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THE ALLIANCE FOR PERFORMANCE EXCELLENCE NEWSLETTER

THE PREMIER RESOURCE FOR A THRIVING BALDRIGE COMMUNITY

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"Enhancing Our Members' Ability to Grow Baldrige-based Performance Excellence"

www.baldrigepe.org/alliance



A Message from the Chair of the Board

Liz Menzer, Chair

Alliance for Performance Excellence &
Executive Director of the Wisconsin Center for Performance Excellence

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

www.baldrige.org/alliance

See You in September: Alliance Members to Gather in the Windy City September 9

Greetings:

This newsletter is chock full of information about ways the Alliance and our member programs continue to advance performance excellence across the nation and beyond!

The Baldrige Foundation’s focus over the past year has been to restore federal funding (and we played a key role in that effort). However, it appears that initiative has not been successful for the 2017 budget. Clearly, the Baldrige Enterprise model going forward is going to look very different from the current one and this could have a significant impact on state and local programs. AT OUR SEPTEMBER MEETING THE DAY FOLLOWING THE CHICAGO REGIONAL, the Alliance will be determining how it can be sustainable, potentially take a more active role nationally, and be proactive about possible changes. We have been thinking about a new business model—and now is the time for formalize those plans. Our work is more easily accomplished face to face. Details about the meeting are included in this newsletter.

All arms of the Enterprise are hard at work to figure out a strong and sustainable future, and a vibrant Baldrige program. Bob Fangmeyer from BPEP and Al Faber from the Baldrige Foundation will be on hand in September to share more about the new cyber security efforts, the 2017 criteria, increased advocacy efforts and more.

As you know, there has been a strong desire for more standardization among Alliance Member Programs to help ensure the Baldrige brand is easily recognized and understood nationally, and to provide consumer trust and confidence in the quality of services received in all Alliance programs. The Governance and Operations task forces have work hard to define standards that all Alliance member programs should aspire to. The standards, aligned with the Baldrige framework, start with fundamental elements and move all a continuum toward best practices for nonprofit organizations. I think they did GREAT work! We’ll begin rolling out these standards in September.

Here’s a quick recap of a few of the MANY things are still moving within the Alliance:

- The Alliance Baldrige Express and Baldrige Explorer – two products that will be available for resell to our customers nationwide – will be launched at our meeting in Chicago. Brian Lassiter is orchestrating a webinar that will walk folks through the process.
- We also continue to make terrific progress on ManageHub, a product that serves small business and could serve as a feeder to our Award/assessment products, including cyber security. The Board is also using ManageHub for Alliance work.
- The Alliance will be taking over the Regional Conferences from BPEP. We will sponsor one regional in 2017, with a goal of two (or more) profitable conferences in the following years.
- The Judging Consistency task force led by Mike Belter and Geri Markley has formed a team to establish consistent Judging processes by Alliance Member programs. Many of us participated in the focus group and offered feedback via a survey earlier this summer.
- The examiner training curriculum pilot held in conjunction with National Baldrige Examiner training this May was a significant success. This hardworking team continues to refine the training, and at least two states will use the modules as part of Examiner training this year. Our partners at ASQ are exploring ways to support and augment the training.
- We have strengthened our collaboration with the Baldrige Foundation, partnering on advocacy efforts. Thank you in advance for your prompt response to requests for information about our programs, our applicants and our impact!

Message from the Chair of the Board (continues)

- We have some of the most dedicated, hardworking volunteers around. Thank you to each of you who helps to make this organization tick!

On a personal note, I am stepping down but not away from WCPE. While Brett Remington will take over as interim Executive Director, I will be joining the WCPE Board of Directors, and will continue to serve as Wisconsin's representative in the Alliance. I am excited about my new position with Studer Education, a division of Studer Group.

It is a very dynamic time for our organization, and we need you to join us at in Chicago on September 9 to continue the discussion on a new business model, standards and more. Save the date and make your reservations!

Sincerely,

Liz Menzer (WI)

Alliance News

Updates from the Alliance Board of Directors



State and Regional Program Directors:

Doug Gilbert, Rocky Mountain Performance Excellence (RMPEX); Anne Warner, Granite State Quality Center (GSQC); Donn Fisher, Mid-South Quality-Productivity Center (MSQPC); Katie Rawls, Tennessee Center for Performance Excellence (TNCPE); Gary Nesteby, Iowa Quality Center (IQC); Dean Bondhus, Kentucky Center for Performance Excellence (KYCPE); Marta Nichols, Partners in Performance Excellence (PIPEX); Karen Shepard, Southwest Alliance for Excellence (SWAE); Bill Shepard

Alliance Membership and Board of Directors Meetings at Baldrige Regional Conference in Chicago, IL

Friday, September 9th (the day **AFTER** the Regional Conference)

Room HU136 (Hamburger University)

Board Meeting 8:30am — 12:00pm

Member Meeting 1:00pm — 3:00pm



We need a few good Men — and Women! (for the Alliance Membership Committee)!!

Submitted by Dean Bondhus

The Membership Committee is doing great things for new and renewing members. And we need a few fresh perspectives for expanding our reach to all programs. We have been helping grow regional programs that serve multiple states with combined resources that better serve the organizations in their region. We have been gathering and reporting information about all Alliance programs that will assist us with sustaining growth of the performance excellence program services across the nation. And with much more to do, the Alliance LC (Leadership Committee) has recommended creating two distinct membership committee working groups.

The **Services Group** will focus on support services for new and renewing programs through 1.) collaboration on Examiner Training services to make the most of scarce resources, 2.) combining efforts to attract, assess, and report applicant feedback (and/or awards), 3.) training webinars and manuals for shared services like Baldrige Express, ManageHub, and examiner support software. 4.) developing and delivering focused topic networks, workshops and webinars to share best practices identified by member programs (financials, governance etc.)

The **Policy and Process Group** will manage membership policies that help us all grow and ensure that all member programs are aligned with the Alliance for Performance Excellence bylaws. This group will: 1.) ensure that all programs receive a portion of national framework booklets provided by BPEP, 2.) socialize, document, communicate and maintain membership policies and procedures, 3.) Assist with enterprise wide initiatives like the regional conferences, 4.) Encourage timely payment of dues, and 5.) refine, distribute, and analyze results of annual membership survey feedback.

If you have a passion for the performance excellence framework and would like to share your expertise with others to grow the pie (raise all boats, create triple win's...) – consider the good you can do by serving on one of these committee groups. Your time is yours to manage. We will appreciate your help, and you will learn from others Alliance leaders in the process. Current Membership Committee (Board) Members include: Katie Rawls (TN), Marta Nichols (PiPEX), Sue Weather (AR), Gary Nesteby (IA), Donn Fisher (Memphis), and Dean Bondhus (KY). Call to discuss how you can help (502)608-2061.

Alliance News (continued)

Updates from the Alliance Board of Directors

Alliance Programs using BOSS will discontinue use after 12/31/2016!

Submitted by: Karen Shepard, Southwest Alliance for Excellence

BACKGROUND

A year and a half ago, the Alliance Board of Directors voted to support BOSS through Dec. 2016, to allow state and regional programs time to develop and implement a plan that makes BOSS self-supporting.

BOSS costs the Alliance about \$35,000 per year. Currently the Alliance covers two-thirds of the cost and BOSS users share the other third of the cost. (*Users are charged a flat fee of \$500 plus \$70 per application that is evaluated using BOSS*).

Over the past 18 months, Karen Shepard, SWAE, Geri Markley, Michigan Performance Excellence and Katie Rawls, TNCPE have tried several approaches to make BOSS self-supporting, including:

- encouraging additional Alliance members to adopt BOSS as their examiner software
- inviting companies with Baldrige-based assessment programs to adopt BOSS and share the cost
- identifying cost savings through a closer partnership with the Baldrige Program
- seeking support from the Baldrige Foundation.

We are disappointed that our efforts have not been successful.

After Dec. 31, 2016, we will no longer be able to afford the BOSS software.

We will continue to use BOSS and AboutWeb (the company providing technical support and hosting the Alliance BOSS server) through Dec. 31, 2016.

PLAN FOR 2017

We have seen a demo of the Scorebook Navigator examiner software that mirrors BOSS and we believe it will work well for current BOSS users. SWAE, Michigan and Tennessee all plan to move to Scorebook Navigator for their 2017 cycles.

The Alliance contract with AboutWeb, will be cancelled Dec. 31, 2016. If your award cycle begins in 2016 and ends in 2017, you will probably want to begin the award process using a program other than BOSS.

The fees for Scorebook Navigator are \$20/user with a user defined as anyone who accumulates 25 hours on the system during a calendar year. This would normally exclude mentors, judges, and examiners who go to training but do not participate on an evaluation team. RMPEX administers this fee structure by asking for an estimate of the number of "users" expected by a program. The program license is extended by a payment for that user-estimation. At the end of the license period (one year), a usage report is generated and the number of actual users is compared to the estimate. A credit or additional fee based on the difference is generated for the next year. "Users" are usually examiners who have served on a team starting with independent review and continuing through consensus and site visit. To learn more about Scorebook Navigator, you should contact Jim Walker at RMPEX: drjimw@hotmail.com

We are really disappointed that we couldn't make BOSS work, but we believe that Scorebook Navigator will meet our needs – and we think it will meet yours, too, if you choose to continue with an electronic evaluation of applications.



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Examiner Scorebook Software offered by RMPEX to other programs

The Scorebook Navigator software is available to assist your examiners in completion of their scorebooks. This software reduces the amount of work examiners must do by reducing the amount of typing required and automatically accumulating independent review work on an Item-by-Item basis while retaining identification of examiner contribution and allowing easy sorting of data to identify all comments on each criteria question set.

The cost to your program for providing this tool to your examiners is \$20 for each examiner that accumulates more than 25 hours online. The 25 hour threshold means that there is typically no charge for judges or examiners who complete training without serving on a team. There are no set-up charges or fees for installing new criteria; just \$20 for each examiner that makes significant contribution to the assessment of an application. There is no minimum number of examiners required. The tool can be available to you within 24 hours of a request.

A demonstration of the software is available online. To access this demonstration, enter scorebooknav.org in a browser, use demo for the sign in name and password. After clicking on the I Accept button on the Legal Notice page, a scorebook page will open. Click on IndependentReviewDemo to open a scorebook. Training materials can also be reviewed at

<http://rmpex.org/products-services/scorebook-navigator-support/> .



For more information on the Scorebook Navigator, call Jim Walker at 303 893 2739.

communities of excellence 2026

Update submitted by Stephanie Norling

We are making progress on many fronts. After three years of development and thanks to a series of focus groups and expert feedback, we have a solid draft of the Communities of Excellence Framework that is ready to be tested. You can view that draft as well as provide us valuable feedback at

<http://www.communitiesofexcellence2026.org/coeframework>

The San Diego County and Northwest Missouri pilots are now underway. Thanks to a small grant, the Regional Vitality Committee in Northwest Missouri is starting to put together a regional “community” profile. In San Diego County we narrowed the focus of our pilot region to the elementary school boundaries of Chula Vista and National City: a population of 350,000 and we are meeting with *Live Well San Diego* partners to develop their community profile.

We are exploring a new strategy for spread of the COE Framework. In order to allow more communities to adopt the framework in this early phase we are examining the possibility of a national collaborative of communities that would work together to implement the framework and share successes, challenges and best practices over the course of their journey. So far we are hearing positive feedback on this approach and will provide more information as well as opportunities to participate when it is finalized.

MOU of Cooperation between the Alliance and ACBSP opens doors to business school use of Baldrige

The respective boards of directors of the Alliance for Performance Excellence and the Accreditation Council for Business Schools and Programs (ACBSP) have agreed to enter into a Memorandum of Understanding with the purpose of facilitating strong collaboration between the state and regional Baldrige programs and the nearly 1,000 business programs and schools that are affiliated with or accredited by ACBSP.



ACBSP is the largest accreditor of business programs in the world and uniquely bases its accreditation standards and criteria on the Baldrige Framework for Performance Excellence. The accrediting body also uses an evaluation and scoring process closely tied to the Baldrige examination and judging processes. ACBSP also is the only business program accrediting body to offer accreditation to programs at two-year or community colleges.

According to the Jeff Alderman, President and CEO of ACBSP, “Entering into a memorandum of understanding with the Alliance will allow a much tighter integration of Baldrige with ACBSP’s processes. We looking forward to carrying the message about Baldrige to our member programs and schools in the U.S. and worldwide.”

For more information on the agreement please contact Doug Gilbert, Board Chair RMPEX (rmpechair@rmpe.org).

Operational Standards

At its January meeting the Board determined that the Alliance should expand upon the top tier award standards that were successfully adopted a few years ago. Two task forces have been at work developing Governance and Operational standards that are linked to the Baldrige Criteria. These standards will help ensure the quality of all Alliance member programs as we mature as an organization, and help maintain and enhance the Baldrige brand..

The Governance and Operational standards were drafted by teams led by Geri Markley (MI) and Katie Rawls (TN) and reviewed with a focus group of members whose feedback has been incorporated. The next step is to share the proposed standards with all members to get your feedback. When you receive the standards, give some thought to what you already have in place and what you will need to add to be in compliance. We plan to establish a repository where “good” examples of documents and processes will be uploaded and if you don’t have a process in place, you can modify someone else’s process to fit your own program.



If you have any questions or suggestions, please contact Geri (miperformanceexcellence@gmail.org) or Katie (Katie.rawls@tncpe.org).

Alliance News (continued)

Updates from the Alliance Board of Directors

Curriculum piloted as part of BPEP Examiner Training



The Enterprise-wide Examiner Curriculum Task Force piloted its Examiner Training curriculum in April and May with a group of 11 mostly Alumni/Senior Examiners. These Examiners worked their way through on-line modules that focused on Examiner Fundamentals, Independent Review, Comment Writing and Consensus Preparation before gathering together in Gaithersburg for a classroom day that reinforced all concepts by going through a mock consensus process. Online modules included quizzes and/or assignments to reinforce learning and identify and address when an Examiner may not fully understand concepts before moving ahead with the curriculum.

The Examiners also spent a half-day providing feedback to the facilitator team in support of next steps and improvements as well as participated in a follow-up survey. Their feedback indicated that the curriculum achieved key objectives related to promoting examiner consistency, incorporating 21st-Century Learning, supporting different styles of learning, and allowing for flexibility for both examiners and how programs can provide the training. Examiners also felt that the curriculum compared well to both BPEP and Alliance Examiner Training programs that they have experienced; however there is also much opportunity for improvement. Key improvements are related to having the on-line modules supported by a Learning Management System (LMS), developing recorded modules that are no longer than 20 minutes, and building in opportunities for participant reflection during modules.

The Examiner Curriculum team consists of representatives from BPEP, ASQ, the Alliance, and Alumni Baldrige Examiners. The facilitator team of Jan Garfield (SPQA-VA), Geri Markley (MI), MaryAnn Pranke (CA), and Anne Warner (NH/ME/VT) are in the process of refining the curriculum for the next pilots this fall in Michigan and Northern New England. We are also exploring options for adding an LMS which will go a long way towards enabling additional programs to test this new approach to train Examiners. Contact Anne (anne@gsqc.com) or Geri (miperformanceexcellence@gmail.com) if you have questions or would like more information.

Baldrige News Updates

Updates from the Baldrige Performance Excellence Program

- The Baldrige Program is partnering with the Applied Cybersecurity Division of the National Institute of Standards and Technology (NIST) [to develop a Baldrige-based assessment tool](#) that will be aligned to NIST's Cybersecurity Framework.
- [Download examiner training materials](#) used by the Baldrige Program in national training.
- [Register now for 2016 regional conferences](#) in Chicago (September 8) and Dallas (September 22).
- [Submit your answers to two key questions](#) as input to the 2017–2018 Baldrige Excellence Framework.
- [Nominate a leader](#) for the 2017 Harry S. Hertz Leadership Award.
- Share the link to an [online “shop”](#) where the public can purchase items (through a third-party vendor) with the Baldrige logo, such as mugs and shirts.
- To support your own communications/marketing, share and reprint [Baldrige blogs](#), using the Baldrige website as the credit.
- [Thirty-four organizations have applied for the 2016 Baldrige Award](#). All Baldrige examiners have now been placed on teams or assigned to tech editing or case study processes. The Panel of Judges will meet August 17 to review scoring data and determine which applicants should receive a site visit.
- For sharing, read “[Benefits of the Baldrige Framework in U.S. Health Care: A Summary of Recent News.](#)”
- Read about the journey of the 2015 cohort of Baldrige Executive Fellows in “[Peer Network of Executives Ends Fellowship with Leadership and its Challenges Addressed.](#)”

Baldrige News Updates (continued)

- The Baldrige Program has [endorsed 2016 Manufacturing Day](#) to share resources and connect to U.S. manufacturers. Consider attending an event or becoming an endorser, as well.
- The [2016 Baldrige Case Study: FitHabits](#) and its scorebook are now available.
- People can now subscribe directly for news about the Communities of Excellence (COE) and Baldrige Foundation on the [Baldrige home page](#) (you are also encouraged to sign up for news direct from the [Foundation](#) and [COE](#)). In the bottom, right-hand corner of the page, under “Connect with Baldrige,” click on the red envelope. Submit your email address, and sign up for various topics under Baldrige Performance Excellence Program. You may also unsubscribe following this same format.
- To ensure communication and collaboration, Baldrige Director Robert Fangmeyer will host open calls with the Baldrige consultant community on Friday, July 29, 2016 2:00–3:30pm ET; October 28, 2016 2:00–3:30pm ET; and Friday, January 27, 2017 2:00–3:30pm ET.
- Baldrige Examiners who have successfully completed training and their assignment in 2016 can [add a Baldrige Examiner Badge](#) to their Facebook page, Twitter account, LinkedIn profile, or wherever it can receive online professional recognition in accordance with the Code of Ethical Conduct.
- In Fall 2016, the Baldrige Program will pilot the Baldrige Site Visit Experience to offer a selected award applicant that did not advance to the Site Visit Review stage the chance to host a Baldrige site visit for its learning and improvement only.



[Register now](#) for the [2016 Baldrige Regional Conferences](#) in Chicago, IL and Dallas, TX for a one-day showcase of Baldrige best practices! The conferences, which will each showcase current and past Baldrige Award Recipients, will be held:

September 8, 2016 The Hyatt Lodge at McDonald’s Campus Chicago/Oak Brook IL

September 22, 2016 The Crowne Plaza Dallas Galleria-Addison Dallas/Addison, TX

Attend and engage in a day dedicated to improving your organization’s performance. The dynamic [conference schedules](#) include an opening plenary session featuring senior executives from the [2015 Baldrige Award recipients](#), a closing keynote speaker, and 15 interactive management sessions featuring Award recipients from the business, education, health care, and non-profit sectors.

In Chicago, the closing speaker is Brenda Yarnell, President/CEO United Cerebral Palsy Land of Lincoln, 2013 ILPEX Gold Award for Achievement of Excellence. In Dallas, the closing speaker is Gerry Agnes, President and CEO, Elevations Credit Union, 2014 Baldrige Award recipient.

An optional [Pre-Conference Workshop for Baldrige beginners](#) is available the day before each conference. The facilitators are Pattie Skriba, Vice President, Business Excellence, Advocate Food Samaritan Hospital (Chicago) and Cindy Milrany, Chief Financial Officer, Freese and Nichols (Dallas).

Book your [hotel room reservations](#) now at the conference hotels to receive the conference rate.

To learn more, visit the [Regional Conferences website](#).

Co-sponsored by the [Baldrige Performance Excellence Program](#), [Illinois Performance Excellence](#), [Quality Texas](#), and the [Alliance for Performance Excellence](#).

For questions about the conferences, contact us at 301-975-2036 or baldrige@nist.gov. For registration inquiries, contact Experience at 800-310-7554 (Domestic) or 240-439-2554 (International) or e-mail to NIS@experient-inc.com.

Elevations Credit Union Shares with Organizations new to Baldrige

Elevations Credit Union, in Boulder, Colorado, received the Malcolm Baldrige National Quality Award in 2014. After conducting several Sharing Days, their CEO, Gerry Agnes, realized that most of the sharing day attendees were from organizations that were already started on the Baldrige journey. He asked his organization to develop a way to attract organizations that were not currently aware of the Baldrige program.

The Elevations staff created a performance excellence event held at the Denver Ritz Carlton with breakfast provided. Business leaders from leading Colorado companies were invited by Gerry to attend a panel discussion moderated by Eben Harrell of the Harvard Business Review. The panel consisted of representatives from the four Colorado national award recipients, plus a recent top level state award recipient. The panel discussed their Baldrige experience and answered questions from those attending. Colorado Governor John Hickenlooper appeared, discussing current improvement efforts in education and expressing appreciation for the accomplishments of the four Colorado Baldrige Award recipients.

Of the 227 individuals who registered to attend the event, 167 were from organizations that had not previously expressed interest in Baldrige.

Elevations has published an e-book summarizing the comments from the panel. This e-book is available at <https://www.elevationscu.com/baldrige-ebook>. Feel free to share this link with your community. Videos of the discussion are being prepared and will become available on the Elevations website, <https://www.elevationscu.com/baldrige>.

Representatives of Rocky Mountain Performance Excellence were invited to attend to provide information on how to get started with the Baldrige process. Copies of the Baldrige Excellence Builder were provided to interested attendees along with RMPEX contact information.

For further information on this event or the e-book, contact Susan Green, SVP Marketing, Elevations Credit Union, Susan.Green@elevationscu.com, 303 443 4672 X1291



Molly Baldrige, Secretary Baldrige's daughter, was the Key-note Speaker at the 2016 Baldrige Foundation's Annual Dinner held during the 28th Quest for Excellence Conference. Molly told stories and spoke of her father's legacy. She also graciously posed for pictures and signed copies of the new book "Mac Baldrige: The Cowboy in Ronald Reagan's Cabinet".

Max Summers, Regional Vitality Chair for Community Foundation of North West Missouri; Anne Warner, Executive Director, Northern New England Alliance for Excellence; Molly Baldrige; Stephanie Norling, Managing Director, Communities of Excellence 2026; JoAnn Sternke, Superintendent, Pewaukee School District, Pewaukee, Wisconsin; Brian Lassiter, President, Performance Excellence Network



Foundation Included in the Combined Federal Campaign



The Combined Federal Campaign (CFC) allows federal employees to designate tax-deductible contributions through payroll deductions for any one of thousands of approved, listed charitable organizations. By gaining inclusion to the CFC, the Foundation has access to more than 2.7 million federal employees that may designate portions of their salaries to the Foundation, thereby supporting the Baldrige Performance Excellence Program.

Inclusion in the CFC list of charities is a great opportunity, but it is no guarantee of funding. The Foundation is now working on a plan to market itself to federal employees. The official solicitation period, the window during which federal employees may designate their payroll deductions and charitable organizations, is September 1 through December 15.

Foundation partners can help in this effort can help by amplifying Foundation marketing among board members and organizations on the Baldrige journey, and especially in areas with large concentrations of federal offices. The Foundation’s numerical code for the CFC is 23918. Anyone can get additional information about the CFC here:

<https://www.opm.gov/combined-federal-campaign/>

Development and Execution of a Comprehensive Fundraising Strategy

The Foundation has been developing and has begun to execute a new fundraising strategy. It is based on a multi-pronged, by-sector focus that gives us maximum flexibility to adapt our focus in a changing environment. The new strategy has integrated the Foundation’s marketing strategy with targeted, sector-specific social media and other digital communications that promotes Foundation brand recognition, gives us additional touchpoints with existing and/or lapsed donors, and engages new audiences.

In support of the new strategy, the Foundation has developed general and sector-specific integrated marketing/fundraising campaigns. We have developed and have been using hashtags to support specific campaigns. The following hashtags are now active:

<i>Foundation Campaigns and Hashtags</i>	
Campaign:	Hashtag:
Health Care	#BaldrigeSavesLives
Education	#BaldrigeHelpsStudents
Communities of Excellence	#BaldrigeBuildsCommunities
Cybersecurity	#BaldrigeCyber
General	#SupportBaldrige, #Baldrige

We are also currently developing campaigns for the other Baldrige sectors: Manufacturing/Industrial, Small Business and Non-Profits/Government

We use more generic hashtags to tie the Baldrige brand to specific sectors so that when someone does a search on these more general hashtags, our posts will be reported in their results. As a result, you will see #hospitals, #healthcare, #education, #schools, #communities, #cyber, #cybersecurity, etc. in our

posts. These efforts are intended to broaden the exposure of the Baldrige brand and Baldrige Foundation outside of the Baldrige community.

Be sure to follow the Foundation on social media and share and like our content

Spread the Word! Foundation Accepting Nominations for Harry. S. Hertz Leadership Award

The Harry S. Hertz Leadership Award is presented annually by the Foundation to an individual that exemplifies the qualities of leadership prized by the Baldrige criteria. A description of the award, the award criteria and nomination process, and the members of the selection committee can be found at:

<http://www.baldrigepe.org/foundation/hshla.aspx>

We would greatly appreciate your assistance in identifying a role model leader for the 2017 award. The deadline for nominations is September 20, 2016.

BLOGRIGE

the official Baldridge blog



Baldridge for Detection and Prevention of Corporate Espionage

Posted by Dawn Marie Bailey

Sitting deep in the basement of the FBI in Washington, D.C., reading the personal files and dossiers of J. Edgar Hoover, Donald Fisher became fascinated with intelligence and organizational security. Fisher, one of the first researchers at the FBI approved under the Freedom of Information Act, could see the importance of organizational intelligence because so many organizations had been so easy to infiltrate.

Today, such infiltration often takes place in the world of cybersecurity and big data. But what can be done to stop corporate espionage and the risk that the proprietary and confidential information of U.S. organizations can be so easily laid bare by hackers, some allegedly linked to foreign governments?



Fisher, who is chief executive officer of the Mid-South Quality/Productivity Center, may have an answer.

“Why not use the world’s greatest criteria—the Baldridge Criteria—to do self assessments?” he asked. “It just seemed logical.”

According to Fisher, organizations need to look at protecting their copyrights, trade secrets, regulated information (e.g., patient data), FDA scores, and other classified information; to identify risk; and to look at data security, asset management/control, the business environment, training, risk assessment, information protection processes, protection of technology, and strategy. Then they need to ask themselves about security, continuous monitoring, and detection processes. What’s in place? What’s not in place? What kind of response do they have inside the organization? What are the ongoing security issues? What about response/recovery time and communication with employees, customers, and vendors? Analysis and process improvement are also key, he added.



Luckily for organizations, all of these areas are covered in the [Baldridge Excellence Framework](#) and its Criteria.

“The idea is that a lot of espionage does happen internally,” Fisher said. “I think that every organization ought to develop an in-house assessment team using the Baldridge Criteria to look at all of these areas of an organization. . . . Everything really that the Baldridge Criteria asks for they should be looking at.”

Fisher, who has completed over 200 Baldridge-based assessments around the world and in various industries, including education, said a lot of security breaches are internal, with companies losing their intellectual capital, copyright protection, and patents. Often these companies, and especially Fortune 500 companies, hire external experts to come in and do a security assessment, but this really should happen internally by the people who are most knowledgeable about the data and most impacted, he said.

Fisher’s research outlines the need for organizations to develop corporate intelligence plans to look at sustainability, especially in regards to financial assets, environmental initiatives, and social assets. A Baldridge-based security self-assessment would help organizations put their “arms around how effective or not effective [and what are the] holes in your intelligence apparatus and inside your organization.” And an in-house assessment team gives you freedom to work together holistically, said Fisher; espionage might not be as easily discovered by a third-party expert who would not know the corporate culture.

[To continue reading this article click here.](#)

BLOGRIGE

the official Baldrige blog



The Organizational Profile: Most Valuable Preface Ever Written?

By Christine Schaefer

What are your main product offerings?

What is the relative importance of each to your success?

What mechanisms do you use to deliver your products?

What are your stated mission, vision, and values?

What are your organization's core competencies, and what is their relationship to your mission?

What is your workforce profile?

What recent changes have you experienced in work-force composition or your workforce needs?



What are your workforce or employee groups and segments, the educational requirements for different employee groups and segments, and the key drivers that engage them in achieving your mission and vision?

Those are the first eight questions from the preface to the [Baldrige Criteria for Performance Excellence](#), known as the Organizational Profile.

In many books, the preface is not essential reading: giving scant attention to a prefatory section will not usually make it impossible for the reader to meaningfully complete the rest of the book. But that is not the case with a *Baldrige Excellence Framework* booklet when you are using this resource to assess the performance of an organization.

As stated in the *2015–2016 Baldrige Excellence Framework* booklets (which include Business/Nonprofit, Health Care, and Education versions), “The Organizational Profile is the most appropriate starting point for self-assessment and for writing a [Baldrige Award] application.” Here are three reasons the profile is criti-cally important:

- It helps you identify gaps in key information and focus on key performance requirements and results.
- You can use it as an initial self-assessment. If you identify topics for which conflicting, little, or no information is available, use these topics for action planning.
- It sets the context for and allows you to address unique aspects of your organization in your responses to the Criteria requirements in categories 1–7.

Many organizations that have used the Baldrige framework to raise their performance, particularly Baldrige Award recipients, have affirmed the value of the Organizational Profile as a beginning and ongoing tool for performance assessment and improvement.

For example, Lisa Muller, assistant superintendent of teaching and learning for 2005 Baldrige Award-winning Jenks Public Schools, provided a testimonial regarding the value of the Organizational Profile [in which she described four benefits of using it as a tool for performance measurement and improvement](#):

- It encourages valuable conversation about the organization's identity.
- It provides opportunities to discuss the organization's strategic situation.
- It creates a snapshot in time of the organization, how it operates, and the challenges it faces.
- It introduces the idea of core competencies.

[To continue reading this article click here.](#)

Summit Reinforces Baldrige Practices for Leaders

In April 2016, the GSQC co-hosted the second annual New Hampshire Leadership Summit to bring together leaders at all stages of their career – established, new, and aspiring – to learn from and share with recognized leaders around the state. The Summit is designed to help leaders support other leaders by sharing experiences and practical advice.

The Summit is currently a half-day event focused on the nuances of leadership. This year’s theme reflected the nuances of how successful leaders build relationships with all critical stakeholders including customers, employees and peers, and the community. The format includes a keynote speaker, a diverse panel that shares best practices and discusses audience questions, and small group discussions - all related to the theme. A networking reception closed out the day to support the creation of a community of leaders.

The Baldrige Framework is an implicit foundation for the Summit. Speakers do not need to be recipients or on a Baldrige journey, however are selected based on how well they demonstrate the core value of Visionary Leadership. Diversity is also a large consideration in selecting speakers so that multiple demographics, sectors, and experiences are represented. Small group discussions build on speaker ideas as well as questions submitted by the audience. The goals of the day are that all participants leave with renewed energy, at least one idea that they can implement immediately, and other practices that they can work on for the long term.



Keynote speaker retired CEO, US Marine, and NH Gubernatorial Candidate Walt Havenstein addresses the 2016 New Hampshire Leadership Summit

If you’ve identified a need in your state/region for leaders to sharpen their skills and have leaders willing to share, we’ve found this to be a successful approach to support and engage local leaders. The GSQC has also been fortunate to develop a partnership for this annual event with the Center for Women’s Business Advancement, a part of Southern New Hampshire University’s School of Business. For more information contact anne@gsqc.com.



Report out after a brainstorming activity at 2016 New Hampshire Leadership Summit



Committed to a State of Excellence

The first recipient of Quality New Mexico's "Don Chalmers Passion for Excellence Award" is Dr. Mike Sather, Center Director Emeritus, VA Cooperative Studies Program Clinical Research Pharmacy Coordinating Center in Albuquerque.

Dr. Sather received the award at the 2016 Quality New Mexico Learning and New Mexico Performance Excellence Awards Ceremony. Greg Chalmers, brother of the late Don Chalmers and Quality New Mexico Board Chair Steve Keene, Managing Partner at Moss Adams LLP presented the brass eagle designed by artist Curtis Fort of Tatum, New Mexico.



Photo: Greg Chalmers (L), Dr. Mike Sather (C), Steve Keene (R).

"We are proud to recognize Dr. Sather for his passion for excellence," said Steve Keene. "We congratulate him for his outstanding accomplishments and his continued commitment to the Center's core values: build enduring relationships, respect, adopt a 'can-do' attitude, seek excellence, and act with integrity."

In 1997, Dr. Sather recognized the value of the Baldrige Criteria for organizational learning and improvement. In 2004 the Center received the New Mexico Zia Award for Performance Excellence and in 2009 the Malcolm Baldrige National quality Award. Dr. Sather served on Quality New Mexico's Board of Directors and Panel of Judges and in 2015 completed his term on the Baldrige Panel of Judges. Quality New Mexico recruited Dr. Sather to return to its Panel of Judges; he agreed.

Don Chalmers, a beloved businessman and community leader, served on Quality New Mexico's Board of Directors. His company achieved 3 recognition levels in the New Mexico Performance Excellence Awards Program: Pinon, Roadrunner, and Zia Award for Performance Excellence. Don often said: "I want to have a great company, in a great community, in a great state."

The 2016 nomination form is available at www.qualitynewmexico.org. The 2016 recipient will be awarded at the 2017 New Mexico Performance Excellence Awards Ceremony.

Photo: Don Chalmers Ford, 2005 New Mexico Zia Award for Performance Excellence Recipient



Partners in Performance Excellence (PiPEX)

Submitted by Marta Nichols, Executive Director



PiPEX Strategic Planning & Implementation Workshop, September 12th

Understand why Strategic Planning is important and what it can help your organization achieve. Recognize the key role that “vision” plays in strategic planning. Dick Eppig, Principal in Strategic Management Consulting Group for over 20 years, will walk you through the key elements of strategic planning, how to identify and collect key information as well as how to implement your plan. Find out more at [here](#).



PiPEX 2016 Conference

Join Partners in Performance Excellence at our 2016 conference being held at Bryant College in Smithfield, RI, on Thursday, November 3rd.

Charting the Path to Excellence (link to website) will feature keynote addresses by:

- Dr. Harry Hertz, Director, Emeritus of the Baldrige Program
- Dr. Glenn Crotty, COO of Charleston Area Medical Center Health System, a recipient of the 2015 National Baldrige Award

PiPEX is also excited to welcome the participation of the following Baldrige winners to deliver breakout sessions:

- Hill County Memorial
- Elevations Credit Union
- Mid-America Transplant
- PricewaterhouseCoopers Public Service Practice
- K&N Management
- Charter School of San Diego

PiPEX is thrilled to host this regional Baldrige conference for the first time in Rhode Island and the event is open to the public.

Visit it us at <http://www.partnerspex.org/>. Early bird registrations will be available in mid-August!

Don't miss the opportunity to learn from recent Baldrige Award winners and to network with performance excellence professionals who will help you make your organization become world-class.

Rocky Mountain Performance Excellence

Submitted by Dr. Doug Gilbert, Board Chair

RMPEX begins Baldrige-based Executive Leadership Program

Beginning in March 2016, Rocky Mountain Performance Excellence in partnership with the Peregrine Leadership Institute and the Mountain West Credit Union Association launched the *Chief Executive Institute*, a Baldrige-based Executive Leadership Program. The curriculum has many similarities to the Baldrige Fellows program but is more geared to new CEOs or executives who will soon come into the CEO role. The program is being offered in five two-day sessions in Denver with each session containing a deep dive into different Baldrige categories.

One expected outcome from each participant is to prepare an application for one of the tiered performance excellence awards, which hopefully will lead to completion of a top-tier state regional award and application through the BPEP organization for a national award. The applicants are assisted in these efforts by coaching provided from the state and regional program. The coaching takes place between the in-person sessions and involves a visit to the operations of the participants' companies.

The program represents a planned additional level of educational offerings by RMPEX. Two organizations have partnered with RMPEX to develop and offer the program. Peregrine Leadership Institute of Gillette, Wyoming, developed the curriculum and has provided program logistics support. Peregrine's long history of offering leadership education to small and medium enterprises in the Intermountain West has been a major asset in getting the program launched and established. According to Peregrine CEO, Dr. Olin Oedekoven, "Redesigning an existing leadership curriculum with the explicit use of the Baldrige Framework has provided participants with a world-class, systems-based approach to leadership. Such a holistic approach is a very helpful approach that allows executives to understand the multi-faced nature of leading an organization."

Mountain West Credit Union Association, a regional trade association representing 125 member credit unions throughout Arizona, Colorado and Wyoming, has partnered in program development and recruitment of participants. Dr. Dan Santangelo, Executive Director of the Foundation and Senior Vice President of the Association notes the benefits of using Baldrige as the basis of the program, "Orienting leadership education around the Baldrige Framework has provided a valuable addition to our range of programs for leadership development in credit unions. It is also very helpful that a local credit union, Elevations Credit Union, is a recent national award recipient and provides a rich source of knowledge on how to lead and improve credit unions."

Three of the participants are from businesses in Arizona. The Southwest Alliance for Excellence has provided support for the potential Baldrige journey of those Arizona-based businesses.

RMPEX will begin planning and recruiting for the 2017 Baldrige-based Executive Leadership Program later this year. The RMPEX Board would be pleased to see the program expanded and offered outside of the three-state RMPEX region in partnership with other Alliance programs. For information on the 2017 program details or discussions about partnering please contact Doug Gilbert, RMPEX Board Chair.



Southwest Alliance for Excellence (Arizona, Nevada & Utah)

Submitted by Karen Shepard, Executive Director

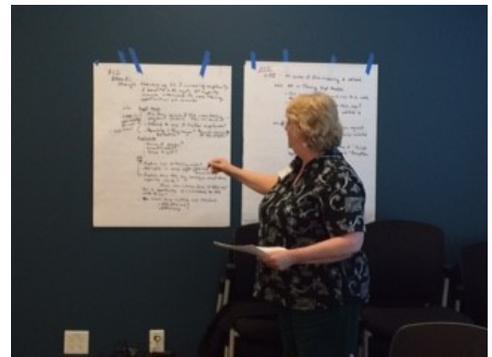
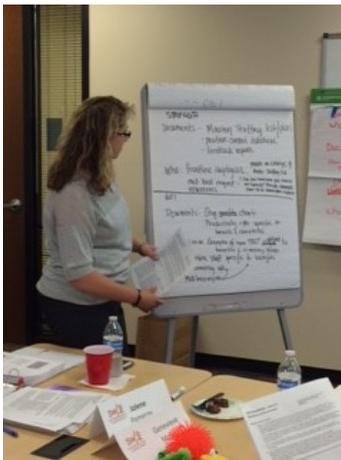
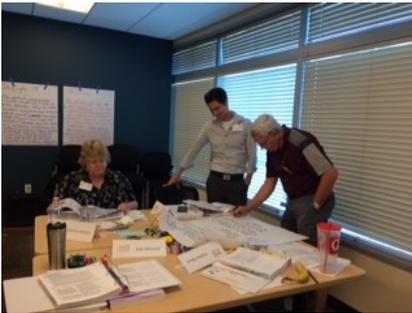


Our 2016 Performance Excellence Program cycle is already underway, with Applications from six organizations submitted and examiner training completed. The first training was conducted in Phoenix on June 7, 8 and 9th and the second training was held in Las Vegas on June 27, 28 & 29th. The training went very well with 30 examiners in attendance representing all industries.

We would like to thank our talented and dedicated volunteer trainers Stacy Harley, Heather Mock and Jeremiah Scott for their invaluable service to the program. We would like to thank the University of Phoenix for generously donating training space in Phoenix and Montevista Hospital for hosting and sponsoring our training in Las Vegas.



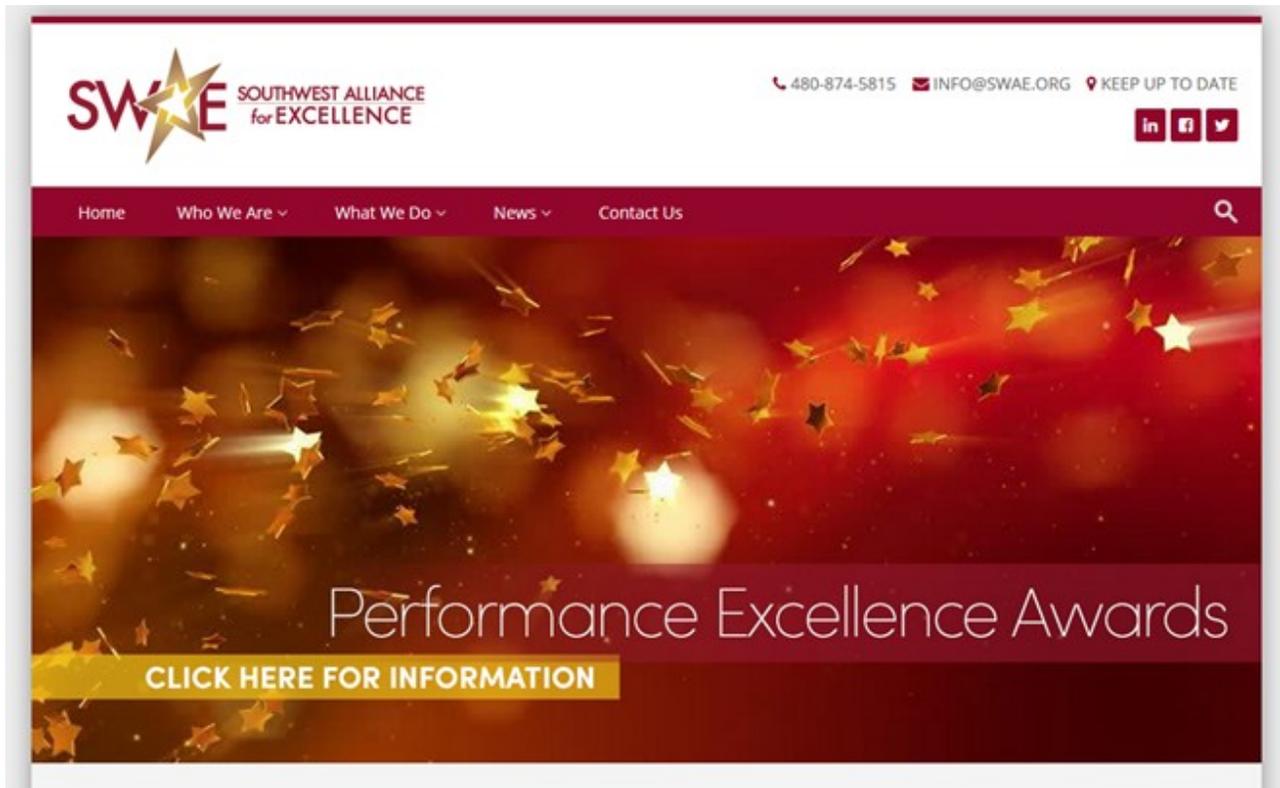
Examiner Training Phoenix and Las Vegas



Southwest Alliance for Excellence (Arizona, Nevada & Utah) continued

Submitted by Karen Shepard, Executive Director

We have a *New* look to our Website!



Tennessee Center for Performance Excellence

Submitted by Maria Mayo, Marketing & Communications Manager

Tennessee Center for Performance Excellence Outfits a New Board of Examiners

On July 14, the Tennessee Center for Performance Excellence will complete the last of five three-day examiner training sessions in Memphis, Nashville, Knoxville, and Kingsport. In total, 227 professionals from across the state applied to serve on the 2016 Board of Examiners, with 35 master examiners back for their third year or more. Every year in the fall, each examiner receives a custom-designed t-shirt to honor the occasion. Examiners participate in choosing the shirt's theme, and then we challenge them to submit photographs wearing their shirts in exotic locations. Below are examiners sporting examiner cloth at the Taj Mahal, in Peru, and at the Indianapolis 500. At around \$5-6 per shirt, this recognition is an affordable and fun way to give a gift of appreciation and build camaraderie among each year's group of examiners.



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

Submitted by Margot Hoffman, TPE President & CEO

TPE Announces 2016 Award Recipients

On May 9th, The Partnership for Excellence announced the recipients of its 2016 Awards for Excellence. Applicants from healthcare, business and education participated in the cycle and ten organizations will be recognized with awards at TPE's Quest for Success conference in September. The awards represent Ohio, Indiana and West Virginia's highest honor for performance excellence through innovation, results and visionary leadership using the Baldrige Excellence Framework. The 2016 Award Recipients who will be honored in September are:



- **Memorial Hospital and Health Care Center**, Jasper, IN (Platinum, Governor's Award for Excellence)
- **Six Disciplines Consulting Services**, Findlay, OH (Platinum, Governor's Award for Excellence)
- **Blanchard Valley Health System**, Findlay, OH (Gold, Achievement of Excellence)
- **Managed Healthcare Services, Lilly USA**, Indianapolis, IN (Gold, Achievement of Excellence)
- **Henry County Hospital, Inc.**, Napoleon, OH (Silver, Commitment to Excellence)
- **ProMedica Memorial Hospital**, Fremont, OH (Silver, Commitment to Excellence)
- **University Hospitals Geauga Medical Center**, Chardon, OH (Silver, Commitment to Excellence)
- **Butler Technology and Career Development Schools**, Hamilton, OH (Bronze, Pledge to Excellence)
- **Camden Clark Medical Center**, Parkersburg, WV (Bronze, Pledge to Excellence)
- **Lima Memorial Health System**, Lima, OH (Bronze, Pledge to Excellence)

All of the applicants were rigorously evaluated by an independent board of examiners. The evaluation process for each of the recipients included more than 1,000 hours of review and a three-day site visit by a team of examiners to clarify questions and verify information in the applications. An independent panel of judges reviewed each organization's evaluation, approved the final feedback reports, and developed their award recommendations for the TPE Board of Trustees, which were unanimously approved. Over 100 volunteer examiners, judges, team leaders and trainers supported the process.



TPE Quest for Success Conference – September 12 & 13, 2016

TPE's Quest for Success conference will take place September 12 – 13, 2016 at the Polaris Hilton in Columbus, Ohio. Malcolm Baldrige National Quality Award winners, TPE Award winners, and performance excellence professionals will deliver leading-edge presentations. Participants will engage in best practice sharing, key note addresses and breakout sessions, networking and learning sessions. MBNQA recipients present-

ing at the conference include: CAMC Health System, Charleston, WV; Mid-America Transplant, St. Louis, MO; and Elevations Credit Union, Boulder, CO.

Participants can register for the conference at http://www.thepartnershipforexcellence.org/events_quest_for_success.html

Earlier in my career, I had the opportunity to facilitate strategic planning at a division level and then at the sector level for several years. This wasn't because I had a great deal of business acumen at the time or an uncanny knowledge of our competitive landscape. I was tapped because I was a pretty good facilitator who could deal with a big room of very bright people with equally big egos.

That opportunity, however, gave me a tremendous respect for the power that a well-developed strategic plan has to position an organization for a successful future and to mitigate the challenges it might face. One of the attributes of a good strategic plan is its cross-functional view of the world. It reflects a systems perspective and helps tease out the synergies while recognizing the internal competition for resources, all to the greater good of the organization.



Another attribute of a good strategic plan is a robust review of data – both internal and external – that calls into question the approach of treating one year much like the previous one without identifying the changes that have taken place and the ones that are likely to occur. Some organizations use SWOT (Strengths, Weaknesses, Opportunities, and Threats) analyses, PEST (Political, Economic, Social, and Technology) analyses, scenario planning, or even a combination of these to gain a clear picture of the current and future competitive landscapes.

A well-developed strategic plan balances objectives across many elements: customers, workforce, operations, and financial. It includes goals, short- and long-term action plans, timetables for accomplishing them, and measures to assess progress. Excellent organizations also project not only their own performance but the projected performance of competitors to identify emerging gaps while there is still time to address them.

But wait a minute! This sounds a lot like Item 2.1 of the Baldrige Excellence Framework. Of course it does, and that framework was in the back of my mind those many years ago when I facilitated strategic planning. However, one thing that took my organization several years to develop as a systematic process was the execution of the strategic plan, which would be Item 2.2.

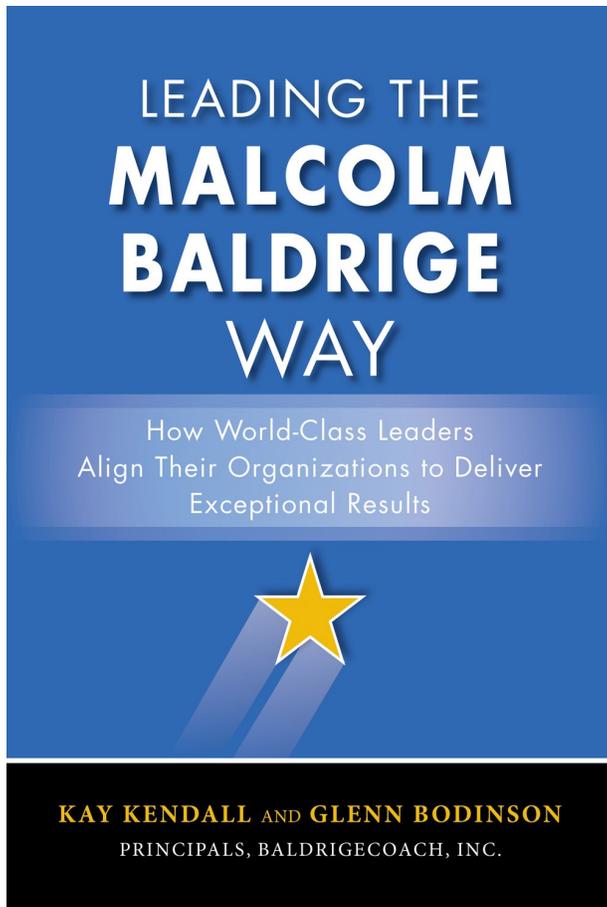
Initially, there was a great reluctance on the part of the senior leaders in “sharing” the strategic plan because of the highly competitive nature of our business. Ultimately, the organization developed a very effective process of cascading the top level goals down throughout the organization, answering the question of “how” we would accomplish those goals and giving all employees the ability to answer the question of “why” they did the work they did. This line-of-sight created powerful momentum in moving us faster toward achieving the strategic objectives.

The importance of good strategic planning was underscored for me years later in my career when I worked for an organization where the CEO proudly announced that we didn't have a strategic plan. His rationale? The environment of the industry saw rapid shifts in technology and regular innovation that made products obsolete overnight. But rather than taking those factors into account and establishing an agile business model that kept the organization focused on an aligned direction, the CEO by his (in)action, created not just one rudderless ship but many of them, even sailing in different seas. The organization no longer exists as it was, having been acquired by a competitor who divested many parts of the business to re-establish focus.

I was reminded of much of this when I read a recent LinkedIn Post by Jack and Suzy Welch, Five Questions That Make Strategy Real. <https://www.linkedin.com/pulse/five-questions-make-strategy-real-jack-welch?trk=prof-post> I also had to laugh when I read the no-nonsense advice that marries strategy development with execution, “You just pick a general direction and implement like hell.”

Leading the Malcolm Baldrige Way:

How World-Class Leaders Align Their Organizations to Deliver Exceptional Results



What did more than 30 Baldrige Award winning CEOs and senior leaders all agree changed for the better during their performance excellence journey?

Kay Kendall and Glenn Bodinson interviewed more than 30 senior leaders of Baldrige Award winning organizations and other Baldrige-based programs. They observed an interesting phenomenon. Although they never once asked explicitly about culture, every executive wound up talking about how the culture of their organization changed along the journey and the importance they now place on intentionally designing the culture that is needed to achieve the strategic objectives.

Glenn Bodinson, Alliance Board member, and Kay Kendall, former Alliance Board member, have a new book coming out in early December from McGraw-Hill. The book is designed to speak to leaders of any sector, of any size, and at any stage in their performance excellence journey. In addition to using the Baldrige Excellence Framework to promote alignment, leaders of award-

winning organizations found the keys to engaging their employees in ways that enabled them to overcome economic challenges, industry setbacks, and even cultures of entitlement.

The book will be available on December 9th and is available for preorder now at Amazon.com and BarnesandNoble.com.