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
Hello fellow Alliance members! As we wind down the year, it’s a time to reflect on the progress the Alliance has made in 2018, and position ourselves to gain momentum in 2019. A few highlights:

We have a new face among us! Welcome to Jordan Munn, who has taken the helm of PiPEx. Congratulations are also in order to our newly (re)elected Alliance board members. The following join the existing board members, who will serve beginning January 1:

- Scott Burgmeyer (IQC)
- Donn Fisher (Mid-South)
- Marcia Harrington (SPQA)
- Cary Hill (OK)
- Margot Hoffman (TPE)
- Brian Knight (PiPEx)
- Raina Knox (Stratex / Supporting Member)
- Kaleokalani Kuroda (HAE)
- Geri Markley (MIPEx)
- Tamara Fields Parsons (TNCPE)
- Ron Schulingkamp (LQF)
- Karen Shepard (SWAE)
- Anne Warner (GSQC/NNEAE)

Thanks to WCPE and RMPEx for hosting and managing a very successful Baldrige Fall Conference earlier this fall in Denver. Over 300 attended, and the program was terrific! TNCPE will take the lead, with the help of a coalition of Alliance member programs from the southeast, to host the 2019 Fall Conference in Nashville. The date and specific location will be announced shortly.

As most of you know, the Alliance now offers Supporting Memberships to any organization (or individual) that wants to support our mission and excellence throughout the US. Welcome to the three first non-program members: Mike Belter, Stratex, and Walden University. We appreciate your support!

As I mentioned in an email earlier this fall and we discussed at the Alliance meeting in Denver, the Baldrige Enterprise Leadership Team recently selected two strategic areas on which to collectively focus: a marketing strategy (to identify a target market(s) that we all can systematically focus on to grow an underserved segment) and a strategy to promote consistency in examiner training. Katie Rawls and Julia Galbadon (two of our rock start retired EDs!) are representing the Alliance on the marketing task force, and Geri Markley and Anne Warner are representing us on the examiner training task force. Both teams are making progress, and recommendations should be ready in early 2019.

Similarly, the Alliance has launched two task forces itself: one is focusing on setting guidelines for lower tier awards and one is creating an inventory of revenue-generating services so that we can share across the Alliance (helping to create a bucket of products that any/all of us can use to grow revenue and impact within our programs). More information on both should be ready by Quest.

And you can see many other great things going on within the Alliance and our member programs throughout the rest of the newsletter. Thanks for all you’re doing to advance performance excellence across your state/regions and the nation. Have wonderful, safe holidays.

Brian Lassiter, Chair (PEN/MN)
The Alliance for Performance Excellence has a new website!!

It includes the interactive state map and listing of Alliance Programs and Services. Please visit the website at:  https://www.baldrigealliance.org

Make sure to change the web address in your personal favorites / settings AND program/organization website links.
Update the link from http://www.baldrigepe.org/alliance/ to  https://www.baldrigealliance.org

Dues Reminder, Discount & Alliance Participation
Submitted by: Geri Markley, Alliance Treasurer

As a reminder, the Board approved an increase in member dues last year, which will take effect with Jan 2019 dues. Member programs with revenues over $500,000 will be charged $2,000 per year while member programs with revenues under $500,000 will be charged $1,000.

There is an opportunity to earn a 50% reduction in dues when a representative from your program actively works to advance the mission of the Alliance.

Currently we have a need for volunteers to join the Governance Committee, the Membership Committee, and to coordinate the member Calling Tree. If you are interested in joining the Governance Committee, please contact Brian Lassiter (brian.lassiter@performancexcellencenetwork.org). If you are interested in joining the Membership Committee or coordinating the member Calling Tree, please contact Dean Bondhus (dabmnky@gmail.com). It’s time to act!
Register today for the 31st Annual Quest for Excellence® Conference!

The conference, which will showcase the best practices of the five newly announced 2018 Baldrige Award recipients and past awardees, is being held April 7-10, 2019 at the Gaylord National Harbor Resort and Convention Center in National Harbor, MD.

Come join us at our new conference location and network with current and past Baldrige recipients and members of the Baldrige community! Learn role model best practices and take home solutions to help your organization achieve breakthrough performance and results.

The Baldrige Award Ceremony, which will honor the 2018 Award recipients, will take place on Sunday, April 7.

Baldrige Criteria Pre-Conference Workshops are available the afternoon of April 7 for beginner and intermediate users of the Baldrige Criteria.

The Baldrige Cybersecurity Pre-Conference Workshop will be held on Sunday, April 7. This will be a practical, interactive workshop on how to conduct a self-assessment of an organization’s cybersecurity program, utilizing the Baldrige Cybersecurity Excellence Builder.

Quest attendees staying at the Gaylord enjoy extra amenities such as in-room internet, fitness center access, shuttle service around National Harbor, and more! Staying at the Quest conference hotel is also a way to support the Baldrige Program. Book your stay today at the Gaylord National Harbor at the special attendee rate.

Sponsorships are also available. These are great ways for your organization to be a part of the conference and contribute to the learning experience for Quest attendees.

The 2018 Baldrige Award recipients being featured are:


Alamo Colleges District, San Antonio, Texas (education)

Tri County Tech, Bartlesville, Oklahoma (education)

Memorial Hospital and Health Care Center, Jasper, Indiana (health care)

Donor Alliance, Denver, Colorado (nonprofit)

Past Award recipients presenting so far include Advocate Good Samaritan Hospital, the City of Fort Collins, Elevations Credit Union, K&N Management, Mid-America Transplant, Mountain Valley of Cascadia (formerly Kindred Nursing and Rehabilitation-Mountain Valley), Southcentral Foundation, Studer Group, and University of Wisconsin-Stout.

Join us for an awesome Quest experience! We look forward to seeing you there.

For more information about the Quest for Excellence Conference, visit the conference webpage. For questions, contact the Baldrige Performance Excellence Program at (301) 975-2036 or baldridge@nist.gov.
Baldrige Program Seeks Examiners- Apply by January 7

Contact: Examiner Help Center

There is still time to apply for the Malcolm Baldrige National Quality Award Board of Examiners for the 2019 Award cycle. The Examiner Application will be open until 6:00 pm, EST on Monday, January 7, 2019.

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 organizational performance excellence. The board is composed of senior leaders and experienced management professionals from across all sectors of the U.S. economy, including manufacturing, service, small business, health care, education, government, and nonprofit.

The Baldrige Performance Excellence Program (BPEP) has a particular need for examiners who are senior leaders of medium and large organizations; physicians, nurses, and other clinicians; community, technical college, and university deans and above; and K-12 principals and superintendents. We are also seeking individuals with knowledge of and experience working in joint ventures and other complex governance structures.

Examiners are selected based on knowledge of the Baldrige Framework and Criteria for Performance Excellence, industry expertise, good oral and written communication, good interpersonal communication, and other attributes. More information on who should apply is available on the Baldrige Examiner Qualifications webpage.

Examiners attend a training course focused on the Baldrige Framework and Criteria for Performance Excellence and their role in the Baldrige Award process. As part of the Examiner Preparation course, examiners evaluate a case study (a fictitious Baldrige application) and engage in peer learning; in-depth Criteria training; and facilitated team, leadership, and technical writing training.

Baldrige examiners then participate in the evaluation of an actual Baldrige Award applicant, which includes independent and consensus reviews, and may include a site visit review. Read testimonials of why examiners serve.

The Baldrige Program relies on its community to spread the word about this unique volunteer opportunity. If you have a colleague who you think would benefit from serving on the Board of Examiners, please share this message with them.

Complete information is available on the Become a Baldrige Examiner webpage. Contact examappl@nist.gov for more information.

For those professionals who 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 mid-January 2019.
In June the Senate’s Commerce, Justice, Science, and Related Agencies Appropriations subcommittee passed the FY 2019 appropriations bill including the Department of Commerce. That bill includes, for the second consecutive year, $2.2 million for the Baldrige Performance Excellence Program.

“For a time this summer it appeared Congress might pass all the appropriations bill in ‘regular order,’ in which each of the 13 appropriations bills are considered and adopted separately,” said Foundation President and CEO Al Faber. “A number of the critical federal spending bills were passed, either separately or in smaller collections referred to as a ‘minibus.’ But as the country moved into the midterm election season, those efforts stalled and the Commerce bill is still awaiting final Congressional action.”

The fiscal year ended on September 30, and BPEP has continued to be funded under a continuing resolution (CR), which provides funding for programs funded in the previous year, at about 90 percent of the previous year’s level. “That CR expires on December 7,” continued Faber. “Congress must either re-authorize the CR for another period of time or take final action on the budget, or those programs will be shut down until funding is arranged. When you add the uncertainties of the lame duck to the political difficulties already faced in Congress, it is difficult to predict what the final result will be.”

In the meantime, please continue to call and write your Senators and Representatives and ask them to support funding for Baldrige. For help in how to do that, click here: http://baldrigefoundation.org/get-involved/write-to-congress.html

Foundation Pushing Corporate Sponsorships for Quest

Our efforts to secure sponsors for the 2019 Quest for Excellence® conference has been going well with nearly a dozen new and renewing sponsors already committed. We also have approximately 150 open requests with a diverse group of some of the largest corporations in the United States.

You can help! If you are working with organizational leaders that you think might be interested in aligning their brands with quality, encourage them to consider a Quest sponsorship. Direct them to our website here where they can learn more about sponsorship opportunities and how to contact our staff.

Foundation Preparing to Announce Its Leadership Award Winners

In November, the Foundation Board’s Awards Committee met to review nominations for the E. David Spong Lifetime Achievement Award, the Harry S. Hertz Leadership Award, the Foundation Awards for Leadership Excellence, and the Dr. Curt Reimann Baldrige Scholarship. “We had many great candidates,” said Foundation President and CEO Al Faber, “and we are excited to honor these great current and future leaders at Quest in April.

The Foundation is currently notifying winners privately, after which there will be a series of public announcements leading up to the presentation of the awards at the Foundation’s luncheon on April 9 at Quest.
Learning from Role Models: Category 6: Operations

October 11, 2018
By Dawn Bailey

Baldrige Criteria Blog Series

In this blog series, we are highlighting some of the learning (successful strategies and programs) shared by Baldrige Award recipients to highlight the categories of the Baldrige Criteria and how your organization might consider using them as guidance.

Part of the purpose of Malcolm Baldrige National Quality Improvement Act of 1987 (Public Law 100-107) is to disseminate information about the successful strategies and programs of Baldrige Award-winning organizations that “practice effective quality management and as a result make significant improvements in the quality of their goods and services.” Such sharing by Baldrige Award recipients is done face-to-face and with the option of asking questions of and networking with these recipients at the Annual Quest for Excellence® Conference, as well as at the Baldrige Fall Conference. Baldrige Award recipients also often host sharing days after their wins to share best practices. 

The Baldrige Criteria are Insufficient

October 25, 2018
By Harry Hertz “The Baldrige Cheermudgeon”

For people who have known me for years, you probably never thought you would hear me say, "The Baldrige Criteria for Performance Excellence are an insufficient guide for achieving improvement and, hopefully, excellence." But the statement is true and it is not a new epiphany for me. The Criteria... Read more

Why Be a Baldrige Examiner: "Passion for Improving Products and Businesses"

November 08, 2018
By Christine Schaefer

Where in the world is this woman (in the photo above) holding a Baldrige Excellence Framework booklet? We’ll reveal the answer in a bit. First, let’s identify her: she is Baldrige alumni examiner Patrice (“Pat”) Griffith. By day she is employed as director of quality improvement and safety at the... Read more
Developing Sterling Examiners as Leaders

This year in Florida and Georgia, we decided to disrupt our model for examiner training, and radically innovated our approach. Several factors led to this decision:

- High-quality, value-add feedback reports must consistently focus on what is most important to the organization, not just ensure responses to the Criteria are present.
- Development of leadership competencies would not only establish a stronger Board of Examiners, but enhance the value of our examiners in their professional life through these transferable skills.
- Enhance examiner satisfaction with both training and assessment experiences.
- Increase examiner retention based not only on enhanced satisfaction, but viewing Florida Sterling as the place to continue to develop their leadership skills.

Therefore, we decided to stop training on the assessment processes, and on the mechanics of how to write good feedback comments. Instead, we changed our focus on how to teach our examiners to become more effective leaders; thereby becoming more effective examiners.

This caused us to basically throw away the training program we had evolved over the years; create a new, radical approach to training; and take the risk on what had never been done before. Our basic premise was – if we could build better leadership competencies around the framework of the Criteria plus ADLI, we would get to a level of competence and become the best leadership development program in the country. So, we began with defining our training outcomes and the following learning objectives:

- Develop examiner leadership skills that result in high-quality feedback and reports.
- Learn why leveraging the key competency of business acumen is critical to understanding the importance and relevance of the systems and unique aspects of a business.
- Understand how systems thinking demonstrates alignment and integration across organizational processes, and how these processes drive business results.
- Understand how critical thinking provides the insight to ask the right questions, discern and prioritize information, and draw the right conclusions.
- Learn how analytical skills are used to evaluate and analyze factors that gauge the maturity of processes and results.
- Understand the importance of teamwork and communication in driving high performance.
- Understand how leveraging the core competencies of business acumen, systems thinking, critical thinking, and analytical skills enable high performance leadership.

As we continued to develop our content, we established a pre-test/post-test instrument to determine how well our examiners “got it”. We believe that if we cannot measure the training process beyond basic satisfaction, we cannot measure its effectiveness to meet the overall outcome of high-quality feedback reports.

We were thrilled to see that Harry Hertz supported our approach with his BLOG “The Baldrige Criteria are Insufficient”. This fit directly into our model, where a full eight hours (40% of our training time) was devoted to teaching ADLI through the leadership competency of analytical thinking, and helped our examiners to more fully appreciate how the Criteria without ADLI simply does not work.

We have only recently completed this training and our feedback has been extremely positive, demonstrating 99% of our examiners agree that our new and innovative examiner training “will strengthen my leadership competencies”. And one of our return examiners stated “The examiner training class adjustment was an excellent move. To pull some of those critical thinking pieces to blend everything into a systems thinking perspective was a homerun.”

While this was one of our major undertakings this year, we are not done. To enhance our measurement system, our Team Leaders partnering with us to develop in-process measures to help shape and drive our overall outcome measures.

The Sterling Council is excited about setting a new standard for examiner training.
The Oklahoma Quality Foundation (OQF) recognized three organizations as role models for excellence in organizational performance during the Program’s 7th Annual Sharing of Best Practices and Awards Luncheon. The conference was held on November 15th at the Convention Center Moore Norman Technology Center South Penn Campus, Oklahoma City.

Oklahoma City Indian Clinic received the Leadership in Excellence award, the state’s highest level recognition. City of Tulsa and Head Country, Inc. were both honored with the Foundation of Excellence Award.

Modeled after the prestigious Malcolm Baldrige National Quality Award, the nation’s highest presidential award for organizational performance excellence, OQF’s tiered award levels allow applicants to receive recognition and valuable feedback for improvement at various milestone performance levels on their journey to excellence.

“These three award recipient organizations represent the best of the best in Oklahoma,” said Oklahoma Quality Foundation executive director, Cary Hill. “They already outstanding in their own right, yet exhibit a rare degree of humility by undergoing one of the most rigorous evaluations available in order to achieve higher levels of performance. Each has been honored with various awards and accolades within their respective industries, and each produces exceptional results that create jobs and contribute to the economic prosperity and well-being of Oklahoma.”
Announcing the Award Recipient of the
SWAE 2018 Performance Excellence Program

On December 3, 2018, Southwest Alliance for Excellence (SWAE) announced the award recipient of the 2018 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. Press Release

Congratulations to our 2018 Performance Excellence Pioneer Award Recipient!

YUMA REGIONAL MEDICAL CENTER

YRMC podcast on their Baldrige journey

Congratulations to RE Darling ~ Interest Recognition Award*

*Organizations submitting a Level 1 application are taking the first step on the journey to performance excellence
On September 10th & 11th more than 150 participants gathered at The Ohio State University for TPE’s annual Quest for Success conference. Four past Baldrige recipients shared stories of their performance excellence journey and best practices in keynote addresses and breakout sessions. Attendees participated in best practice sessions led by TPE Award winners and performance excellence professionals, and received an update from the Baldrige Foundation. The first cohort of TPE’s Leader2Leader Collaborative commenced its year of leadership development with a strategy session. During an evening reception, The Partnership for Excellence celebrated its 20-year anniversary with a historical update and timeline, and a keynote address from Major General John Harris, Commander of the Ohio National Guard and national Baldrige judge. A highlight of the conference was recognition of members of the 2017 – 2018 TPE Board of Examiners, who were honored at a breakfast. The conference culminated with TPE’s annual awards ceremony. Managed Healthcare Services – Lilly USA and ProMedica Memorial Hospital were recognized with TPE’s highest award, the Platinum level Governor’s Award for Excellence. We hope you can join us at our 2019 conference on September 9 – 10, 2019 in Columbus, Ohio.
Baldrige: Building a Foundation for Success

Baldrige core values and concepts are embedded in high-performing organizations.

The Baldrige Performance Excellence Program is one of the greatest opportunities healthcare leaders have to improve the quality outcomes, patient safety and overall performance of our nation’s healthcare organizations.

Of the six sectors that use Baldrige, statistics have shown the program to be particularly valuable to the health-care field: In 13 of the last 14 years, at least 50 percent of all Baldrige applicants have come from the healthcare sector.

ACHE, a staunch supporter of Baldrige, is on the Baldrige journey, too. In 2016, ACHE received the Gold Award for Achievement of Excellence at the state level, and this spring, ACHE submitted its second application to the National Baldrige Performance Excellence Program.

As we continue on our Baldrige journey, ACHE is focusing on transforming its culture to become more agile to achieve a central goal of educating, engaging and inspiring leaders to improve health.

A key component for organizations that take the Baldrige journey is the Baldrige criteria, a set of questions that addresses critical aspects of organizational management and performance. The criteria are built on a set of interrelated core values and concepts.

Of these core values and concepts, a combination of the following are the essential ingredients of Baldrige that are embedded in high-performing healthcare organizations:

- Visionary leadership: Senior leaders should set a vision for their organization, create a focus on patients and other customers, demonstrate clear and visible organizational values and ethics, and set high expectations for the workforce.
- Patient-focused excellence: Your patients and other customers are the ultimate judges of your performance and the quality of your healthcare services.
- Valuing people: An organizations success depends on an engaged workforce that benefits from meaningful work, clear organizational direction, the opportunity to learn and accountability for performance.
- Delivering value and results: By delivering and balancing value for key stakeholders, your organization builds loyalty, contributes to growing the economy and contributes to society.

Demonstrating visionary leadership. Baldrige-winning hospitals and health systems ask themselves questions about how their senior leaders’ personal actions guide and sustain their organizations, such as, “How do senior leaders communicate with and engage the entire workforce, patients and other key customers?”

For example, senior leaders at Adventist Health Castle, Kailua, Hawaii, winner of the 2017 Malcolm Baldrige National Quality Award, guide the organization by modeling a deep commitment to its faith-based mission of “Living God’s love by inspiring health, wholeness and hope.”

To support this empathy-driven workforce, Adventist Health Castle developed “always behaviors” that guide a caring, compassionate and positive culture. Leaders reinforce these behaviors through hospital visits, in weekly huddles, by presenting awards and writing thank-you notes to employees and volunteers.

Read more...
Are You Ready for a CEO Self-Assessment?

“It was the best of times; it was the worst of times.” But is it ever the right time to pursue excellence?

In the past few weeks, we’ve heard from two different organizations that have decided not to use the Baldrige Excellence Framework to drive improvement. Neither was a surprise to us. The first has been dragging their feet for over a year, always finding excuses for “now” not being the right time. The second was immediately detected when we shared our lessons learned in working with 20 clients ultimately named as Baldrige Award recipients. The CEO wouldn’t make eye contact with us when we stated that leading the journey cannot be delegated. This set of CEOs has chosen to avoid using the framework to avoid having to acknowledge problems in their organizations.

What a contrast this has been with the two CEOs we’ve been working with to prepare their organization for their Baldrige site visits this week. Both organizations have been on the journey to performance excellence for years. The CEOs describe the great value they’ve received from the objective, non-prescriptive feedback they’ve received during that time, and they realize that the feedback received after a site visit will be even more actionable. This set of CEOs committed to using the Baldrige Excellence Framework to solve problems and become better organizations.

What’s the difference between these two sets of CEOs, and which group would you fall into?

A CEO Self-Assessment

1. How do you react when someone points out areas in your organization that aren’t performing as well as they could or should?
   a. I brush it off because they can’t possibly know my organization as well as I do.
   b. I ask for the data that supports that and then ask for their suggestions.

2. I’m able to keep my organization focused,
   a. But the urgent usually takes over the longer-term important objectives. We’re in constant firefighting mode.
   b. And we’ve slowly moved from being very reactive to more proactive in our improvement.

3. In my organization,
   a. I still struggle with breaking down silos to make improvements in cross-functional projects.
   b. I enjoy our culture of teamwork. People really work well together.

4. In my organization,
   a. I often get blindsided by a serious customer complaint or employee issue.
   b. People regularly stop me to talk about concerns or things they’re excited about.

5. I use comparative data to
   a. Ensure that we’re above state and national averages.
   b. Establish stretch goals to compare ourselves against top quartile or top decile performance.

6. I consider our strategic plan to be
   a. Highly confidential because we’re in a very competitive industry.
   b. Something we shared with all employees so they can identify how they contribute to our most important objectives.

7. I rely on
   a. The Senior Leaders to come up with the best ideas. They’re the most educated.
   b. Getting ideas from every employee at every level. The people closest to the work understand the issues.

8. I expect
   a. People to come in prepared to do their jobs.
   b. To invest in training on tools and methodologies, and to give people time to use them to improve their work.

9. I want improvement,
   a. But we’ve tried PDCA, TQM, Six Sigma, and/or Lean. Nothing has really stuck.
   b. And I know that improvement takes time, and we’re staying the course.

10. I expect high performance,
    a. That’s why you only get so many chances to screw up before you’re gone.
    b. But I encourage people to take intelligent risks knowing that every effort won’t be successful.

If you answered mostly “a,” then you’re with the first set of CEOs who want to avoid being challenged to address the problems in their organizations.

If you answered mostly “b,” then you’re with the second set of CEOs who sincerely want to lead their organization to better performance. You might already be using the Baldrige Excellence Framework. If you’re not, we encourage you to check it out. You sound like just the kind of leader who would embrace it. [https://www.nist.gov/baldrige](https://www.nist.gov/baldrige)

However, our bottom line is, the pursuit of excellence isn’t for the faint of heart!

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