



Learn. Share. Connect.

THE ALLIANCE FOR PERFORMANCE EXCELLENCE NEWSLETTER

THE PREMIER RESOURCE FOR A THRIVING BALDRIGE COMMUNITY

Table of Contents

Message from the Chairman	2
Alliance News	3
Baldrige Annual Quest for Excellence Conference	4
Baldrige Foundation	5
Communities of Excellence 2026	6
Baldrige—Various Blogrige Articles	7
Florida Sterling Program	8
Louisiana Quality Foundation	9
Oklahoma Quality Foundation	10
Rocky Mountain Performance Excellence	11
Southwest Alliance for Excellence	12
Quality Texas Foundation	13
The Partnership for Excellence	14
Baldrige Coach “Are you Leveraging Your Satisfaction Surveys?”	15

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

<https://www.baldrigealliance.org>



A Message from the Chairman

Brian Lassiter, Chair

Alliance for Performance Excellence &
President of the Performance Excellence Network (MN, ND & SD)

Spring Forward

Hello fellow Alliance members! It's hard to believe it's March already (I don't know about you, but if you all have had a winter similar to what we experienced in MinneSNOWda, we're all ready for spring!). But not just for the change in weather – spring is widely considered a time for renewal in many ways: there's spring cleaning, Lent and other religious holidays, and the beginning (or close to it) of many of our fiscal years, where strategies and action plans kick into gear. I hope all of your programs experience renewal and rejuvenation in the coming months.

Here is a summary of key activities within and beyond the Alliance:

Survey Season: Thank you all for completing the annual Alliance member survey in February. We had 100% participation (thank you!), which is one requirement to remain a member in good standing (and get your comp Criteria books!), but also provides data and rich insights to help the Alliance board and committees continue to add value for you, our members. Thank you also for completing the annual Top Tier Award & Impact Sheet survey as well. As mentioned in that request, Baldrige is inviting Alliance member top level recipients to a special networking event (and will be briefly recognized) at Quest for Excellence, which hopefully builds excitement and encourages them to continue (and others to begin) their excellence journeys.

Quest for Excellence: Speaking of Quest: this year's annual Baldrige conference is April 7-10 in DC, moving this year into the "beltway" (at the Gaylord National Harbor). For those new to the Alliance and the Baldrige Enterprise, this is the premier learning/networking event tied to Baldrige – three days of intense learning and rich networking with Baldrige recipients, other stakeholders, and other leaders on the journey to excellence. Please remember to help market this event through your channels (and for doing so, your program gets a comp seat to the conference itself).

Alliance Meetings: The Leadership Committee reviewed and discussed input about Alliance member meetings from the recent member calling tree. There was clear input that members miss the longer meetings devoted to sharing, networking, and relationship building that we have done in the past. We discussed several options on how to make this happen and decided that the best option for this year is to have a member *meeting the day before the Fall Conference* (Thursday, October 24) in Nashville. Some of that time will be used for an official Alliance board meeting, but most of it will be designed to help us share and learn from each other. More information and a "save the date" article is later in this newsletter, and many more details will come this summer as the committee begins its planning. As part of this decision, Alliance leadership also decided not to have any formal Alliance meeting, (board or member) at this year's Quest for Excellence. We still highly encourage your attendance and support of the conference (and no doubt there will be informal Alliance gatherings – happy hour, dinner, etc.), but we'd like to try this approach at least this year and hope and expect to see most of you in October. We will still have a virtual Board meeting on April 25th.

Baldrige Fall Conference: Which brings me to the Fall Conference. As most of you know, the Alliance began managing this important product, in cooperation with the Baldrige Program, two years ago, hosting successful conferences in Tempe and Denver. This year's conference is being planned by a consortium of programs in the Southeast US, spearheaded and hosted by TNCPE in Nashville. Mark your calendars: October 24 pre-conference workshops and Alliance meetings and October 25 main conference. The conference is at the Gaylord Opryland Hotel, one of the largest (and most extravagant!) hotels in the US. More information on the program, registration, and other details will come after Quest.

Those are just the highlights: there are many other great things going on within the Alliance and our member programs, so enjoy the rest of the newsletter! Good luck on your own renewal strategies and thank you for all you're doing to advance excellence in the US!



Learn. Share. Connect.

Alliance Sharing Day – Save the Date!

October 24, 2019

Purpose: To provide all members of the Alliance for Performance Excellence the opportunity to share ideas & programs to enhance all members' ability to grow Baldrige-based performance excellence. Plan for the entire day!

When/Where: Thursday, October 24, 2019 at the Gaylord Opryland Resort & Convention Center, Nashville, TN, in conjunction with the 2019 Baldrige Fall Conference on October 24-25.

2019 BALDRIGE
FALL CONFERENCE

Tune into
excellence

SAVE THE DATE

Performance excellence enthusiasts will gather to *Tune into Excellence* at the annual Baldrige Fall Conference, **October 24–25, 2019 at the Gaylord Opryland Resort and Convention Center, Nashville, Tennessee.**

Learn practical skills from national role model organizations and experts. Hosted by the Baldrige Alliance. Visit us at baldrigealliance.org



[Register today](#) for the [31st Annual Quest for Excellence® Conference](#), April 7-10, 2019, and learn best practices from the [2018 Baldrige Award recipients](#) and 18 past awardees.

Quest will be held at the [Gaylord National Harbor Resort and Convention Center](#) just outside of Washington, D.C.

Attend Quest and take home solutions to help your organization achieve breakthrough performance and results. Take advantage of conference sessions and activities including:

- The Baldrige Award Ceremony, which will honor the 2018 Award recipients on Sunday, April 7.
- An opening plenary session featuring the senior leaders of the 2018 recipients as they share role-model leadership practices.
- A keynote presentation on Wednesday, April 10 by [Dennis Brouwer](#), CEO, the Brouwer Group, LLC, a firm that helps companies to achieve peak performance by getting crystal clear on their value proposition, promoting creative leadership behaviors and energizing high-performing teams.
- 50 sessions featuring [current](#) and [former](#) Baldrige Award recipients from all sectors sharing their proven performance management practices and real-world insights in strategy, customers, workforce, and many more areas important to business success.
- A special session featuring the two organizations recognized by the Panel of Judges for best practices in a Baldrige Category.
- [Baldrige Criteria Pre-Conference Workshops](#) on the afternoon of April 7 for beginner and intermediate users of the Baldrige Criteria.
- The [Baldrige Cybersecurity Pre-Conference Workshop](#) 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](#).
- Opportunities to network with and learn from Baldrige recipients, applicants, examiners, [Alliance for Performance Excellence program representatives](#), [Communities of Excellence participants](#), as well as Baldrige experts and users in all industries.
- Opportunities to meet the Quest [sponsors](#).

[Register](#) by March 11 for the \$125 early bird discount and [book your room today](#) at the Gaylord National Harbor at the special attendee rate. Quest attendees staying at the Gaylord enjoy extra amenities such as in-room internet, fitness center access, shuttle service around National Harbor, and more.

For questions about the [Quest for Excellence Conference](#) contact the Baldrige Performance Excel-



Advocacy Update: Final Budget Deal Preserves BPEP Funding

Narrowly avoiding a second partial government shutdown in the very new year, Congressional conferees in February completed work on a budget proposal, signed by the President, to fund the previously-unfunded government agencies, including the Department of Commerce, for the remainder of the fiscal year. The budget deal included continuation, for the second consecutive year, of the appropriation of \$2.2 million for the Baldrige Performance Excellence Program.

“With the extra political uncertainty surrounding the budget process this cycle,” explained Foundation President and CEO Al Faber, “it was a very challenging time for the staff at BPEP and we are pleased that funding was preserved.”

The Foundation has already been working with Congress on the FY 2020 budget to ensure the BPEP funding. “But our next goal,” continued Faber, is to see the BPEP funding returned to the President’s budget proposal. Once included there, it provides a level of institutionalization of the appropriation that makes funding in future years more certain. We continue our efforts with the NIST and the Department of Commerce to make this a reality.”

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>

Save the Date: Foundation’s Next Quarterly Webinar on March 28.



Our next quarterly webinar is scheduled for March 28, 2019, starting at 1:00 EST. In addition to critical updates from the Alliance, the Program, and the Foundation, our special guest will be Stephanie Norling, Executive Director of Communities of Excellence 2026. [For updates and information on how to register for the webinar, click this link.](#)

Foundation Announces Its Leadership Awards Recipients

Al Faber, President and CEO of the Foundation for the Malcolm Baldrige National Quality Award, Inc. today announced the 2019 recipients of the Baldrige Foundation’s Leadership Awards. “We have four categories of leadership awards,” said Faber, “that recognize outstanding individuals, leaders, and supporters who embody Baldrige leadership values and principles, and who have provided outstanding service to the Baldrige community.” The awards will be presented at a Foundation luncheon on Tuesday at Quest.

The E. David Spong Lifetime Achievement Award: The Honorable Senator **Richard Shelby**

The Harry S. Hertz Leadership Award: **Dr. JoAnn Sternke**, Senior Director, Studer Education

The Foundation Awards for Leadership Excellence: **Maryruth Butler**, Executive Director, Cascadia Healthcare, in the Health Care sector; **Dr. Glenn Crotty**, Executive Vice President and COO, Charleston Area Medical Center, in the Health Care sector; **Dr. James Evans**, Professor Emeritus, Lindner College of Business, University of Cincinnati, in the Education sector; **Tommy Gonzalez**, City Manager, El Paso, Texas, in the Government sector; The Honorable **Sam Graves**, U.S. House of Representatives (MO), in the Government sector; **Cary Hill**, CEO of MESA, in the Business sector; **Jo Ann Jenkins**, CEO of AARP, in the Nonprofit sector; **Dr. Bruce Kintz**, President and CEO of Concordia Publishing House, in the Non-profit sector; **Deborah Larkin-Carney**, Vice President of Quality at RWJ Barnabas Health, in the Health Care sector; **Robert Pence**, Chairman of the Board of Freese & Nichols, in the Business sector; **Pattie Skriba**, Vice President for Business Excellence at Advocate Good Samaritan Hospital, in the Health Care sector; **Allyson Young**, HR and Brand Director at K&N Management, in the Business sector

Dr. Curt Reimann Baldrige Scholarship: **Robin Eckhardt**, President, NMF Consulting; **Dr. Allen Turner**, Emergency Management Specialist, NASA Glenn.

Request to Baldrige Board of Overseers

On December 11th, the Baldrige Board of Overseers unanimously approved our request for support to add Community as the 7th category of Baldrige. We were very pleased with the support from the Overseers and the many individual comments we received expressing their enthusiasm. We will keep you updated on the next steps which will include receiving the support of the NIST Director and Secretary of Commerce and advocating to Congress. The three specific requests were:



1. Endorse and support the effort to have Congress approve Community as the 7th Category.
2. Support the five-year plan presented, concluding with a viable award program in 2023.

Work with COE 2026 and other members of the Baldrige Enterprise to achieve Congressional Approval, acquire necessary funding, and implement the five-year plan.

COE 2026 National Learning Collaborative

Year two of our [National Learning Collaborative](#) continues to provide us with great opportunities for learning, sharing, and growth. Five new communities joined us in October, 2018 for our second cohort and six communities from last year's cohort continued into year two of their COE journey. The hard work and commitment by both cohorts of communities has exceeded expectations.

We again held our COE 2026 Learning Collaborative Kick-Off Conference alongside the Baldrige Fall Conference this past October. All our 60+ participants attended the Baldrige Fall Conference sessions on October 24th and then took part in a COE-only day of sessions on October 25th. Enabling our attendees to join the Baldrige Conference was a great addition to their experience. We look forward to continuing this tradition next year in Nashville.

Recently the COE 2026 Board agreed to pursue a third cohort of the National Learning Collaborative to begin in October 2019. Marketing information for new communities will be available by early April. We would love to see new states/regions represented in these cohorts and appreciate any support you can provide. Our thanks to you all for your support in identifying communities to join us last year!

Partnerships

We truly appreciate the many opportunities we've had to present at Alliance state and regional conferences and webinars, and hope to continue to do so whenever possible. In the next few months we will be presenting at CCE, PEN, QT, and Quest. Many of you have made it possible to bring a COE community leader and share their experiences. It is very exciting for them to be a part of this community of like-minded people who are committed to excellence.

As we look to the future, we are always thinking about how to collaborate with the Alliance and align our efforts. We appreciate all of your support and are open to future opportunities that will reinforce this commitment.

BLOGRIGE

the official Baldrige blog



[What Does Success with the Baldrige Cybersecurity Excellence Builder Look Like](#)

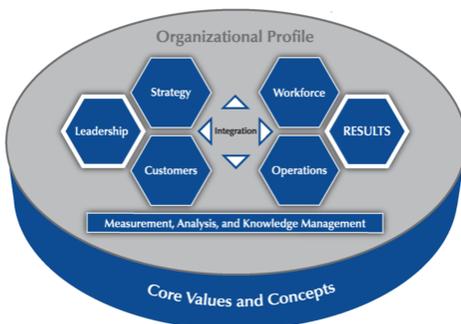
January 31, 2019
By Dawn Bailey

What does success look like for organizations using the [NIST Cybersecurity Framework](#) with the [Baldrige Cybersecurity Excellence Builder](#) to shore up their cybersecurity efforts?



Success Story

For the Information Security team at the [University of Kansas Medical Center](#), immediate, short-term results and impacts have included better understood roles and engagement in protecting the organization and helping to achieve the mission; deeper levels of trust, cooperation, understanding, and overall effectiveness; a better approach to intake, response, and follow-up, improving stakeholder relationships and getting the right solutions for customers; and gaps identified during the process resulting in action plans, funding opportunities, and deep alignment to the business. [Read more...](#)



From Baldrige Performance Excellence Program, 2017-2018 Baldrige Excellence Framework: A System Approach to Improving Your Organization's Performance. Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology. <https://www.nist.gov/baldrige>.

[Is Good, Good Enough for You? Taking the Next Step After ISO 9001:2015](#)

February 12, 2019
By Harry Hertz "The Baldrige Cheermudgeon"

Winter 2018-2019

A recent report entitled [Risk-Based Thinking: Creating Opportunities from Strategic Insights](#) by Nicole Radziwill includes references to both the [Baldrige Excellence Framework](#) and [ISO 9001:2015](#). The report describes the role of risk-based thinking in ISO 9001:2015. Since risk is based on the systems being impacted, the report recommends starting with an organizational profile, called the *organizational context* in ISO 9001:2015. In the Baldrige Excellence Framework, the [Organizational Profile](#) is "category 0" of the [Criteria for Performance Excellence](#) and sets the background (quite literally, as you can see in the framework diagram below) against which all other Baldrige Criteria questions are answered.

[Read more...](#)

FLORIDA STERLING 27TH ANNUAL CONFERENCE
May 28 – May 31, 2019

THERE IS A BETTER WAY
TOOLS AND STRATEGIES TO BEAT THE ODDS

The Florida Sterling 27th Annual Conference features 60 ninety minute, hands-on workshop sessions, 30 speed learning events, and 5 Certification tracks. The workshop tracks consist of eight unique time slots to learn and take away direct application in many areas of performance excellence. Feedback from our workshop sessions has sustained high levels of satisfaction and exceeded 4.6 out of 5 for overall satisfaction for five consecutive years, with overall conference satisfaction within the two top boxes at 99%.

The five certification tracks are some of our most popular opportunities as part of the conference experience. These certification tracks are: **Leadership MBA Lite, Advanced Leadership, Management for Excellence, Yellow Belt Six Sigma, and Lean Project Leader.** Over the past three years, we have certified over 500 people as part of our conference.

Keynote Speakers:

Tony Moore, [tonymooreSpeaks](http://tonymooreSpeaks.com). Tony Moore is a speaker, trainer, culture architect, and recovering Human Resource Executive.

Darin Atteberry, City Manager, Fort Collins, Colorado. The City of Fort Collins is a 2017 recipient of the Malcolm Baldrige National Quality Award.

Special Events: Tuesday, May 28, 2019

The Sterling Management System – A Framework for Achieving and Sustaining Performance Excellence
2019 Strategic Planning Summit – Action Planning to Ensure Success for Your Organization
2019 Florida Healthcare Symposium – Developing Leadership Systems for Excellence

Team Showcase – Story Boards – Products and Services Exposition

Learn from high performing teams and story board presentations that showcase systematic improvement approaches. Visit our Products and Services Exposition to learn from more than 40 vendors who will share their best practices and tools to help improve your business.



Opening Keynote Session, 26th Annual Conference, May 29, 2018

Join us for the Florida Sterling 27th Annual Conference. For more information register for the Conference events, go to <https://dasterling.com/conferences-events/nual-conference>



Maximizing ROI with Six Sigma workshop

Florida Sterling Council
For more information or to register, go to dasterling.com/conferences-events/nual-conference



Louisiana Quality Foundation Partners with University of New Orleans

The Louisiana Quality Foundation (LQF) was established in early 1990s. Initially the organization partnered with the University of Louisiana Lafayette (then University of Southwestern Louisiana), the location of the Manufacturing Extension Partnership of Louisiana (MEPOL). Over the past decade LQF had no specific partnerships and LQF has experienced a decline in state-level interest in the Baldrige process. Since 2010, LQF has averaged one top-level application each year.

LQF began a relationship with the University of New Orleans (UNO) in 2016 when UNO provided space on campus for the annual Examiner Training. In 2018, an official partnership was created when LQF Vice President Dr. Ron Schulingkamp and President Gordon Payne met with UNO College of Business Dean Dr. John Allen, Department of Management and Marketing Chair Dr. Pamela Kennett-Hensel, and UNO Director of External Relations and Corporate Development Aundrea Kloor.

The partnership began with UNO officially hosting the 2018 Examiner Training session with on-line registration and a wonderful venue, the AT&T Center. The training course went well, with examiners preparing to review the only top-level (Level 3) Louisiana Performance Excellence Award (LPEA) application received in 2018.

With that process winding down as the new year began, LQF finalized the details of the first UNO-hosted Performance Excellence Conference. Feedback provided by past Examiner Training and Performance Conference attendees indicated that Louisiana organizations were interested in Baldrige but did not know how to start. This 2019 conference is designed to address those needs.



Photo by G. Payne

The Conference is scheduled March 14-15 in the AT&T Center in UNO's Kirschman Hall. The goal of the two-full-day conference is to help each attendee produce a first draft of a Level 1 application, addressing the questions in the Organizational Profile. Any attendee who completes the Organization Profile for their organization and submits it through LQF's normal application process will have a review by a panel of experts and receive a two-page feedback report.



We are now accepting applications for the Oklahoma Quality Foundation 2019 Board of Examiners!

[Apply today](#) to become a Oklahoma Quality Foundation Examiner and help Oklahoma hospitals, schools, small businesses, government agencies, and more improve their processes, empower their workforce, and achieve better results.



[Examiner Application](#)

For additional information or questions please email sandy.kube@oklahomaquality.com

Oklahoma Performance Excellence Awards Program

The centerpiece of what we do at the Oklahoma Quality Foundation is the Oklahoma Awards for Performance Excellence. Organizations receive the greatest benefit when they put themselves through the rigor of the evaluation that is part of the Awards process. In applying for the Performance Excellence Program, organizations take a major step to improve their performance and growth.

The deadline for the [Intent to Apply](#) form is April 19, 2019 and completed applications are due by May 29, 2019.

Questions? Email Sandy Kube at Sandy.kube@oklahomaquality.com

Scorebook Navigator Upgrade and Redesign

Rocky Mountain Performance Excellence is pleased to provide an update on the progress of the redesign and upgrade of Scorebook Navigator (SN).

As a first point, we are maintaining a focus on the key principles of how a new version of SN is developed: remaining neutral and non-proprietary; ensuring flexibility and adaptability; providing full cycle coverage from pre-application to final reports and best practice dissemination; based on input of members and stakeholders; and designed for and built to current cyber security standards.

We have already completed several key actions. First pass use cases have been developed. The use cases allowed for the dimensioning of the key functionality of the new program. These will evolve as we are at a point to involve more stakeholders in requirements definition. In addition, hosting options with Amazon Web Services (AWS) have been put in place. The existing SN will be migrated to AWS and future development will occur there. Moving to this platform enhances cybersecurity with AWS' ISO 27001:2013 certification and GDPR compliance and the associated safeguards. In the coming months, we will also be introducing a streamlined help desk feature.

Online licensing solutions are being tested for selection and implementation. The terms and conditions of user licenses will evolve to reflect the transition to online payments and registration. A partial implementation is planned for the existing SN platform with a full implementation in the new SN.

A make or buy decision process is being conducted by the RMPEX Board. The costs and benefits of a custom solution versus off the shelf solutions are being evaluated.

A product roadmap is nearing completion. After presentation to the RMPEX Board and sign-off, we look forward to sharing it with Alliance members and user groups.



SOUTHWEST ALLIANCE for EXCELLENCE PERFORMANCE EXCELLENCE PROGRAM
Sharing of Best Practices & Awards Luncheon

The Southwest Alliance for Excellence (SWAE) Performance Excellence Program recognized three organizations on February 6, at the Program’s annual Sharing of Best Practices & Awards Luncheon. The event was held at the East Valley Institute of Technology in Mesa, AZ.

Types of Awards

Organization Level Awards—Level 4 is modeled after the Malcolm Baldrige National Quality Award and based on the Baldrige criteria. The Pinnacle Award for Excellence recognizes organizations that have mature and fully deployed quality systems within their operations that demonstrate a commitment to continuous improvement and have a sustained significant record of performance. The Pioneer Award for Excellence recognizes organizations that demonstrate effective, systematic approaches that are aligned with the organizational needs. The Category Award recognizes organizations in one or more of the six Baldrige process categories. The organization will achieve recognition based on its performance in that category and the results related to that performance.



Tiered Organizational Levels 1, 2 & 3

Level 1—Beginning Level—Interest with Coaching (Recognition)

Level 2—Intermediate Level—Commitment Award

Level 3—Advanced Level—Achievement Award

Process Level Award—The Showcase in Excellence Award recognizes a team for one specific process that could be innovative or a cutting-edge approach.

Recipients for the 2018 Performance Excellence Program are:

Pioneer Award: Yuma Regional Medical Center, Yuma, AZ

Level 1 Recognition: RE Darling Co., Tucson, AZ



Leadership Recipient & Examiners are Honored with Recognition Awards

The recipient of the SWAE 2019 Leadership Award: Lucas Kavlie, VP, Compliance and Accreditation of Western Governors University, Salt Lake City, UT was announced at the Award Luncheon. The “Examiner of the Year” was Tyson Heath, the “Lead Examiner of the Year” was Wayne Haggstrom, and the “Rookie Examiner of the Year” was Jenna Golab

Lucas Kavlie, SWAE 2019 Leadership Award Recipient

. Quality Texas Foundation (QTF) Training Opportunities



Much like Florida discussed last month, QTF (www.quality-texas.org) has accomplished a number of surveys from our Board of Directors, Judges, Examiners, Members, and past members. The surveys indicate that just doing Examiner Training is not what they want. These customers pay the bills for sure.

They wanted information about how their employees could come back and become an internal coach or consultant. The customers also asked for intensive training of the Baldrige categories including the latest information from high quality, research-based business books, Harvard Business School Press, and Sloan MIT Management School.

So now the following results. All information is from the past four years. All training length is three days. It can be located at <https://quality-texas.org/training/>.

Pre-Examiner Training focusing on addressing the questions of CEOs and front-line staff in a slow and methodical manner. Currently, 100% satisfaction from participants.

Internal Coach/Examiner Training. This training highlights what an Internal Coach/Consultant needs to know past the Baldrige Framework and exportable to the workplace. This training is 98.9% satisfaction with around 1400 participants.

Leadership Development Training. This program is based upon Dr. Mac's third book, "Beacons of Light on Leadership" and uses YouTube videos, case studies, actual events, and MBA case studies. It is very interactive and allows organizations to have a common language regarding the requirements of management and leadership.

Strategic Planning Training. This training has two days of organizational strategic planning and then one day of personal strategic planning. The personal strategic planning day has had significant impact on the person's role in the organization and focuses on identifying individual strengths and talents.

Writing Seminars. These events are designed to help leap frog the levels of applications and specifically focus on the maturity of the organization. Most of these seminars are three days with higher levels extending to five days.

Workforce Engagement Seminar. (NEW) This training is planned for October and will be focused on Category 5 with a great deal of time spent on Item 5.2.

Customer Focused Seminar. (NEW 2020) This training will focus on Category 3 with linkage back to Categories 1 and 2.

QTF would like to extend a tuition free seat to each member of the Alliance (\$700 value) to help Alliance members to see our training, experience the events, meet new folks for your networks, and discuss transportability to your state.

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

Submitted by Margot Hoffman, TPE President & CEO

Leader2Leader Collaborative

In September, TPE kicked off its Leader2Leader Collaborative (L2L), a year-long leadership development program grounded in the Baldrige framework. The first cohort includes 11 dynamic professionals from the business, non-profit and health care sectors. During the kick-off meeting, the cohort developed a mission, values and strategic objectives for the year. Throughout the year, the cohort is attending two TPE Quest for Success conferences, going to site visits at three Baldrige/TPE award recipients, participating in eight webinars, and engaging in quarterly calls with mentors. In January, during the first site visit to 2015 Baldrige recipient CAMC Health System in Charleston, WV, CAMC shared its best



2018 – 2019 Leader2Leader Collaborative Cohort



L2L Cohort learning about Top 5 Boards at CAMC

practices and facilitated an interactive workshop on strategy development and deployment. Participants toured some of the hospital units to see CAMC's Top 5 Boards in action. In April, the cohort will visit 2018 TPE Governor's Award recipient Managed Healthcare Services of Eli Lilly and Company in Indianapolis to see its best practices and to learn about customer and workforce engagement. TPE will be kicking off the next L2L cohort at its Quest for Success conference on September 9 – 10 in Columbus, Ohio. If you are interested in learning more about the Leader2Leader Collaborative or to join the next cohort, contact

Margot Hoffman at margot.hoffman@partnershipohio.org

2019 Third Thursday Webinars

The Partnership for Excellence continues to offer complimentary webinars on the third Thursday of each month at 11:00 AM Eastern time. *The webinars are open to anyone who is interested in attending and provide information to assist organizations on their performance excellence journey. In January, Communities of Excellence 2026 Managing Director Stephanie Norling provided an update on the Communities of Excellence initiative and the positive impact it has had on the communities involved. In February, Amy Breidenbach, Nurse Manager with 2018 TPE Governor's Award recipient ProMedica Memorial Hospital, presented how they improved employee engagement through alignment. On March 21st, Tammy Dye, Chief Strategy Officer with Jordan Johnson, Inc., will present Taking Engagement to the Next Level through Customer Journey Mapping. Register for the March webinar at <https://attendee.gotowebinar.com/register/3411737695580909826>*

Videos of past TPE monthly webinars can be viewed at <https://vimeo.com/partnershipforexcellence/videos>

To learn about future Third Thursday webinars, visit the TPE website at http://thepartnershipforexcellence.org/events_calendar.html

Are You Leveraging Your Satisfaction Surveys?

Are you getting everything you could out of your customer and employee satisfaction surveys? How do you know?



First, are you trying to assess satisfaction or engagement? Satisfaction, while interrelated with engagement, is associated with an experience that's "in the moment." I might be satisfied with my pay or the meal that I ordered, but I don't have any intrinsic loyalty to the organization. If something better comes along, I'll have no qualms about shifting to another organization for employment or another business as a customer. On the other hand, engagement is based on a long-term relationship where customers or employees are actively advocating for you as a place to work or a place to do business with. Engagement is essential to your organization's continued success. You need a survey instrument that allows you to assess both satisfaction and engagement.

Do you have the right survey instruments? If you use internally generated surveys, you're probably missing the statistical analysis of the questions with the strongest correlation to "willingness to recommend." These are the key drivers of customer or employee engagement. You're missing another key component for sure – external comparisons. Even if you have comparisons against sister organizations, that's no way to evaluate how you compare with the best in your industry or sector. As a former boss of mine used to say, "You could be the best pig in a bad litter!"

Your goal should be to be in the top quartile or top decile in key comparisons. But what kind of comparisons does your third-party vendor offer? National and state averages? The average of a peer group without any other discriminators for being in the group other than being in your industry and of a similar size? Those provide little value unless you aspire to be just a bit above average, and we haven't seen a vision statement reflecting that aspiration in all of our years working in and with hundreds of organizations! The best comparisons are those that provide your percentile ranking, not just for your average scores but for your "top box" or "top two box" scores. This shows how you are comparing against other organizations that are aspiring to excellence.

What do you do with all of the verbatim comments? What? You don't get a lot of comments? That's a sure sign that customers have given up believing that you listen to their concerns and intend to respond to them. It's also a sure sign that your employees don't trust you and believe there will be repercussions if you can ferret out the identity of those malcontents! Okay, so you're in better shape. You do receive a lot of verbatim comments – both positive and negative. Do you sort them for common themes? Do you segment customer comments by transaction type, service or product offering, gender, age, geography, etc.? Do you segment employee comments by gender, age, tenure with your organization, job type, department, location, shift, etc.? By segmenting data, you can identify differences and pinpoint where to take improvement actions.

Do your managers know how to interpret and act upon their survey results? We often find clients who are working on their lowest scoring items regardless of whether those areas impact the drivers of engagement. Depending on your environment, you may not be able to share your survey results with your customers, but every manager can and should share the survey results with their employees. They should probe for deeper understanding of the issues and involve employees in developing the action plans to close gaps. After actions are taken, managers should reinforce with employees that this was the direct result of their feedback in the survey.

We also have clients who don't hold their managers accountable for improving performance based on survey results. Their survey results are stagnant or declining. Survey results shouldn't be viewed as punitive, but they matter every bit as much as other financial and operational measures. If your managers' performance is evaluated against those measures, they should also be evaluated against improvement in customer and employee satisfaction and engagement results.

How are your participation rates? Have they been trending downward? There are usually three root causes for this. The first two indicate that you're surveying too frequently, and the respondents are suffering from "survey fatigue," or there isn't enough time between surveys to analyze the results, validate the issues, and implement corrective action plans. The third root cause is that respondents have voiced the same concerns in several previous surveys, and they see no signs of you acknowledging the issues and trying to resolve them.

When I worked in aerospace, our largest customer made a very public statement at one of our leadership forums when their Vice President stood up and told us to quit sending them surveys. He said, "We've told you for the past three years that your delivery performance was unacceptable. It isn't any better. In fact, in some of your divisions, it's gotten worse. Clearly, your surveys are not used for improvement, and we're not going to waste any more of our time."

Top survey performance is like the Money Ball number for your business. Senior leaders have the responsibility for setting the direction and high-performance standards for their organization. It is important that senior leaders assure that the organization is leveraging their survey results. This is even more important in today's tight labor market. Employee surveys provide critical information in