



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 Foundation	4
Communities of Excellence 2026	5
Baldrige—Various Blogrige Articles	6
ExcellenceNorth Alliance	7
Oklahoma Quality Foundation	8
Southwest Alliance for Excellence	9
The Partnership for Excellence	10
Baldrige Coach “Helping Applicants Cross the Finish Line”	11
7 Steps for Level 3 Applications	12

“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)

The Journey Continues...

Hello fellow Alliance members! I hope you're all having a terrific summer (where is it going?!).

As you'll read in this issue of our newsletter, there is a lot going on within the Alliance and the broader Baldrige Enterprise. A few highlights:

Baldrige Fall Conference: You all know that this year's conference will be held October 24-25 in Nashville; this year's conference is being planned by a consortium of programs in the Southeast US, spearheaded and hosted by TNCPE in Nashville. Pre-conferences are October 24, with the main conference October 25, and the event will be at the Gaylord Opryland, one of the largest (and most extravagant!) hotels in the US. Please help the Alliance market it within your networks! After your program has two paid attendees registered, you'll be eligible for a comp seat! More information is in this newsletter or contact tamera.fields@tncpe.org.

Alliance Meeting: As part of the Fall Conference, the Alliance has resumed a "sharing day." Held all day October 24 in Nashville, this day is intended to provide a forum for us to share and learn from each other. Topics were rated and prioritized earlier this spring using a survey that you were asked to complete, and details are being finalized. We really hope that you'll consider attending, as this is the only official time during the year that we'll be together to spread best practices and ideas across the Alliance – an effort to "raise all boats," if you will.

Communities of Excellence 2026 Task Force: As most of you know, COE2026 is a nonprofit that is using an adapted Baldrige Framework to address community problems and improve community outcomes in the US. Led by Stephanie Norling, COE2026 has been partnering with the Alliance for many years, working with many of our programs to bring these principles into communities within each of our states/regions. COE2026 is current pursuing a strategy to created eligibility for national recognition (so in addition to businesses/NFP, healthcare, education, and small businesses, "communities" would be eligible to apply for the national Award); this requires Congressional legislation. As part of the strategy, COE2026 has a vision of transitioning operations over the next five years to the Baldrige Enterprise: the national recognition and Framework ownership to BPEP, fundraising/advocacy to the Foundation, and the rest of operations (local assessment, recognition, examiner training, learning/conferences) to Alliance members. The beginning of this work involves an Alliance/COE2026 Task Force to identify all areas that need to be considered in a new model, prioritizing and sequencing the most important to consider first – essentially creating a project plan for the next five years. Margot Hoffman (TPE) has agreed to lead the Task Force, and several other Alliance members are being recruited to participate. The goal is to have preliminary recommendations by the Fall Conference. I believe this is an exciting growth area for the Alliance and all of our members, helping communities across the nation improve performance!

Other Task Forces: Progress continues on the other Alliance Task Force (setting guidelines for lower tier awards) as well as the two Baldrige Enterprise Task Forces (one focused on business development and one focused on examiner training). Both are nearing completion, and more will be shared at the Fall Conference Alliance day.

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, and we'll see you this October in Nashville! Enjoy the rest of summer...

Brian Lassiter, Chair (PEN/MN)

Alliance Day of Sharing



There will be an **Alliance Day of Sharing on Thursday, October 24, at the Gaylord Opryland Resort & Convention Center, in Nashville, TN.** The 2019 Baldrige Fall Conference will follow on the next day on Friday.

This all-day event will allow Alliance Members to share practices with each other. The event will begin with a breakfast and presentation at 7:30, and will end around 4:30 pm. Alliance Members will have a lunch with participants of the Communities of Excellence workshop. Following the daytime event, Alliance Members will be able to continue to share practices at a local Nashville restaurant over dinner.

Presentations are being lined up, but they include Onboarding Applicants, Membership Processes, Judging, Examiner Management, Leadership Seminars/Symposiums, Webinars, Participation & Recognition, Volunteer Management, Training Course that Generate Revenue, Examiner Management, Donations & Sponsorships, Lower-Tier Approaches, Baldrige & Colleges, and Marketing/Partnerships. Late afternoon will include a Member Briefing, Short Presentations from BPEP and BF, and an Alliance Board of Directors meeting.

This daytime event, including breakfast, lunch, and breaks is free to all Alliance Members. Dinner will be your own cost.

Please mark your calendars to attend this Day of Sharing and the Baldrige Fall Conference.



Join us for the premier, performance excellence conference for today's leading-edge organizations and their people. The 2019 Baldrige Fall Conference is a "must attend" event for business leaders who are looking for a proven methodology that can be tailored to meet their unique business objectives while sustaining a culture of continuous improvement.

The conference, *Tune Into Excellence*, presented by the Alliance for Performance Excellence in partnership with the Baldrige Performance Excellence Program, will be held at the **Gaylord Opryland Resort & Convention Center in Nashville, Tennessee on October 24-25, 2019.** Presenters, using the Baldrige framework, will share best practices that drive organizational performance. Conference topics will focus on leadership, strategic planning, customer focus, measurement, workforce engagement and capability and operational excellence.

The Baldrige Fall Conference Planning Committee* has been very busy finalizing all the details to create a strong Fall program. In addition to a program that mimics the national Quest conference with some extra program content, we have arranged three pre-conference workshops and a tour to the Nissan Plant.

<https://www.baldrigeconference.org/registration>



Foundation Leadership Awards Create Opportunities for Alliance Programs

The Foundation currently presents four categories of leadership awards that recognize outstanding individuals, leaders, and supporters who embody Baldrige leadership values and principles. The awards are presented at the Foundation awards luncheon each year during the Quest for Excellence Conference ®.

The purpose of the Foundation Awards program is to highlight exemplary leaders throughout the various sectors of the economy, introduce a new generation of leaders to the Baldrige principles, and to thank and recognize leaders that have been especially support of the Baldrige community.

“The Foundation Awards are an investment in the long-term viability of the Baldrige Program,” according to Foundation President and CEO Al Faber. “The awards are part of an innovative strategy employing ambassadors throughout the U.S. to broaden the awareness and understanding of Baldrige.”

The Foundation Awards can also serve to assist Alliance programs to cultivate organizations for their state awards programs.

“We all understand how powerful it is for the leaders of Baldrige Award recipient organizations to take the national stage in front of the entire Baldrige community” Faber continued. “The Foundation’s individual awards for excellence expand that celebration of performance excellence to a larger group of leaders who also play an important role in the success of Baldrige.”

That is made possible through the Foundation’s awards program. State directors can nominate

leaders of the organizations they are working with at the state level, board members, volunteers, judges and others whose service qualifies for this recognition. Those leaders that receive Foundation Leadership Awards will be have the opportunity to receive those awards in front of all the Quest attendees, in addition to being featured in the Foundation’s Journal of Performance Excellence, and in the media.



“The nomination window is open each from April 15 through the end of September,” said Faber, “and we’ve streamlined the application process to make it as easy as possible for Alliance program directors to use this great recognition tool.”

You can find the listing of awards and qualifications, as well as the nomination form, on the Foundation website at <https://baldrigefoundation.org/what-we-do/foundation-awards/>. You will also find there the forms to nominate student-professionals for the Dr. Curt Reimann Baldrige Scholarship.

Update from Communities of Excellence 2026

Year Three of the National Learning Collaborative to start October 1st

All 11 communities from our first and second cohorts will be continuing their learning collaborative experience with us this year. In addition, we are accepting applications for six new communities to join the National Learning Collaborative: *A Systematic Approach to Excellence in Communities: Using a Baldrige-based Framework to Lead Transformation*. Applications from interested communities are due July 31st. This year we've added two new faculty and improved our curriculum based on feedback from our communities. The Learning Collaborative is designed to be a 3-year experience. At the end of the third year we will be implementing a membership program to keep communities engaged and part of the COE/Baldrige community.



Baldrige Fall Conference/Communities of Excellence Conference

To kick off the Learning Collaborative experience, we will again partner with the Alliance to host our in-person conference in collaboration with the Baldrige Fall Conference. Last year, 60 COE participants attended in Denver and we expect about 80 this year. Our attendees will spend Thursday October 24th in COE only sessions and then join the Fall Conference on Friday the 25th to round out their experience.

Communities of Excellence 2026 Assessment and Recognition Program

The 2019 Program is now underway. 11 communities are applying for the three levels of the program. This is the first year we will have applicants at the third level: Communities of Excellence. 3 communities are applying and will submit their responses to the questions in the Community Profile and all 7 categories. Approximately 55 volunteer examiners will review these applications. In addition to our partnership with BPEP, this year we are working closely with TPE, who will be piloting the assessment process for two of our communities. This pilot will provide valuable insight for our eventual goal of including state/regional programs in community assessments and recognition.

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. We recently presented at the Quality Texas annual conference and in the next few months we will be presenting at the Baldrige Fall Conference and TPE Conference. 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.

Stephanie Norling, Director

BLOGRIGE

the official Baldrige blog



Culture and Strategy Eat All Three Meals

May 8, 2019
By Harry Hertz "The Baldrige Cheermudgeon"

Spring 2019

We have all heard the saying, "Culture eats strategy for breakfast," a statement believed to have come from management guru Peter Drucker. The 2018 Baldrige Award recipients demonstrate that culture and strategy combined make for a full and healthy "meal plan" every day, especially when an organization's leadership sets the environment that allows culture and strategy to thrive. To be clear, by *thrive*, I mean that strategy is planned, executed, and agile to enable an organization to adapt to change. [Read more...](#)



Rethinking Innovation

July 24, 2019
By Harry Hertz "The Baldrige Cheermudgeon"

It was exactly two decades ago (1999) that the concept of *innovation* was first introduced into the Baldrige Criteria for Performance Excellence.

In those Criteria, we asked one simple question related to innovation:

- How do senior leaders establish and reinforce an environment for empowerment and innovation?



The Criteria have evolved significantly in the intervening twenty years, including significantly greater emphasis on innovation, starting with the addition of *Managing for Innovation* as a core value in 2000. The current Baldrige definition of *innovation* has not changed significantly since 2005. The definition in the [2019-2020 Baldrige Excellence Framework](#) and the [2019-2020 Baldrige Excellence Builder Glossary](#) is:

- Making meaningful change to improve products, processes, or organizational effectiveness and create new value for stakeholders. The outcome of innovation is a discontinuous or breakthrough change.. [Read more...](#)



GSQC Announces the ExcellenceNorth Alliance!

The Granite State Quality Council (GSQC) is evolving to become the ExcellenceNorth Alliance (ENA). This reflects a forward-looking focus to help Northern New England organizations and communities address performance excellence as the rate of change and disruption continues to dramatically increase across all business sectors.



For 27 years, the GSQC has been the nonprofit resource for organizational performance excellence, starting in New Hampshire and, in 2012, adding Vermont and Maine. The *ExcellenceNorth Alliance* name reflects our purpose to help organizations and communities identify and follow their “North Star” to build and sustain Excellence for the long-term. Being known as an Alliance reflects our increasing desire to develop trusted partnerships and collaborations both within the region and in the Baldrige community.

The ENA will continue to provide expertise in the Baldrige methodology and other systematic approaches, customized to the goals of each organization with which we work. We will approach this from a Business Ecosystem perspective considering both the external or “Macro” ecosystem that impacts the organization and the “Micro” ecosystem that defines the organization itself.

ENA Board Secretary [Brian Hettrick](#) has been the visionary in leading this transition into a world replete with disruption and distributed everything. *“Systems thinking will be a competency required by individuals and organizations to be successful in both their organizational and community ecosystems. This includes emphasizing the Baldrige Framework systems perspective to help individuals and organizations break down the silo mentality that prevents true agility and adaptability. Additionally, it brings more awareness and openness to unexpected opportunities along with the creativity and innovation to take advantage of them i.e., thriving on uncertainty as we flow into this quantum world.”*

ENA Board Chair, President & CEO of Northeast Delta Dental Tom Raffio provides this summary. *“From its inception, the GSQC has had a systems focus and collaborated with organizations having similar missions. Under the banner of the ExcellenceNorth Alliance, we believe this uniquely positions us to both lead the collaboration of interrelated industries to achieve thriving community networks and to help individual organizations identify and benefit from their individual ecosystems.”*

Learn more about ENA at our new [website \(https://excellencenorth.org\)](https://excellencenorth.org) which will continue to evolve as we do. You can continue to contact Executive Director Anne Warner at anne@gsqc.com or at her new email anne@excellencenorth.org.



The Oklahoma Quality Foundation 2019 Performance Excellence Program cycle is under way with applications already submitted and examiner training completed. The Board of Examiners have finished Independent review and are currently working on Stage 2 of the process, which is Consensus Review. We provided an additional resource for the Board of Examiners in the form of a weekly Tuesday “study hall” session from noon to 1:00 pm, throughout Independent Review. Although we couldn’t talk about applicant specific information on these calls, they provided great opportunities to get answers for challenges Examiners may have with the process, the criteria or Scorebook Navigator. Examiners were encouraged to hop on, get their question answered, and hop off if they didn’t want to stay for the entire session. They could stay on the entire call if they wanted to hear what others’ questions were and the answers. Examiners will have until August 24 to complete their Consensus Review so they are ready for the Consensus meetings held on August 26-28. They will also work on Site Visit issues during this time .

Site visits are scheduled to occur during September 8-20th.



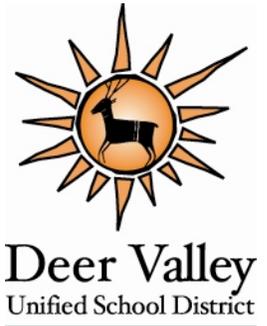
SAVE the DATE
Wednesday,
November 6, 2019



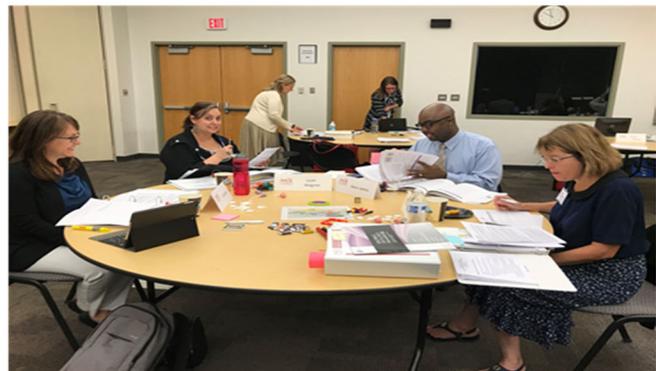
PERFORMANCE EXCELLENCE PROGRAM

2019 Board of Examiners Training in Phoenix

Our 2019 Performance Excellence Program cycle is gearing up with applications due August 12th. We are expecting three Level 4 applications and 1 Level 3 application. **Examiner training will be held on August 7 and 8 in Phoenix.** We have members of the Board of Examiners representing all industries and all three states: Arizona, Nevada and Utah. The Board of Examiners will start examining the applications August 16th with Site Visits occurring November 3 through 15th .



Our talented and dedicated volunteer trainers this year will be Regan City, Stacy Harley and Wayne Haggstrom. We appreciate all of our trainers for their invaluable service to the program. We would like to thank Deer Valley Unified School District for generously donating training space.



2019 TPE Award Recipients Announced

TPE recently completed their annual award cycle with over 65 volunteer examiners, judges, team leaders and trainers supporting the process. Five organizations will be recognized with awards at TPE's Quest for Success conference in September. The awards represent Ohio, Indiana & West Virginia's highest honor for performance excellence through innovation, results and visionary leadership using the Baldrige Excellence Framework. The 2019 Award Recipients who will be honored in September are:

- **Blanchard Valley Health System, Findlay, Ohio** (Platinum, Governor's Award for Excellence)
- **Hendricks Regional Health, Danville, Indiana** (Gold, Achievement of Excellence)
- **ProMedica, Toledo, Ohio** (Gold, Achievement of Excellence)
- **University Hospitals Conneaut and Geneva Medical Centers, Conneaut and Geneva, Ohio** (Silver, Commitment to Excellence)
- **University Hospitals Portage Medical Center, Ravenna, Ohio** (Silver, Commitment to Excellence)

ProMedica Health System will also be recognized with a Category Leadership Award for Category 1 and several organizations will be awarded with Spirit awards for completing an organizational profile and Pioneer awards for completing a 25-page application to the overall requirements.

TPE Quest for Success Conference – September 9 & 10, 2019

TPE's Quest for Success conference will take place September 9-10, 2019 at the Ohio State University 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 presentations and breakout sessions, networking and learning sessions. **2018 MBNQA recipients, Donor Alliance, Integrated Project Management Company, Memorial Hospital and Health Care Center and Tri-County Tech will present plenary presentations and break-out sessions.** Additional workshops feature TPE Award winners, and performance excellence professionals who will provide actionable ideas to implement new processes and strengthen management practices. Participants can register for the conference at http://thepartnershipforexcellence.org/events_quest_for_success.html



2018 Third Thursday Webinars!

TPE has partnered with Oklahoma Quality and the Southwest Alliance for Excellence to continue to offer complimentary webinars on the third Thursday of each month at 11:00 AM Eastern time. *These educational webinars provide information to assist organizations on their performance excellence journey.* In August, Rosamari McNulty, Vice President, Employee & Volunteer Solutions for Nathan Adelson Hospice in Las Vegas, Nevada will share The Nathan Adelson Hospice Quest for Performance Excellence story. To register for future Third Thursday webinars, visit our website at http://thepartnershipforexcellence.org/events_calendar.html

Helping Applicants Cross the “Finish” Line

We all know that the performance excellence journey doesn't really have a “finish” line, but we also know that if organizations aren't continuing to improve, they're really losing ground.

Do you have some organizations that are stuck in neutral gear, seemingly unable to achieve your program's highest level award? What are the most common causes you've seen?

Some that we've identified in organizations we've worked with are:

- ⇒ Embarking on the journey for the wrong reason – chasing the award rather than trying to become “Award Worthy”
- ⇒ Failure to do effective root cause analysis resulting in “fixing” the same problems over and over again
- ⇒ Not implementing a proactive process improvement methodology so that organizational learning accelerates progress
- ⇒ Not engaging all levels and all functions in being part of the journey
- ⇒ Not selecting relevant comparisons from high-performing organizations and being satisfied with comparing favorably to state and national averages
- ⇒ Taking a year off from submitting an application, losing momentum and the opportunity to receive more objective feedback

Since feedback reports, by design, are non-prescriptive, many organizations fail to recognize and prioritize which opportunities for improvement (OFIs) should be addressed to take them to the next level.

We'd like to make a complimentary offer to any of your applicants who find themselves wanting to gain traction and accelerate their progress. We'll review their latest application and feedback report and schedule a 30-minute phone consultation. We'll offer our recommendations for 2 or 3 actions they should implement to regain momentum and propel them forward on their journey. There is no further obligation.

Level 3 Application Development Made Easy

PERFORMANCE
IMPROVEMENT
NOTES



Preparing a well-written Level 3 Application is a great way to begin your performance improvement journey.

7 SIMPLE STEPS TO DEVELOP A WELL-WRITTEN LEVEL 3 AWARD APPLICATION

Thousands of organizations around the world use the Malcolm Baldrige Criteria for Performance Excellence (Baldrige Criteria) to improve and attain sustainable results. Why is it so successful? The Baldrige Criteria expresses what great organizations should do to be successful!

Your leaders may seek an evaluation of how well the organization is employing the Baldrige Criteria. To obtain such evaluation, the organization must answer the Baldrige Criteria questions by documenting its key organizational processes. This information is often called an Application. The organization then submits the Application to a state or regional performance excellence award program for evaluation. A team of evaluators assesses the Application against the Baldrige Criteria and provides Feedback. The Feedback provides the organization's leaders with an assessment of how well the organization is meeting the Baldrige Criteria.

Answering all the Baldrige Criteria questions can be a daunting task. Many Performance Excellence Award Organizations (PEAO) now offer what is called a Level 3 Application, which contains about 75% fewer questions than the full Baldrige Criteria. Think of the Level 3 Criteria as "Baldrige lite." Many organizations find it easier to submit a "Level 3 Application" to their PEAO to gain valuable Feedback on how well they are applying the Baldrige principles.

The Application is also an excellent tool to educate Board members and employees about: organizational goals; key processes; and key measures of performance.

The Seven Steps below make it easier to produce a well-written Level 3 Application. Using them will help an organization complete the Application better, faster, and more efficiently. A well-written application will earn Feedback from its PEAO that sheds light on the organizations' strengths and improvement opportunities. The Feedback becomes the organization's guide to improve its operation's performance. [Click on this link to continue reading](#)