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THE ALLIANCE FOR PERFORMANCE EXCELLENCE NEWSLETTER

THE PREMIER RESOURCE FOR A THRIVING BALDRIGE COMMUNITY

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“Enhancing Our Members’ Ability to Grow Baldrige-based Performance Excellence”

www.baldrigepe.org/alliance



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A Message from the Chairman

Brian Lassiter, Chair

Alliance for Performance Excellence &
President of the Performance Excellence Network (MN, ND & SD)

“Enhancing Our Members’ Ability to Grow Baldrige-based Performance Excellence”

www.baldrigepe.org/alliance

Preparing for a Growth Spurt

Happy Quality Month! It was great seeing many of you at the Minnesota Baldrige Regional Conference last September, including some new faces! Welcome to Margo Hoffman (TPE director) and Marta Nichols (PiPEX), two new program directors that attended the Minnesota meetings. Welcome also to Mac Maguire (QTF) and Doug Hummer (NC) who have taken leadership roles with their programs since September.



Our Alliance meetings in September were very productive.

In fact, I should collectively applaud us all for the civility, professionalism, and productivity in our discussions! For those who were unable to attend, we focused on marketing and business development – two areas that will help the Alliance and our member programs grow. For marketing, the Alliance is working in partnership with the Baldrige Program and the Baldrige Enterprise to create a more thoughtful, robust marketing plan (thanks to Liz Menzer, Alliance Vice chair and Wisconsin director, for her leadership on this). Coming out of our September discussions, we have dozens of ideas that are now being considered in a marketing plan for the Enterprise; you can see them at Box.com. Bob Fangmeyer is taking the lead on a draft plan. Once it’s created, we’ll share it with Alliance membership.

For business development, we have a new Alliance committee that formed coming out of the September meetings. The committee operationalizes what the Alliance board set as a strategy in our 2014 plan earlier this year: to systematically identify, vet, and then package and turn over to member programs products/services that are revenue-generating for the benefit of our members. The committee (Liz Menzer, Glenn Bodinson, Dean Bondhus, Raina Knox, and Anne Warner) has formed, chartered itself, and is beginning to consider its first products. I think this strategy is important to grow and sustain the Alliance and our members in that it will systematically “spread” valuable, turnkey products that produce revenue throughout the system. Much more to come on this initiative.

With an increased focus on marketing and business development, I’m optimistic that we can increase awareness, increase activity, and increase revenue within all of our programs. The Alliance’s goal is to grow so that we can better support and serve state/local/sector programs; I believe we’re on the path to do that, and thank all of you involved with those committees to help make that happen!

Here are some other things happening within the Alliance and across our partners:

- Progress continues on Alliance committees in executing our 2014 plans:
 - Membership has revised our policies, worked to support the Alabama program, reviewed this year’s SWOP states;
 - Governance has elected new board members (congrats to Raina Knox, Liz Menzer, Gary Nesteby, and Katie Rawls) and is working to revise by-laws and other policies to support the internal workings of the Alliance;
 - Finance has implemented the new Regional Conference revenue share (checks should arrive shortly for those programs who had 10+ attendees); and
 - you’ve seen the updates on Marketing and Business Development above.

Message from the Chairman Continued

- The BOSS Task Force continues to support BOSS user programs, and the Alliance itself is working on a plan to make that solution financially self-sustaining within a year or so.
- Alliance directors also continue to work on Enterprise teams to improve consistency across the system, make examiner training more efficient, and improve communication across the Enterprise.
- The 2014 Baldrige recipients were announced last week. Congratulations to PWC Public Sector (VA), Elevations Credit Union (CO), Hill Country Memorial (TX), and St. David's HealthCare (TX) – and to their supporting state programs: US Senate Productivity & Quality Awards, Rocky Mountain Performance Excellence, and Quality Texas Foundation!
- The Baldrige Foundation continues its national fundraising campaign, with new CEO Al Faber now currently at the helm. Many state programs have already collaborated with Al and Kellie Glenn to determine strategies and open prospect doors, and one state (Michigan) has received a donation thanks to the collaboration! Thank you all for your partnership – this can and will be a win-win.
- The Baldrige Program will release its 2015-16 Criteria later this year, which will now include abbreviated Criteria as Bob shared with us in September. BPEP is also inviting a new cohort of Fellows. Feel free to nominate candidates by the December 15 deadline.

Thank you all for all you do for the Alliance and our collective cause of advancing performance excellence. We've made much progress in 2014, and have exciting opportunities as we move into 2015. If you'd like to get directly involved with any of our committees or task forces, having a direct role in advancing our mission and stabilizing/growing our member programs (your own state/local/sector programs!), please drop me a note and we'll explore where you – and/or some of your staff or key volunteers – can play a role.

Have a wonderful Thanksgiving and holiday season,

Brian Lassiter, Chair (MN)

Alliance Photo Highlight

Submitted by Julia Gabaldon, Executive Director of Quality New Mexico



3 BOD members: Darcy Davidsmeyer, Illinois Performance Excellence, Karen Shepard, Southwest Alliance for Excellence and Anne Warner, Granite State Quality Council.

Taken at the Alliance for Performance Excellence Strategic Planning meeting in 2013, Las Vegas, Nevada, hosted by University of Phoenix.



Picture of Julia Gabaldon, Quality New Mexico and Karen Shepard, Southwest Alliance for Excellence at the Intel Mentoring and Planning Services (MAPS) Showcase.

April 2014 - East Valley Institute of Technology, Mesa, Arizona

Upcoming Dates

- Leadership Committee Meeting**.....2nd Thursday of every month, 3:00-5:00 PM Central Time
(2015: February 12, March 12, May 14, June 11, August 13, October 8, November 12 & December 10)
- Board Meetings 2015**.....Annual Strategic Planning Meeting Jan. 29 (PM) / Jan. 30 (AM) (FL)
April @ Quest Conference (MD), September @ Regional Conference (TN)
- Alliance Member Meetings**.....April @ Quest (MD) & September @ Regional Conference (TN)
(TBD)
- Regional Conferences**.....September 2 (Denver, CO); September 25, 2015 (Nashville, TN)

Special Request

Submitted by Karen Shepard, Southwest Alliance for Excellence

Newsletter Request

We are looking for one of the other fine Alliance member programs to take over the Alliance newsletter role starting in 2015. A survey sent out earlier this year indicates members feel the newsletter is of great value for staying in the loop, so it is important that another organization step in to carry on this publication.

The Alliance Newsletter, originally created by the Alliance Marketing Committee, has been bringing you updates from Baldrige, The Alliance for Performance Excellence, as well as member programs since 2008. Southwest Alliance for Excellence has been proud to create and distribute the newsletter for the last five years, but due to a shift in available time and resources, it is time for us to pass the torch.

It is pretty simple and straightforward. The main requirements are:

- The newsletter goes out 3 times per year (March, July and November)
- Send out an initial email requesting submissions and a follow up email reminder
- Compile all submissions and edit full document (We will even provide you the template!)
- Send to the Alliance All Users Google email group

Interested? Contact Karen Shepard at kshepard@swae.org or 480-874-5815.

Baldrige News Updates

Dear Colleagues,

This is an exciting time of year for the Baldrige Program! Last week we announced the [2014 Baldrige Award recipients](#) - another great class of Baldrige role models. Next week on November 25 we take the first step in the Award process for 2015 by opening our [Baldrige Examiner Application](#).

Baldrige examiners are part of an elite group of more than 400 professionals who commit their knowledge, skills, and time to help evaluate applicants for the Malcolm Baldrige National Quality Award—the only Presidential award for performance excellence. They are what make last week's announcement of the four outstanding 2014 Baldrige Award recipients possible.

Each year we strive to identify a talented class of new Baldrige examiners to join our dedicated returning examiners. Visit our website for details on our [sector needs for 2015](#), and learn more about [who should apply](#).

Why do Baldrige examiners serve? They will give you many reasons, including networking, patriotism, professional development, and having the opportunity to work with and learn from some of the nation's best people and organizations. Some organizations, recognizing the value of the learning opportunity, mandate Baldrige examiner service as a part of their leadership development program. Read [testimonials](#) of why others serve, check out our [Blogrige post from earlier today](#) and watch this [video](#) for more information on becoming a Baldrige examiner.

Also in 2014 we were proud to receive 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 success and impact of both the [Baldrige Executive Fellows Program](#) and Baldrige examiner training were acknowledged as major reasons for the honor.

I encourage anyone interested in serving as a Baldrige examiner to apply. The 2015 Baldrige Examiner Application will be open from November 25 to January 8.

For those that don't have the time to commit to being a Baldrige examiner this year, they can still benefit from the training by participating in the [Baldrige Examiner Training Experience \(BETE\)](#). Registration for the BETE opens in January, 2015. We also encourage you to let others know about this option as well as the benefits of being a Baldrige examiner.

Sincerely,

Bob Fangmeyer, Director
Baldrige Performance Excellence Program



The Louisiana Quality Foundation (LQF)

Submitted by Gordon Payne, President LQF

The Louisiana Quality Foundation (LQF) is hosting the Annual Performance Excellence Conference in Baton Rouge March 2-3, 2015. The location is TBA. We plan to have 1 ½ days of sessions, team activities and a luncheon with a key-note speaker. Registration (\$150, includes lunch) will be by mail or on-line, with the on-line web site also TBA. Sessions are planned to address issues in education, health care, government and business. LQF also welcomes Mississippi organizations that desire to get involved in the Baldrige process.



I will be posting updates on the LQF web site as new info is available:

www.louisianaquality.org

Maryland Performance Excellence Award Program (MPEA)

Submitted by Michael J. Novak, Executive Director, Maryland Performance Excellence Awards Program

Excellence Awards Presented to Four Maryland Healthcare Organizations

By Michael J. Novak, Executive Director, Maryland Performance Excellence Awards Program

The 2014 Maryland Performance Excellence Awards (MPEA) Program concluded on Thursday, October 16, with the Program's annual Awards Ceremony.

The highlight of the Ceremony was the presentation of the MPEA Platinum Award to MedStar St. Mary's Hospital, of Leonardtown, Maryland. The Platinum Award is Maryland's highest performance excellence award, given to organizations that are worthy of emulation as role models throughout the state. Platinum Award recipients demonstrate effective, systematic, well-deployed approaches to the overall requirements of the Baldrige Criteria for Performance Excellence, and demonstrate a fact-based, systematic evaluation and improvement process and organizational learning that result in improving the effectiveness and efficiency of key processes. Platinum Award recipients' results address many key customer/stakeholder, market, and process requirements, and they demonstrate areas of strength and good performance against relevant comparisons and benchmarks. Improvement trends are reported for areas of importance to the award recipient's key requirements, and there are no patterns of adverse trends or poor performance in areas of importance. Platinum Award recipients exemplify visionary leadership, strong customer focus, systematic approaches to strategy development and implementation, information systems that support fact-based decision-making processes and measurement and analysis of results, and human resource development and management systems that promote employee growth and loyalty.

In addition, two MPEA Silver Awards were presented – to GBMC HealthCare, Inc., of Towson, Maryland, and to Adventist Health Care, Shady Grove Medical Center, of Rockville, Maryland. The Silver award is given

Maryland Performance Excellence Award Program (MPEA) Continued

Submitted by Michael J. Novak, Executive Director, Maryland Performance Excellence Awards Program

to organizations that demonstrate an effective, systematic approach responsive to the basic requirements of many Baldrige Criteria items. Although approaches are deployed in some areas, many areas or work units are in the beginning stages of deployment. Silver Award recipients have developed a general improvement orientation that is forward-looking, and obtains results stemming from its approaches, with some improvements and good performance. The use of comparative and trend data is in the early stages. There is some evidence of systematic leadership practices, customer focus, a process for setting strategic direction, information systems that permit fact-based decision making, and human resource systems that contribute to employee growth and development.

A Certificate of Recognition was presented to Meritus Health, of Hagerstown, Maryland. The Certificate of Recognition is given to organizations that are beginning to develop and implement approaches to the requirements of the Criteria for Performance Excellence. Deployment is at the earliest stages. Improvement efforts focus mostly on problem solving. Results reported are limited and generally lack trend and comparative data.

Recognition Awards Presented to Maryland Examiners

By Michael J. Novak, Executive Director, Maryland Performance Excellence Awards Program

Maryland Performance Excellence Awards (MPEA) Program Examiners were recognized on Thursday, October 16, during the Program's annual Awards Ceremony.



Linda Mehlinger was designated as "Master Examiner" for having served as Team Leader for two full award cycles. Seventeen Examiners were designated "Senior Examiners" for having participated in all phases of the 2014 MPEA examination cycle.

Marcela Cámpoli was recognized as Examiner of the Year" for her sustained superior performance as Backup Team Leader and Acting Team Leader over two award cycles.

Four Examiners – Michele Britton, Keisha McKenzie, Ingrid Connerney, and Ellen Rice – received the MPEA "Above and Beyond Award." This award recognizes superior effort and performance by Examiners in their assigned roles and other team duties as assigned.

Three Examiners – Deborah Aceto, Joseph Hoholick, and Reid Spearman – received the MPEA "Rookie of the Year Award." This award recognizes outstanding effort and performance on the part of Examiners who have never before participated in a Baldrige-based award examination process.

Quality New Mexico

Submitted by Julia Gabaldon, President/CEO, Quality New Mexico

Call it “A Labor of Love”

Since December 1999, we’ve hosted a weekly radio show on 770KKOB (NM’s 50,000 watt radio station) to showcase performance excellence best practices and success stories in NM and across the USA.

We’ve interviewed Baldrige Award Recipients, Baldrige Performance Excellence Directors, State Directors, NM recipients and examiners. We’ve featured some award recipients from several states and, of course, some of our Alliance colleagues. We have many vocalists sing three of my favorite songs: “Star Spangled Banner, America the Beautiful, God Bless America.”



During the late ‘70s, I hosted a Spanish radio show in ABQ, in the ‘80’s I hosted couple of bilingual TV shows, co-hosted MDA Telethon for 16 years. So, as I thought about how to promote Quality NM, I thought perhaps I could use my radio/TV experience. When I contacted the radio station manager, she was interested in what we had to offer and the rest is history, as they say.

As producer and host of 700 shows, the only show I missed was in November of 2002 during my father’s funeral. I received a phone call from the station production manager asking where I was and I told them I was on my way to my father’s funeral.

Want to share your success story on “Performance Excellence USA” on 770KKOB? Send me a note at julia@quality-newmexico.org.

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

Submitted by Margot Hoffman, TPE President/CEO

Update from The Partnership for Excellence (TPE) serving Ohio, Indiana and West Virginia

2014 TPE Quest for Success Conference



The Partnership for Excellence hosted its 15th annual *Quest for Success* conference September 15 – 16, 2014. Over 180 participants were inspired by messages from 2013 Malcolm Baldrige National Quality Award recipients, Janet Wagner, CEO of Sutter Davis Hospital, Inc. and JoAnn Sternke, Superintendent of Pewaukee School District. Attendees also participated in over 25 breakout sessions and keynote addresses. Several participants also attended Yellow Belt Certification training, which ran concurrent to the conference on the second day. A highlight of the conference was an Awards Dinner and Ceremony. Four organizations received

TPE’s Silver-level award. The evening culminated with the Platinum-level Governor’s Award presented to Charleston Area Medical Center (CAMC) Health Systems, Inc., which is the first Platinum-level Governor’s Award received by an organization from West Virginia. Other awards included the President’s Award for Extraordinary Service and Volunteerism received by Brenda Grant of CAMC Health System, Inc. and Tracy Owens of Lexis-Nexis and the first annual Frank J. Perez Leadership Award received by Paul Worstell, President (Retired) of PRO-TEC Coating Company and Certified Business Coach with Six Disciplines Consulting Services.

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

Submitted by Margot Hoffman, TPE President/CEO

TPE Announces new President and CEO

Dr. Margot Hoffman became President and CEO of The Partnership for Excellence effective September 17, 2014. Margot took over this role from Al Faber, who is now President and CEO for the Baldrige Foundation. In this role, Dr. Hoffman has overall responsibility for the operation of TPE, including all strategic and operational day-to-day functions. Prior to joining TPE, Margot was the owner and president of Quest4Leadership, LLC, a leadership development and management consulting firm. She has over 25 years of experience in engineering, corporate training, general management and senior leadership positions with global automotive supply corporations. As dean of a corporate university, she helped deploy the organization's strategic planning process. Her international experience includes spending 2-1/2 years living in Australia leading a new product launch, including starting up a manufacturing facility. As president of a global product group, Margot provided leadership for a \$1.5 billion business unit, consisting of 27 manufacturing facilities and six technical centers employing over 7,000 people in 17 countries.



Happy 16th Birthday TPE!

On October 6, 1998, *The Partnership for Excellence* (formerly the *Ohio Partnership for Excellence*) was incorporated to help cultivate performance excellence in Ohio organizations, by administering a state-level Baldrige program. Today, in addition to Ohio, TPE includes Indiana and West Virginia and has had over 256 award applicants! These award applicants represent 1.3 million jobs at over 1,700 work locations. These organizations have served approximately 211 million customers and have revenues of over \$131 billion. Additionally, 2,131 examiners have volunteered over \$32.3 million in services to help organizations that are on the path to performance excellence.

South Carolina Quality Forum

Submitted by Bridget Dewees, Steering Committee Chair SCQF

South Carolina Quality Forum Celebrates 20 years of Excellence!

The South Carolina Quality Forum held its 20th Governor's Quality award conference on Wednesday, October 15, 2014 in Columbia South Carolina. The first conference was held in 1995 to recognize and encourage improvements in quality and productivity by organizations throughout the state. The annual SC Governor's Quality Conference is sponsored by the South Carolina Quality Forum Steering Committee and their primary partner, The South Carolina Chamber of Commerce. The Forum was elated to have Governor Nikki Haley present the awards with Bridget Dewees, Chair SC Quality Forum and Frank Fusco, Chair Advisory Board. The event re-energized South Carolina's focus on quality and promoted the value added when applying the Baldrige principles to organizations. Three outstanding organizations were a part of the 2014 celebration, Caris Healthcare, Greenville Technical College and The Public Employees Benefit Authority. The steering committee looks forward to serving the state of South Carolina another twenty years!



Pictured- Governor with SC Examiners and Judges: Glenn Robinson, Betsy Hartman, Rick Bickerstaff, Julie Eddy, Norman Lambeth, Governor Haley, Robbie Bell, Bridget Dewees, Betsy Beam, Walter Cederholm, Gary Monjo

The Southwest Alliance for Excellence (SWAE), announced six recipients of the 2014 Performance Excellence Program.

The annual Performance Excellence Program recognizes organizations for excellence in quality, performance, and outcomes. The program, modeled after the Malcolm Baldrige Award criteria, provides not only an opportunity for recognition, but also valuable feedback on where an organization is positioned on the quality continuum.

In addition to formal recognition, the SWAE's multi-tiered process assists organizations in Arizona, Nevada and Utah along their path to achieving performance excellence, which means being role models in customer and employee satisfaction, sound management, innovation and results.

Awards will be presented at a banquet to be held from 11:30am-1:30pm on Tuesday, January 27, 2015 at the Chaparral Suites Resort in Scottsdale, Arizona. The keynote speaker at the Banquet will be Carolyn Campos, MSN RNC of Sutter Davis Hospital in California, a 2013 Baldrige National Award Recipient.

The Pioneer Award for Excellence will also be presented at a City Council meeting with the Mayor of Henderson, NV at a date yet to be determined. Additional information about the Awards is available at www.swae.org or by calling 480-874-5815.

Recipients for the 2014 Performance Excellence Program are:

Pioneer Award for Excellence (Organization Level)

City of Henderson, Nevada

SWAE is proud to recognize the City of Henderson as being the first organization outside of the state of Arizona to receive a Southwest Alliance for Excellence Performance Excellence Program Award!

Showcase in Excellence Awards (Process Level)

- **Arizona State Retirement System** – *“Online Member Statements”*
- **Arizona State Retirement System** – *“Online Refund Process”*
- **Deer Valley Unified School District, AZ** – *“Campus Improvement Plan”*
- **University of Phoenix** – *“Prior Learning Assessment Professional Training Portfolio”*
- **Yuma Regional Medical Center, AZ** – *“Reducing Hospital Acquired Pressure Ulcers: One Patient at a Time”*



“SWAE is proud to continue empowering organizations to pursue performance excellence, improve outcomes and contribute to the economic strength of their community and state.

This evaluation process and feedback is one of the best methodologies available to develop a higher level of organizational performance, said Karen Shepard, Executive Director of the Southwest Alliance for Excellence.”

The **Pioneer Award for Excellence** honors organizations in the early stages of carrying out operations with repeatable processes, evaluation, and improvement and there is early coordination among organizational units. Strategy and quantitative goals are being defined. Some results demonstrate good performance levels and use of comparative and trend data is in the early stages.

The **Showcase in Excellence Award** recognizes teams for one specific process that is innovative or a cutting-edge approach. It may be used as a role model in comparison to competitors or result in exceptional performance. It could also be a routine process performed in an extraordinary manner.

The 2014 Board of Examiners – made up of more than 45 experts in business, education healthcare and government spent more than 4500 hours assessing this year's applicants in seven areas: leadership, strategic planning, customer focus, measurement, analysis and knowledge management, workforce focus, operations focus, and results. The SWAE Panel of Judges is responsible for validating the integrity of the award process and determining recognition levels for each of the applicants. The Panel is comprised of experts selected from all industry sectors with experience at both the state and national levels.

Applications for the 2015 program will be available in February 2015.

Established in 1990, The **Southwest Alliance for Excellence** is a 501(c)(3) non-profit corporation that advances improvement and excellence in organizations, communities and individuals throughout Arizona, Nevada and Utah by using the Baldrige Criteria.

And The Oscar Goes To...

The Making of TNCPE's Just-In-Time Site Visit Training Video

Move over, Scorsese! The Tennessee Center for Performance Excellence is officially in the movie-making business.

In September, TNCPE debuted our ["Just-in-Time" Site Visit Training](#) video - a brand new resource designed to equip examiners with the tips, tools, and techniques needed to be successful on-site.



We uploaded the video to our YouTube Channel and promoted its release on social media via Facebook, Twitter, and LinkedIn, as well as targeted email blasts to examiners and members. We also encouraged team leaders to carve out time during their consensus meetings to view the video as a team and debrief any key learnings, "AHA" moments, and best practices for ensuring a top-notch site visit.

In the spirit of continuous improvement, TNCPE is sharing a few of our best practices and lessons learned that could potentially benefit other state programs as you all design and implement future training projects!

Begin with the End in Mind – While we debuted the final cut of the video in September, the initial production process began back in April, when we engaged a consultant to help create the content and curriculum for the training video. We selected a videographer in May and filmed the video in July, which allowed four to six weeks to assemble the raw footage and make additional edits. Allowing extra time for last-minute tweaks was extremely valuable and helped to ensure we didn't compromise quality due to time constraints.

Hire a Professional – Despite the fact that the new iPhone can capture stellar selfies, we acknowledged early on that our collective filmmaking skills were—to put it diplomatically—fairly limited. Hiring a local videography firm to shoot and edit the training video gave TNCPE access to state-of-the-art film and sound equipment, data backup, and years of professional experience working on similar projects. The videographer's expertise and value-added feedback throughout filming (not to mention the extra camera batteries he had stashed away) were worth every penny!

Craft Your Vision – Before filming commenced, we created a storyboard that outlined the entire video from start to finish and summarized the content to be covered in each segment. We shared the final storyboard with our videographer and volunteer "actors" early on to help ensure each key player understood their role in achieving our vision for the finished product.

Keep it Conversational – We wanted the mock site visit interviews to resonate with our target audience, which meant keeping the segments as conversational and realistic as possible. Rather than drafting a word-for-word script, we created a list of talking points, blunders, and best practices for the actors to incorporate into their conversations as the interviews progressed.

[Check out the final cut on YouTube](#) and let us know what you think! We're always looking for new and innovative ways to improve examiner training and support our volunteer workforce throughout the evaluation process. Because in our eyes, **our examiners are the real STARS of the show!**

Corporate Intelligence (Baldrige-based Corporate Espionage Organizational Assessment)

Createspace Publisher (An Amazon Company) November 2014

This Baldrige-based Manual was written to help an organization conduct a comprehensive assessment of corporate intelligence as it relates to the high stakes of corporate espionage efforts being deployed by individuals, corporations, and countries worldwide that the organization impacts. Corporate espionage is the most common means by which an organization tries to gain competitive or financial advantage over one or more competitors. Many organizations hire ex-military and government agents trained in very sophisticated spying techniques to obtain sensitive, competitive and trademarked data and information under the guise of competitive intelligence. Corporate espionage tactics can involve allowing volunteers and student assistants to work for an organization and secretly conduct undercover work, theft of documents by employees, dumpster diving by both employees and vendors, planting of electronic bugs throughout an organization by outside vendors, hacking an organization's computers by contract and in-house IT professionals, tapping phones and voicemail by outside vendors and in-house employees, planting false information about an organization in various industry and trade magazines, trailing family members of senior executives, threatening reporters who conduct investigative reporting on an organization's competitive practices, hiring police, contracting with former security agency officials and combat veterans who have had prior experience orchestrating highly confidential intelligence work in conducting various covert and undercover operations that can cause negative impacts and disruptions within an organization and on its various business practices. Intellectual property protection is the theft, copying or unauthorized reproduction of confidential trade secrets and business practices that are obtained by a business competitor.

Organizations often obtain competitive data and information by stealing and securing their competition's corporate intelligence. The Central Intelligence Agency (CIA), National Security Agency (NSA) and Federal Bureau of Investigation (FBI), renowned for their analysis of intelligence and for their technical prowess in covert operations, electronic surveillance and overhead reconnaissance, have transferred various intelligence operations from government staff to private firms in recent years. This outsourcing to outside intelligence-gathering groups brings about an immense capacity of intelligence gathering for hire. In a global economy saturated in the transfer of competitive data in nanoseconds, the need to turn competitor information into actionable intelligence has never been greater. Most organizations' corporate intelligence resides within the organization among employees who can be either perpetrators or resolvers of corporate intelligence problems and issues. This comprehensive manual will aid an organization's corporate intelligence efforts by identifying strengths and opportunities for improvement regarding an organization's overall intelligence and security initiatives. This manual will also be most valuable in developing, revising, and/or improving a Corporate Intelligence Plan that will help an organization identify and strategically address intelligence opportunities that will:

- Identify "early warning signs" of intelligence breaches by employees, competitors, and vendors
- Retain competitiveness and maintain intelligence security within the workforce throughout the organization
- Identify security leaks, breaches, and corporate intelligence weaknesses within the organization
- Provide intelligence data/information and practices that need additional protection and alignment

[Corporate Intelligence: A Baldrige-Based Corporate Espionage Organizational Assessment](#)

About the Author:

Donald C. Fisher, Ph.D. is the Executive Director/CEO Mid-South Quality/Productivity Center (MSQPC) a partnership between the Greater Memphis Chamber and Southwest Tennessee Community College in Memphis, TN. He is a six year member of the Alliance Board and his Center manages the Baldrige-based Memphis Regional Chamber Quality Cup Award.

**BALDRIGE
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BALDRIGE IN BRIEF

Accelerating Excellence™



I read an interesting article in McKinsey Quarterly last month. The title was “Reflections on Corporate Longevity,” written by Ian Davis, managing director at McKinsey from 2003 to 2009.

http://www.mckinsey.com/Insights/Strategy/Reflections_on_corporate_longevity?cid=mckq50-eml-alt-mkq-mck-oth-1410&p=1 (If you don't have a log in to the McKinsey site, it's easy to register or you can e-mail me, and I'll send you the pdf of the article.)

In discussing corporate endurance, he states, “...survival is the ultimate performance measure.”

In the article, he describes common characteristics of enduring organizations. These include (with some paraphrasing on my part):

- A relentless focus on their customers
- Engagement of their suppliers in problem solving and opportunity identification
- A view beyond their own organization and industry to understand broader trends
- Challenging the status quo and a dissatisfaction with the current performance
- Leadership development and robust succession planning
- A deep commitment to and demonstration of the organization’s values
- Ensuring that the organization benefits from the diverse ideas and thinking of its workforce

An active and supportive governance structure

I couldn’t help but notice how much these characteristics reflect important elements of the Baldrige Criteria. With the growing importance of “sustainability” throughout the Criteria and articles such as this one, along with books like [How the Mighty Fall](#) by Jim Collins, isn’t it time for senior leaders to re-evaluate the approaches they have in place to ensure their organization’s survival?

For me, that’s the beauty of the Baldrige Criteria. It has never prescribed a particular approach, but it advocates for balance and integration across all of the systems needed for an effective organization. Is it time for your organization to look at your sustainability? What if survival really is the ultimate performance measure?

I received a great e-article from McKinsey&Company last month. Written by Gary Hamel and Michele Zanini, "*Build a change platform, not a change program,*" offers fresh insights into the truisms surrounding large-scale or transformational-change initiatives. Most of us are familiar with the poor success rate of these changes, either from reading the same management literature or personal experience. However, many of the traditional approaches to counteract the known failure modes often seem ineffective. As Hamel and Zanini say, "The reality is that today's organizations were simply never designed to change proactively and deeply – they were built for discipline and efficiency, enforced through hierarchy and routinization." As a result, most organizations are challenged in implementing change at the same pace of change in the environments in which they operate.

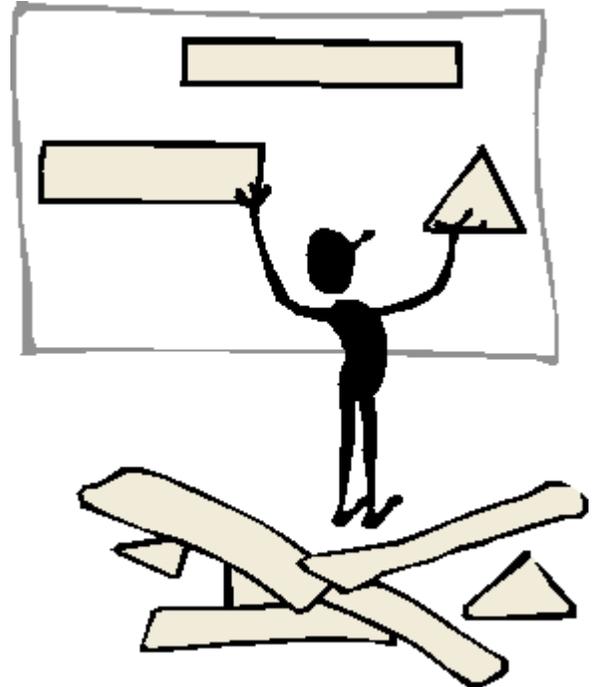
In our work with many organizations, we have identified some common characteristics among those that demonstrate excellent results across multiple areas – product and service quality, efficiency, customer satisfaction and engagement, workforce engagement, leadership and governance, and financial and marketplace performance. One characteristic is the active involvement of the senior leaders in promoting change at all levels in all areas of the organization. They don't believe that change can only start from the top. They not only empower employees, they equip them with tools, methodologies, data, and support to do real root cause analysis to effectively challenge any "sacred cows."

Another characteristic of these organizations is the attention to those parts of the organization (i.e., people) that are most likely to be impacted by the change. These people are enlisted to become part of the change process and, therefore, part of the solution.

A third characteristic of these organizations is a demonstrated tolerance for intelligent risk-taking. When asked about the consequences of an unsuccessful project, many of these organizations' senior leaders don't accept the concept of "failure" but frame a well-thought-out effort that didn't achieve the expected results as constructive input to organizational learning.

We've often mentioned in our news "blasts" that there is a palpable culture in Baldrige award-winning organizations (or award winning organizations for Baldrige-based programs). These three characteristics are part of that culture. If this sounds like your organization's culture, you're well on your way to being award-worthy. If this doesn't sound like your organization's culture, how can you help change it?

(If you'd like a copy of the referenced article, just send me an e-mail.)



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Baldrige Examiners: Patriots, Community Members, Elite Quality Professionals

Posted on [November 20, 2014](#) by [Dawn Bailey](#)

In 1987, when the development of a national quality award was assigned to scientists at the National Bureau of Standards (NBS), first Baldrige Program director [Curt Reimann had a dilemma](#).

How do you recruit quality experts from a broad spectrum of industries and ask them to contribute volunteer hours and expertise? And then how do you keep these volunteer experts engaged and willing to share with peers? In the late 1980s, for a technical organization like NBS, such cross-sector teamwork was new—scientists in different disciplines rarely worked across fields with other scientists.

However, the cross-sector sharing was a success. Driven by patriotism and a spirit of continuous improvement and innovation, individual members of the [Malcolm Baldrige National Quality Award Board of Examiners](#) have worked together, sharing insights, expertise, and best practices from all sectors of the U.S. economy and abroad for more than 26 years.

This elite group of professionals excelling at performance excellence and continuous improvement recently shared the benefits they have derived by serving as a Baldrige examiner; for example,

- “Best post-grad-education and professional development”
- Understanding of an organization at both the big-picture and detail levels
- Knowledge of the core values at the foundation of all high-performing organizations
- Skills to build consensus, balancing varied viewpoints
- Knowledge of when to use ELMO (Enough, Let’s Move On)
- Application of a systematic framework to processes that are often driven by the “seat-of-the-pants”
- Best practices across industries and sectors/benchmarking opportunities
- Evaluation of processes using approach-deployment-learning-integration
- “Continuous refining clarity and focus about performance”
- An extensive network of other examiners for mentoring and sharing
- Resources to create an organizational strategic plan
- Knowledge of ways to improve measurements and deployment

This list continues and continues. Just ask a Baldrige examiner what he or she has personally gained as a professional development and what his or her organization has gained from having a Baldrige examiner among its ranks.

What could *you* gain as a Baldrige examiner? Interested in finding out? The [2015 Baldrige Examiner Application](#) opens on November 25, 2014.

Special thanks to Rebecca Anderson and all of the Baldrige Examiners who participated in the LinkedIn discussion “The Benefits of Baldrige Program Examiner Participation.” And thanks to all who have ever served as an examiner; your contributions continue to help U.S. organizations and the economy, as well as your peers, your companies, the Baldrige Program, and hopefully yourselves.