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## Upcoming Events

- Jan. 27 — Recognition Banquet for Award Recipients and Volunteers
- Feb. 12— Baldrige 101 Workshop
- Feb. 27— Balanced ScoreCard Workshop
- Mar. 12— Phoenix ASQ Section 0704 Meeting
- Mar. 17— Arizona Technology Council Lunch & Learn
- Apr. 22— Baldrige 101 Workshop
- May 29— Integrating LEAN with Baldrige



Jean Hammelev

## Letter from the Chair of the Southwest Alliance for Excellence Board of Directors

Happy Holidays! As 2014 comes to an end, I would like to recognize our staff and all of our volunteers who make the Southwest Alliance for Excellence (SWAE) an organization that I am proud to be a part of! This year brought a number of opportunities for our members to advance improvement and excellence throughout Arizona, Nevada and Utah.

The 2014 Performance Excellence Program Award Recipients were recently announced and I am so excited to see the City of Henderson as our first recipient from Nevada receiving the Pioneer Award for Excellence !!! In addition we had 5 organizations who submitted Process Level applications receive the Showcase in Excellence Award. These organizations have achieved recognition for their respective quality efforts and they will be recognized at our annual Performance Excellence Awards ceremony on January 27, 2015. I would also like to recognize the efforts of the Board of Directors, valued Examiners, Committee Board of Overseers, Mentors and our Panel of Judges for another excellent year of work! I hope you all will return and participate in the 2015 program cycle!

I hope you all have a wonderful Holiday Season and a Very Happy New Year! Thank you for your continued support of SWAE and your commitment to quality improvement!

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

## Announcing the Award Recipients of the 2014 Performance Excellence Program

On December 8, 2014, Southwest Alliance for Excellence (SWAE) announced the six award recipients of the 2014 Performance Excellence Program.

The Performance Excellence Program recognizes organizations for excellence in quality and performance. 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.

### Congratulations to our 2014 Performance Excellence Award Recipients:

#### Pioneer Award for Excellence:

City of Henderson, NV



#### Showcase in Excellence Awards:

- 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. We are proud to continue over two decades of the Performance Excellence Award Program, one of the best methodologies available to develop a higher level of organizational performance.”

-- Karen Shepard, Executive Director of Southwest Alliance

Applications for the 2015 program will be available in late Feb. 2015.

### Join us for the 2014 Performance Excellence Program Awards Banquet!

**Date:** Tuesday, January 27, 2015

**Time:** Luncheon 11:30 AM-1:30 PM

**Location:** Chaparral Suites Resort, 5001 N. Scottsdale Road, Scottsdale, AZ 85250

Register Now

For more information, download our [event flyer](#) or [registration form](#), visit [www.swae.org](http://www.swae.org), or contact us at 480-874-5815.

## Utah Heads The Best States For Business 2014

By Kurt Badenhausen

The national unemployment rate recently dipped to 5.8%, a level last seen in July 2008, but the economic recovery has hardly been robust. Voters went to the polls last week and expressed their dissatisfaction. The economy is the most important factor for voters and [seven out of 10](#) said it is still in bad shape.

Yet, pockets of the U.S. are prospering with strong business climates. You need to head west to find most of these spots. Eight of the top 10 states in Forbes' annual study of the [Best States for Business](#) are west of the Mississippi. Leading the way is Utah, which previously ranked first between 2010 and 2012 before dropping to third last year.

Total U.S. employment declined between 2008 and 2013, but Utah added jobs at a 0.6% annual clip, good for fourth best in the country. The gains are expected to continue with both Moody's Analytics and EMSI forecasting top 10 growth rates for jobs over the next five years using "top down" (Moody's) and "bottom up" (EMSI) methods. Utah also has the highest household incomes among the 10 states with the [best job growth forecasts](#) over the next five years.

Utah has a very pro-business climate, and companies benefit from energy costs that are 26% below the national average—third lowest in the nation. Utah's economy expanded 2.4% a year over the past five years—fifth best in the U.S. It is the only state to rank in the top 10 in five of the six main categories we used to determine the Best States.

Utah has become a technology hub in recent years, but its tech roots run deep. In 1985, it was home to two of the three largest software companies in Novell and WordPerfect ([Microsoft MSFT -0.21%](#) rounded out the top three). Novell and WordPerfect have long been swallowed up, but Utah continues to be a hot locale for technology firms.

[eBay](#) has been in Utah since 2000, and it began an expansion last year to add 1,600 more jobs and almost double its workforce in the state. "The talent pool in Utah is incredible," Scott Murray, vice president of global customer experience, [told the Associated Press](#) last year citing the availability of software engineers and Mormon missionaries with foreign language skills.

[Oracle ORCL -0.55%](#) announced an expansion to its Utah operations this year, which will add more than 300 jobs. Other tech firms with a heavy presence in the Beehive State include Microsoft, [Twitter TWTR -0.08%](#) and [Adobe Systems ADBE -0.59%](#). Only five states received more venture capital funding than Utah in the first three quarters of 2014, according to the National Capital Venture Association ([Washington](#) just barely eked ahead of Utah). Most of the money is going to tech startups in either the Provo or Salt Lake City areas.

In addition to software and IT, life sciences is a [targeted industry](#) for Utah's economic developers. Medical device firm Varian Medical Systems kicked off an expansion in August to add 1,000 new jobs, which will more than double its presence in Salt Lake. There are nearly 1,000 life sciences companies in Utah, and all major subsectors of the industry are experiencing faster employment growth than the U.S. average.

Financial services is another targeted area for Utah developers, and they can point to Goldman Sachs. The firm has 1,700 employees in Salt Lake, which serves as its second biggest office in the Americas. The company expects significant growth in Utah over the next two to four years.



## Member & Volunteer Recognition

Phoenix Business Journal recognizes, SWAE member, SQL/LSA as a finalist in the “Best Places to Work 2014.” Congratulations!



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## **The Value of Belonging...**

### **"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.



## Baldridge & Alliance for Performance Excellence Updates



Learn. Share. Connect.

### Baldridge Guest Submissions

[Baldridge.com](http://Baldridge.com) welcomes guest contributions to their column "Voices in the Field."

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

To submit an article that meets [these guidelines](#), e-mail it to [mbrennan@baldridgefoundation.org](mailto:mbrennan@baldridgefoundation.org).

### The Baldridge Resource Library (BRL)

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



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

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

Use it! ... Share it! <http://www.baldrigepe.org/brl/>

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Boeing is proud to be a recipient of two SWAE Showcase in Excellence awards.





## Baldrige 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

# BLOGRIGE

the official Baldrige blog



## Ten Reasons Small Businesses Benefit from the Baldrige Criteria, Part I

Posted on October 30, 2014 by Dawn Bailey

Posted by Dawn Marie Bailey

Note: This blog is the first in a three-part series on how small businesses are benefiting from using the Baldrige Criteria.

In the Baldrige Criteria for Performance Excellence, small business owners are finding a tool to make their businesses stronger and more sustainable and to manage their resources as effectively and efficiently as possible.

From architectural and executive search firms, to car dealerships, animal shelters, health care associations, and other types of businesses, the Criteria are being used by small businesses most often for

1. strategic planning,
2. agility,
3. profitability,
4. sustainability,
5. alignment using a systems approach,
6. growth,
7. job creation,
8. prioritization of improvements,
9. measurement of data, and
10. development of leadership skills.

This blog addresses the first four reasons.

### Strategic Planning

One of the greatest opportunities for small businesses is using the Baldrige Criteria to look beyond tactical planning to consider strategic planning, said Donna Douglas, vice chair for strategy at the United States Senate Productivity and Quality Award (SPQA), a Baldrige-based program that, among other services, mentors small businesses in its region.

“With no exceptions, the opportunity to use the Baldrige Criteria as a strategic plan was something that each one of those small businesses [being mentored] embraced,” said Janice Garfield, SPQA board chair. “Very few of them had a strategic plan. They had a business plan, but they did not have a strategic plan that was holistic and showed them how to measure what was relevant and important in terms of what they wanted to do. In every instance, helping organizations plan and align key performance measures with what they were all about and where they wanted to go was what our mentors and application of the Baldrige Criteria brought to those small businesses.”

Cindy Milrany, chief financial officer and chief administrative officer for Baldrige Award-winning small business Freese and Nichols, said when the engineering and architectural firm started using the Baldrige Criteria, it was challenged by changing client needs and the ability to anticipate those changes and respond quickly.

[Click here to read more.](#)

# BLOGRIGE

the official Baldrige blog



Excellence

Innovation

Results

## 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 personal gained as a professional development and what his or her organization has gained from having a Baldrige examiner among its ranks.

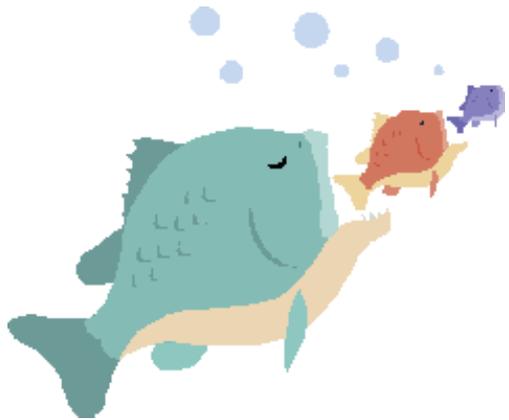
What could *you* gain as a Baldrige examiner? Interested in finding out? The [2015 Baldrige Examiner Application](#) opens on November 25, 2014.

*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.*


 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](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?

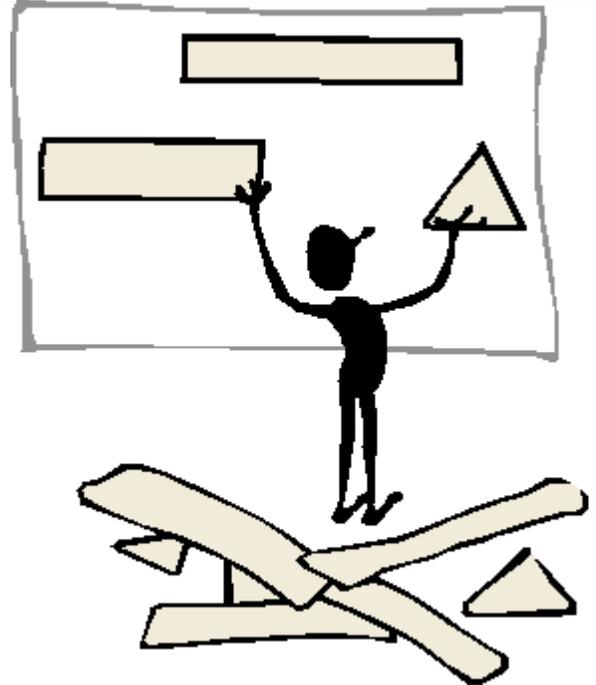
For me, that's the beauty of the Baldrige Criteria. It has never prescribed a particular approach, but it advocates for balance and integration across all of the systems needed for an effective organization. Is it time for your organization to look at your sustainability? What if survival really is the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



## BALDRIGE IN BRIEF

Accelerating Excellence™

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.

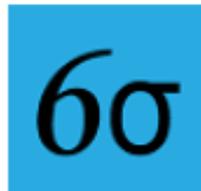
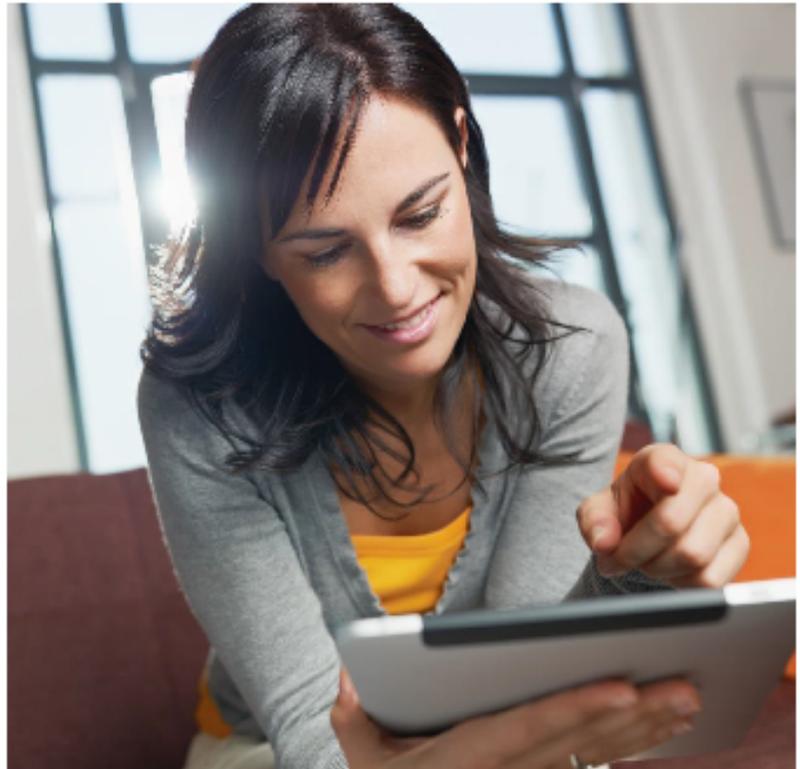
We've often mentioned in our news "blasts" that there is a palpable culture in Baldrige award-winning organizations (or award winning organizations for Baldrige-based programs). These three characteristics are part of that culture. If this sounds like your organization's culture, you're well on your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



## Online Six Sigma Certification and Project Management Courses

AQI in partnership with MindEdge, Inc. now offers Six Sigma Green Belt training. Our training is based on the DMAIC process improvement methodology. This Green Belt training is in addition to our wide selection of online courses in Project Management. As a PMI® Global Registered Education Provider (R.E.P.), MindEdge provides courses in an easy to learn, online format based on the comprehensive PMBOK® Guide.

Designed for rapid learning, these programs engage learners with real-world examples, videos, interactivity, assessments, & focused instruction. An "Ask The Expert" feature provides access to a subject matter expert who will answer any unresolved questions. Since courses are accessible anytime from a computer with an Internet connection, you determine the course schedule and set your own pace.



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For more information, course descriptions, and to register, visit: <http://www.aqionline.com/aqimain/onlinelearning.html>



# SWAE Quarterly Newsletter Advertising Opportunities & Reservation Form

## Promote Your Business

Looking for a way to expand your reach to other business professionals for a low cost? Consider purchasing ad space in the *Southwest Excellence Quarterly*—the Southwest Alliance for Excellence quarterly e-newsletter! Advertising opportunities start at \$75.

Name: \_\_\_\_\_ Title: \_\_\_\_\_

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<input type="checkbox"/> Business Card	(color)	3 ½ X 2	\$75

**Method of Payment:**  Check—Please **make payable to “SWAE”** and **send with this form to:**  
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Phoenix, AZ 85048

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Name on Card: \_\_\_\_\_ Signature: \_\_\_\_\_

For Payment by Credit Card: You can **email this form to [kshepard@swae.org](mailto:kshepard@swae.org)**, **fax it to (602) 343-8330**, or **call (480) 874-5815**.

For more information, visit [www.swae.org](http://www.swae.org) or call 480-874-5815.

**SPRING ISSUE RESERVATION DEADLINE: March 19, 2015**

## ***2014 Program Calendar***

<b>Date</b>	<b>Who</b>	<b>Where</b>	<b>Task/Item</b>
Jan. 27, 2015	SWAE	Chaparral Suites, Scottsdale	Recognition Banquet for Recipients and Volunteers
Feb. 12, 2015	SWAE	AZ Tech. Council/ SWAE office	Baldrige 101 Workshop 1:30pm-5:00pm
Feb. 27, 2015	SWAE	TBD	Balanced ScoreCard Workshop 9:00am-12:00pm
Mar. 12, 2015	SWAE	TBD	Phoenix ASQ Section 0704 Meeting 6:00pm-8:00pm
Mar. 17, 2015	SWAE	TBD	Arizona Technology Council Lunch & Learn 11:30am-1:30pm
Apr. 22, 2015	SWAE	TBD	Baldrige 101 Workshop 1:30pm-5:00pm
May 29, 2015	SWAE	TBD	Integrating Lean with Baldrige Workshop



Don't forget to [click here](#)  
for our new LinkedIn Company page!

## Thank You to Our Sponsors

**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.

### Gold Sponsor



### Bronze Sponsors



### Copper Sponsor

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