and Overall) and Gold (full criteria). Engagement in the Baldrige criteria among the AHCA/NCAL membership has expanded rapidly and we receive close to 1,000 applications per year. Over half of these are at the Silver and Gold level.

The growing application numbers drive a demand for an increasing number of capable Examiners within the program. **We are currently recruiting for both Senior and Master Examiners for the 2014 program cycle.** Senior Examiners review Silver applications while Master Examiners review the Gold level applications. If you are interested in engaging in the largest Baldrige-based program in the country, **visit our [Examiner Recruitment website](#) to learn more about the review process, key dates and deadlines, and apply to serve.**

If you are interested in participating, but unwilling or unable to travel, we are also recruiting for "support" Examiners. Support examiners will not be required to travel, but will participate in individual review of applications, participate in team conference calls, and contribute feedback comments and scoring. If you are interested, please complete the application and send an email to [Courtney Krier](#), Director of Quality & Quality Award.

ASQ

Submitted by Michael J. Barry, Communications Manager

Join the World Quality Month celebration!

November is designated as a worldwide celebration of quality—a time to showcase the advancement and valuable quality contributions in businesses, communities and institutions—where collectively the global quality community can raise the voice of quality.

The World Quality Month [website](#) will once again serve as the hub for the celebration. Browse the calendar to see what worldwide quality events are happening during World Quality Month; download [toolkit pieces](#) to help spread the word; access knowledge resources (case studies, research, quality tools, etc.); read about quality success stories; and join the conversation on Twitter.

New in 2013! In celebration of World Quality Month, Quality Progress published a number of readers' favorite quality quotes and descriptions about why that particular quote speaks to them in the November issue. During the months of November and December visit [qppquote.com](#) where you can turn your favorite quality quote into an image you can share on Facebook, Pinterest and Twitter (use hashtag #WQM13), or print and display your quote in places where you or your colleagues could use some extra inspiration.

Learn more about World Quality Month and learn how you can join in the celebration. Tune in to the current episode of [ASQ TV](#) which is devoted to World Quality Month.

If you have any questions or would like to contribute content to the website, send an email to worldqualitymonth@asq.org.

