



# 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



*"I was proud as a U.S. Senator to vote in favor of the Baldrige Act..." this award has helped us re-focus on the future, on quality, on performance, and most importantly maybe, on innovation."*

Joe Biden

*"In just a few years, the National Quality Award has literally become the standard of business excellence. And the renewed spirit of excellence in business, of making quality an integral part of America's corporate strategy, has truly, I believe, made us more competitive in the international arena."*

George H.W. Bush

*"The Malcolm Baldrige National Quality Award, which highlights customer satisfaction, workforce empowerment, and increased productivity, has come to symbolize America's commitment to excellence."*

Bill Clinton

*"I always prized the quality of Mac's vision. He had the capacity to look up from the dust of the plains to see the distant mountains."*

Ronald Reagan







**Presents:**  
**2022 Baldridge Enterprise Update**

**March 24<sup>th</sup>, 2022**





### Mac Baldrige Society Institute Trustees



## A Special Thanks to Our Donors & Sponsors!



## Opening Remarks/Agenda

**Introduction**

**Al Faber**

**Guest Presenters**

**Bob Fangmeyer, Director, Baldrige Program, NIST**

**Al Faber, President & CEO, Baldrige Foundation**

**Brian Lassiter, Chair, Alliance for Performance Excellence Board of Directors**

**Lowell Kruse, Chair, Community of Excellence 2026**

**Questions from the  
Audience**

**Al Faber, Moderator**

**Closing Remarks**

**Al Faber**

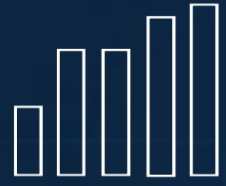


# Baldrige Performance Excellence Program

Robert Fangmeyer, Director BPEP







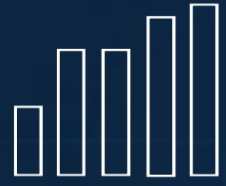
# 2022 Operational Plans



Baldrige Performance Excellence Program | [www.nist.gov/baldrige](http://www.nist.gov/baldrige)

- In-person Award Ceremony and Quest for Excellence conference
- In-person Judges and Overseers meetings in June
- In-person Fellows' meetings throughout the year
- Redesigned Award Process rollout
- Virtual Examiner Training
- Framework revision process underway; 2023-2024 versions available 1/23





# Ceremony and Quest for Excellence

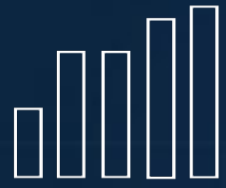
NIST

Baldrige Performance Excellence Program | [www.nist.gov/baldrige](http://www.nist.gov/baldrige)

- Quest for Excellence – April 3-6, Gaylord National Harbor
- Ceremony – April 2, honoring three years' worth of recipients (14)
  - [The Charter School of San Diego \(education, 2021\)](#)
  - [Mid-America Transplant \(nonprofit, 2021\)](#)
  - [MidwayUSA \(service, 2021\)](#)
  - AARP (nonprofit, 2020)
  - Elevations Credit Union (nonprofit, 2020)
  - GBMC HealthCare, Inc. (health care, 2020)
  - MESA (small business, 2020)
  - Wellstar Paulding Hospital (health care, 2020)
  - [Adventist Health White Memorial \(health care, 2019\)](#)
  - [Center for Organ Recovery & Education \(CORE\) \(nonprofit, 2019\)](#)
  - [City of Germantown, Tennessee \(nonprofit, 2019\)](#)
  - [Howard Community College \(education, 2019\)](#)
  - [Illinois Municipal Retirement Fund \(nonprofit, 2019\)](#)
  - [Mary Greeley Medical Center \(health care, 2019\)](#)







# Award Process Redesign

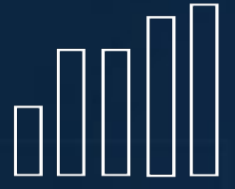


Baldrige Performance Excellence Program | [www.nist.gov/baldrige](http://www.nist.gov/baldrige)

- 2020 rollout delayed due to covid
- Leaned out the evaluation process
- Created more opportunities for applicant to engage with the team
- Simplified comments
- Feedback will include scoring rationale
- Shared with Alliance programs and COE







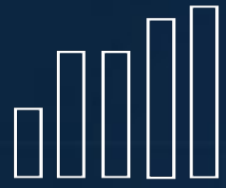
# 2022 Examiner Training



Baldrige Performance Excellence Program | [www.nist.gov/baldrige](http://www.nist.gov/baldrige)

- 100% virtual leveraging best practices and lessons learned
- Combination of synchronous and asynchronous modules, imbedded quizzes, and group discussions around key changes and other learning objectives
- 7 weeks in duration, paced for optimal flexibility and learning
- Extra-challenging since this is new for everyone, including training facilitators





# Framework Revision Process



Baldrige Performance Excellence Program | [www.nist.gov/baldrige](http://www.nist.gov/baldrige)

- Actively collecting inputs from inside and outside the Baldrige community
- Ongoing review of various journals and articles looking for evidence-based improvements in management and leadership
- Six focus group webinars are planned for May and June to explore potential changes, thematically as well as specific changes
- Draft changes will be shared with broad set of stakeholders
- Final versions to be released in Late December/Early January
- Excellence Builder, Communities framework to follow





# BPEP 2021-2025 Strategic Plan



Purpose: Improve performance and ensure long-term success of organizations and thereby enhance the competitiveness of the nation  
 Mission: Define, recognize, and foster organizational excellence in every sector  
 Vision: Enhance the quality of life for every American through improved job opportunities, work environments, health care, education, government, and nonprofit services.  
 Values: Mission-focused, People-focused, Results-focused

Objectives

Goals

Measures / Initiatives

## Sustain the Program

- Financial Stability
- Appropriate capability and capacity
- Increased efficiency and effectiveness

- 1. Increase funding to support current strategic initiatives
- 2. Increase revenues to fully fund current operations
- 3. Sustain and grow current program offerings
- \$2M or more increase in appropriated funding
- \$1M revenue increase
- 1. Hire new staff to fill current and future needs
- 2. Enhance staff skills
- 3. Rebuild interest in serving as a volunteer examiner
- 3 to 5 new hires
- Favorable Examiner Application trends
- Decreasing Examiner attrition rates
- Higher examiner satisfaction
- 1. Streamline award process
- 2. Virtual Examiner training model
- 3. Digital modernization of program offerings and operations
- Complete and fully deployed #1, 2 Hybrid site visits

### Operational Imperatives

## Increase Reach and Impact

- Increased awareness of and interest in Baldrige
- Expanded award categories
- Expanded Baldrige- based offerings

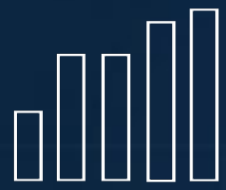
- 1. Strengthen engagement across all sectors
- 2. Enhance availability of products and services
- 3. New "Why Baldrige" video
- 4. NIST/DOC/Congress Presidential engagement
- Presidential participation
- 50% increase in applications and framework distribution
- Increase in communication subscriptions
- NIST participation in BPEP offerings
- 1. Establish "Community" as 7<sup>th</sup> award category
- 2. Develop framework and criteria for Community award
- 3. Promote through partners and communication channels
- Approval and funding for new category
- 1. Workforce Excellence recognition program
- 2. Advanced Manufacturing assessments with MEP
- 3. Online interactive version of the Baldrige Framework
- Implement new WF award
- Mfg assessments in all MEP centers
- Virtualized framework

### Strategic Imperatives

## Strengthen the Baldrige Enterprise

- Enhanced alignment and integration
- Provide support to Enterprise members

- 1. Operationalize and grow Alliance pipeline
- 2. Consistent evaluation and scoring across all programs
- 3. Common training content and shared LMS
- >50% top state recipients apply for Baldrige
- 100% Alliance programs adhere to stds
- 1. Freely available frameworks
- 2. Grants to support Alliance and Communities of Excellence
- 3. Collaboration, coordination, and transparency with Baldrige Enterprise
- BPEP budget additional \$4M above base (or more)



# 2022 Strategic Initiatives

NIST

Baldrige Performance Excellence Program | [www.nist.gov/baldrige](http://www.nist.gov/baldrige)

- Job Quality Framework – tentative release date: end of April
- Exploring additional opportunities for lowering barriers and engaging more organizations in the Award
- Broadening NIST's utilization of Baldrige – modified AWMP; participation in the Fellows program
- Strengthening alignment and collaboration with Manufacturing Extension Partnership Program
- Advanced Manufacturing assessments with MEP – pilots through summer
- Supporting NIST and DOC's diversity, equity, and inclusivity initiatives
- Ongoing support of COE and push for award category expansion



# Thank you!



**National Institute of  
Standards and Technology**  
U.S. Department of Commerce



**BALDRIGE**  
Performance Excellence Program

# Baldrige Foundation President & CEO Update



ORGANIZATIONAL ALIGNMENT: STRATEGIC BUDGET- ACCOUNTABILITY

## Four Strategic Imperatives

### 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.

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



### 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/ Institute for Performance Excellence

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



### 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

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

### FOUNDATION OPERATIONS

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



*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.



# Advocacy Update



**Gina M. Raimondo**  
US Secretary of Commerce



**James K. Olthoff**  
Acting NIST Director  
Associate Director for  
Laboratory Programs

**Al Falzer**  
President and CEO at the Foundation for the Malcolm Baldrige National Qual...

Earlier today, U.S. Senator Maria Cantwell (D-WA), Chair of the Senate Committee on Commerce, Science, and Transportation, convened a hearing to consider the presidential nomination of Dr. Laurie E. Locascio, to be Under Secretary of Commerce for Standards and Technology, and Director of the National Institute for Standards and Technology (NIST) within the US Department of Commerce. Dr. Locascio did a superb job outlining her vision for NIST, especially in the areas of cybersecurity, workforce development, manufacturing support, and promoting NIST frameworks with international partners, among other issues. Dr. Locascio was introduced to the committee by Senator Ben Cardin from Maryland, who highlighted Dr. Locascio's distinguished career as a scientist and leader. Congratulations on a very successful hearing. Dr. Locascio! #technology #development #cybersecurity #commerce #manufacturing



U.S. SENATE COMMITTEE ON COMMERCE, SCIENCE, & TRANSPORTATION

About | Hearings | Nominations | Subcommittees | Legislation | Minority | News | Whistleblower

### Nominations Details

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Position	Nominee	Status	Completed Initial Questionnaire	Hearing	Post Hearing Question Responses	Committee Vote	Senate Floor Vote
<b>Department of Commerce</b>							
Under Secretary-Standards and Technology	Laurie E. Locascio	Submitted	<a href="#">Click Here</a>	10/20/21	<a href="#">Click Here for Majority</a> <a href="#">Click Here for Minority</a>	Voice (11/17/21)	

# FY2022 Federal Funding for Baldrige

**On Tuesday, March 15, 2022, the President signed into law:**

H.R. 2471, the “Consolidated Appropriations Act, 2022,” which provides full-year funding through September 30, 2022, for projects and activities of the Federal Government.

## Commerce, Justice, Science and Related Agencies:

(NIST) SCIENTIFIC AND TECHNICAL RESEARCH AND SERVICES

The agreement provides \$850,000,000 for NIST's Scientific and Technical Research and Services (STRS) account.... *House direction on Malcolm Baldrige Performance Excellence Program and provides no less than \$2,500,000.*



**Jeanne Shaheen,  
D-NH (Chair)**



**Jerry Moran,  
R-KS (Ranking)**

## Membership

Patrick Leahy, Vermont  
Dianne Feinstein, California  
Jack Reed, Rhode Island  
Chris Coons, Delaware  
Brian Schatz, Hawaii  
Joe Manchin, West Virginia  
Chris Van Hollen, Maryland

Lamar Alexander, Tennessee  
Lisa Murkowski, Alaska  
Susan Collins, Maine  
Lindsey Graham, South Carolina  
John Boozman, Arkansas  
Shelley Moore Capito, W. Virginia  
John Kennedy, Louisiana  
Marco Rubio, Florida



# Advocacy Update



January 25, 2022

H.R. 4521, The America COMPETES Act of 2022

**Key Points:**

- The House will consider H.R. 4521, the America Creating Opportunities for Manufacturing Pre-Eminence in Technology and Economic Strength (America COMPETES) Act of 2022 – a bold legislative package that makes transformational new investments in research, innovation and American manufacturing that will ensure that America can outcompete any nation in the world, now and for decades to come. The package

In early February 2022, the House passed H.R. 4521, the America COMPETES Act of 2022 which contained language supporting “Community” becoming the 7th Category of Baldrige Awards. Now we will continue working with the U.S. Senate for matching language.

Includes numerous provisions to strengthen and promote America’s leadership around the globe, including in such areas as investing in partnerships and alliances, investing in standing up for America’s values, expanding our investments in diplomacy, and promoting human rights.

- The United States has long been a beacon of excellence in science and technology in the world. Since the last major investment in innovation and competitiveness, the original COMPETES Act, was passed nearly 15 years ago, America has fallen behind in terms of global science and innovation leadership. The need to reinvest in and reimagine our approach to science and innovation has become a national imperative.
- Now is the time to recommit to boldly and strategically investing in our nation’s future – to promote America’s economic strength, the well-being of our communities, our national security and our leadership in the world. This transformative legislation will ensure that America can out-compete any nation, for decades to come.



## United States Senate Commerce Subcommittee on Space and Science

### Majority



- John Hickenlooper, Colorado, Chair
- Richard Blumenthal, Connecticut
- Ed Markey, Massachusetts
- Gary Peters, Michigan
- Kyrsten Sinema, Arizona
- Ben Ray Luján, New Mexico
- Raphael Warnock, Georgia

### Minority



- Cynthia Lummis, Wyoming, Ranking Member
- Ted Cruz, Texas
- Deb Fischer, Nebraska
- Jerry Moran, Kansas
- Todd Young, Indiana
- Mike Lee, Utah
- Rick Scott, Florida




# Fundraising



**BALDRIGE FOUNDATION**  
BALDRIGE - America's Best Investment

Recognizing our donors, sponsors, and supporters!

Thank You for Your Support



**The Honorable Malcolm "Mac" Baldrige**  
October 4, 1922 - July 25, 1987

"I always prized the quality of Mac's vision. He had the capacity to look up from the dust of the plains and see the distant mountains."  
- President Ronald Reagan

Planned Gifts Supporting a Legacy of Performance Excellence

## WHY YOUR GIFTS MATTER

Investing in Excellence and Improving the Quality of Life!



# Together we give.

Nov 30, 2021

GIVING TUESDAY

**BALDRIGE FOUNDATION**



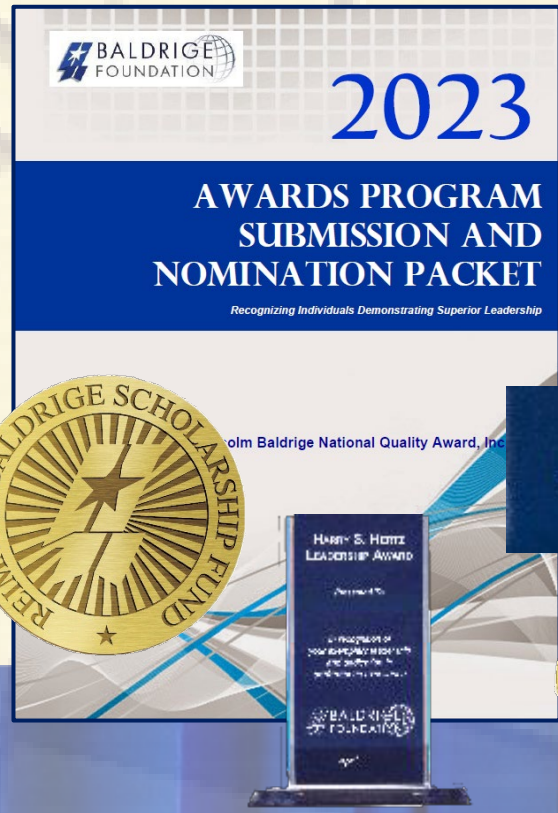
America's Best Investment



## Mac Baldrige Society Institute Trustees







### Role Model Breaking the Mold

“Michael is a role-model leader who has consistently over the years applied the principles of the Baldrige Framework to his leadership approach.”  
— Al Faber, President, Baldrige Foundation

Congratulations to Michael Ugwueke, our President and CEO, on receiving the Harry S. Hertz Leadership Award from the Baldrige Foundation. Thank you for being a steward of visionary leadership and unwavering commitment to our mission.

Michael Ugwueke  
President & CEO

methodisthealth.org

### On behalf of the Board of Directors of the Quality Texas Foundation (representing TX, PR, MO, KS, and LA), Judges, Examiners, and Fellows, we congratulate our Board Chairperson for being named the 2022 Baldrige Foundation E. David Spong Lifetime Achievement Award Recipient

Mr. Tommy Gonzalez

“We at Stellar Solutions have relied on the foundation and framework of Baldrige to achieve our core vision: to satisfy customer critical needs while realizing our dream jobs.”

Thank you for the lasting legacy of Baldrige that inspires us to continue to reach for the stars!”

— Celeste Ford  
Board Chair and Founder,  
Stellar Solutions, Inc.

“Congratulations to Celeste Ford for achieving the 2021 E. David Spong Lifetime Achievement Award. Your leadership has fueled our commitment to Baldrige standards in everything we do.”

— Michael Lencioni  
CEO,  
Stellar Solutions, Inc.



### Foundation Awards for Leadership Excellence

#### WALTER BUMPHUS, Ph.D. • Education

President and CEO, American Association of Community Colleges

“I am humbled to receive the Baldrige Foundation Award for Leadership Excellence. The strength of the nation’s community colleges lies in their ability to respond effectively to local needs while advancing national efforts to provide access and foster success for nearly 12 million Americans annually. The Baldrige Program sets rigorous standards that model exceptional quality in strategy and operations, both of which are paramount to transforming culture and practices to continually strive for clearer pathways for student and institutional excellence. I am grateful to the Baldrige Foundation for recognizing the community colleges and their significant contributions to ensure that Americans have access to better opportunities through quality higher education.”

#### SUZANNE P. CLARK • Nonprofit

President and Chief Executive Officer  
U.S. Chamber of Commerce

“Over the course of the past year, businesses across every sector and every state stepped up and answered our nation’s call when we needed them most. At the U.S. Chamber of Commerce, we were proud to help them do it. The Baldrige Foundation has provided the framework and insights for organizations like ours to enable excellence and strengthen our impact for those we serve. I am honored to receive the Baldrige Foundation Award for Leadership Excellence, and I look forward to continuing to implement these practices as the Chamber works to develop the policy environment needed to create jobs, solve problems, and grow the economy.”

# Foundation Leadership Awards Program




# Thought Leadership

CHRONICLE OF LEADERSHIP AND MANAGEMENT

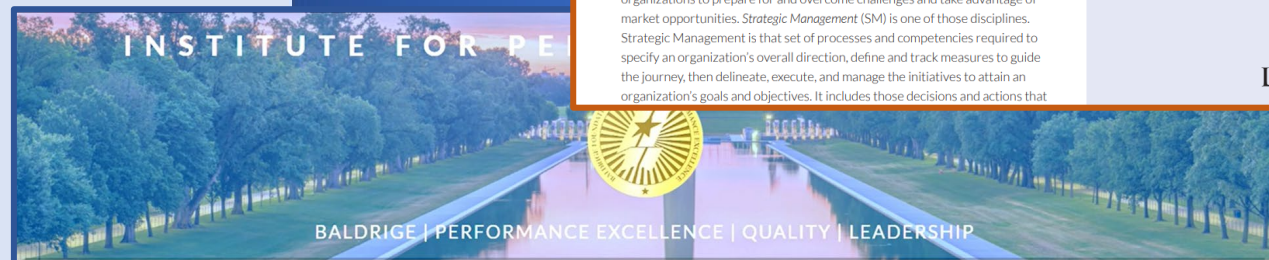


**A System for Excellence:**  
A Cross Walk of the Baldrige Criteria for Performance Excellence and the Strategic Management Performance System



"Whether your organization is new, is growing or has existed for many years, it faces daily and long-term challenges. It also has strengths that have served you so far. The Baldrige Excellence Framework helps you identify and leverage your strengths and prepare to face your challenges." (page viii 2019-2020 Baldrige Excellence Framework)

Similarly, there are other synergistic disciplines and frameworks that enable organizations to prepare for and overcome challenges and take advantage of market opportunities. Strategic Management (SM) is one of those disciplines. Strategic Management is that set of processes and competencies required to specify an organization's overall direction, define and track measures to guide the journey, then delineate, execute, and manage the initiatives to attain an organization's goals and objectives. It includes those decisions and actions that



## The Baldrige Foundation Institute for Performance Excellence

Presents:

*Burnout: Clarifying the cultural impact of staffing mistrust, low tolerances for stress and change, the high contract labor percentage, and the reality of PTSD*

[www.baldrigeinstitute.org](http://www.baldrigeinstitute.org)



### How the Community Has Recognized the Team Members

<b>MEALS</b> 8,454 Meals Sandwiches Italian cuisine BBQ, Chicken	<b>Medical Supplies</b> 6,300 Sanitizer, gowns, etc.	<b>FRUIT</b> 10,000 pounds Boxes or Bags of Fresh Fruit like apples, oranges and bananas	<b>PRAYERS</b> Millions Prayers Well-Wishes Positive Thoughts	<b>COOKIES</b> 55 Boxes Girl Scout Cookies	<b>BALM</b> 100 Packets lip balm and hand lotion from Mary Kay	<b>WATER</b> 150 Cases of water
<b>MASKS</b> 518 Hand-Sewn 1,242 N95 and Surgical Masks	<b>SNACKS</b> Thousands Of snacks Bundt cakes, chips, crackers, granola bars and popcorn	<b>GLOVES</b> 6,300 Surgical Gloves	<b>Face Shields</b> 5,261 Handmade face shields	<b>DRINKS</b> 75 Cases soda sport drinks & smoothies	<b>PIZZA</b> 600 Individual slices of Pizza	<b>CARE PACKAGES</b> 871 Gift bags with puzzles note pads and pens



# Training & Professional Development



### OUR SELF-PACED COURSES

Lean Six Sigma White Belt	\$50
Lean Six Sigma Yellow Belt	\$125
Lean Six Sigma Green Belt	\$257
Lean Six Sigma Black Belt	\$399
Lean Six Sigma Master Black Belt	\$699
Diversity & Inclusion Yellow Belt	\$99
Process Improvement Specialist	\$299
Project Management	\$157
Supply Chain Management	\$299
Agile Professional	\$299
Agile Leader	\$225
Data Analytics	\$199
Scrum Master	\$299
Lean Practitioner	\$157
Lean Health Care Professional	\$299
Health Care White Belt	\$50
Health Care Yellow Belt	\$149
Health Care Green Belt	\$275

### OTHER CERTIFICATION OPPORTUNITIES

**Mastering Strategy Certification**  
Learn to improve performance for your organization by mastering the complete strategic management process.

**Mastering Agile Organizational Design Certification**  
Construct organizational components and align the design with the strategy.

**Strategic Foresight and Scenario-Based Planning**  
Provides a framework for planning in uncertain times by giving organizations a structured way to think about the future.

**Strategic Thinking in the 21st Century**  
Align day-to-day decisions to your organization's strategic direction.

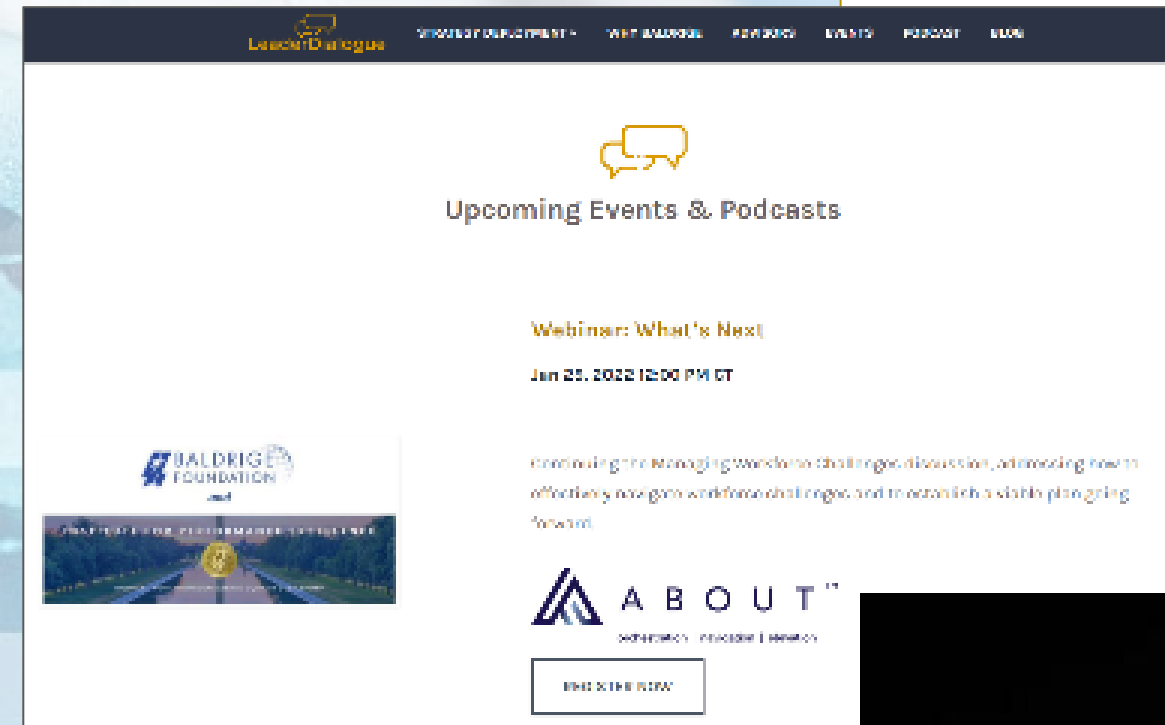
[www.baldrigeinstitute.org](http://www.baldrigeinstitute.org)





Mission: Connecting those in need with those who heal, faster.

- ❖ Podcasts
- ❖ Webinars
- ❖ Virtual CEO Roundtables
- ❖ In-person CEO Roundtables



**BALDRIGE FOUNDATION**

You are invited, with 20 other CEOs by the President and CEO of the **Baldrige Foundation** to participate in a Leader Dialogue Executive Roundtable Event

**Health System CEO INNOVATION COUNCIL**

THEME

**MOVING FROM DISRUPTION & CHANGE TO PEAK PERFORMANCE**

**ABOUT™**

<https://www.leaderdialogue.com/podcast/>



# 33<sup>rd</sup> Quest for Excellence Sponsorships



### Why Sponsor

With a goal to increase your company's visibility and reputation, the Quest for Excellence Conference provides a unique opportunity to connect with industry leaders and showcase your organization's achievements.

Customized sponsorships are available to meet your needs and goals. Contact us today to learn more.

### The Audience

**Audience: 1,000+**

**Speakers: 70+**

**Sections of the Event:**

- Business
- Healthcare
- Education
- Manufacturing
- Government
- Non-Profit
- Technology



Executive Director of Corporate Development  
Josh Racette

Baldrige Foundation Quarterly Webinar March 2022

**BALDRIGE FOUNDATION**  
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**A Special Thanks to Our Donors & Sponsors!**

www.baldrigefoundation.org



<https://www.questsponsorship.com>



# Alliance for Performance Excellence Update



Learn. Share. Connect.

The Journey to Performance Excellence Starts Here

[Home](#)   [About Us](#)   [Members](#)   [Events & Training](#)   [Contact Us](#)

Find Performance  
**IMPROVEMENT**  
HELP NEAR YOU



**Brian Lassiter**  
Chair

**Alliance for Performance Excellence**

# (re)Introducing Alliance for Performance Excellence

- **Founded in 2005, the Alliance for Performance Excellence is the network of Baldrige-based programs and other supporting members throughout the United States**
- **Mission: Enhance our members' ability to grow Baldrige-based performance excellence**
- **Vision: to be the premier resource for a thriving Baldrige community**



*Learn. Share. Connect.*



# A National/International Footprint

## Local, State, Regional Programs:



The Journey to Performance Excellence Starts Here

Home About Us Members Events & Training Contact Us

Find Performance  
**IMPROVEMENT**  
HELP NEAR YOU



## National/International Programs:

- American Health Care Association (AHCA), National Center for Assisted Living (NCAL), Washington DC
- Communities of Excellence 2026, St. Joseph
- Sterling International, Kuala Lumpur

## Other Members:

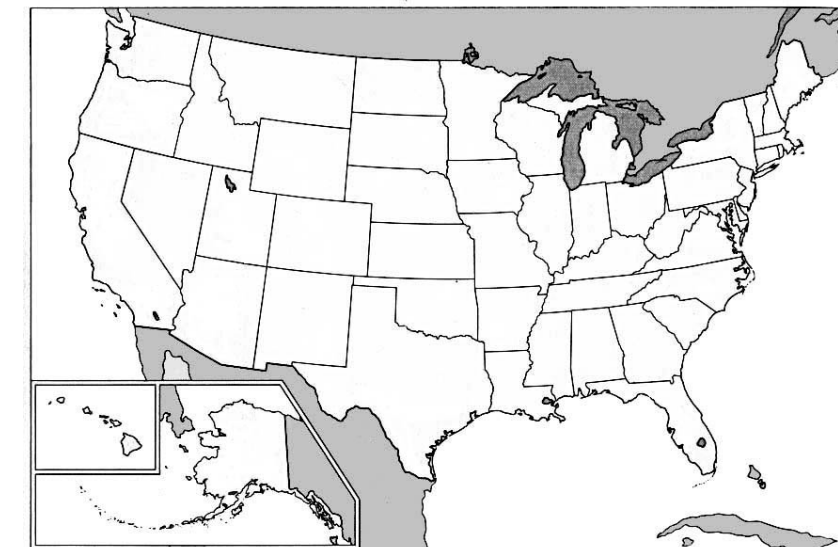
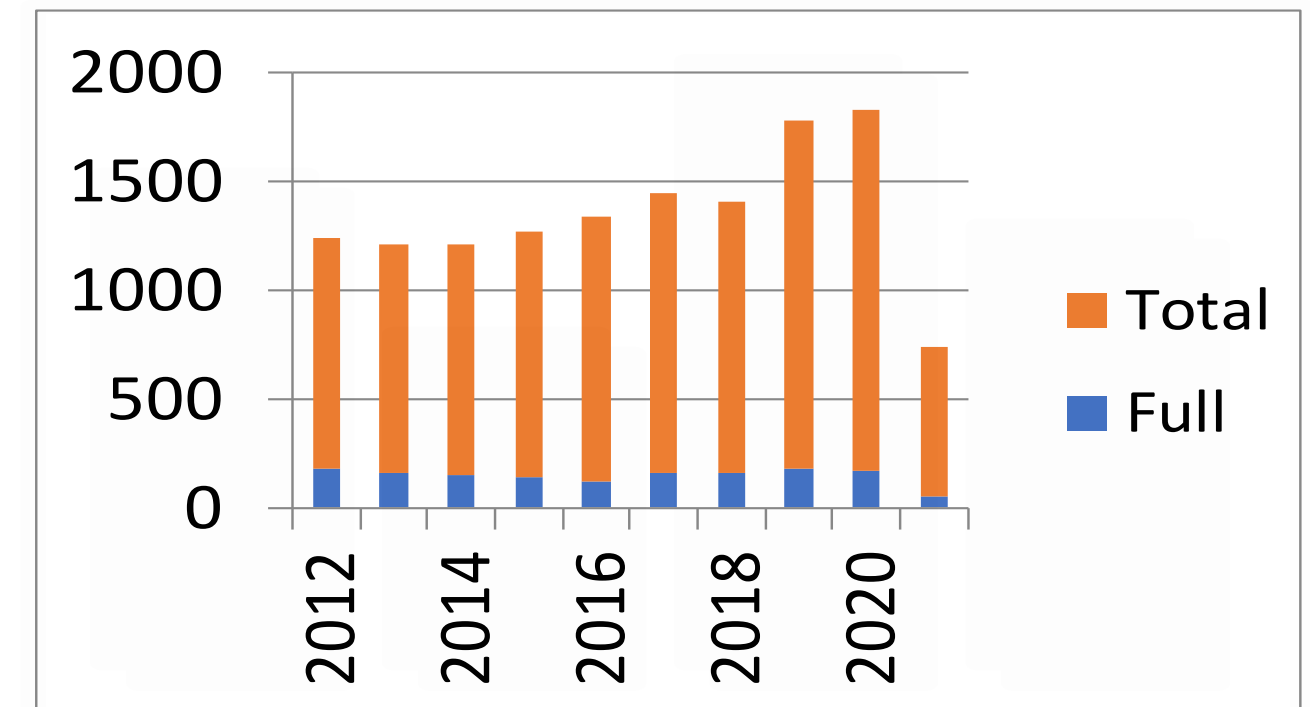
- LBL Strategies, Chicago
- Stratex Solutions, Kansas City
- Walden University, Minneapolis
- Mike Belter, Columbus



Learn. Share. Connect.

# 2021 Alliance Statistics

- 29 Baldrige-based programs serving all 50 states and US Territories
- 679 – Applications received (from 1662)
  - 55 full 50 page (down from 167)
- 1194 – Examiners trained (from 1243)
- 409 – Recipients (down from 981)
  - 12 top level (down from 18)
- 11 – Conferences (hosted 3351 attendees)
- 37 – Paid staff (up 4), 757 volunteers (in addition to exam)
- ~\$9M\* – Combined budget



\* 2018 estimate



# Alliance 2021 Plan on a Page

## Mission

To enhance our Members' ability to grow Baldrige-based performance excellence.

## Vision

To be the premier resource for a thriving Baldrige community.

## 2021 Strategic Priorities

### 1. Improve marketing

- Marketing Task Force led to [Marketing Committee](#)
- Created first draft marketing plan
- Created & posted Marketing Specialist position

### 2. Share revenue-generating content

- Launched [Content Sharing Task Force](#)
- Partnered on Govapalooza conference
- Hosted one quarterly workshop, considered library
- Learning: Alliance culture reflects more of an independent licensing model than a “franchise” model

### 3. Improve member value

- Created Business Model Canvass and Customer Value Propositions from both Program & Supporting Member perspectives
- Board approved [membership structure changes](#), eliminating Supporting Member category
- Launched [Shared Service Provider Task Force](#), which discovered no consensus on which services of value to members

### 4. Create Alliance board scorecard

- Draft in process (see right column)

### 5. Hire staff

- In process of hiring Marketing Specialist

## Value Proposition

The Alliance for Performance Excellence is a collaborative network that provides members with credibility as well as access to resources and knowledge that strengthen their ability to engage and deliver Baldrige-based services to customers.

## Core Values

**Collaboration**- Cooperatively working with others in mutually beneficial relationships.

**Passion for Excellence**- Achieving excellence through innovation, agility and continuous improvement.

**Ethics**- Acting with integrity and principles.

**Knowledge Growth** - Continuously increasing and sharing our knowledge.

**Customer Focus**- Serving the needs and acting on behalf of our members.

## Scorecard (proposed)

- *Workforce Learning & Development*
  - % of engaged programs (by % of programs receiving dues discount)
- *Operational Excellence*
  - Engagement process implemented & achieved
  - Member compliance to standards (top tier award, judging, operational)
  - Number of LMS learners
  - % complete achievement of strategy
- *Member Engagement*
  - Net Promoter Score
  - Baldrige Fall Conference NPS
- *Financial & Sustainability*
  - Overall profit margin
  - Conference profit margin
  - LMS profitability
  - Year-end cash balance

[Click here](#) to view all linked documents





# Alliance 2022 Plan on a Page (Draft)

Year  
of the  
Member

## Mission

To enhance our Members' ability to grow Baldrige-based performance excellence.

## Vision

To be the premier resource for a thriving Baldrige community.

## 2022 Strategic Priorities

### 1. Define Alliance Identity

- Purpose & Values
- Core Competencies
- DEI

### 2. Identify & Document key/core processes

- Identify: Align with core competencies
- Map those in existence
- Select 1-2 to design/refine based on SWOT & other strategic priorities

### 3. Marketing – increase knowledge of Alliance & Baldrige (Owner: Marketing Committee)

- Hire Marketing specialist
- Create common message & collateral

### 4. Define, Promote, & Advance Alliance Role in Baldrige Enterprise

- Reflect core competencies; advance Vision
- Determine strengths and Brand (building from #'s 1 & 3)
- Work within Enterprise from a position of strength

## Value Proposition

The Alliance for Performance Excellence is a collaborative network that provides members with credibility as well as access to resources and knowledge that strengthen their ability to engage and deliver Baldrige-based services to customers.

## Core Values

**Collaboration**- Cooperatively working with others in mutually beneficial relationships.

**Passion for Excellence**- Achieving excellence through innovation, agility and continuous improvement.

**Ethics**- Acting with integrity and principles.

**Knowledge Growth** - Continuously increasing and sharing our knowledge.

**Customer Focus**- Serving the needs and acting on behalf of our members.

## Scorecard (proposed; pending 2022 initiatives)

- *Workforce Learning & Development*
  - % of engaged programs (by % of programs receiving dues discount)
- *Operational Excellence*
  - Engagement process implemented & achieved
  - Member compliance to standards (top tier award, judging, operational)
  - Number of LMS learners
  - % complete achievement of strategy
- *Member Engagement*
  - Net Promoter Score
  - Baldrige Fall Conference NPS
- *Financial & Sustainability*
  - Overall profit margin
  - Conference profit margin
  - LMS profitability
  - Cash and equivalents

# Alliance Updates

- In process of hiring marketing specialist and launching several marketing initiatives
- Hosted a successful online Baldrige Fall Conference last October
  - The 2022 conference will be hosted in San Diego by California Council for Excellence & Communities of Excellence 2026 – **October 19-20**
- To explore the value of getting started (or accelerating) your journey to excellence using Baldrige, contact your Alliance member program at <http://baldrigealliance.org>



*Learn. Share. Connect.*



# **communities** of excellence 2026



*“For America to sustain its vitality, promote opportunity, and create a more equitable society during its second 250 years of existence, we must improve the performance of communities and the people who lead and live in them.”*



**Lowell Kruse**  
**Board Chair**  
**Communities of Excellence 2026**

# Our Strategic Future

## Purpose

To ensure that every person in America has the opportunity to live their best life in communities that are thriving.

## Envisioned Future (BHAG)

Communities that adopt the Baldrige-based Communities of Excellence Framework are recognized as the top-performing in the nation and are catalysts for our country to again lead the world in educational attainment, economic prosperity, health and wellness, and quality of life.



# Our Strategic Future

## Key Changes

**Actively support an Energized, High Performing Baldrige Enterprise**

**Increase Capability and Capacity to Support Communities**

**Become the Center for Community Performance Excellence Resources and Knowledge**

- Investment in High Quality Training, Support, and Curriculum Packages
- Community Performance Indicators Resource
- Best Practice/Promising Practice/Tools Inventory
- Leverage Technology to Connect Communities across the country
- Engaging Communications Platform that promotes cross-community learning and sharing
- Research/Evaluation hub producing and spreading innovative community practices

## Upcoming Events and Programs



**Jumpstart your Journey** – Spring Conference April 21-22 in Excelsior Springs, MO

**Commitment to Community Excellence Assessment** – Request for Assessment due May 15<sup>th</sup>

-or-

**Volunteer as a COE Examiner** – Applications accepted beginning May 1<sup>st</sup>

**Cohort 6 begins October 1<sup>st</sup>, 2022** – Up to 6 communities are accepted on a first come first serve basis

**communities of excellence<sup>2026</sup>**  
**Assessment & Recognition**  
A CONTINUOUS IMPROVEMENT PROGRAM

**communities of excellence<sup>2026</sup>**  
**National Learning Collaborative**

For more information on any of these opportunities visit our website at [www.coe2026.org](http://www.coe2026.org) or contact Stephanie Norling at [snorling@communitiesofexcellence2026.org](mailto:snorling@communitiesofexcellence2026.org)



# Panelist Questions and Discussion

**Bob Fangmeyer**  
Director  
Baldrige Performance  
Excellence Program



**Al Faber**  
President & CEO  
Baldrige Foundation



**Brian Lassiter**  
Chair  
Alliance for Performance Excellence



**Lowell Kruse**  
Board Chair  
Communities of Excellence 2026



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