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## Upcoming Events

- April 2 – Showcase Application Workshop Part 1
- April 15 – Board of Overseers Meeting
- April 17 – Showcase Application Workshop Part 2
- May 3 – Organization Intent-to-Apply forms due to AQA**
- May 13 – Board of Overseers Meeting
- May 15 – Examiner Applications due to AQA**
- June 5 – Examiner Introductory Training
- June 10 – Board of Overseers Meeting
- June 20 – Examiner Stage 1 Training



Jean Hammelev

*"I strongly encourage leaders of Arizona organizations to participate in AQA. 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**

## Letter from the Chair of the AQA Board of Directors

Welcome to our newsletter! As some of you know from an announcement at our banquet, AQA will soon be transitioning in an exciting new way. These upcoming changes reflect the addition of our partner states, Nevada and Utah. This transition will occur over the next several months, so I encourage you to look for updated information as it becomes available. Read the next page for more information about our special announcement!

On February 5, 2013, we had an opportunity to recognize the 2012 Arizona Performance Excellence Award recipients at our annual Performance Excellence Award Program Banquet. Congratulations to all of our recipients for their outstanding work in the area of quality improvement!

During this first quarter, we have been heavily involved with membership recruitment efforts. Membership value includes the opportunity to improve organizational efficiency, productivity and effectiveness through our Performance Excellence Awards Program, networking opportunities, attending workshops and benchmarking with leading Arizona organizations. Membership in our organization can support and enable continuous improvement opportunities at the local level.

We are excited to be launching the 2013 awards cycle, and we are currently recruiting examiners and applicants to the program. Participating as an examiner provides individual development opportunities as well as an overall benefit to the examiner's organization. Examiners receive extensive training on the Performance Excellence criteria and are then able to assimilate key learnings into their day-to-day job functions. The schedule for the 2013 Performance Excellence Program can be accessed from the AQA website. We look forward to working with current and potential members to improve organizational performance throughout Arizona, Nevada and Utah.

Jean Hammelev, BS CT(ASCP) MBA/HCM  
Executive Director – Program Office & Quality  
Sonora Quest Laboratories  
Laboratory Sciences of Arizona  
Jean.hammelev@bannerhealth.com

## We're Changing Our Name!

As we have expanded our programs beyond Arizona to serve Nevada & Utah, we felt it was time for a change.

In order to decide how to best shape our identity moving forward, we sought the insights of our Board of Directors and a sampling of stakeholders from all three states. With their input and after great deliberation, we decided to change our name to become more inclusive and widen the scope of our organization.

We are excited to reveal our new name to you:

**Southwest Alliance for Excellence (SWAE)**

We will be gradually rolling out our new name and logo throughout the year, so be on the lookout for more updates. We would like to thank our board and stakeholders—representing a sample of our membership—for their input and feedback in this process.

1990

**THE Arizona Council  
For Excellence**

1992



ARIZONA  
QUALITY  
ALLIANCE

2002



ARIZONA  
QUALITY  
ALLIANCE

2013

**To be  
revealed!**

### A brief history of AQA:

The Arizona Quality Alliance began as the Arizona Council for Excellence (ACE) in 1988, when it was run entirely by volunteers. The initial goal was to attract senior-level executives from around Arizona to join the Council for the purpose of learning about and sharing experiences in implementing Total Quality Management across Arizona's public and private sector organizations.

ACE incorporated in 1990, became Arizona Quality Alliance (AQA) in 1992, and achieved 501(c)(3) nonprofit status in 1993. AQA was also involved with the Governor's Advisory Council on Quality (GACQ) in 1994 until its dissolution in 2001, as well as being a co-sponsor of the Governor's Conference on Quality from 1991-97. As of 2012, AQA – now **Southwest Alliance for Excellence** – is working toward a new relationship with the State of Arizona through the Government Transformation Office (GTO) – an entity initiated in 2012 by Governor Jan Brewer that enables government agencies to develop and sustain a culture of continuous improvement.

We expanded our services to include programs in both Nevada in 2011 and Utah in 2012.

What hasn't changed is our dedication to advancing organizational excellence in the states we serve. We still offer our respected Baldrige-based programs and trainings at extremely reduced rates. And, our volunteer workforce is still highly committed. We are excited for this opportunity to grow and serve more organizations throughout the southwest.

### Award Program Timeline:

1993 Pioneer Award for Quality  
1994 Governor's Award for Quality  
2003 Showcase In Excellence Award  
2012 Category Award for Excellence

## Award Banquet Highlights

Thank you to everyone who attended our 2012 Performance Excellence Award Program Banquet earlier this year on February 5, 2013. It was a great success! Check out photos of our recipients and more below.



**Left:** AQA Board Chair, Jean Hammelev; Keynote speaker Robert Woods from the Government Transformation Office; Emcee Ginger Lamb, VP and Publisher *AZ Capitol Times*; and AQA Executive Director, Karen Shepard; **Center:** 2012 Performance Excellence Program Board of Examiners; **Right:** Trainers for the Board of Examiners Wayne Foraker, Jane Humble, Carla Carter, Frank Bouchard, Susan Duffy, and Sandy Kube



**Left:** Examiner Stacy Harley and Cindy Gruben, who served on the Panel of Judges; **Center Left:** Pioneer Award for Quality recipient Southern Arizona VA Health Care System; **Center Right:** Category Award for Excellence recipient Arrowhead Hospital; **Right:** Showcase in Excellence recipient Banner Health



**Left:** Showcase recipient Maricopa County Department of Transportation; **Center:** Showcase recipient Rio Salado College; **Right:** Showcase recipient Scottsdale Healthcare;



**Left:** Additional Showcase recipient from Scottsdale Healthcare; **Right:** Group photo of the three Showcase recipient teams from University of Phoenix

## AQA/Intel Mentoring Program Recognition

The Arizona Quality Alliance (AQA) is pleased to conclude another year of partnership with the Intel Corporation for the Mentoring and Planning Services (MAPS) Program. [Click here](#) for a slideshow of highlights from the 2012 program.

We'd especially like to thank the 2012 Intel Mentors who made a tremendous impact on the organizations they assisted:

<b>Chelsea Beck</b>	<b>Glenn Dickenson</b>	<b>Rudy Hacker</b>	<b>Eric Manton</b>	<b>Sharlyn Stocker</b>
<b>Wes Clark</b>	<b>Valentina Dimitrova</b>	<b>Bill Hoddy</b>	<b>Paul Sandell</b>	<b>Leslie Quinn</b>
<b>Glen Compton</b>	<b>Eduardo Gamez</b>	<b>Julio Lopez</b>	<b>Mukund Shenoy</b>	<b>Ann Xu</b>
<b>Miachelle Depiano</b>	<b>Patrick Grogg</b>	<b>Paula Mackenzie</b>	<b>Ashutosh Srivastava</b>	



The Intel Corporate Quality group provides skill-specific volunteers as mentors to small and medium-sized nonprofits, educational entities & government agencies throughout Arizona. These volunteers provide mentoring and assist organizations with training in quality skills and accomplishment of quality objectives. This program is **FREE** for participants.

The organizations who applied and completed projects in the MAPS Program this year were:

- **Arizona Department of Administration/Government Transformation Office** - "Leading participating state agencies through a structured approach to defining a problem, mapping a process, collecting process data, developing solutions, and measuring improvement."
- **East Valley Institute of Technology (EVIT)** - "Developing a plan of action to address the problem of some school counselors discouraging students from pursuing a career skill"
- **East Valley Institute of Technology (EVIT)** - "The exploration of an ASU/Intel/EVIT college prep class in engineering or quality management"
- **Gilbert Fire Department** - "Developing a long-term sustainment and development plan of the Electronic Patient Care Report (EPCR) software application"
- **Extended Campuses of Northern Arizona University** - "Unifying practices and capturing data surrounding outreach to the communities and constituents/influencers served"
- **Southwest College of Naturopathic Medicine & Health Sciences** - "Implementing data mining technologies to help control costs and improve the efficacy of patient care"
- **Sonoran Schools** - "Making our organization's SYSTEM/CULTURE better and align with current best practices"

We would also like to highlight the special recognition one Intel Mentor received for his recent participation in the AQA/Intel Mentoring and Planning Services (MAPS) program. It's a story that exemplifies what MAPS is all about and it truly lives out the AQA mission *to empower organizations to pursue performance excellence, improve outcomes and contribute to the economic strength of their community and state.*



Intel representatives honored by the Town of Gilbert: Paul Ryan, Bill Hoddy, Mentor Patrick Grogg, his son Justin Grogg, and Rudy Hacker

The project's ultimate goal—to create a mobile electronic patient care reporting (EPCR) system. Such devices are extremely helpful to emergency medical personnel, but are also quite costly. Through the help of the Intel mentors, especially engineer **Patrick Grogg**, the Gilbert Fire Dept. developed their very own EPCR software specifically tailored to their needs and copyrighted. "[Patrick]'s a great man and a great contributor to his community," remarked Gilbert Fire Dept. Chief Collin Dewitt. "His vested interest developed a product that was even greater than what it might have been." Dewitt then presented Patrick with his very own fire helmet as a thank you.

We are thrilled at the outcomes of this project, and we know there are many more wonderful stories like it from participants in our MAPS program. If you are a qualifying organization, be sure to take full advantage of this **free resource** and [apply for the MAPS program today!](#)

## Member Recognition

Congratulations to the 25 honorees of 2013's Dynamic Women Leaders in Business as awarded by the *Phoenix Business Journal*. The honorees were selected by peers, colleagues and the *Phoenix Business Journal* news team for their leadership, professionalism, dedication and impact on our community. The reception and celebratory awards program was held Thursday, February 21, 2013. We would especially like to note the following honorees from our member organizations:

**Jean Hammelev**

Sonora Quest Laboratories

**MaryAnn Miller**

Avnet Inc.

**Harriet Mountcastle-Walsh**

Honeywell Aerospace

Jean Hammelev is the Board Chair of the Arizona Quality Alliance, and we congratulate her on this exciting recognition and all of her many achievements as Executive Director of Program Office & Quality for Sonora Quest Laboratories!

(Photo—left to right—AQA Board member Cheralyn Beaudry; Matthew Hammelev; Honoree Jean Hammelev; AQA Director Karen Shepard; and AQA Board member Wayne Foraker.)



### CONGRATULATIONS TO THE VALLEY'S 2013 HEALTHIEST EMPLOYERS!!

We'd like to celebrate our member organizations who have been selected as the *The Phoenix Business Journal's* Healthiest Employers for 2013. The following have been recognized for being among the organizations employing the most innovative strategies for keeping their workforce healthy:

**Avnet, Inc.**

**Blue Cross Blue Shield of Arizona**

**Scottsdale Healthcare**



The honorees were recognized and showcased at a celebratory awards breakfast and health fair on March 21. The health fair was intended as an interactive area where companies could market their businesses while guests learned, shared and networked with each other before and after the Healthiest Employers awards program.

[Click here](#) to see the full list of honorees or to learn more about the event.

## Upcoming Application Workshops

### Workshops: "Making Your Showcase Application the Best It Can Be" Parts 1 & 2



(Session 1) April 2, 2013, 10:00 am-12:00 pm

[This session](#) is for those new to applying or for those who need a refresher.

This session will give you the opportunity to:

- \* Review the Showcase in Excellence process
- \* Understand key points of the criteria
- \* Determine how to apply the criteria to a process within your organization
- \* Obtain guidance from an experienced examiner

*This session is free but registration is required.*

(Session 2) April 17, 2013, 12:00-4:00 pm

[This session](#) is Part 2 for those new to applying and recommended for past participants. This session will give you the opportunity to:

- \* Work through a full case study to understand application writing challenges
- \* Understand key points of the criteria in relationship to your organization
- \* Obtain guidance from an experienced examiner
- \* Ask one-on-one questions with the instructor after workshop

*This session is \$25 for AQA Members and \$50 for non-AQA Members. (Lunch will be provided.)*

**Location:** ASU SkySong, 1475 N. Scottsdale Rd., Suite 200, Scottsdale, AZ  
85257 (4/2 - #249 Imagination Room; 4/17 - #349 Discovery Room)

**Instructor:** Barbara Chatzkel is the Owner and President of New River Group which focuses on helping organizations make sense of and implement large-scale change. Change happens one person at a time and New River Group develops and implements strategies that deal with how PEOPLE react to change. Much of her time is spent coaching executives on how to implement change within their organizations. Barbara is the former National Director of Quality for the Internal Revenue Service. While there she deployed a Baldrige-based system for improvement throughout the organization. She is a Senior Member of ASQ, a Certified Quality Manager and Certified Quality Auditor. She was a Baldrige National Quality Award Examiner for two years, a Judge for the Tennessee Center for Performance Excellence program for seven years, and is currently a Judge for the Arizona Quality Alliance's Performance Excellence Award Program. She also has been a regional and national judge for the ASQ Team Excellence Award.

[Click here to register.](#)

# The Baldrige Framework

## Driving Organizational Excellence

### The Criteria for Performance Excellence

**“The Baldrige Criteria challenged us to become leaders by any measure, and we succeeded – seeing improved productivity, customer loyalty, employee engagement, and financial returns.”**

– Samuel Liang, president/CEO of MEDRAD, a 2003 and 2010 Baldrige Award winner

**What is the Baldrige Framework?** In 1987, President Reagan established a bipartisan program to develop world-class management criteria that many credit with helping to revitalize the U.S. economy. Today, the Baldrige *Criteria for Performance Excellence* are being used by organizations across every sector of the U.S. economy and around the world as an assessment and improvement tool. And performance results have been dramatic! Read winning stories here: [www.baldrige.nist.gov/Contacts\\_Profiles](http://www.baldrige.nist.gov/Contacts_Profiles)

**What are the Baldrige Criteria?** The Criteria take a holistic, systems approach in viewing an organization’s performance management system across seven categories (see the diagram at right). With an emphasis on feedback and a fact-based, knowledge-driven system for improving performance and competitiveness, the Criteria have helped thousands of organizations in the United States and around the world report results such as:

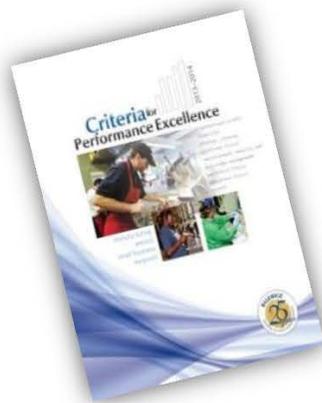


**“The Baldrige Criteria are the key to winning results and world-class excellence.”**

– Ken Schiller, co-owner of K&N Management, 2010 Baldrige Award winner

- Growth in customer satisfaction, engagement, and loyalty
- World-class product and service outcomes
- Role model process efficiency
- Increased workforce and volunteer satisfaction and engagement
- Growth in revenue and market share, and improved financial results
- Increased student learning outcomes
- Dramatically improved patient outcomes, safety, and loyalty

**Why Use the Baldrige Framework?** The Baldrige Criteria ask insightful questions about how high-performing organizations operate and achieve sustainable results. Using the Criteria will help you think and act strategically and align your people, processes, and resources to achieve your goals.



**How do we get started?** The *Criteria for Performance Excellence* is available from the Baldrige Performance Excellence Program at [www.nist.gov/baldrige](http://www.nist.gov/baldrige). Commentary on the Criteria and other resources, including how to begin your performance excellence journey, also are available. For additional guidance, contact the Arizona Quality Alliance, [www.arizona-excellence.com](http://www.arizona-excellence.com), [kshepard@arizona-excellence.com](mailto:kshepard@arizona-excellence.com), or 480-874-5815.

**What is the Baldrige Enterprise?** The Baldrige Enterprise is a partnership of the Baldrige Program, Alliance for Performance Excellence (state and other Baldrige-based programs), ASQ, and Foundation for the Malcolm Baldrige National Quality Award. The Enterprise’s vision is to enhance the competitiveness, quality, and productivity of organizations.

**“When you look at the Baldrige Criteria, what a great road map to say if you can do the things in all these categories and do them well, you’re going to be a well-run company.”**

– Robert F. Pence, CEO of Freese and Nichols, Inc., 2010 Baldrige Award winner

## Baldrige Updates

### One Hundred and Fifteen Million

Posted by Robert Fangmeyer on [Blogrige](#)



Bob Fangmeyer

Bob is the Baldrige Program's Deputy Director. He has been with Baldrige since 1997 serving on many of the teams in the office in many different roles. Most recently before joining the Management Team in 2008, he served as Team Leader on the Award Process Team from 2005-2008. Bob is thrilled to be a part of the Baldrige Program where he gets to work with and learn from people and organizations committed to achieving excellence.

His background includes owning and managing small service-based businesses, six years as a human resources specialist, a Bachelors degree in Psychology, and an MBA from the University of Maryland.

No, that is not the latest Powerball Lottery jackpot, the daily addition to the budget deficit, or the number of times Charlie Sheen and Lindsey Lohan have been arrested.

That is the number of employees who would beg to differ with the author of a recent article found in the on-line version of *Inc. Magazine*.

Steve Tobak attempts to make the case that employee engagement is not important. In fact, he claims it is nothing more than a fad and money making racket. Why? Because the data don't clearly indicate that employee engagement surveys and strategies directly impact the bottom line.

Now, before you jump to conclusions like I did, it is important to listen carefully because I believe Steve is 100% correct... about the problem: most employee engagement efforts fail to improve satisfaction, morale, commitment, or the bottom line. My disagreement is with his answer to the problem.

Steve characterizes the approach many organizations take to employee engagement as follows: "You just hire Gallup, do a survey, announce some strategies, and poof, instant engagement."

This is analogous to someone trying to lose weight by eating a random selection of subs at Subway. Subway worked for Jared, it should work for me!

Engagement requires a lot more than a satisfaction survey and handing out Employee-of-the-Month awards. Moving the needle on engagement is not quick or easy... thus the problem. Weak, half-hearted efforts like these will not improve engagement, much less the bottom line. As Steve notes "Half the time it backfires because they're not measuring the right factors, they don't make the right changes, they fix one thing and screw up another, or they don't follow up at all. In reality, there's a high risk of actually losing credibility with employees."

Amazingly, Steve doesn't advise organizations to figure out the right factors to measure, the right changes to make, and to do so from a systems perspective. Instead, Steve's answer to the problem is to give up. Don't waste your time.

Back to our analogy, this is like telling a person to not bother trying to lose weight because most people aren't successful at it.

...[Continue reading](#)



## Baldrige Updates

### Other Key Enterprise News:

- Harry Hertz explores the factors leading to sustainability and growth in his latest Insights column. (<http://www.nist.gov/baldrige/insights.cfm>)
- Registration for the 25<sup>th</sup> Annual Quest for Excellence (April 7-10) is still open! The Monday of the conference will consist of the Award Ceremony for the 2012 Baldrige Award recipients and plenaries, including an international plenary. Tuesday's sessions will include a panel of the 2012 national category best-practice winners. (<http://www.nist.gov/baldrige/qe/index.cfm>)
- The Baldrige Executive Fellows Program now has eight applications, with a ninth on the way (enough to run the program): four from manufacturing, one from a nonprofit, and four from health care.
- In February, a national search (to be posted on [www.usajobs.gov](http://www.usajobs.gov)) is planned to begin to replace BPEP Director Harry Hertz who is retiring in June 2013. The interview panel will include representatives from the Board of Overseers, the Foundation, and the Federal government Senior Executive Service.

**Q** UALITY

Laboratory & Information Services

As a proud Gold Sponsor of the Arizona Quality Alliance, Sonora Quest Laboratories and Laboratory Sciences of Arizona provide comprehensive laboratory testing services; patient convenience; electronic connectivity solutions; and award-winning quality.

Arizona Governor's Award for Quality 2005 Recipient

Arizona Showcase in Excellence Award 2011 Recipient

Arizona Showcase in Excellence Award 2010 Recipient

Arizona Showcase in Excellence Award 2009 Recipient

Arizona Showcase in Excellence Award 2007 Recipient

Arizona Showcase in Excellence Award 2006 Recipient

Arizona Showcase in Excellence Award 2004 Recipient

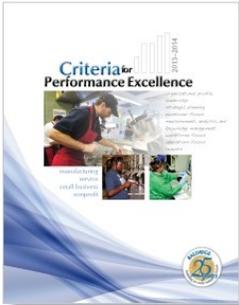
Arizona Pioneer Award for Quality 2003 Recipient

Sonora Quest Laboratories™

Laboratory Sciences of Arizona

SonoraQuest.com

## Baldrige & Alliance for Performance Excellence Updates



### 2013–2014 Baldrige Criteria for Performance Excellence Now Available

For 25 years, the Baldrige Criteria have empowered organizations—no matter their size, sector, or industry—to reach their goals, improve results, and become more competitive.

The 2013–2014 Criteria build on this tradition and feature a renewed focus on:

- innovation management, intelligent risk, and strategic priorities;
- social media;
- operational effectiveness; and
- work systems and core competencies.

The Criteria are a set of questions about critical aspects of managing and performing as an organization. These questions work together as a unique, integrated performance management framework.

**[Purchase your copy today.](#)**

**There are three versions of the Criteria:**

- [Criteria for Performance Excellence](#) (known as the Business/Nonprofit Criteria; for manufacturing, service, small business, nonprofit, and government organizations)
- [Education Criteria for Performance Excellence](#)
- [Health Care Criteria for Performance Excellence](#)

The Alliance for Performance Excellence LinkedIn group welcomes discussions. Post your Criteria and other questions here: ([http://www.linkedin.com/groups?gid=4790894&trk=myg\\_ugrp\\_ovr](http://www.linkedin.com/groups?gid=4790894&trk=myg_ugrp_ovr))

### The Baldrige Resource Library (BRL)

*The BRL is a service of the Alliance for Performance Excellence - a group of state and local organizations dedicated to advancing organizational excellence through Baldrige-based programs.*



#### What is the Baldrige Resource Library?

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.

#### PURPOSE

- (1) To answer the question for those newly introduced to the Baldrige Criteria – “Where do I find out more?”
- (2) To serve as a repository of articles, podcasts, and videos about organizational improvement, quality methods, and leadership approaches that help change organizations.

**IT’S FREE!** Use it to broaden your knowledge and improve yourself and your organization.

Use it! ... Share it with others! ... Put it on your website and in newsletters! <http://www.baldrigepe.org/brl/>

**The 2013 Baldrige Regional Conferences will be held in Chicago and Dallas in mid- and late September.**

## Why Bother With Baldrige (Part 1)

by Chuck Harrington on [JERA Sustainable Development Blog](#)

### The Criteria for Performance Excellence

The well known National Baldrige Award program recognizes organizations that demonstrate outstanding levels of performance excellence. The program was established by act of congress in 1987. Every year since, a small number (typically 2 to 6) organizations receive the award, usually presented by the President of the United States or the Vice President. It is a truly prestigious award, perhaps comparable to a Nobel Prize or Olympic gold medal for organizational performance, if such things existed.

But this post isn't about winning a prestigious award, as nice as that might be. This post is about the process by which winners become winners, and the implications of that process for your firm.

The Baldrige Criteria for Performance Excellence are published biannually. The Criteria comprise an extensive set of queries about the set of processes, policies, procedures and practices by which an organization operates. The queries are divided into seven Categories: Leadership; Strategic Planning; Customer Focus; Measurement, Analysis and Knowledge Management; Workforce Focus; Operations Focus; Results.

The first six Categories, taken together, constitute the premier "table of contents" for a comprehensive operations management system available today. And formulating and continuously improving a comprehensive operations management system [2] for your business is what Baldrige is really about.

The first six Categories can be used to formulate a comprehensive operations management system in much the same way that the ISO 9001 Standard is used to formulate a quality management system. Obviously, the scope of a comprehensive operations management system is much broader than that of a quality management system. Still, the Criteria's queries can serve the same purpose as ISO 9001's "shalls" in identifying areas to be addressed. Like ISO 9001, the Criteria are not prescriptive -- they don't tell you how to address the queries. However, the Criteria demand results -- ISO 9001 does not. Meanwhile, ISO 9001 explicitly demands extensive documentation -- the Criteria do not.

The Baldrige Award process amounts to an evaluation of a comprehensive operations management system and the results that system generates. To apply for an Award, an organization produces a five page Organizational Profile [3], along with responses to all of the queries in all seven Categories, packed into another fifty pages. If that sounds like a lot of work to you, you are right.

So, why bother? Because establishing and implementing responses for the first six Categories in order to improve the seventh Category is a real good way to use your time. Whether you have any intention of ever applying for an Award or not, creating a formalized comprehensive operations management system is a good idea for any business that intends survive and prosper in today's increasingly globalized competitive environment.

### How to Get Started

>> Download the (free) [Baldrige 20/20 Executive Guide](#) [4]. This 132 pg. brochure provides background and examples.

>> Download the (free) [Sample from the Criteria booklet](#) [5]. The booklet contains the Organizational Profile queries. Start by constructing an outline of responses to those queries. If you don't have all of the answers, then you do know where to start.

>> Download a copy of the [Criteria](#) (\$10.00) and the (free) [Self Analysis Worksheet](#) [6]. The Self Analysis Worksheet is a Word document that will start you on your way.

[Click here to read the full blog post.](#)

## Why Bother With Baldrige (Part 2)

by Chuck Harrington on [JERA Sustainable Development Blog](#)

### An Examiner's Perspective

Part 1 of this post [1] discussed the National Baldrige Awards and the Baldrige Criteria for Performance Excellence, by which Award applicants are evaluated and winners chosen. Part 1 also pointed out that the Criteria might also be used as a guide or table of contents for constructing and improving a results oriented comprehensive operations management system. Further, Part 1 suggested ways to become familiar with the Criteria, in order to apply them within your operation. Part 2 proposes an even more excellent way.

### Examining as a Learning Opportunity

A Baldrige Award application amounts to a description of an actual comprehensive operations management system, as it exists in a real organization. The role of the Examiner is to determine the extent to which the applicant's management system, as described in the application, addresses the Criteria, as well as the maturity and integrity of that management system and of the processes, practices, policies and procedures which comprise that system. Through detailed, systematic, hands-on analysis, the Examiner gains critical insights that can be applied to the Examiner's organization.

### The examination process for each application consists of:

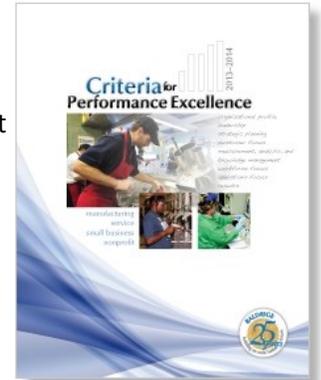
- >> A team of about six specially trained Examiners is designated, along with a very experienced Lead Examiner.
- >> Each Examiner individually analyzes the application, noting strengths and weaknesses for each Category and Item in the Criteria.
- >> The team meets as a group and achieves consensus on a group analysis, which is then scored. Areas of the application where the team needs additional clarity or context are noted for review at Site Visit.
- >> Where appropriate, a Site Visit is arranged and conducted, in order to gain clarity and context. Consensus lists of strengths and weaknesses, along with scores, are adjusted if and as appropriate.

Sure, examining is intense, and a lot of work. Because of the team aspect of the examining process, understanding of what performance excellence really requires comes fast. In today's globalized economy, insights that can improve your organization's competitive posture are well worth the bother.

To this point, discussion has focused on the national Baldrige Award program. There is also a network of State programs [2]. Most, if not all, State programs include a number of award levels, culminating in a top level award that follows the national Baldrige Award process quite closely. In fact, effective with this year's Award cycle, applicants for the national Baldrige Award will be required to have won a State award at the highest level. The multiple levels of award offerings in most; if not all of the State programs provide organizations with a structured pathway for improvement over time.

Correspondingly, multiple award levels generate a need for Examiners within the State programs. State programs offer examiner training, along with opportunities to apply that training by examining Baldrige - based applications on levels of increasing intensity. Whether your organization intends to pursue Baldrige - based awards or not, becoming an Examiner in your State program offers a very practical, low cost route to improving your organization's competitiveness.

Note: I serve on the Board of Overseers for the Arizona Quality Alliance, the organization that conducts State-level Baldrige based award programs for Arizona, Utah and Nevada. I have also served as an Examiner for the Arizona and the Mississippi programs. Examining *is* worth the bother. [Click here to read the full blog post.](#)



## Partner Opportunities

### Accelerated Quality Improvement Offers Online PMP Exam Prep Training - Register Today!

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**SUMMER ISSUE RESERVATION DEADLINE: June 19, 2013**

## 2013 Arizona Quality Alliance Performance Excellence Program Schedule

Date	Who	Where	Task/Item
April 2 (Part A) April 17 (Part B)	SC Applicants	ASU SkySong	Workshops- Making Your SC Application the Best It Can Be (Part A 10am-12pm) (Part B 12:00-4:00pm)
<b>May 3</b>	<b>Applicants</b>	<b>AQA Office</b>	<b>Completed Intent to Apply forms due</b>
<b>May 15</b>	Potential Examiners	AQA Office	Examiner Applications Due for Performance Excellence Program
May 20	Introductory Examiners*		(TBD) Pre-work for Introductory Examiner Training sent out - bring completed to Introductory training (* <b>Introductory</b> = 2 or less yrs. of examiner experience w/in last 3 yrs.)
<b>June 5</b> 7:30 AM – 5 PM	Introductory Examiners*	Univ. of Phoenix, Phoenix	Introductory Examiner Training (Offered twice; Introductory Examiners <b>MUST</b> take June 5 <b>OR</b> Tucson date if available)
Early June	Introductory Examiners*	Tucson – if needed (tentative)	Introductory Examiner Training (Offered twice; Introductory Examiners <b>MUST</b> take June 5 <b>OR</b> Tucson date if available)
June 13	All Examiners		(TBD) Pre-work for Stage 1 Examiner Training sent out– mandatory for all examiners; bring completed to Stage 1 Training
<b>June 20</b> 7:30 AM – 5 PM	All Examiners	Univ. of Phoenix, Phoenix	Examiner Stage 1 Training Session (Offered twice; ALL examiners <b>MUST</b> take June 20 <b>OR</b> Tucson date if available (includes initial Software training)
Late June / Early July	All Examiners	Tucson – if needed (tentative)	Examiner Stage 1 Training Session (Offered twice; ALL examiners <b>MUST</b> take June 20 <b>OR</b> Tucson date if available (includes initial Software training)
July 10 <b>or</b> 16	All Examiners, Mentors & Judges	Univ. of Phoenix, Phoenix	2-3 hours – In-person Computer Lab Software Training for Stage 2
<b>July 12</b>	Applicants	AQA Office	Completed Awards Applications due
July 15-18	AQA		Selection of Examination Teams, Leads, & Mentors
July 19	AQA		Distribute applications and supporting materials to examination teams
July 18	Lead Examiners & AQA	Univ. of Phoenix, Phoenix	2-3 hours Lead & Software Training in computer lab; Site Visit Responsibilities; and initial applicant contact
July 23-Aug 13	Examiners		Stage 1 - Independent Review of Applications
Aug 6	Applicants	Sonora Quest Laboratories	Workshop – “How to Prepare for a Site Visit” (1:00-3:30pm)
<b>Aug 13-15</b> 7:30 AM – 5 PM	Examiners / Mentors	Univ. of Phoenix, Phoenix	Examiner Stage 2 & 3 Training Session – <b>3 days / all days mandatory (Mentors half day in PM each day)</b>

## 2013 Arizona Quality Alliance Performance Excellence Program Schedule (*continued*)

Date	Who	Where	Task/Item
Aug 19- Sept 13	Examiners & Mentors		Examiners Stage 2 – Team Meeting (1-2 days) & Consensus report completed
Sep 16	Lead Examiners	AQA office	Consensus scorebooks & scoring sheets with mentor review due
Sep 16-22	Examiners & Mentors		Site Visit Preparation
Sep 23 - 27 Sept 30 - Oct 4	Examiners/ Mentors & Applicants		Stage 3 - Site Visits completed (Site Visit time based on applicant type)
Oct 11	Examiners	AQA office	Draft Feedback Reports with mentor review due
Oct 17	Judges	Univ. of Phoenix, Phoenix	Panel of Judges Training
Nov 6	Judges	Univ. of Phoenix, Phoenix	Stage 4 - Panel of Judges Meeting
Nov 7 – 24	Judges & Lead Examiners		Finalize feedback report
Nov 7 – 24	AQA		Stage 5 - Final Due Diligence conducted
Nov 25	Lead Examiners	AQA Office	Final Feedback Reports due
Nov 25 - 29	AQA		Applicants notification of selection/non-selection
Early Dec	AQA		News Release distributed reporting Recipients
Early-Mid Dec	AQA		Editing of feedback reports
Mid Dec	AQA		Feedback Reports provided to all applicants
Feb. 2014	AQA	TBD	Recognition Banquet for Recipients and Volunteers

*Last updated 2/11/2013*

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The 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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