

The Foundation for the Malcolm Baldrige National Quality Award



“The award that bears his name reflects the virtues that he brought to public service and how he lived in his private life, a commitment to excellence, shrewd judgment and sound judgment, principled leadership, integrity, and a sense of responsibility.”

George W. Bush
President of the United States
March 7, 2002



Opening Remarks/Agenda

Introduction	Al Faber, President & CEO, Baldrige Foundation
Strategy Execution	Ben Sawyer, President and CEO, SOAR Vision Group
Questions	Audience
Foundation Update	Al Faber, President & CEO, Baldrige Foundation
Baldrige Performance Excellence Program Update	Bob Fangmeyer, Director, BPEP
Alliance for Performance Excellence Update	Brian Lassiter, Chair, Alliance Board of Directors
Closing Remarks	Al Faber

Special thanks to our Foundation Partners



The Synergy Organization

Transforming Healthcare With Evidence-Based Leadership Talent

**Evidence-Based Executive Search,
Assessments and Consulting**



**Designing stakeholder insights programs that
align to the Baldrige Criteria**

**WALDEN
UNIVERSITY**

A higher degree. A higher purpose.

**Providing a variety of education opportunities
and credit to members of the Baldrige
Community**



**A strategy execution system that aligns people
with purpose to achieve exceptional results**

Foundation Partner – SOAR Vision Group

SPONSORS:

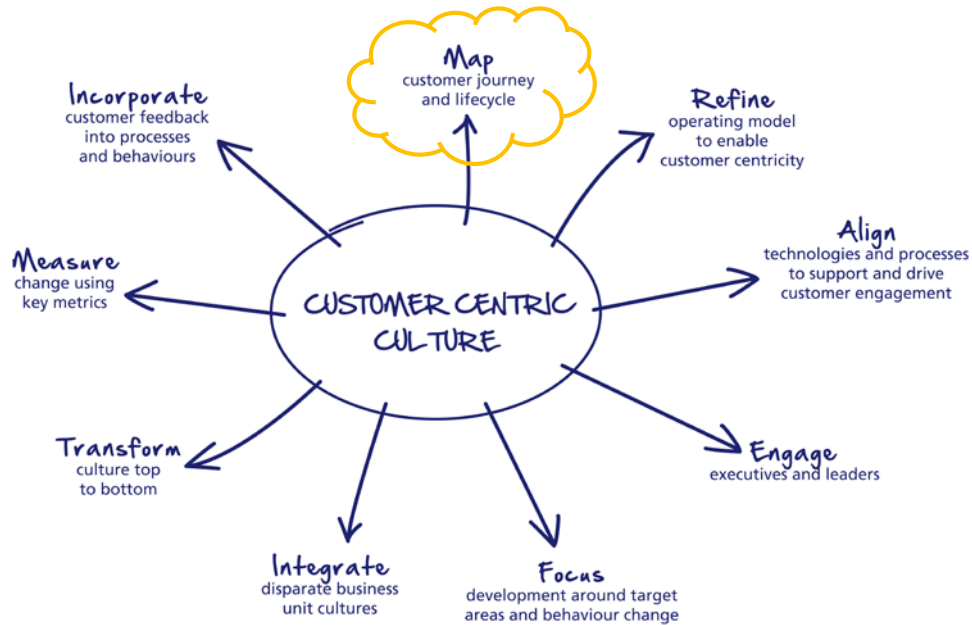


Strategize. Organize. Activate. Recalibrate.



The New Normal

Adapting to the Age of Consumerism



Age of Consumerism

Requirements

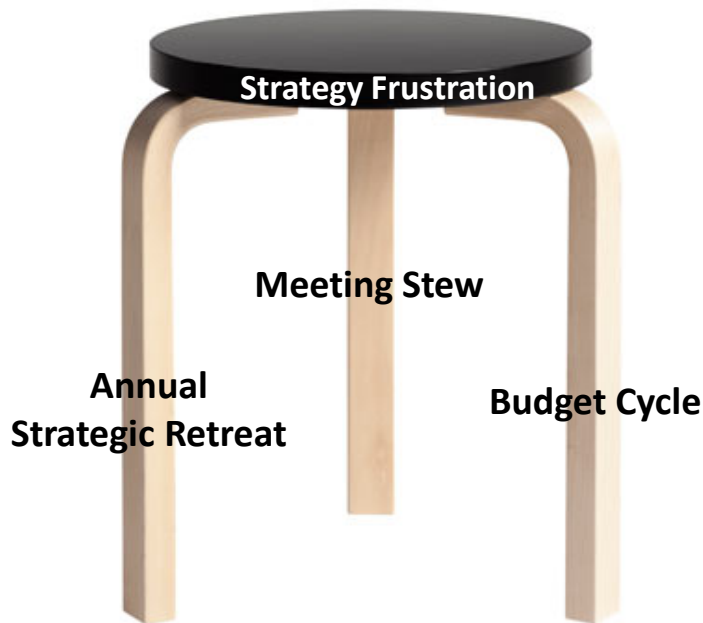
1. Challenge clarification
2. Solution visualization
3. Relevant communication
4. Readily applicable structure
5. Acceleration from strategy to results

1) Challenge Clarification

Adapting to the Age of Consumerism

Challenge Clarification Example

The Realities of Failed Strategy Execution



5% Percentage of employees who understand how their job connects to the organization's strategy

21% Percentage of middle managers who can recognize their organization's strategy when made available to them

87% Percentage of companies that fail to achieve their profitability targets because they cannot execute on their strategy

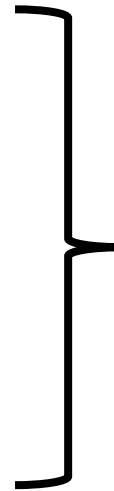
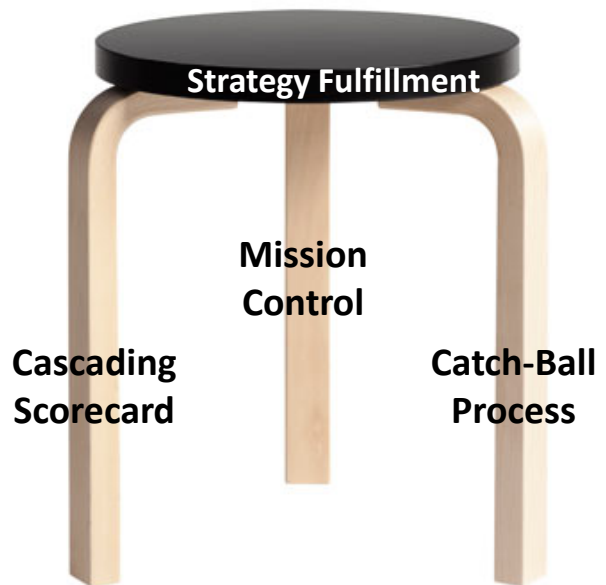


2) Solution Visualization

Adapting to the Age of Consumerism

Solution Visualization Example

Solving the Strategy Execution Dilemma



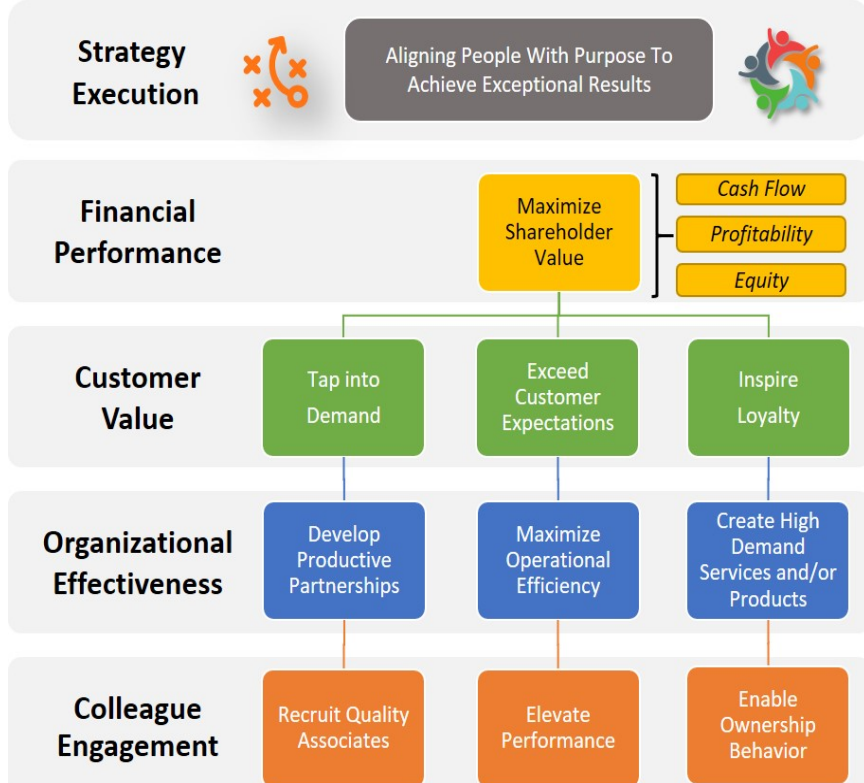
Dramatic Improvements in:

- Financial performance
- Customer value creation
- Organizational effectiveness
- Colleague engagement

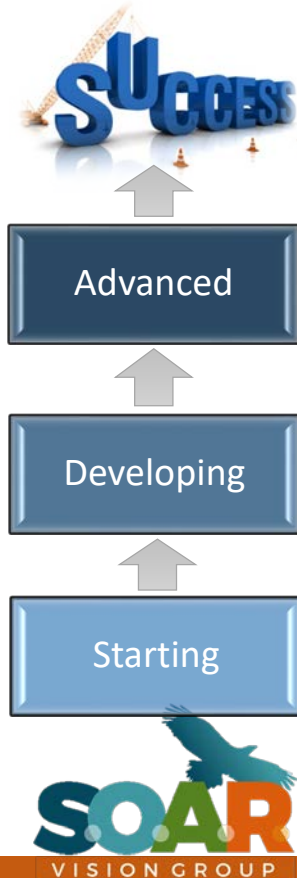
Solution Visualization: *What is the Winning Combination?*

Visual Baldrige: The Organizational Hierarchy of Needs

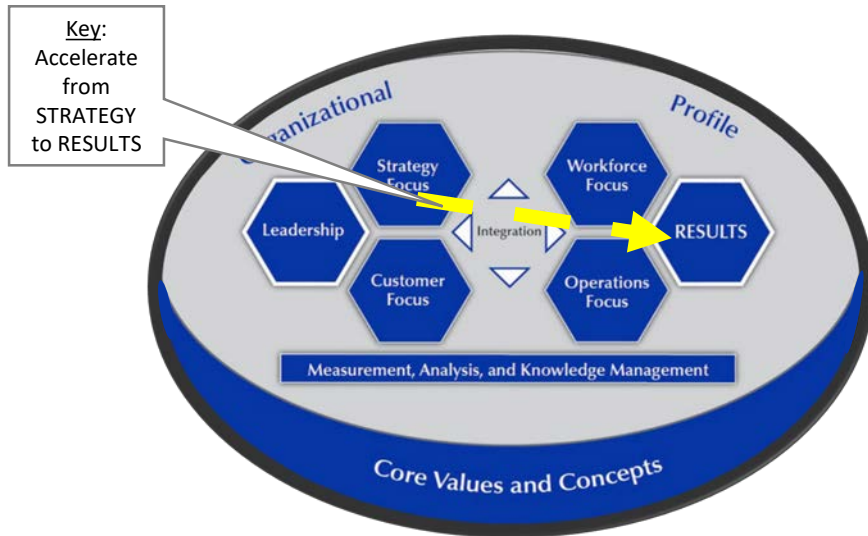
Keys: Effective Leadership & Persistent Curiosity



- Best performing organizations innovate (**Strategize**) then execute seamlessly on every **category of performance** that matters!
- Categories of performance are reflected in the **organizational hierarchy of needs**, starting with strategy execution.
- **Strategy Execution** involves (3) key steps:
 1. **Organize** - Differentiate performance.
 2. **Activate** - Engage associates to execute seamlessly.
 3. **Recalibrate** - Measure performance to expectations and adjust course as necessary.
- Regardless of an organization’s maturity journey, **winners** always clarify what matters, and then execute seamlessly.



The Baldrige Performance Excellence Framework



Solution Visualization

Category 1: LEADERSHIP

Category 2: STRATEGY

Category 3: CUSTOMERS

Category 4: MEASUREMENT, ANALYSIS, & KNOWLEDGE MANAGEMENT

Category 5: WORKFORCE

Category 6: OPERATIONS

Category 7: RESULTS

communities of excellence 2026



- What is your community, and what is important to it? [Community Profile](#)
- Where do you want to go? [Vision](#)
- How will your community prepare for the future? [Community Strategic Planning](#)
- What are the gaps and how do you as a community engage to prioritize which ones to focus on first, next? [Strategy Execution System](#)
- How will you know when you get there? [Results](#)

3) Relevant Communication

Adapting to the Age of Consumerism



STRATEGY DEPLOYMENT ▾ WHY BALDRIGE ABOUT SOLUTIONS ▾ EVENTS PODCAST BLOG CONTACT

Successful Strategy Execution

Everybody has a playbook. Execution is the challenge.

That's why 7 of 8 companies failed to achieve profitable growth. Any slips or missteps can be disastrous.

LET'S TALK

EFFECTIVE STRATEGY EXECUTION INVOLVES THREE KEY STEPS:

- ✓ DIFFERENTIATING YOUR ORGANIZATION
- ✓ ENGAGING ASSOCIATES FOR SEAMLESS EXECUTION
- ✓ MEASURING PERFORMANCE AND ADJUSTING COURSE

Relevant Communication





15 The Art &

Relevant Communication



LEADER DIALOGUE: The
Baldrige Journey vs. The
Destination



Relevant Communication: Leader Dialogue

SAVE THE DATE



WSJ. CUSTOM STUDIOS **BALDRIGE FOUNDATION**

You are invited, by the President and CEO of the **Baldrige Foundation** and the **Wall Street Journal** (via the Tech-Mahindra *In the Future* symposiums) to participate in the charter event of the:

HEALTHCARE CEO INNOVATION COUNCIL

THEME

PERFORMANCE EXCELLENCE IN THE AGE OF CONSUMERISM

Healthcare CEO Innovation Council

AN EXCLUSIVE INVITATION TO JOIN 20 OF YOUR HEALTH SYSTEM CEO COLLEAGUES, IN THE CHARTER EVENT OF THE HEALTHCARE CEO INNOVATION COUNCIL ON **OCTOBER 18-19**, AT THE KIMPTON GRAY HOTEL, CHICAGO, ILLINOIS.

CO-FACILITATORS:
Roger W. Spoelman, DBA, MBA Interim CEO, Loyola University Medical Center and SVP, Strategic and Operational Integration
 Trinity Health
Ben Sawyer, CEO, SOAR Vision Group.

Theme: PERFORMANCE EXCELLENCE IN THE AGE OF CONSUMERISM

RSVP: www.leaderdialogue.com/ceoroundtable

DAY ONE (8:00 AM to 4:00 PM)

- Keynote: **Morten Hansen, PhD** – Author of the new Book, *Great at Work*, and co-author with Jim Collins of *Great by Choice*.
- Strategy Execution in the Age of Consumerism
- Leveraging IT Innovation to Maximize Performance and Decrease Operating Expenses

RECOGNITION DINNER: (6:00 PM to 8:30 PM)
 Acknowledgement of an outstanding Health System Strategy Execution Leader by the Baldrige Foundation and the SOAR Vision Group

DAY TWO (8:00 AM to 11:00 AM)

- Cascading Strategy Example: Patient Safety Organization approach, demonstrating High Reliability Performance
- Co-facilitator: Dr. Mark Crockett, MD., CEO Verge Health

BALDRIGE FOUNDATION PARTNER **LEADER DIALOGUE SERIES** **SOAR VISION GROUP**

baldrigefoundation.org www.leaderdialogue.com www.soarvisiongroup.com

SPONSORS: **HCI group** **VERGE HEALTH** **Tech Mahindra**

October 18-19, Chicago, Ill.



4) Readily Applicable Structure

Adapting to the Age of Consumerism

Readily Applicable Structure

Strategy Execution System

PAIN POINTS

1. Frontline actions are not always linked to organizational goals
2. Sorting through disparate sources to get to actionable data is time consuming
3. Current resources are stretched thin among disparate projects
4. Improvement initiatives in one department may directly conflict with organizational goals
5. Growth is limited by existing capacity constraints and inefficiencies



VALUE PROPOSITION

1. Effectively aligns senior leader decision making with frontline operations
2. Establishes a review and cadence cycle to keep the organization on track
3. Engages employees, empowering them to work together to solve performance gaps
4. Builds a culture of trust, developing exceptional brand and customer loyalty
5. Improves financial performance, expanding organizational and market capabilities

ADDRESS THE GAPS

STRATEGY EXECUTION COMPONENTS

DEPLOYMENT PROCESS

1

KNOWLEDGE GAP:

Research shows that only 5% of a company's employees are aware of and understand how the company strategy impacts their job function.

STRATEGY DEPLOYMENT

Achieve strategic execution alignment. Five courses: Foundations; **S**trategize; **O**rganize; **A**ctivate; and **R**ecalibrate address this.

2

PERFORMANCE GAP:

Excessive process waste, compromising customer value, poor information flow and decision rights management compromise performance.

OPERATIONAL EXECUTION

Performance gap analysis, problem solving tools, and cascading scorecard development instruction: to drive exceptional customer value. Provided in conjunction with each e-learning course.

3

VISIBILITY GAP:

Most leaders don't realize that their strategy is not working until it is too late to recover.

CASCADING SCORECARD

Cloud based real-time Tracking software. Makes visible in real-time what is impacting performance, providing each person their view of what they are accountable to achieve.



PARTNER



Strategize. Organize. Activate. Recalibrate.

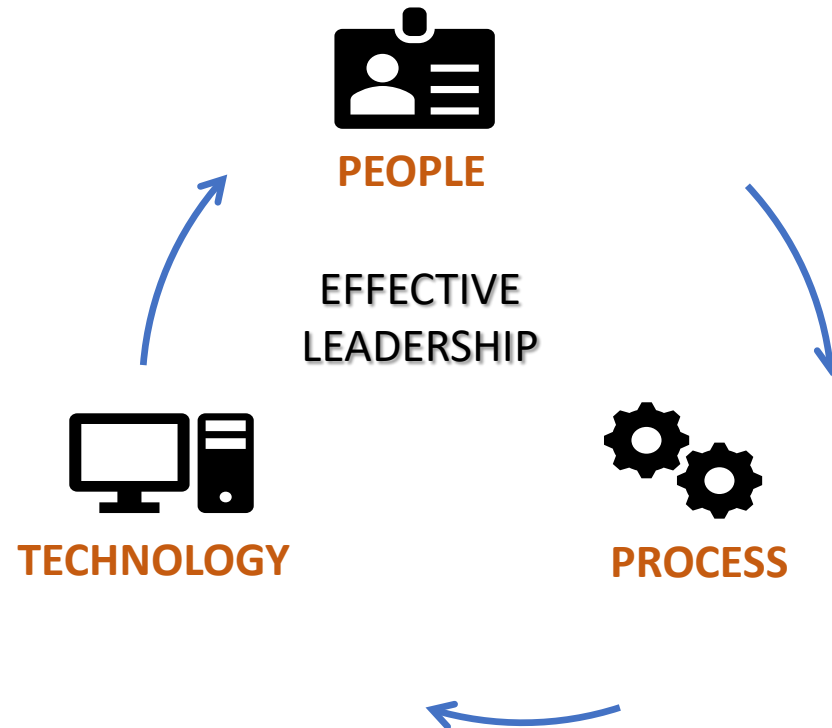


5) Acceleration from Strategy to Results

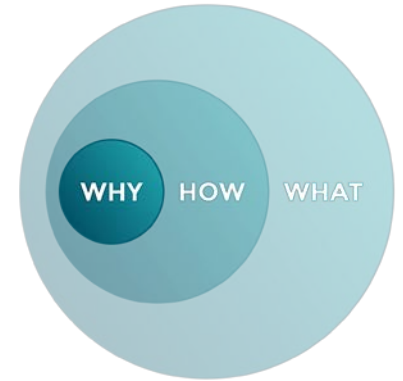
Adapting to the Age of Consumerism

Acceleration From Strategy to Results

To achieve the desired results, leaders must optimize the *capability* and *performance* of...

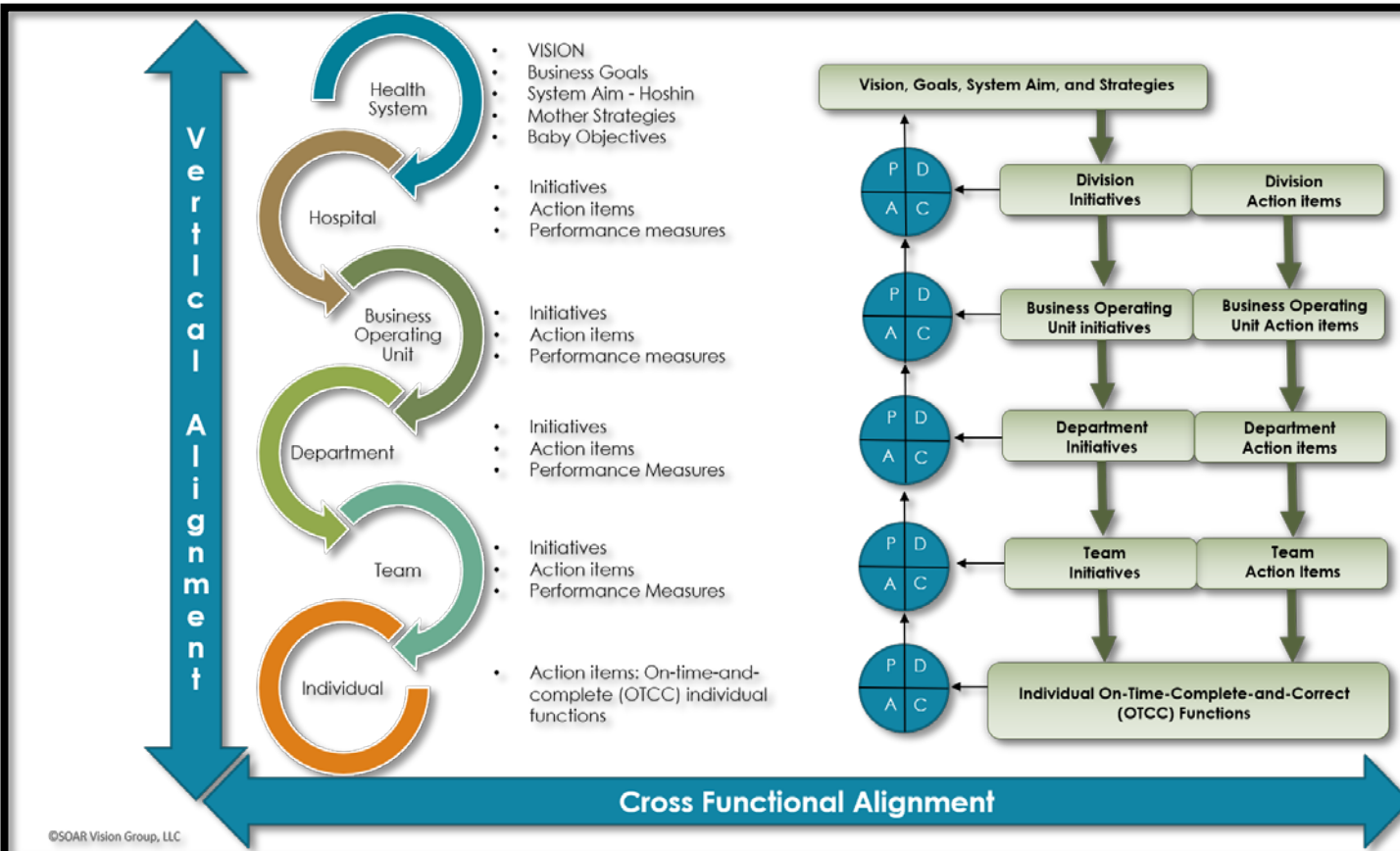


Acceleration from Strategy to Results: Cascading Scorecard



The Power of 'WHY'

Inspiration through
Purpose,
Cause,
and
Belief



©SOAR Vision Group, LLC

Acceleration from Strategy to Results: **Mission Control**



EFFECTIVE COMMUNICATION FLYWHEEL



Standards must be defined, followed, and revisited often.

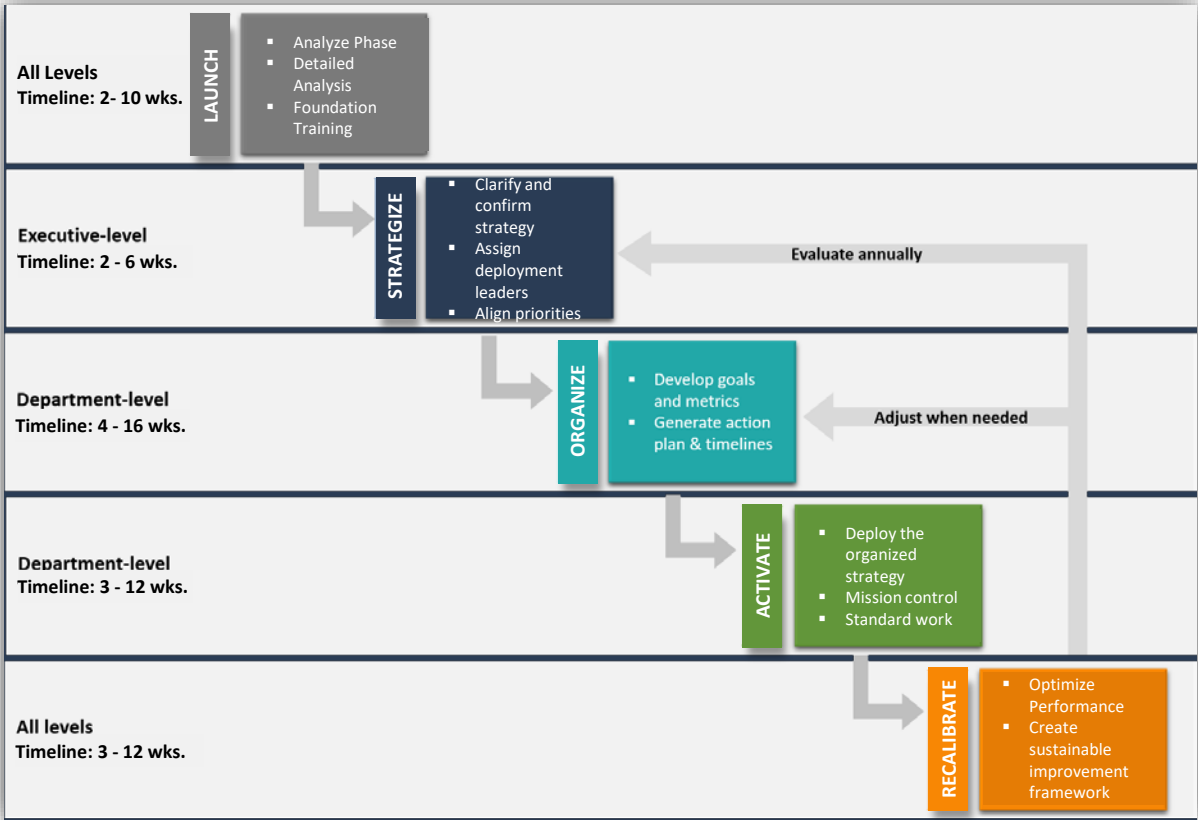
“It’s easier to act your way into a new way of thinking than to think your way into a new way of acting.”



Acceleration from Strategy to Results: **Learn & Adjust**



Acceleration from Strategy to Results: Deployment Process



PARTNER





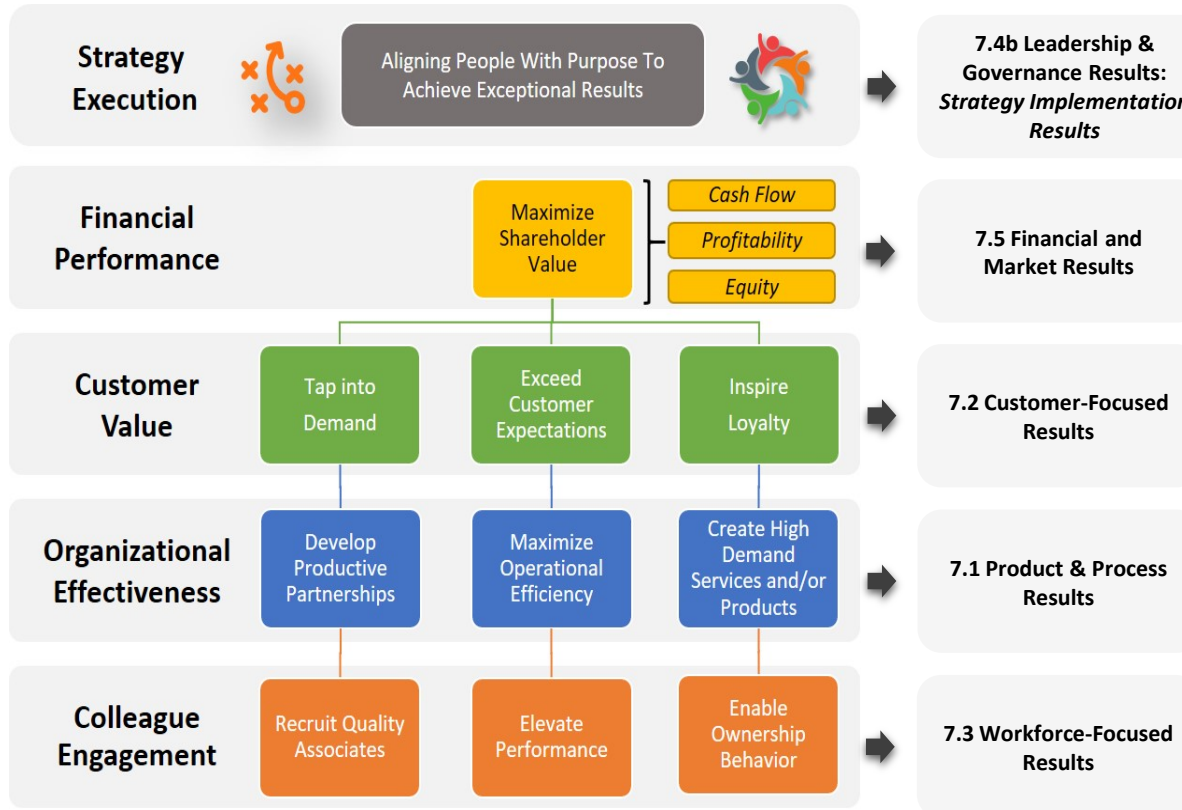
6) Putting it All Together

Adapting to the Age of Consumerism

Putting it All Together

Visual Baldrige: The Organizational Hierarchy of Needs

Keys: Effective Leadership & Persistent Curiosity



BALDRIGE FRAMEWORK: RESULTS CATEGORY

Best performing organizations innovate (**Strategize**) then execute seamlessly on every **category of performance** that matters!

- Categories of performance are reflected in the **organizational hierarchy of needs**, starting with strategy execution.

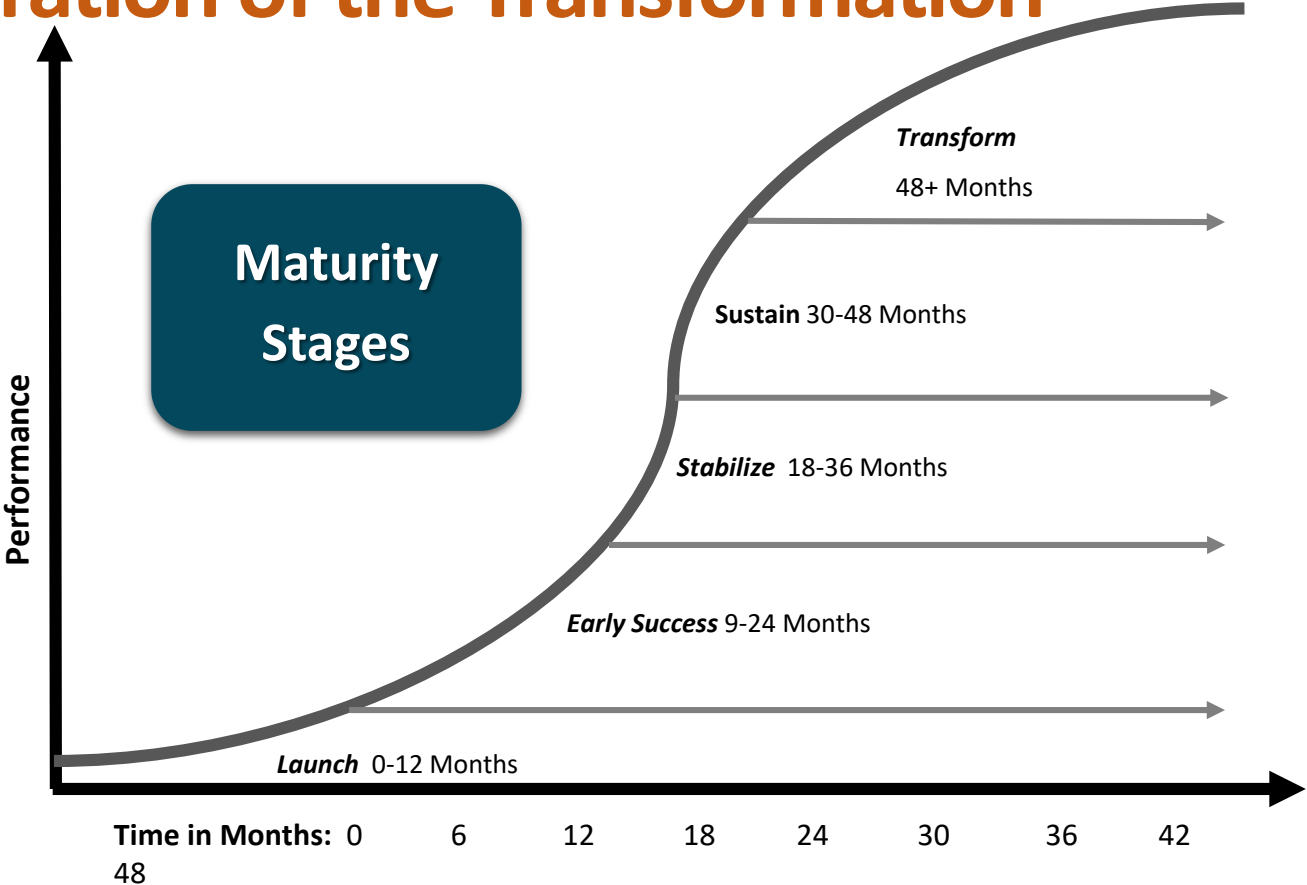
- **Strategy Execution** involves (3) key steps:

1. **Organize** - Differentiate performance.
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Organizational Hierarchy of Needs components are directly measured by the Baldrige Framework: Results category.



Acceleration of the Transformation




7) Questions or Comments?

Adapting to the Age of Consumerism

Foundation Update


Quarterly Webinar – Q4 – September 2018

The Foundation for the Malcolm Baldrige National Quality Award



“The award that bears his name reflects the virtues that he brought to public service and how he lived in his private life, a commitment to excellence, shrewd judgment and sound judgment, principled leadership, integrity, and a sense of responsibility.”

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www.baldrigefoundation.org

1



Four Strategic Imperatives-

ORGANIZATIONAL ALIGNMENT: STRATEGY – BUDGET – ACCOUNTABILITY

ADVOCACY

- Priority #1.** Restore BPEP in the Federal Budget and the President's Agenda.
- Priority #2.** Develop Strategic Alliances. Congress; Departments of: Education; Defense; Health and Human Services; Veterans Affairs; Small Business Administration; and others like ACHE, CHIME
- Priority #3.** Build Grass Roots Support including State Programs.

FUNDRAISING

Message

- Bold, Dynamic, Inspirational Message
- Build and Grow Constituency
- Strategic Communications (Internal/External)
- Media Relations – Print, TV, Radio, Internet
- Announcements Online & Print Advertising
- Leverage Social Media

Fundraising

- Small Donations, Major Gifts, Planned Giving
- Combined Federal Campaign with State Programs, Business Partnerships



BOARD DEVELOPMENT

- Working Board – Trustee Board
- Embrace the Mission and Work as a "Team"
- Contribute financially and seek support
- Make connections and offer expertise
- Represent the organization

FOUNDATION OPERATIONS

- Baldrige-Based using the Framework
- Customer Focused/Driven in Everything We Do
- Stewardship Beyond Reproach
- Continuously Improving
- Adding Value to the Enterprise



" Ensure the long-term financial growth and viability of the Baldrige Performance Excellence Program..."



...and to support organizational performance excellence in the United States and throughout the world"



"America's Most Influential Leaders – Supporting the Nation's Quality Awards Program."



Baldrige-Based, Leads by Example: "Confident, Deliberate, Process Driven, Accountable"



"To be recognized around the world as the premier foundation for the promotion of performance excellence in all sectors of the economy."

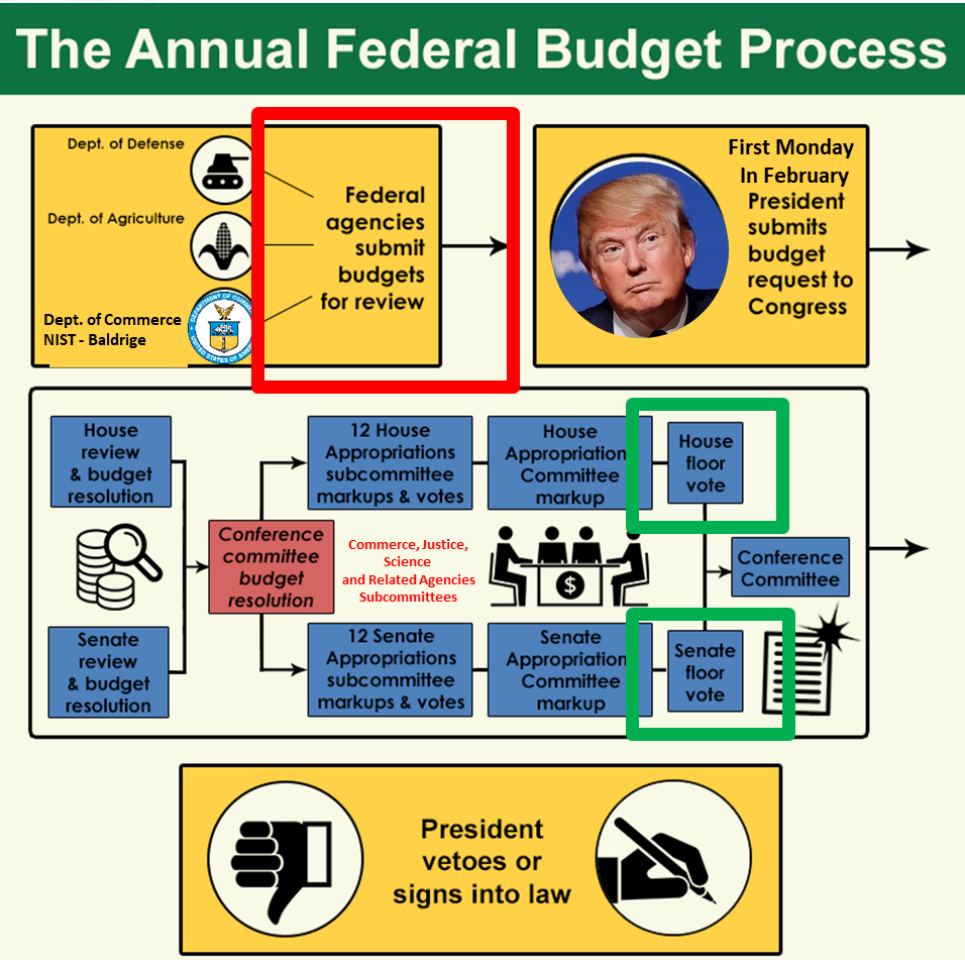
We will inspire organizations to achieve excellence in all they do with pride and societal responsibility. Together with our stakeholders we will create value through research and deployment of the latest cutting-edge management practices. We will focus on the future and manage for agility, innovation and creativity. Our Baldrige-based role-model performance will result in the Foundation's endowment exceeding \$135 million by 2050.

(Photos courtesy of MBNQA Recipients)

ADVOCACY

Priority #1. Restore BPEP in the Federal Budget and the President's Agenda.

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- Priority #3. Build Grass Roots Support including State Programs.



FY19

FY20

US SENATE- COMMERCE, JUSTICE, SCIENCE SUBCOMMITTEE

By State Program



Fundraising

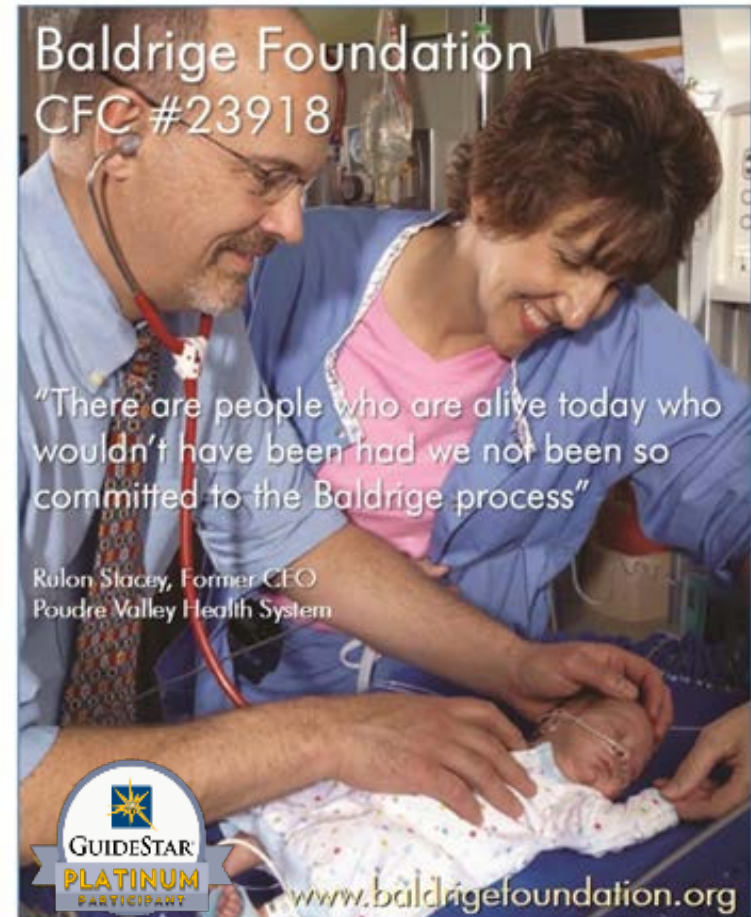


Combined Federal Campaign

2018

Your donation can help us transform lives. Baldrige facilitates higher quality, accessible health care in urban and rural communities, increased performance in K-12 and higher education, and economic prosperity and growth throughout the United States.

100% to State Programs this Year!



Fundraising

<https://smile.amazon.com/>

Welcome to
amazonsmile

You shop. **Amazon gives.**

- Amazon donates 0.5% of the price of your eligible AmazonSmile purchases to the charitable organization of your choice.
- AmazonSmile is the same Amazon you know. Same products, same prices, same service.
- Support your charitable organization by starting your shopping at

Support the Foundation just by shopping at Amazon. Choose Baldrige Foundation as your charity and shop as usual. <http://ow.ly/Y1L1304sTHx>



#SupportBaldrige

Do you shop on Amazon.com? Do you want to help **#SupportBaldrige**? Now you can do both. AmazonSmile is a program in which Amazon pays a percentage of each qualifying sale to a charity of your choice, including the Baldrige Foundation.

Check it out at smile.amazon.com. Log in with your regular Amazon userid and password, then select the Baldrige Foundation as your charity of choice. That's it. Bookmark the AmazonSmile login for your future logins, and you can help generate funds for the Baldrige Foundation every time you shop.

BALDRIGE - America's Best Investment

Who We Are What We Do Contribute Get Involved Resources SEARCH

Shop at Amazon Smile to Support the Baldrige Foundation



It's easy to do. Watch the video for simple step-by-step instructions.

Instead of going to the main Amazon.com website, go to AmazonSmile.

On your first visit to AmazonSmile (smile.amazon.com), you are prompted to select a charitable organization from the list of eligible organizations. Scroll

Contribute

- Why Contribute
- Donate for the Growth of Baldrige
- Combined Federal Campaign >
- Donate Through Amazon Smile
- Planned Giving
- Donate to the Dr. Curt Reimann Scholarship Fund
- Corporate Contributors
- Our Supporters



GET READY TO SEE THE WORLD DIFFERENTLY WITH A WALDEN EDUCATION

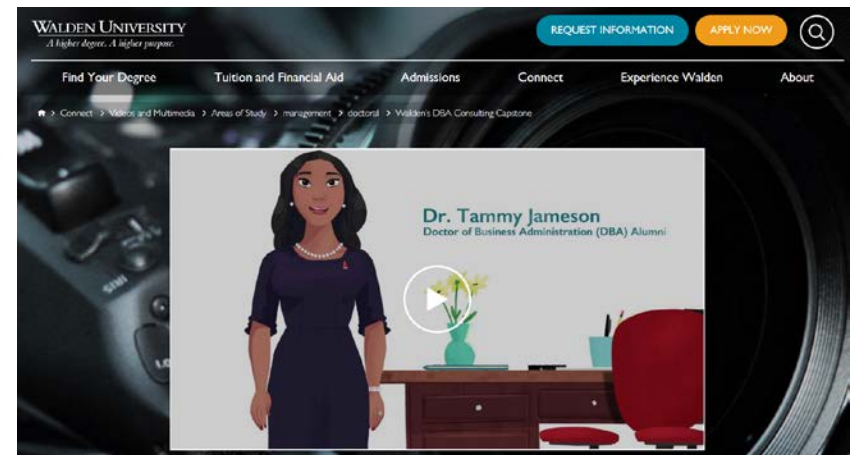
Receive up to \$3000 in tuition grants

Are you an employee of a Baldrige national or Alliance award-winning organization? You may be eligible for reduced tuition to help you ignite your passion and achieve your career goals. Enroll at Walden University, and you could receive a limited-time \$3,000 tuition grant.*

Whether you're beginning a new chapter of your career or simply want to expand your knowledge, Walden can help make your education more accessible.

Choose from over 85 degree programs with more than 435 specializations and concentrations to meet and exceed your career goals, including:

- Doctor of Business Administration
- PhD in Criminal Justice
- Doctor of Education
- Doctor of Information Technology
- PhD in Nursing
- Doctor of Healthcare Administration

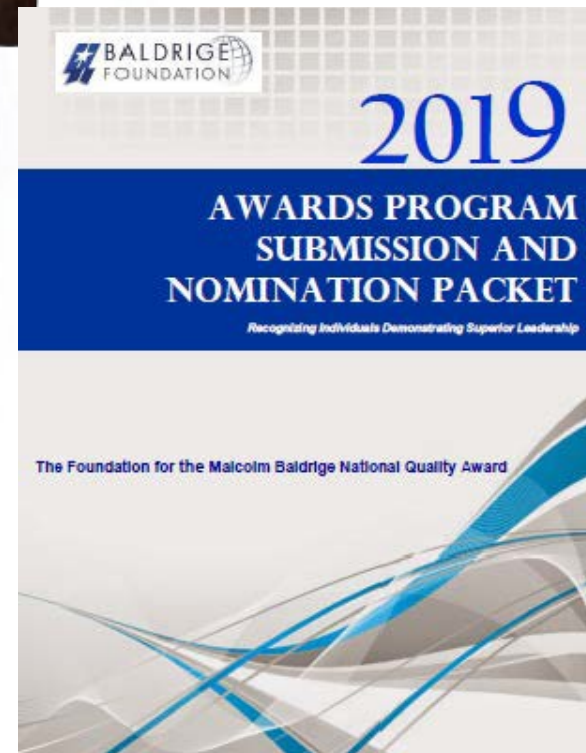


Awards Committee Update

Paul Worstell, Chair

Committee Update

- ❑ 2019 Awards Program Submission and Nomination Packet is posted to the web site
- ❑ The nomination window opened April 15th and closes September 30, 2018
- ❑ Reimann Baldrige Scholarship Update:
 - ❑ Both 2018 recipients have already completed the Baldrige Examiner Training Experience (BETE) course in Gaithersburg, Maryland



Baldrige Performance Excellence Program

Bob Fangmeyer, Director

Program Update | September 27, 2018



2018 Baldrige Award Process

- 12/27 Applicants receiving site visits
 - 4 Education; 3 Healthcare; 3 Nonprofit; 2 Small business (1 mfg/1 svc)
- Judges meet Nov 5-9 to determine recipients
- Award Process Pilot
 - Prior recipient as applicant
 - 6 member team
 - Completed independent analysis, “virtual site visit”, consensus on findings and scores
 - Preparing final report
 - Feedback so far...

Award Process Pilot – feedback so far...

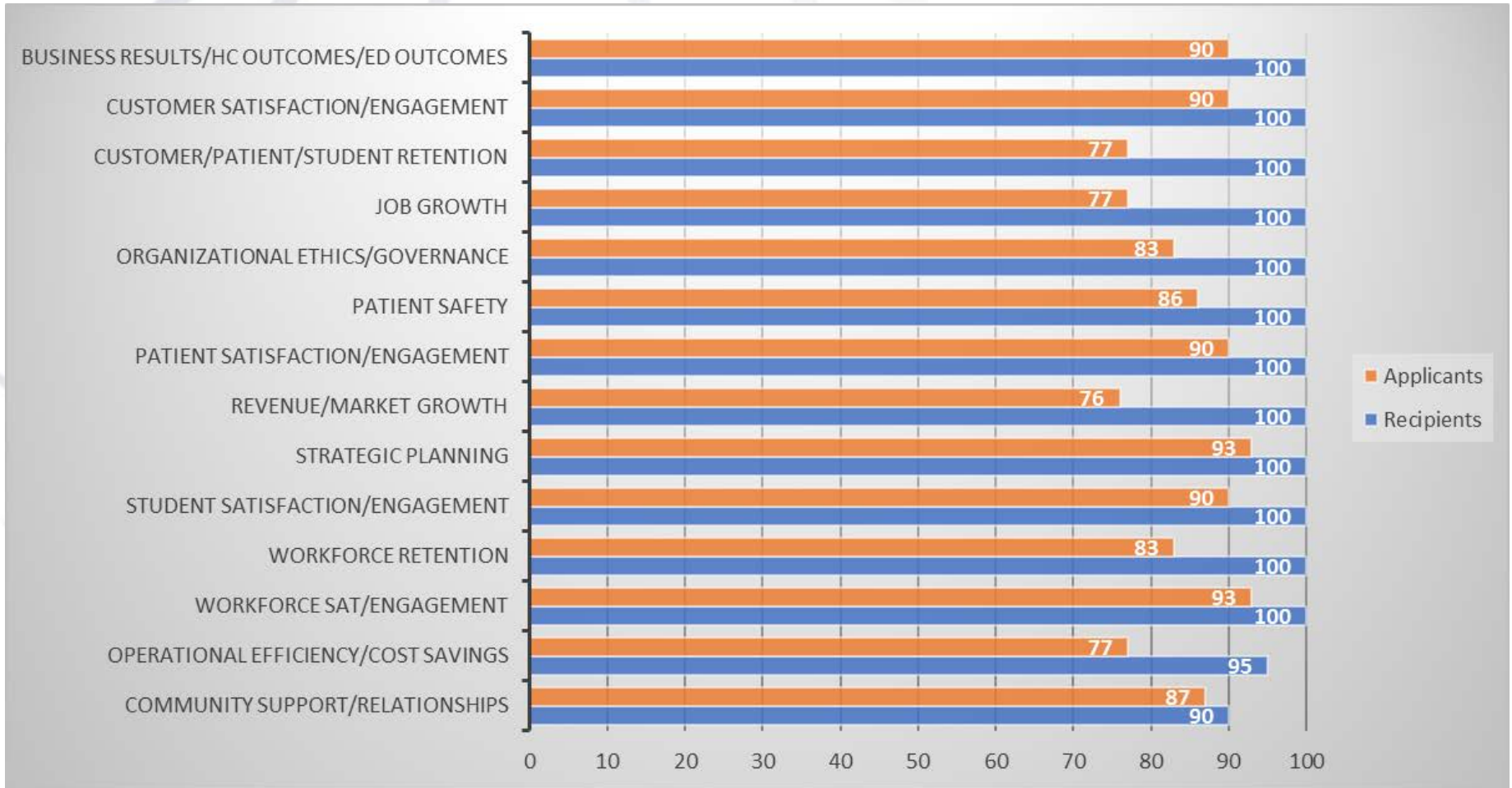
- Examiners believe the process is more efficient, takes less time/effort, and allows them to focus on adding value to applicant rather than crafting finely tuned comments
- Examiners and applicant really appreciated the “virtual site visit”, both believe it adds significant value to the process.
- Open questions...
 - Does applicant find the new form of feedback as good or better than previous approach?
 - Can the process be brought to scale with the “average” team?
 - Can we significantly reduce the overall cycle time?

Baldrige Excellence Framework Revision

- Publication December 2018/January 2019
- Business/Nonprofit criteria is in final draft
- Healthcare and Education are next
- Followed by the Excellence Builder, and the Cybersecurity Excellence Builder
- International Programs updating their models



Survey of All Baldrige Award Applicants



Strategic Challenges and Initiatives

- Re-engage with manufacturing and business
- Presidential participation in Award Ceremony
- Enhance award applicant pipeline
- Strengthen entire Baldrige Enterprise
- Evolution of the framework
- Award process redesign
- Communities of Excellence
- Cybersecurity
- NEW- Privacy?
- NEW- American Workforce Executive Order

Alliance for Performance Excellence

**Baldrige Foundation Quarterly Webinar Update
September 27, 2018**



Learn. Share. Connect.

Alliance: the “Front Door” to Baldrige

- **Mission:** “Enhancing Our Members’ Ability to Grow Baldrige-based Performance Excellence”
- **Vision:** To be the premier resource for a thriving Baldrige community
- 29 programs serving 50 states and US Territories
- Nearly 1500 annual applications received (160 full)
- Over 1700 examiners, 40 staff, 500 other volunteers
- Nearly 18,000 members, ~\$9M combined budget



Key Updates this Quarter

- **Baldrige Fall Conference: October 23-24, Denver**
- **Consider *Baldrige Express* online assessment tool**
- **Participating with other Baldrige Enterprise partners on two strategic Task Forces**
 - **Business Development**
 - **Examiner Training**
- **Launched Alliance Task Forces on two strategic priorities**
 - **Guidelines for lower levels of Tiered Awards**
 - **Inventory of services across Alliance member programs**



Questions?

Foundation Quarterly Webinar



Baldrige – *America's Best Investment*

A Special Thanks to Our Donors & Sponsors!

The Baldrige Family
Midge, Molly, & Megan

