Upcoming Events

April 2—SWAE/Intel Mentoring & Planning Services (MAPS) Program Showcase
April 6-9—Quest for Excellence Conference in Baltimore, MD
April 14—Board of Overseers Meeting
April 17—SWAE Performance Excellence Program Presentation at AZ Tech Council Lunch & Learn
May 2—Intent to Apply forms due to SWAE office
May 12—Board of Overseers Meeting
May 15—Examiner Applications due to SWAE office
May 28—Board of Directors Meeting
June 5—Examiner Introductory Training
June 9—Board of Overseers Meeting
June 19—Examiner Independent Review Training
July 9-10—Examiner Consensus & Site Visit Training
July 11—Completed Organization & Process Level Applications due to SWAE
Letter from the Chair of the Southwest Alliance for Excellence Board of Directors

In March of 2013, we announced that we were changing our name to the Southwest Alliance for Excellence (SWAE). Our name change reflects the addition of our partner states, Nevada and Utah. Our new logo has been out for a while and we continue to recruit for members from all three states we represent. I am pleased to announce that we elected a new board member in January of this year, Jerry Salkowe, MD. Jerry is from St. George, Utah and is working closely with our Executive Director, Karen Shepard, to bring in additional organizations from Utah to the Southwest Alliance for Excellence.

In February, we had an opportunity to recognize the 2013 Performance Excellence Award recipients for their outstanding work in the area of quality improvement. The banquet was wonderful and congratulations to all of our recipients!

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

We are excited to be launching the 2014 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 learning into their day to day job functions. The schedule for the 2014 Performance Excellence Program can be accessed from the SWAE website.

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

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

— David A. Dexter, President & CEO, Sonora Quest Laboratories
Current Opportunities

Coming Up on April 17: "Improving Results in Your Organization through the Performance Excellence Program"

Get an overview of Southwest Alliance for Excellence and the Performance Excellence Program and how they help improve results in organizations.

Who Should Attend: Anyone involved in driving quality and performance in their organization—from leadership, process engineers, project managers, etc. Industries that benefit from this quality methodology include manufacturing, healthcare, education, non-profit, service industries, and government agencies.

Date: April 17, 2014
Time: 11:30 a.m.-1:00 p.m.
Location: Eller School of Management (off the 101 freeway)
16425 N. Pima Rd., Suite 370, Scottsdale, AZ 85260
Panelists: Kristen Drew, Gilbert Fire Department; Eric Davies, University of Phoenix; Erika Gibbons, TriWest Healthcare Alliance; and Audra McQuarie, University of Phoenix
Cost: NO CHARGE
RSVP: Email kshepard@swae.org

If you are located outside of the Phoenix Metro area and are interested in attending via webinar or in receiving a recorded copy, please contact Karen Shepard at kshepard@swae.org or 480-874-5815.

Become a SWAE State Ambassador for Arizona, Utah or Nevada

In 2012, Southwest Alliance for Excellence became the program provider for Utah, the third state in our alliance already comprised of Arizona and Nevada. In order to increase our presence in Utah, we developed the SWAE ambassador program, which sends SWAE spokespeople into specific geographic areas to represent the organization and our Performance Excellence Program. We are now recruiting ambassadors for all three states.

The ambassador role is a two-year commitment of about eight hours a month. Responsibilities include:

- Presenting at group meetings the what, who, why, when, and how of Performance Excellence Program
- Setting up meetings with organizational leaders that have exhibited a quality initiative to encourage them to participate/apply for any of our Award levels
- Recruiting examiners, mentors & judges for the program
- Arranging meetings with sectors (health care, government, non-profit, manufacturing, education) to discuss the merits of participating in the Awards program at some level and to encourage applications
- Helping SWAE identify and obtain necessary resources, i.e. memberships/sponsorships/partnerships/in-kind donations
- Virtual meetings with the Director (quarterly) to discuss strategies for greater participation

We are pleased to have our current Utah ambassadors serving on both our Board of Directors and Board of Overseers. Jerry Salkowe, Advocates for Quality, and Mike Fitch, GE Healthcare, have already proven to be valuable assets, and we will continue to recruit ambassadors for our other states.

Click here for the Ambassador position description, or contact Karen Shepard at kshepard@swae.org or 480-874-5815 to learn more about becoming a SWAE Ambassador.
Make an Impact

Arizona Gives Day

Every day Southwest Alliance for Excellence (SWAE) is making a difference in the communities and states we serve by helping organizations live up to their potential. Now more than ever, your investment means the world to SWAE and the programs we offer.

Join us on April 9, 2014, Arizona Gives Day, and help us continue to positively impact local businesses from every sector through our Performance Excellence Program. Every dollar will go directly to supporting our mission to empower organizations to pursue performance excellence, improve outcomes and contribute to the economic strength of their community and state.

Your contribution of $10, $25, $50 or any amount you choose on Arizona Gives Day will help us better serve nonprofit, government, education, healthcare and other businesses around the state. We are counting on you! Mark your calendar and please help us by spreading the word and pledging to donate at www.azgives.org.

With your support, we hope to raise more than $1,000 on Arizona Gives Day! Follow us on Facebook and on Twitter so you can join in on this exciting day of giving!

Meet Jerry Salkowe

Introducing Our Newest Board Member

Southwest Alliance for Excellence (SWAE) is pleased to welcome Jerry Salkowe, MD to our Board of Directors.

Jerry Salkowe is a family physician, former health plan and hospital administrator, and Baldrige examiner who recently relocated to St. George, Utah. One of the roles he's taken on with this move is to serve as a board member and Utah liaison for SWAE.

Utah's history and organizational accomplishments are very much aligned with the Baldrige Criteria, and SWAE welcomes the opportunity to collaborate in performance excellence efforts.

Jerry welcomes the opportunity for a brief call with Utah organizations striving for performance excellence. He'd be happy to participate in meetings/conferences to discuss Southwest Alliance for Excellence and the Baldrige Criteria for Performance Excellence. He can be reached at jerry.salkowe@a4q.us or (435) 245-1282.

Karen L. Shepard is the Executive Director of SWAE. She can be reached at kshepard@swae.org, and a full list of our Board members can be found at: www.swae.org/bod.htm.
Award Banquet Highlights

Thank you to everyone who attended our 2013 Performance Excellence Program Award Banquet earlier this year on February 4, 2014. It was a great success! Check out photos of our recipients and more below, or click here to access all the event photos online.

Left: SWAE Executive Director, Karen Shepard; Emcee Ginger Lamb, VP and Publisher AZ Capitol Times; Keynote speaker John Cole, MESA Products; SWAE Board Chair, Jean Hammelev; and Examiner of the Year Heather Mock, DVUSD; Center: 2013 Performance Excellence Program Board of Examiners; Right: 2013 Lead Examiners

Left: Pioneer Award for Quality recipient Arrowhead Hospital; Center: Showcase in Excellence recipient Deer Valley Unified School District; Right: Showcase recipient Laboratory Sciences of Arizona

Left: Showcase recipient Scottsdale Healthcare; Center: Showcase recipient Town of Gilbert Fire Department; Right: Both Showcase recipient teams from University of Phoenix

Left: Representatives from Town of Gilbert Fire Department; Center Left: University of Phoenix attendees and Amanda Freeman (right) from the Board of Examiners and Board of Overseers; Center Right: Erica Gibbons, who served as a Lead Examiner and Dennis Stambaugh, who served on the Panel of Judges; Right: Award table
Encourage Organizations to Apply for the Performance Excellence Program

In applying for the Performance Excellence Program, organizations take a major step to improve their performance and growth.

Because of the learning inherent in completing the application and in the feedback you will receive, the effort that goes into applying for the program results in a significant return on your investment. The process will help you prioritize opportunities for improvement and identify strengths to celebrate. As a result, the rate at which your organization improves should accelerate.

The information can be found on our website at: http://www.swae.org/SQA_Program/Awards.htm

There you will find the Intent to Apply & Eligibility Form along with the applications, criteria and guidance for our Organization Level and Process Level Awards. The deadline for the Intent to Apply form is May 2, 2014, and completed applications are due by July 11, 2014.

Should you have any questions, please don’t hesitate to contact the Southwest Alliance for Excellence office at 480-874-5815 or email Karen Shepard at kshepard@swae.org.

Performance Excellence Program Schedule/Deadlines

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<tr>
<th>Date</th>
<th>Location</th>
<th>Item</th>
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<tr>
<td>May 2</td>
<td>SWAE Office</td>
<td>Intent to Apply Forms Due</td>
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<tr>
<td>May 15</td>
<td>SWAE Office</td>
<td>Examiner Applications Due</td>
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<td>June 5</td>
<td>Deer Valley Unified School District Phoenix, AZ &amp; Webinar</td>
<td>Introductory Examiner Training</td>
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<td>June 19</td>
<td>Deer Valley Unified School District Phoenix, AZ &amp; via Webinar</td>
<td>Examiner Stage 1 Training</td>
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<td>July 9-10</td>
<td>Deer Valley Unified School District Phoenix, AZ &amp; via Webinar</td>
<td>Examiner Stage 2 &amp; 3 Training</td>
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<td>July 11</td>
<td>SWAE Office</td>
<td>Completed Award Applications Due</td>
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Southwest Alliance for Excellence is proud to announce the 2014 Performance Excellence Program is underway! We are offering the opportunity for you to be trained and serve as a member of the SWAE Performance Excellence Program Board of Examiners.

Being an Examiner can be a powerful learning experience and a valuable professional development step for any individual.

Benefits include:
- Develop or refine YOUR analytical, teamwork, interviewing and writing skills
- Build and expand YOUR professional network and resume
- Increase YOUR ability to assist YOUR organization in continually improving its management systems and processes
- Learn firsthand of innovative approaches utilized by leading companies in Arizona, Nevada and Utah
- Receive continuing education credit for the training and examiner experience

You will learn how to:
- Use national Malcolm Baldrige award criteria to understand and evaluate an organization
- Conduct an effective assessment of quality performance
- Develop and provide non-prescriptive feedback in a management report
- Develop a strong understanding of a global set of guidelines for running an effective company
- Evaluate the quality systems of a range of organizations, from small and large manufacturing, healthcare, education and service companies to public sector organizations

To be considered as a “potential examiner,” submit an Examiner Application by May 15, 2014 for the 2014 program. Examiners who have previously served must re-apply each year.

Notification will be emailed to all Potential Examiners by May 20, 2014, indicating their selection status.

Examiner applications and the Program Schedule can be found at: www.swae.org/SQA_Program/Awards.htm.

We look forward to working with you!

“Becoming a SWAE Examiner is the best lifelong professional development that I have participated in. The process tested and improved my critical thinking, communication, and collaboration skills. I know what ‘Excellence’ looks like and the questions to answer to get there.”
— Julie Chelius, Deer Valley Unified School District

“My experience as an Examiner utilizing the Baldrige Criteria methodology, not only helped me better understand institutional best practices, but taking a holistic systematic approach to process improvement in my everyday life— personal and professional. The process from start to finish, was an eye-opening experience to how best-in-class processes are dreamed, created, and implemented in the business environment.”
— Eric Dudley, University of Phoenix
SWAE Board of Overseers (BOO)

The Board of Overseers is comprised of quality professionals from the business community. This dedicated group of volunteers provides the foundation for the Performance Excellence Program. This committee’s role is to develop the award standards, ensure that integrity is maintained throughout the program, and to develop and deliver appropriate training.

We would like to introduce to you the members of the 2014 BOO:

- Clarissa Allen, *Harland Clarke*
- Carla Carter, *Carla Carter & Associates*
- Gloria Diaz, *AHCCCS*
- Keith Dompier, *Intel, Corp.*
- Susie Duffy, *Scottsdale Healthcare*
- Mike Fitch, *GE Healthcare* (UT)
- Amanda Freeman
- Stacy Harley, Scottsdale Medical Imaging
- Judy Herrmann
- Dr. Jane Humble, *ASU Polytechnic*
- Sandy Kube, *Deer Valley Unified School District*
- Heather Mock, *Deer Valley Unified School District*
- Courtney Ophaug, *Banner Health*
- Jerry Salkowe, *Advocates for Quality* (UT)
- Candice Vaughan, MS, RN, *Banner Health*

For More Information

Additional information about the Performance Excellence Program, the Board of Overseers, the Board of Examiners, and more is available on our website at: [www.swae.org](http://www.swae.org) or by calling 480-874-5815.
Intel/SWAE Mentoring Program Recognition

Southwest Alliance for Excellence is pleased to conclude another year of partnership with the Intel Corporation for the Mentoring and Planning Services (MAPS) Program. We’d especially like to thank the 2013 Intel Mentors who made a tremendous impact on the organizations they assisted:

Susan Augustyn  Patrick Grogg  Julio Lopez  Shauna Planck  Katy Spada  
Vivienne Boogaard  Rudy Hacker  Paula Mackenzie  Leslie Quinn  Eric Stewart  
Mitch Christensen  Jake Heller  Eric Mantion  Jim Robbins  Shar Stocker  
Glen Compton  Bill Hoddy  Rohit Mantri  Shubhada Sahasrabudhe  
Vikram Dadwal  Marc Hogrefe  Fela Odeyemi  
Glenn Dickenson  Daron Ketter  Davide O’Neill  Paul Sandell  
Kevin Engholdt  Ann-Margaret Lewis  Elly Pedersen  Janet Shen  

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:

- **Civitan Foundation** - “Developing and implementing a more efficient and effective upper management operation and coordination that would enable growth, streamline duties, and limit liability exposure”
- **CompuGirls** - "Design and implement a marketing program to engage hundreds of mentor teachers across ten sites located in Arizona and Colorado"
- **East Valley Institute of Technology** - "Create a dual enrollment course between ASU and EVIT that fosters future engineers and excitement about engineering and/or quality improvement"
- **Gilbert Fire Department** - "Expansion of online dashboard for Gilbert’s Strategic Initiative goals"
- **ICM Food and Clothing Bank** - “Create and implement a strong communications plan to better communicate to the community the mission and importance of ICM”
- **Northern Arizona University Extended Campuses** - “Sharing Intel knowledge, experience, and training skills in Lean Methodology, BPM, and Continuous Quality Improvement, in order to expand these practices and skills in creating a culture of quality”
- **Southwest College of Naturopathic Medicine** - “Determining a new organizational culture that all members of the SCNM community may aspire to”
- **Southwest College of Naturopathic Medicine** - “Creating a centralized data warehouse that collects, manages and stores all the information and assessment data relevant to student learning outcomes and experiences”
- **Stardust Non-Profit Building Supplies** - “Analyzing and improving your material donation process”
- **Town of Gilbert** - “HR Recruitment and Selection Process”

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!
CONGRATULATIONS TO THE VALLEY’S 2014 HEALTHIEST EMPLOYERS!!

We’d like to celebrate our member organization and sponsor who has been selected as one of The Phoenix Business Journal’s Healthiest Employers for 2014. This organization has been recognized for being among the organizations employing the most innovative strategies for keeping their workforce healthy:

Scottsdale Healthcare

All the honorees were recognized and showcased at a celebratory awards breakfast and health fair on March 20. Click here to see the full list of honorees or to learn more about the event.

Examiner Accolades

- Congratulations to Cherryl Paul, Deer Valley Unified School District, for earning her Lean Six Sigma Black Belt.
- Congratulations to our members and volunteers who will be serving as National Baldrige Examiners this year:
  - Cheralyn Beaudry, Scottsdale Healthcare
  - Susan Duffy, Scottsdale Healthcare
  - Cindy Gruben, Sonora Quest Laboratories
  - Jean Hammelev, Sonora Quest Laboratories
  - Cherryl Paul, Deer Valley Unified School District
  - Jim Zurn, Implementation Partners

CBIZ and Mayer Hoffman McCann P.C. are Proud to Support the Southwest Alliance for Excellence

CBIZ SERVICES: Accounting, Outsourcing and Financial Advisory, Litigation Support, Tax Compliance & Consulting, Valuation Services

MHHM ATTEST SERVICES: Audits • Reviews • Agreed Upon Procedures, Employee Benefit Plan Audits • SSAE 16 Audits (formerly SAS 70) • Yellow Book • SEC Advisory Services, Other Attest Services

3101 N. Central Avenue Suite 300 • Phoenix, AZ 85012
Chuck McLane • Phone: 602-264-8835
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Mayer Hoffman McCann P.C. is an independent CPA Firm providing audit, review and attestation services, and works closely with CBIZ, a business consulting, tax and financial services provider.

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

WE ARE YOUR TIMELY RESOURCE FOR ACCURATE AND INNOVATIVE INFORMATION

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

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

EVERYONE IN EVERY DEPARTMENT CAN BENEFIT

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

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

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

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

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

CONNECTING MEMBERS IS WHAT WE DO BEST

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

Tools you can use:
- Sign up for informational e-blasts and newsletters.
- Contact SWAE to be connected to appropriate members and ambassadors.
Southwest Alliance for Excellence (SWAE) would like to publicly recognize and thank the Arizona Technology Council for giving us a "home" for the last 2+ years. We especially want to thank Steve Zylstra, President & CEO, for donating office space and infrastructure to SWAE. We greatly appreciate the Arizona Technology Council’s generosity and the wonderful dynamic we have with their staff.

About the Arizona Technology Council
The Arizona Technology Council is Arizona's premier trade association for science and technology companies. Recognized as having a diverse professional business community, Council members work towards furthering the advancement of technology in Arizona through leadership, education, legislation and social action. The Arizona Technology Council offers numerous events, educational forums and business conferences that bring together leaders, managers, employees and visionaries to make an impact on the technology industry. These interactions contribute to the Council’s culture of growing member businesses and transforming technology in Arizona.

To learn more about the Arizona Technology Council, please visit www.aztechcouncil.org.
Quick Baldrige Updates

- BPEP has been selected as a top-10 finalist in the best leadership development programs in the U.S. government and military (Leadership 500 Awards). Final ranking to be announced April 9. Both Baldrige examiner training and the Baldrige Executive Fellows Program were included in the selection.

- The fourth cohort of the Baldrige Executive Fellows kicks off at Quest (at 15, this is their largest group of executives, yet). [http://nistbaldrige.blogs.govdelivery.com/2014/03/12/the-fellowship-continues/](http://nistbaldrige.blogs.govdelivery.com/2014/03/12/the-fellowship-continues/)


- Eligibility certification packages for the 2014 Baldrige Award are due April 1. [http://www.nist.gov/baldrige/enter/how_to_apply.cfm](http://www.nist.gov/baldrige/enter/how_to_apply.cfm)

The Baldrige Resource Library (BRL)

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

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

Use it! ... Share it! [http://www.baldrigepe.org/brl/](http://www.baldrigepe.org/brl/)

Baldrige Guest Submissions

Baldrige.com welcomes guest contributions to their column “Voices in the Field.”

Excerpted from the site: “Baldrige is all about learning and sharing. Share your lessons learned with us, including how you used the Baldrige Criteria, addressed challenges, or how you achieved success. Whatever the lesson or tip related to Baldrige, we believe that most lessons have universal benefit across sectors, across large and small organizations, and around the world.”

To share your voice and insights, follow these guidelines:

- Post between 300 and 500 words.
- Write from your perspective. It is okay to use the word “I.”
- Your writing must be original and never have been published before on the Internet.
- You can include a link in your byline, which will be displayed at the bottom of the article.
- You cannot promote your services or those of your clients. This doesn’t mean that you can’t talk about an issue or event in your work experience or cite a client example to illustrate a point. It just means no marketing.
- Readers enjoy seeing a photo of the author. Please send a jpg or gif file.
- If your article is accepted, you will receive notice of when to expect publication.

To submit an article that meets these guidelines, e-mail it to mbrennan@baldrigefoundation.org.
Top-100 List Again Demonstrates Baldrige Impact in U.S. Health Care

- In early March, Truven Health Analytics released its annual study identifying the [100 top hospitals](#) (PDF) based on their overall organizational performance.

As in previous years, health care organizations using the [Baldrige Health Care Criteria for Performance Excellence](#) as a management framework were well represented. Some of these organizations have been formally recognized by the national Malcolm Baldrige National Quality Award or state and sector-specific Baldrige-based awards of [Alliance for Performance Excellence](#) programs across the country. Other organizations on the list have applied for Baldrige feedback/recognition at the national or state levels but cannot be publicly named as applicants due to confidentiality policies of the award programs.

According to Truven, the health care organizations on its list have achieved performance excellence and are leading their peer hospitals in demonstrating high-quality patient outcomes while improving efficiency. Truven states that based on the results of this year’s study, if all Medicare inpatients received the same level of care as those treated in the award-winning facilities, the following would be possible:

- More than 165,000 additional lives could be saved
- Nearly 90,000 additional patients could be complication-free
- $5.4 billion could be saved
- The average patient stay would decrease by nearly half a day

In addition, in releasing its 2013 [100 top-hospitals list](#) (PDF), Truven Health Analytics stated that by using publicly available data, it learned that the best hospitals and health systems do the following:

- Follow Baldrige practices closely
- Demonstrate excellence across the organization, delivering top-notch patient outcomes, keeping costs down and finances stable so that they can invest more back into patient care, following recommended processes and providing value to the community as a high-quality employer and trusted care partner
- Exhibit a culture of excellence and performance improvement that pervades every aspect of their organizations—from housekeeping to patient care to administration
- Have leaders with common approaches to management and organizational goal development

See the full list of National Baldrige Award winners or Baldrige-based Alliance program award winners that made the list.

The close relationship between top-performing hospitals and the Baldrige Criteria was also a significant finding in a [2012 Truven survey](#) of hospital chief executive officers. That affirmation of the Baldrige impact on health care reemphasized the findings of a [2011 study](#), also by Truven Health Analytics (then known as the health care business of Thomson Reuters), that hospitals that had won the Malcolm Baldrige National Quality Award or been considered for a Baldrige site visit outperform other hospitals in nearly every metric used to determine the 100 top hospitals, including metrics for patient outcomes (mortality, complications, safety), core measures, HCAHPS, and profitability/expenses.
Baldrige Updates

Growing by Leaps and Baldrige
Posted by Christine Schaefer on Blogrige

Around this time last year, we highlighted on Blogrige how MESA doubled its revenue after winning its first Baldrige Award in 2006. The Tulsa, Oklahoma-based small business also more than doubled in size between 2006 and 2012, when it won its second Baldrige Award. As it transformed from a manufacturer to a full-service provider of corrosion control and integrity solutions to the pipeline industry, MESA added 5 locations and 140 workforce members, while growing annual revenues from $16 million to $100 million from 2002 to 2013.

At the Baldrige Program’s upcoming Quest for Excellence® Conference, Kelsey May, general counsel at MESA, will share best practices behind this story of phenomenal business growth, with a focus on how MESA has used the Baldrige framework to support its strategy for “responsible growth.” In the meantime, she shared the following information in a recent interview.

**How does MESA’s growth strategy relate to the focus on excellence?**

MESA is a big believer that the only sustainable method for getting bigger is by getting better. If we continuously improve in all of our six strategic objectives, we’ll continue to be a world-class organization; if we continue to be a world-class organization, we’ll add and keep customers based on what we can do for them. Our six strategic objectives (which rarely change) are outlined in our annual strategic plan, along with assigned action items to drive those objectives forward.

**What do you see as the key benefit for small businesses like yours of using the Baldrige Criteria for Performance Excellence as a management framework?**

The benefit to using the Baldrige framework is that organizations can tailor the Criteria to suit their needs and their time frame. For example, if your organization is overwhelmed by the idea of “quality management” or the phrase “performance excellence,” start with just one area and try to focus on small improvements that will, over time, add up to organizational change. We all have to start somewhere, and there’s no bad place to start—as long as you just start.

**What are your top tips for organizations beginning to use the Baldrige framework?**

- **Communicate:** Make sure you have the support of senior leadership and employees. Instigating organizational change is not a one-person challenge, and the only way to truly sustain change and excellence is if everyone is on the same page.

Read more
The Baldrige Criteria for Performance Excellence is a very different type of management book. It isn’t packed with sage advice for changing your organization. It isn’t filled with pithy quotes to frame and hang above your desk. It doesn’t have the silver bullet you’ve been looking for to solve your organization’s problems before the next quarter. One of the primary ways it differs from traditional management books is that it leads the reader on a journey of self-discovery through a series of powerful, thought-provoking questions.

These questions have no “right” answers. Those of us who use the Criteria are often amused to say that the standard answer to most of the questions is, “It depends.” Why are there no “right” answers? Because every organization is unique. Its mission, its values, its culture, its place in the competitive landscape are like fingerprints – unique to an organization.

However, the Criteria have two main types of questions (unless you count the one “who” question that appears in just one Item) – “what” and “how.” We frequently coach clients in the appropriate way to respond to these different types of questions when preparing an application. “What” questions are best responded to with a bulleted list or a table of “just the facts.” The response is similar to a list of ingredients for a recipe. “How” questions are best responded to with a description of a systematic process, carefully laying out the steps needed to produce the desired result. The response to “how” questions is more like the instructions for a recipe with oven temperature settings, the sequence of mixing in the ingredients, and any other steps required to make the dish. Many clients have a difficult time with this. They like to tell stories. They like to present philosophy rather than process. They write a paragraph about activities that are more like random acts of goodness than intentional processes designed to meet the requirements.

If you aren’t preparing an application, what’s the relevance of all this? As leaders, you have the same opportunity to shape the performance of your organization by using these two types of questions. When you ask your people, “what,” you should expect a list of requirements, of activities, of measures. When you ask your people, “how,” you should be listening for a description of a repeatable process, evaluated against the requirements for its design, regularly measured for its effectiveness, and deployed to the parts of the organization (and in some cases, to your suppliers and partners) who need to perform it. If that isn’t the response you get, you are hearing wishful thinking, hoped for outcomes, and activities rather than intentional action toward achieving a specific objective.

Is your organization getting the results it needs to be successful, to thrive in a competitive environment? If you see opportunity in this area, your first step toward improvement might be a more intentional use of the powerful question, “how?”

If you’d like to receive a copy of our “Top Ten Tips for Answering ‘What’ and ‘How’ Questions,” just send a request to kay@baldrige-coach.com.

And don’t forget to register for the 26th Annual Baldrige Quest for Excellence, April 6-9, in Baltimore, Maryland! http://www.nist.gov/baldrige/qa/index.cfm
From Operational Excellence to Performance Excellence
by Chuck Harrington on JERA Sustainable Development Blog

A Systems Approach
A manufacturing business is a system that accepts inputs, such as raw materials, energy and human talents. Then, through some number and arrangement of operating processes, that system generates commercially viable products. For present purposes, the key terms here are “system”, “operating processes” and “commercially viable products”.

>> “System” -- The Business Dictionary defines a system as “(a)n organized, purposeful structure that consists of interrelated and interdependent elements (components, entities, factors, members, parts, etc.). These elements continually influence one another (directly or indirectly) to maintain their activity and the existence of the system, in order to achieve the goal of the system.”

>> “Operating processes” -- Operating processes include factory floor processes, such as mixing, machining, painting and packaging. Along with these, processes such as purchasing, maintenance, training, inspection, customer service, sales, waste disposal, product design and many more contribute. Operating processes are the “interrelated and interdependent elements” that comprise the system.

>> “Commercially viable products” -- Commercially viable products are those which customers buy in sufficient volume at high enough prices to produce a profit. Keep in mind that the term “product” refers to that which customers buy in preference to whatever alternatives are available. Hence, “products” include many intangible elements, including perceptions, reasonable or otherwise.

Operational Excellence
“Operational Excellence” refers to the results expected from a systematic program of improvements to operating processes, sustained over time. Since “excellence” is a relative term, “operational excellence” refers to the relative performance of a manufacturing firm’s operating processes. The relative performance of an operating process may be determined by comparison to -- perhaps by “benchmarking” -- recognized leaders.

There is an implicit assumption that superior operating process performance leads to superior organizational performance. The rub here is that the many operating processes that comprise a manufacturing business are interrelated and interdependent. As such, the fact that a given operating process is realistically deemed excellent may, or may not positively affect the performance of the firm (a system) relative to the objectives of the firm. To use an extreme to illustrate this point, consider the importance of superior operating processes in a typewriter manufacturing plant today.

Performance Excellence
From my perspective, “performance excellence” refers to the performance of a manufacturing business (a system), relative to the objective(s) of that business. The manifold operating processes should each be measured by their contribution to the attainment of the objective(s) of the business.

The Baldrige Performance Excellence Award Program provides a number of ready case studies in performance excellence. Awards are made annually, based on the examination of applications. Applications consist of responses to queries on the program’s Criteria for Performance Excellence. The Criteria include three primary components:
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<tbody>
<tr>
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<td>$550</td>
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<td>Half Page Horizontal</td>
<td>$300</td>
</tr>
<tr>
<td>Quarter Page</td>
<td>$150</td>
</tr>
<tr>
<td>Business Card</td>
<td>$75</td>
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</table>

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

SUMMER ISSUE RESERVATION DEADLINE: June 18, 2014
<table>
<thead>
<tr>
<th>Date</th>
<th>Who</th>
<th>Where</th>
<th>Task/Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 17</td>
<td>Potential Examiners/</td>
<td>Scottsdale &amp; Webinar</td>
<td>Performance Excellence Program Informational Session (4/17 – 11:30am-1:30pm)</td>
</tr>
<tr>
<td>May 2</td>
<td>Applicants</td>
<td>SWAE Office</td>
<td>Completed Intent to Apply forms due</td>
</tr>
<tr>
<td>May 15</td>
<td>Potential Examiners</td>
<td>SWAE Office</td>
<td>Examiner Applications Due for Performance Excellence Program</td>
</tr>
<tr>
<td>May 20</td>
<td>Introductory Examiners*</td>
<td>SWAE Office</td>
<td>(TBD) Pre-work for Introductory Examiner Training sent out - bring completed to Introductory training (*Introductory = 2 or less yrs of examiner experience w/in last 3 yrs)</td>
</tr>
<tr>
<td>June 5</td>
<td>Introductory Examiners*</td>
<td>DVUSD, Phoenix &amp; Webinar</td>
<td>Introductory Examiner Training (Offered via webinar; Introductory Examiners MUST take June 5)</td>
</tr>
<tr>
<td>June 13</td>
<td>All Examiners</td>
<td></td>
<td>(TBD) Pre-work for Stage 1 Examiner Training sent out– mandatory for all examiners; bring completed to Stage 1 Training</td>
</tr>
<tr>
<td>June 19</td>
<td>All Examiners</td>
<td>DVUSD, Phoenix &amp; Webinar</td>
<td>Examiner Stage 1 Training Session (Offered via webinar; ALL examiners MUST take June 19 (tentative - includes initial Software training)</td>
</tr>
<tr>
<td>July 9-10</td>
<td>All Examiners</td>
<td>DVUSD, Phoenix &amp; Webinar</td>
<td>Examiner Stage 2 &amp; 3 Training Session –2 days / both days mandatory (Offered via webinar)</td>
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<tr>
<td>July 11</td>
<td>Applicants</td>
<td>SWAE Office</td>
<td>Completed Awards Applications due</td>
</tr>
<tr>
<td>July 14-17</td>
<td>SWAE</td>
<td></td>
<td>Selection of Examination Teams, Leads, &amp; Mentors</td>
</tr>
<tr>
<td>July 18</td>
<td>SWAE</td>
<td></td>
<td>Distribute applications and supporting materials to examination teams</td>
</tr>
<tr>
<td>July 17</td>
<td>Lead Examiners &amp; SWAE</td>
<td>Webinar</td>
<td>2-3 hours Lead &amp; Software Training; Site Visit Responsibilities; and initial applicant contact</td>
</tr>
<tr>
<td>July 1-10</td>
<td>Examiners</td>
<td></td>
<td>Stage 1 - Independent Review of Applications</td>
</tr>
<tr>
<td>Aug 6 (tent.)</td>
<td>Applicants</td>
<td>Sonora Quest Labs</td>
<td>Workshop – “How to Prepare for a Site Visit” (1:00pm-3:30pm)</td>
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<tr>
<td>Aug 11- Sept 14</td>
<td>Examiners &amp; Mentors</td>
<td></td>
<td>Examiners Stage 2 - Team Meeting (1-2 days) &amp; Consensus report completed</td>
</tr>
<tr>
<td>Sep 15</td>
<td>Lead Examiners</td>
<td>SWAE office</td>
<td>Consensus scorebooks &amp; scoring sheets with mentor review due</td>
</tr>
<tr>
<td>Sep 15-28</td>
<td>Examiners &amp; Mentors</td>
<td></td>
<td>Site Visit Preparation</td>
</tr>
<tr>
<td>Sep 22-26 &amp; Sep 29-Oct 3</td>
<td>Examiners/Mentors/ Applicant</td>
<td></td>
<td>Stage 3 - Site Visits completed (Site Visit time based on applicant type)</td>
</tr>
<tr>
<td>Oct 17</td>
<td>Examiners</td>
<td>SWAE office</td>
<td>Draft Feedback Reports with mentor review due</td>
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<tr>
<td>Oct 23</td>
<td>Judges</td>
<td>TBD</td>
<td>Panel of Judges Training</td>
</tr>
<tr>
<td>Nov 12</td>
<td>Judges</td>
<td>TBD</td>
<td>Stage 4 - Panel of Judges Meeting</td>
</tr>
<tr>
<td>Nov 13 – 21</td>
<td>Judges &amp; Lead Examiners</td>
<td></td>
<td>Finalize feedback report</td>
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<tr>
<td>Nov 13-21</td>
<td>SWAE</td>
<td></td>
<td>Stage 5 - Final Due Diligence conducted</td>
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<tr>
<td>Nov 24</td>
<td>Lead Examiners</td>
<td>SWAE Office</td>
<td>Final Feedback Reports due</td>
</tr>
<tr>
<td>Nov 25-28</td>
<td>SWAE</td>
<td></td>
<td>Applicants notification of selection/non-selection</td>
</tr>
<tr>
<td>Early Dec</td>
<td>SWAE</td>
<td></td>
<td>News Release distributed reporting Recipients</td>
</tr>
<tr>
<td>Early-Mid Dec</td>
<td>SWAE</td>
<td></td>
<td>Editing of feedback reports</td>
</tr>
<tr>
<td>Mid Dec</td>
<td>SWAE</td>
<td></td>
<td>Feedback Reports provided to all applicants</td>
</tr>
<tr>
<td>Jan. 2015</td>
<td>SWAE</td>
<td>TBD</td>
<td>Recognition Banquet for Recipients and Volunteers</td>
</tr>
</tbody>
</table>
Southwest Alliance for Excellence—formerly Arizona Quality Alliance—is a non-profit corporation that advances improvement and excellence in organizations, communities and individuals. To achieve our mission we will:

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

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

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

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

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

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

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