



# 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:**

**Data Disasters and Delayed Decisions:  
Moving from an Explanation Culture to an  
Execution Culture**

*September 22, 2022*





Mac Baldrige Society  
Institute Trustees



A Special Thanks to Our Donors & Sponsors!



# Opening Remarks/Agenda

**Introduction**

**Al Faber**

**Guest Presenters**

**Seth Davies, Executive Vice President, Competitive Solutions, Inc.**

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

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

**Stephanie Norling, Executive Director, Community of Excellence 2026**

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

**Questions from the Audience**

**Al Faber, Moderator**

**Closing Remarks**

**Al Faber**





# Data Disasters and Delayed Decisions: Moving from an Explanation Culture to an Execution Culture

Seth A. Davies— Executive Vice President, Competitive Solutions, Inc.



## REFLECTION MOMENT:

*Does your  
organization  
have too much  
data?*

“Management teams often switch off when reviewing KPIs. This may be because they’re overwhelmed by the slicing and dicing of the measures.”

*Harvard Business Review*



“Are we winning or losing?  
Does anyone know?”

Supply Management	VMI Parts Managed	13,052	1,045	1,500	0	1,507	0	0	0	9,000	
Supply Management	VMI Suppliers	10	1	2	0	5	0	0	0	2	
Supply Management	Active Suppliers	2,803				603	1,069	250		881	
Supply Management	Supplier Delivery Performance			95		9800%	1	N/M		90.00%	
Supply Management	Supplier Quality Performance			97		9800%	1	N/M		99.00%	
Supply Management	Certified Suppliers (no inspection)	897		140		426	0	0		331	
Supply Management	Certified Part Numbers	14,913				14,458	15 k +/-	0		455	
Inventory	Part Numbers Managed (active)	35,433				21,433	4,000	10,000			
Inventory	Assemblies Managed (active)	4,154				4,154	N/A	0			
Inventory	Inventory Value (WIP and raw material)	\$ 544,830,102	\$178,706,625	\$207,579,074		\$3,288,514	\$45,540,749	\$39,578,000	\$ 17,000,000	\$27,995,010	\$ 25,142,130
Inventory	Inactive/Excess Inventory Value	\$ 44,547,876	\$10,949,110	\$ 13,020,237		\$347,227	\$11,098,734	\$1,361,000	\$ 1,800,000	\$3,845,000	\$ 2,126,568
Inventory	Inactive/Excess as % INV Value	8.18%	6.13%	6.27%		11%	24.37%	3.44%	10.59%	13.73%	8.50%
Inventory	Material Transactions 2007 (pick, cycle, store)	322,663	19,279			242,514	50,870	10,000			
Inventory	Incoming Receipts	47,487	10,794	6153*	2810	7,684	1,000	1,300	23899		
Inventory	Inventory Accuracy		99.6%	99	99.90%	97%	99.9%	99.7%	95%	98.7	
Space	Warehouse Space	346,800	168,000	43,000	25,000	3,800	32,000	15,000	20,000	20,000	20,000
Shipping	Outbound Shipments	11,836	567			1,470	5,010	191	4598		
Shipping	% Premium Freight Shipments	96				92%	95	30%	25%		
Headcount	L-Codes	21	3	2	2	1	5	2	1	3	2.3
Headcount	Master Scheduling	16	4	4		2	6		0.25	0	
Headcount	Scheduling	30	na			1.5	4	12	7	0.5	5
Headcount	Material Control	85	39	12	6	0.5	11	0	4	9	3
Headcount	Expediting	8	see mtl ctrl	see mtl ctrl		5	1	1	0.5	0	
Headcount	Inventory Records	8	see mtl ctrl	see mtl ctrl		0.5	2	2	2	1	0
Headcount	Material Handlers (Receiving)	20	5	2.5	1	2	2	3	2	1	1.2
Headcount	Material Handlers (Stores)	66	15	16	4	2	15	4		9	1.3
Headcount	Material Handlers (Distribution)	15	5	2.5	2		2	2		0	1
Headcount	Receiving Inspectors	22	2	3	3		5	3		4	1.5
Headcount	Traffic Analyst	12	1	1	1	1.5	3	2		1	1
Headcount	Material Handlers (packaging/shipping)	30	10	5	3	2	3	3		3.5	0
Headcount	Total Materials Headcount	291	84	48		11	59	40		32.75	16.3
									Net		



# Competitive Solutions Inc.



## A Global Business Transformation Firm

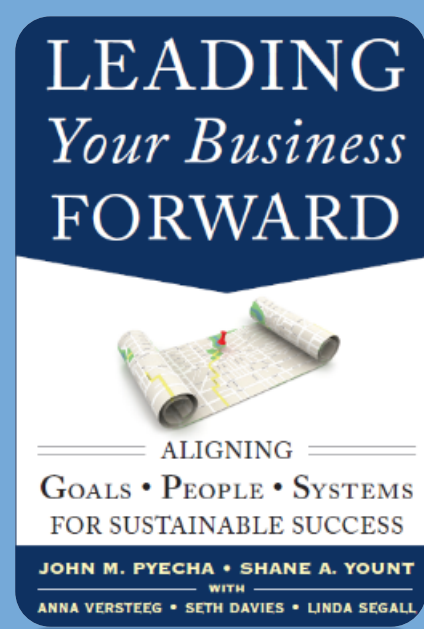
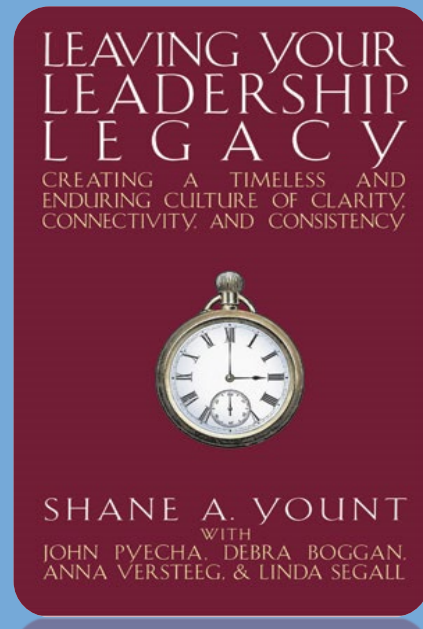
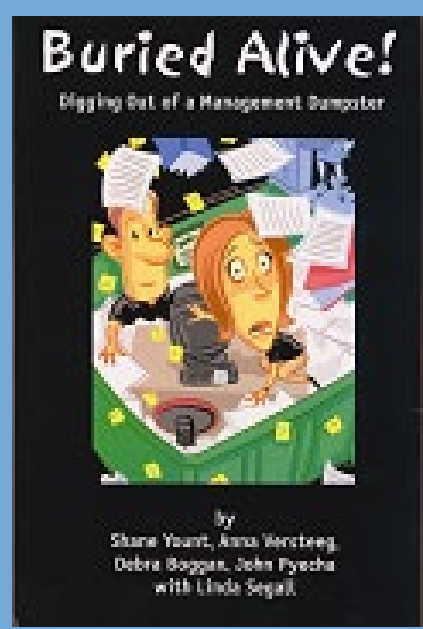
*“Optimizing People, Processes, and Performance”*

Founded in 1991

Headquartered in Raleigh, NC

Office in Atlanta, GA

Published Three Business Novels





# Our Clients

*"Moving Businesses Forward for 30 years..."*



A world map in light gray serves as the background for the client logos. The logos are distributed across the map, with a higher concentration in North America and Europe.

- 3M**
- Abbott**
- Pfizer**
- GILEAD**
- Roche**
- Reid Health**
- HARLEY-DAVIDSON**
- MICHELIN**
- REVLON**
- Kinetico**  
water systems
- Alcon**  
a Novartis company
- BAPTIST HEALTH**
- gsk**  
GlaxoSmithKline
- goodwill**
- lenovo**
- P&G**
- Entegris**
- Bristol Myers Squibb**
- Sabra**
- Adaptive**  
biotechnologies™
- TEIJIN**  
TEIJIN AUTOMOTIVE TECHNOLOGIES
- Continental**  
Structural Plastics
- bp**
- BAPTIST HEALTH**
- zoetis**
- rockline**  
people who make it right
- PHILLIPS 66**
- COLGATE PALMOLIVE**
- Mars**
- RUST-OLEUM**  
INDUSTRIAL BRANDS

## REFLECTION MOMENT:

*What is  
Powering  
Performance  
Today?*





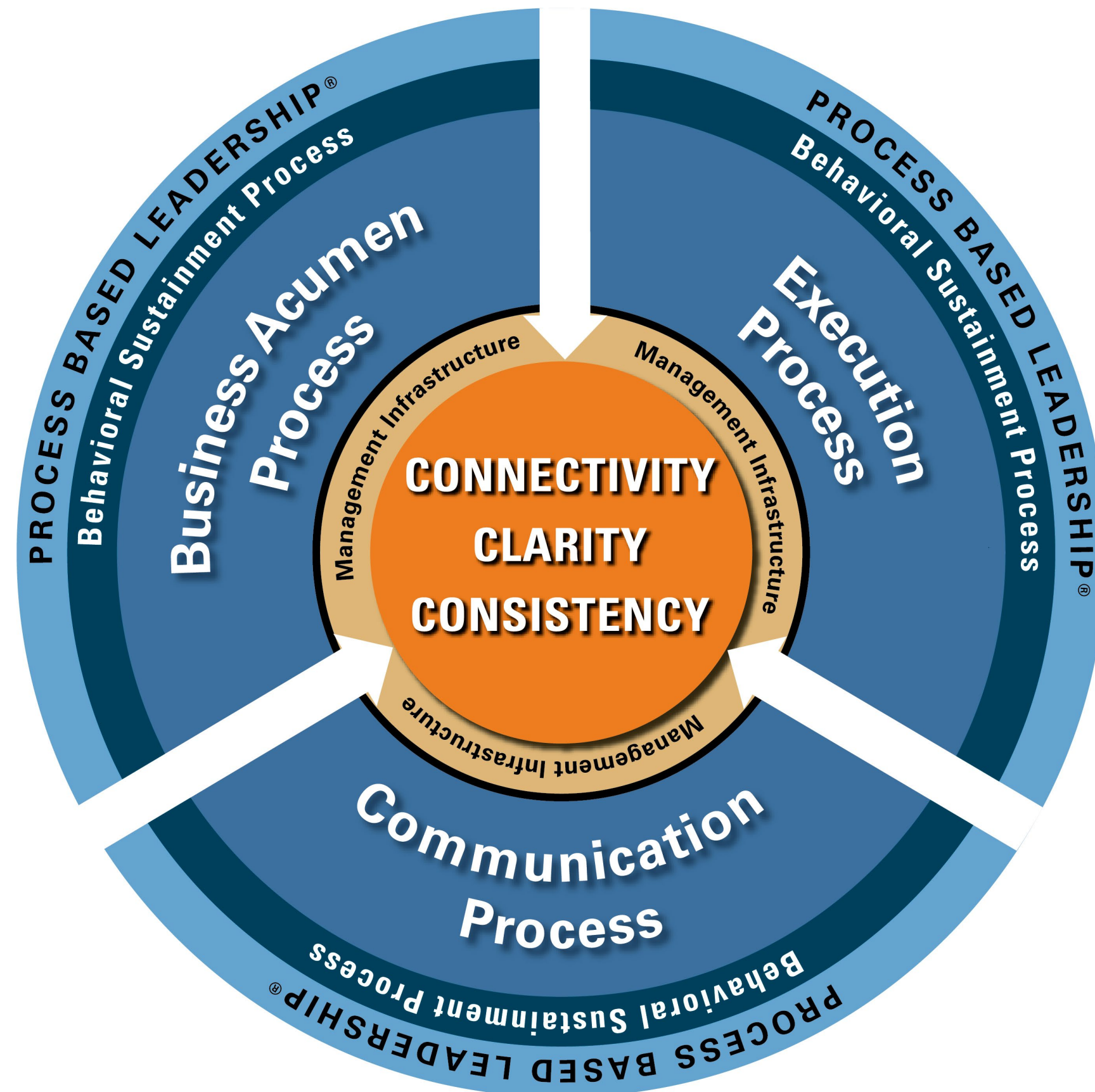
# Process Based Leadership®

You Might be  
in a Three  
“P”  
Organization  
if...

- A *“hidden factory”* exists to generate metrics and data that few folks understand and even fewer actually use
- Meetings feel like an *“in addition to the work...”* as opposed to an *“enabler of the work...”* and often meetings are cancelled when certain personalities can’t attend
- Teams can feel like a failed social experiment – performance predicated on the unique combination of personalities
- If when asked *“How is this done?”* – the answer begins with *“It depends...”*
- Default response of leaders – *“It is just easier if I do it myself...”*
- *“Red Cape”* heroics are required to drive the business forward
- Data is often abstract and decision are driven by personality not process

# Process Based Leadership®

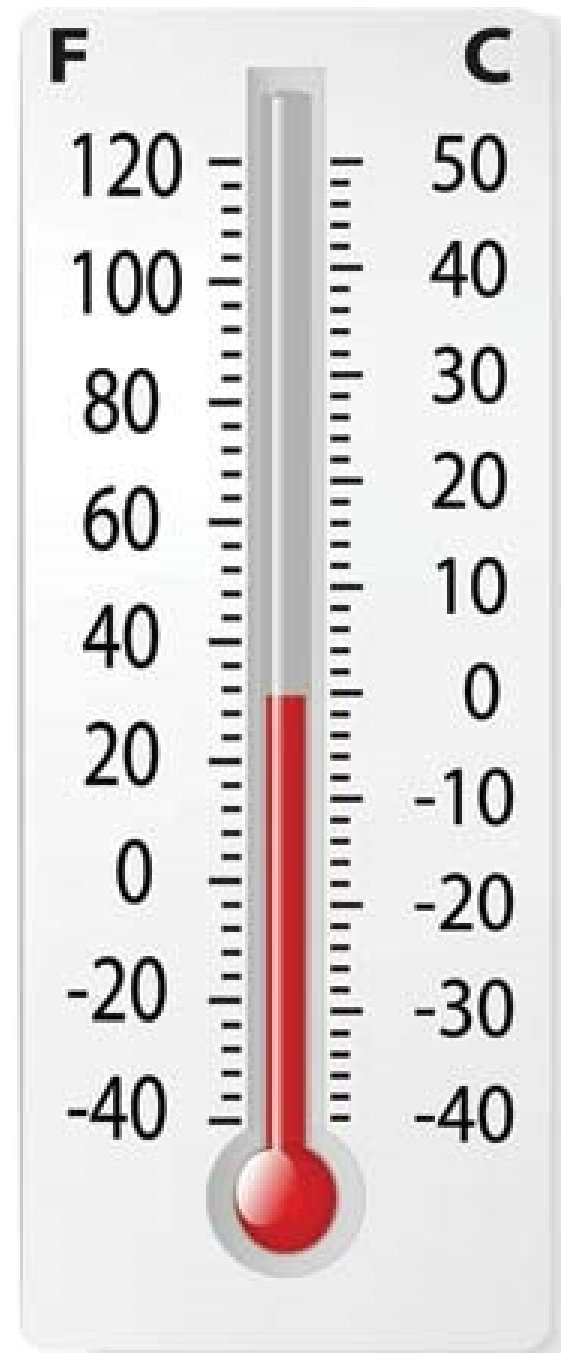
Creating a High  
Functioning Culture  
that Drives  
“Thermostatic  
Data” and Process  
Driven Decisions





# P[ro]cess B[ase]d L[e]adership<sup>®</sup>

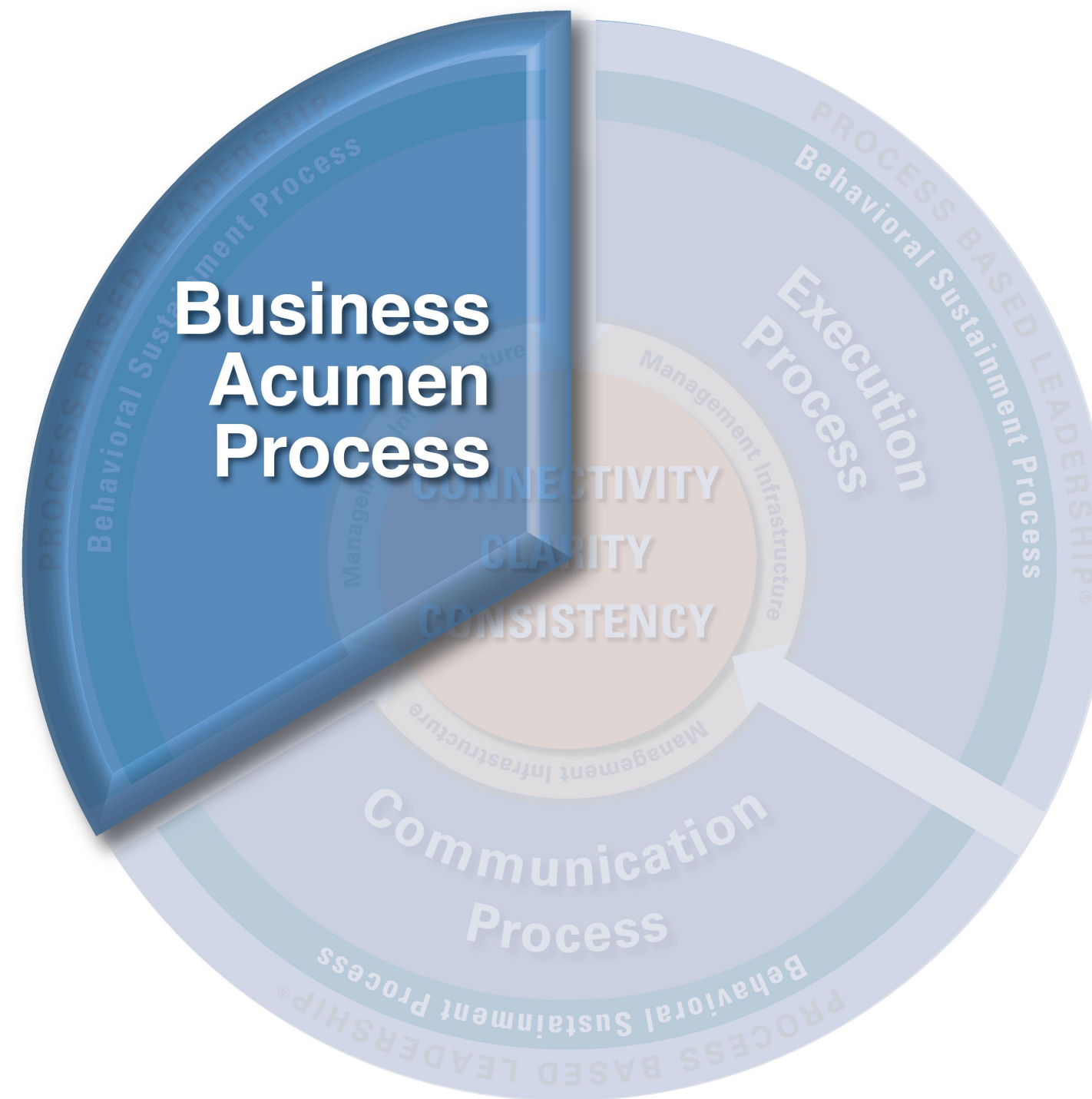
Are your metrics  
viewed as a  
thermometer or a  
thermostat?"



# Process Based Leadership®

## Low Functioning Culture:

1. Data Visualization only - Business Acumen at an all time low
2. "Hidden Factories" generating charts and graphs that no one will ever use
3. "Thermometer" data
4. Too tired from generating data, no energy left to analyze and improve – *Leads to explanation culture*
5. Winning or losing – *Does anyone know?*



## High Functioning Culture:

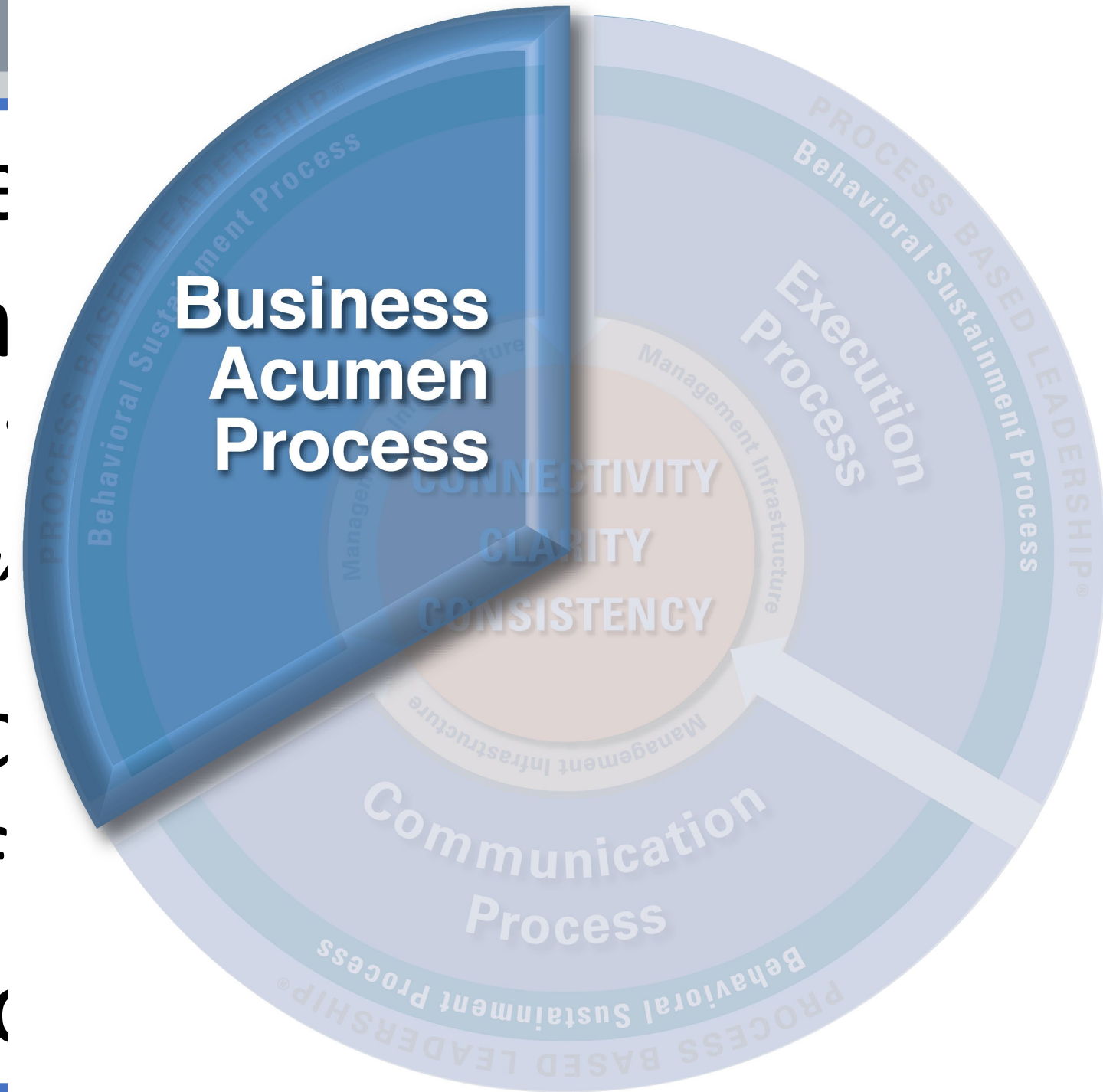
1. Data Utilization – Creating the System of Use – *Educate, Facilitate, & Motivate*
2. "Thermostatic" Data
3. Iterative Process – 90 Day Thermostatic Review
4. Migrate from Explanation Culture to Execution Culture
5. Deploy Communication Cadence powered by Scorecard – *"Are we Winning or losing?"*



Home Metrics Meetings Dashboards Documents Reports Admin

## Dangers of Digitization

- Creates a Culture of Spectators not Players
- Data ownership is compromised, ambiguous, & abstract
- Leads to Explanation Culture not Execution Culture
- Iteration Process lacks Rigor
- Creation of Thermometers not Thermostats



104	increase customer retention from 85% to 90% by year end <a href="#">Customer retention rate</a>	90%	↑	<a href="#">Seth Davies</a>	Monthly	85%	88%	99%	94.25%	📅
105	identify five potential new customers per week <a href="#">Potential New Customers</a>	5	↑	<a href="#">John Pyecha</a>	Monthly	2	14	55	148	📅

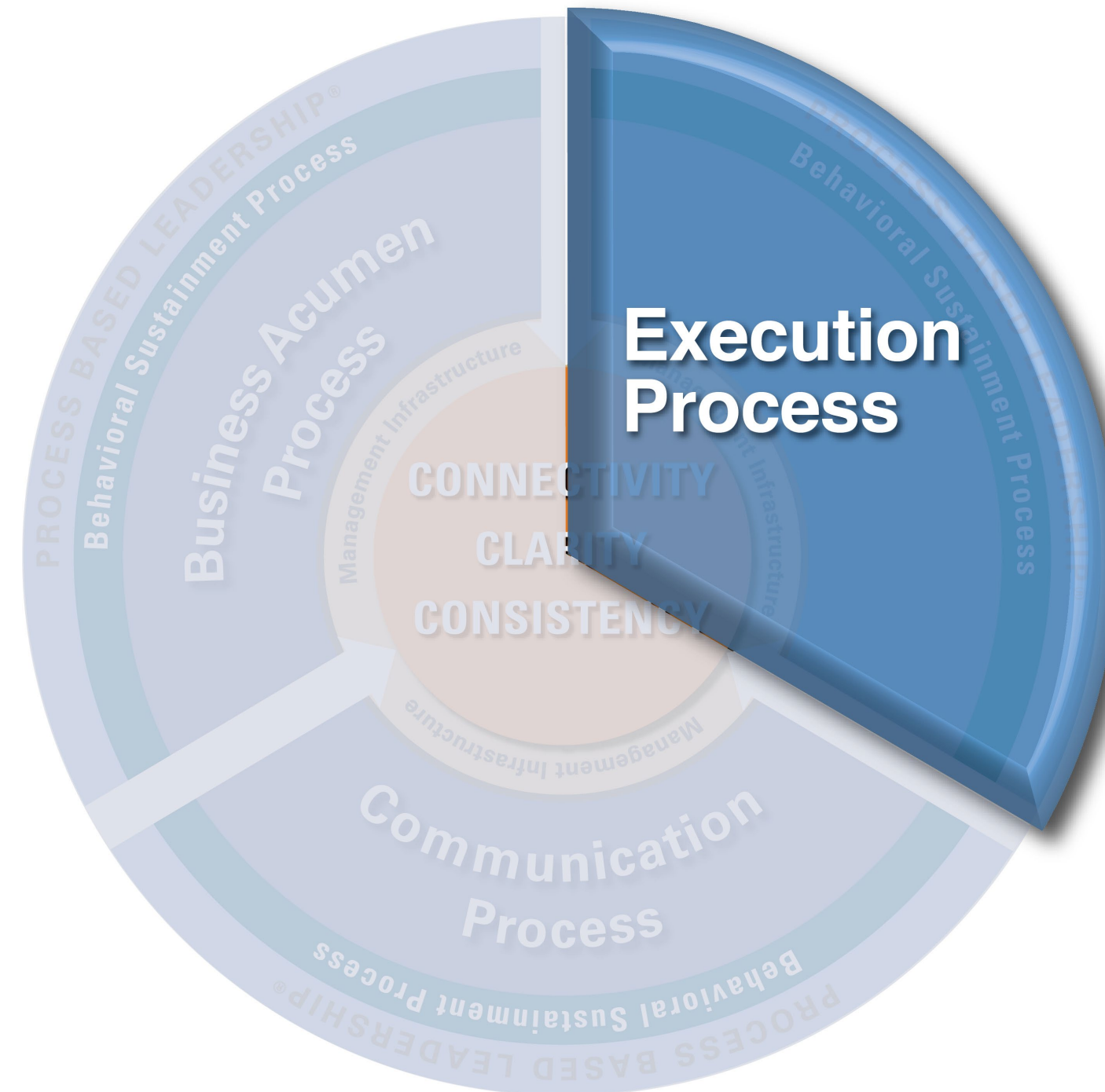
Objective	Target	Owner	Frequency For Review	December 2021	January 2022	February 2022
<b>East Coast Division</b> 📅✅						
<b>Quality</b> 📅						
achieve a 95% Internal customer satisfaction rate for the year <a href="#">Customer Satisfaction Rating</a> 📅✅	97%	↑ <a href="#">Shane Yount</a>	Monthly	87%	98%	90%
Right First Time <a href="#">% RFT (Right First Time)*</a> 📅✅	97%	↑ <a href="#">Seth Davies</a>	Monthly	78%	89.4%	89.9%
% of defects recorded in every million <a href="#">Scrap Rate ( Products Produced)</a> 📅✅	15%	↓ <a href="#">Michael Watkins</a>	Monthly	3%	6.8%	10.26%
reduce defects from 3 per million to 2 per million <a href="#">Defect reduction</a> ✅	2	↓ <a href="#">Paul Campbell</a>	Weekly Ending on Friday	0.22	1.5	1.5
<a href="#">1st Pass Yield %</a> ✅	95%	↑ <a href="#">Quentin Guess</a>	Monthly	98%	99%	96%
<a href="#">OEE</a> 📅✅	60%	↑ <a href="#">Michael Watkins</a>	Monthly	67%	64%	72%
<b>Cost</b>						
<a href="#">\$ spent on Equipment Repairs (Overall)</a> ✅	\$12,000	↓ <a href="#">John Pyecha</a>	Monthly	\$0	\$7,470	\$18,590
<a href="#">Overall Line Efficiency</a> ✅	85%	↑ <a href="#">John Pyecha</a>	Weekly Ending on Friday	84.4%	85.08%	87.12%
<a href="#">Labor % to Standard</a> ✅	100%	↑ <a href="#">Paul Campbell</a>	Monthly	94%	2%	4%
<a href="#">Production Cost Reduction %</a> ✅	15%	↑ <a href="#">Michael Watkins</a>	Monthly	4%	13%	12%
<b>Productivity</b>						
increase output per person by 2% per month <a href="#">Output per person</a>	2	↑ <a href="#">Angela Rittenbach</a>	Monthly	4	4	5.45
increase sales for the plant by 10% by year end <a href="#">Increase plant sales</a>	10	↑ <a href="#">Korey Zawadzki</a>	Monthly	38	10	22
increase customer retention from 85% to 90% by year end <a href="#">Customer retention rate</a>	90%	↑ <a href="#">Seth Davies</a> <a href="#">Quentin Guess</a>	Monthly	88%	100%	98%
identify five potential new customers per week <a href="#">Potential New Customers</a> ✅	5	↑ <a href="#">John Pyecha</a>	Monthly	12	15	10



# Process Based Leadership®

Low Functioning Culture:

1. *“Selective Engagement”* powering the performance of most teams
2. Accountability is often measured by *“How people Feel”*
3. *The biggest demotivator in teams is the disparity of engagement – no means to measure engagement*



High Functioning Culture:

1. Capacity exists to Measure Engagement – *“How are you moving the business forward?”*
2. Accountability is Visible, Personal, and Measurable
3. Collective Accountability powers team performance
4. Changing the Narrative – *“What have you done to move the business forward?”*

# Action Register

Priority	Description	Applies To	Responsibility	Original Target Date	Current Target Date	# of Extensions	Completion Date	Comments	Administration
High	Generis - Need to get all new leads into ACT for F/U	Potential New Customers	<u>Quentin Guess</u>	Oct 15, 2021	Nov 12, 2021 <a href="#">Add To Calendar</a>	3	Nov 18, 2021 <a href="#">Approve</a> <a href="#">Reject</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
1932 High	Engineering specs	East Coast Division	<u>Paul Campbell</u>	Aug 20, 2021	Nov 23, 2021 <a href="#">Add To Calendar</a>	4	Nov 30, 2021 <a href="#">Approve</a> <a href="#">Reject</a>	<a href="#">Comments</a>	<a href="#">Edit History</a>
Medium	Write up CSAT survey and send to all customers.	Customer Satisfaction Rating	<u>Quentin Guess</u>	Nov 01, 2021	Nov 17, 2021 <a href="#">Add To Calendar</a>	1	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
High	Review Vendors for 2022	Scrap Rate ( Products Produced)	<u>Michael Watkins</u>	Nov 05, 2021	Nov 24, 2021 <a href="#">Add To Calendar</a>	2	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
Critical	Need to review all processes to see why this line is not performing- check new dies	Scrap Rate - Product 3	<u>John Pyecha</u>	Sep 20, 2020	Nov 24, 2021 <a href="#">Add To Calendar</a>	16	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
High	Need to add one more person to the 2-11PM call time	average days to respond to customer inquiries	<u>Seth Davies</u>	Dec 03, 2021	Dec 03, 2021 <a href="#">Add To Calendar</a>		<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
SA Medium	Why did we have such an increase in scrap this week- appears to be a supplier issue with material	Scrap Rate ( Products Produced)	<u>John Pyecha</u>	Jul 29, 2020	Dec 08, 2021 <a href="#">Add To Calendar</a>	9	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
Low	Research AI/ANN for more precise Management decisions.	Overall Line Efficiency	<u>Quentin Guess</u>	Oct 30, 2021	Dec 10, 2021 <a href="#">Add To Calendar</a>	2	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
SA Critical	Install new packaging machine	East Coast Division	<u>Seth Davies</u>	Aug 06, 2021	Dec 13, 2021 <a href="#">Add To Calendar</a>	7	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
High	Show Tina how to make a dashboard	Labor % to Standard	<u>Seth Davies</u>	Dec 03, 2021	Dec 14, 2021 <a href="#">Add To Calendar</a>	1	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
Medium	CAT team to review ways to save money	Production Cost Reduction %	<u>Seth Davies</u>	Sep 17, 2021	Dec 15, 2021 <a href="#">Add To Calendar</a>	1	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
High	Talk to procurement about supplier	1st Pass Yield %	<u>Seth Davies</u>	Nov 19, 2021	Dec 15, 2021 <a href="#">Add To Calendar</a>	2	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
High	Need to engage someone from OPEX team	1st Pass Yield %	<u>Seth Davies</u>	Aug 13, 2021	Dec 16, 2021 <a href="#">Add To Calendar</a>	4	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>
SA Critical	Implement new automation manufacturing system	East Coast Division	<u>Seth Davies</u>	Sep 10, 2021	Dec 17, 2021 <a href="#">Add To Calendar</a>	6	<a href="#">Mark as Complete</a>	<a href="#">Comments</a>	<a href="#">Create Sub-Action</a> <a href="#">Edit History</a>

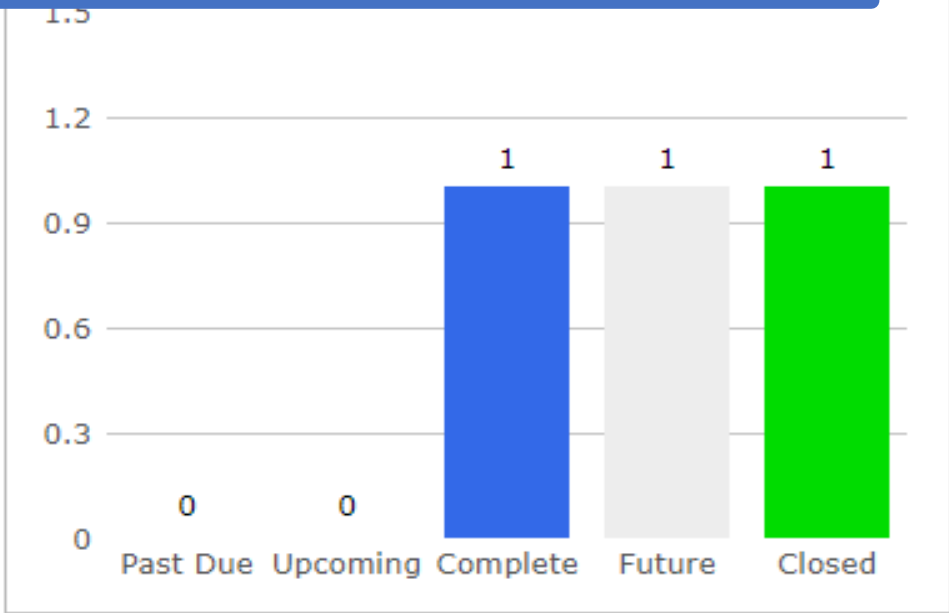
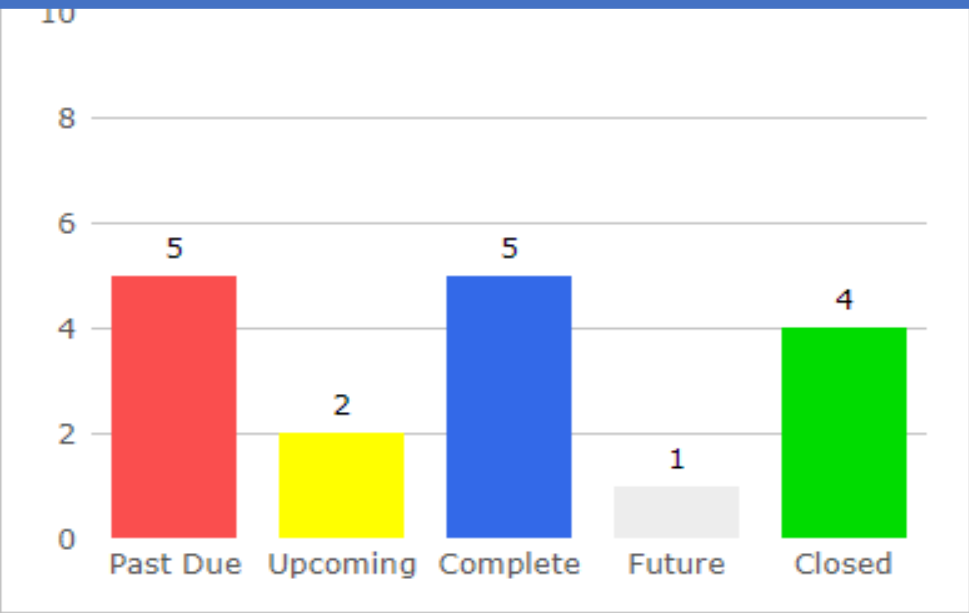
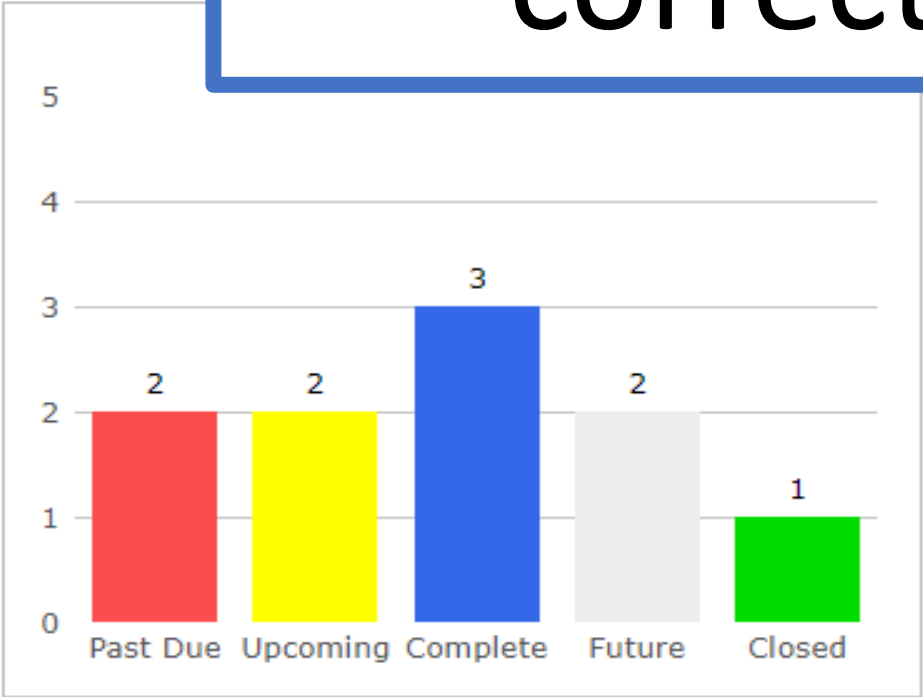


# Using Data for a Strategic Advantage

	East Coast Team Actions(09-Sep-2018 to 08-Mar-2019)						
	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Talk to supplier						★	★
Begin planning 2019 PBL Scoreca							
Publish and Communicate Holid							
Review issue of Fox machines an							
Why did we have such an increas							
had an issue- most of this shb un							
Verify that all the production cos							
Upload team handbook to the a							
Schedule quality training for Su							
Review Q1 strategy document an							
Engage Opex teama to review sp							
building new prototype to help r							

action performance For CSI

**Execution Process: Teams must diagnose and understand why a metric is underperforming (red) and develop a corrective action linked to the KPI**



# Process Based Leadership®

Engagement Analysis – Performed Quarterly

*“Moving the Engagement Narrative from people to what people do...”*

Imperative #2: Elevating Expectations of Engagement by Creating a Culture of Collective Accountability

*Moving the Engagement Narrative from “How do you feel?” to “What have you done to move the business forward?”*

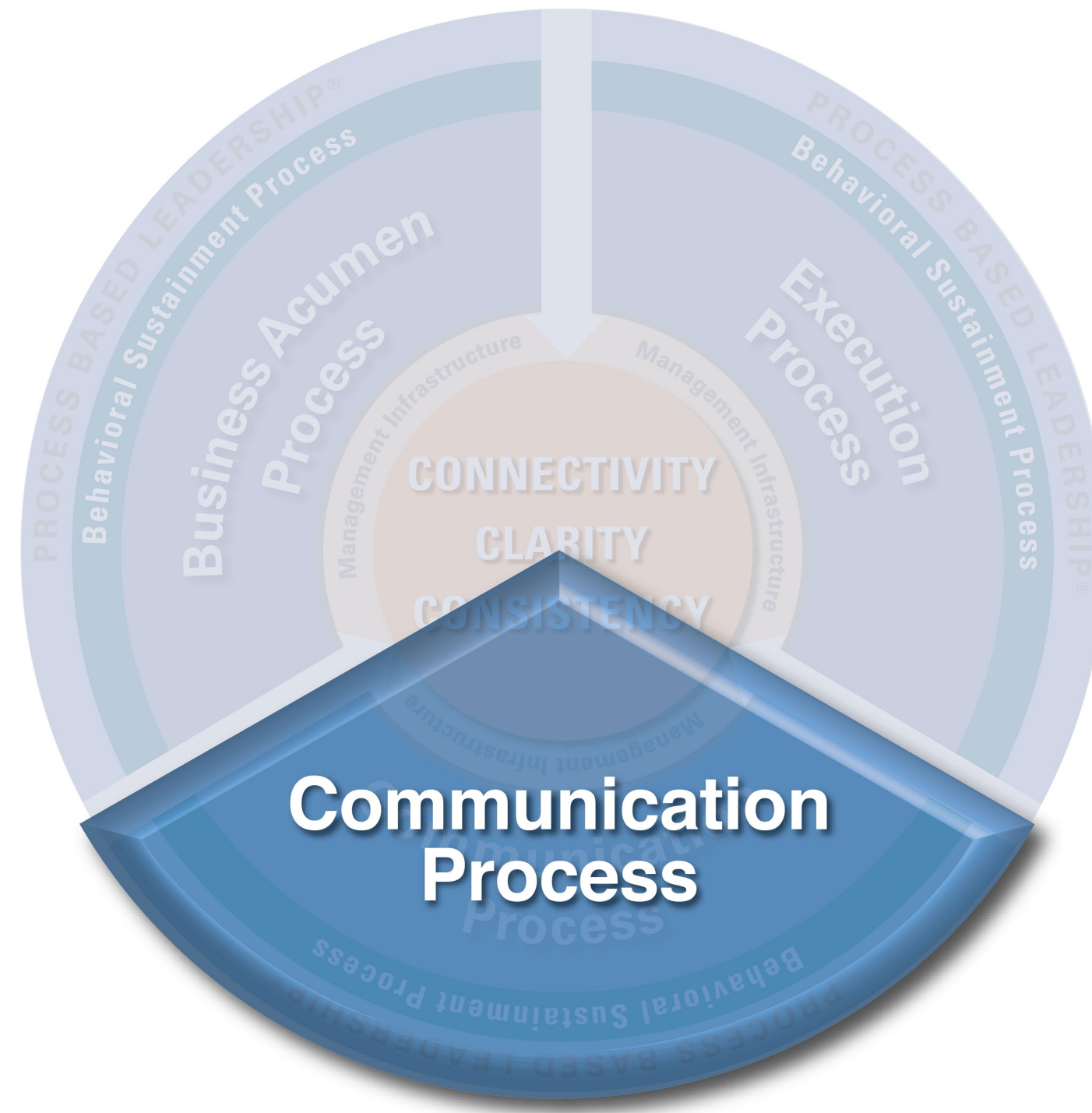
John	0	0	0
Linda	8	3	2.8



# Process Based Leadership®

## Low Functioning Culture:

1. Meetings feel like an *“in Addition to”* the work
2. No harmonized cascade of information so leaders operate from a position of Defense, not Offense
3. Personalities drive meeting effectiveness
4. In the absence of a good process – *“Let’s call a meeting...”*
5. Leaders spend 78% of their week in meetings



## High Functioning Culture:

1. Thermostatic metrics power the meeting – *“Did the time we just spent in this meeting move our business forward?”*
2. Standard Work Meetings = Six hours a week
3. Robust *“Pass Down”* Communication Cadence getting leaders on Offense
4. Meetings are the *“Enabler of the Work”*

# TIER MANAGEMENT SYSTEM

Powered by Process Based Leadership®

Shift

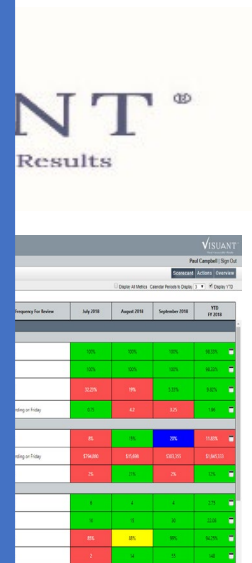


Week

Win the Day

Daily Management System

Imperative #3: Creating a Compressed and Disciplined Cadence of Communication that allows Leaders to Operate from a Position of Offense, not Defense



Transformational Management

Forward  
(Transformational)



T1 T2 T3 T4 T5 T6 T7 T8

Low Tech/High Touch Metrics



Thermostatic Metrics  
High Tech/Low Touch

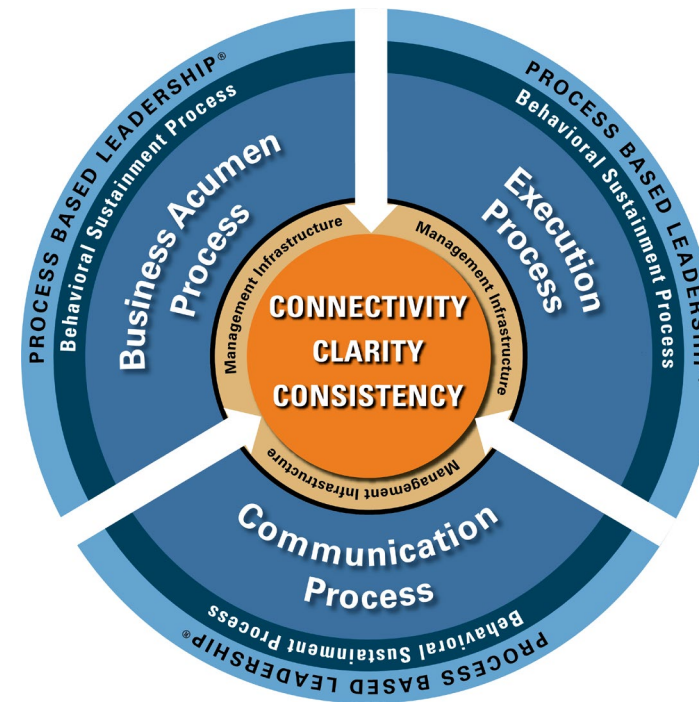
#SHRM22



# Using Data for a Strategic Advantage

Non-negotiable Agenda for Communication Cascade and Connectivity:

- I. Action Register Review  
*(Actions due this communication cycle)*
- II. Scorecard Review  
*(Only Red items)*
- III. Around the Table  
*(60 seconds per participant, future focused, no problem solving)*
- IV. Recognition  
*(Intentional reflection)*
- V. Pass Down/Up/To Process  
*(Creating an offensive position)*
- VI. Action Register Review  
*(New actions – 12-month clarity)*
- VII. Meeting Audit  
*(Did the time we just spend move the business forward?)*



Robust Rhythm and Cadence of Communication

Tier 5

Senior Leadership Team

Tier 4

Leaders and their Teams

Tier 3

Department Managers

Tier 2

Teams in the Field

Tier 1

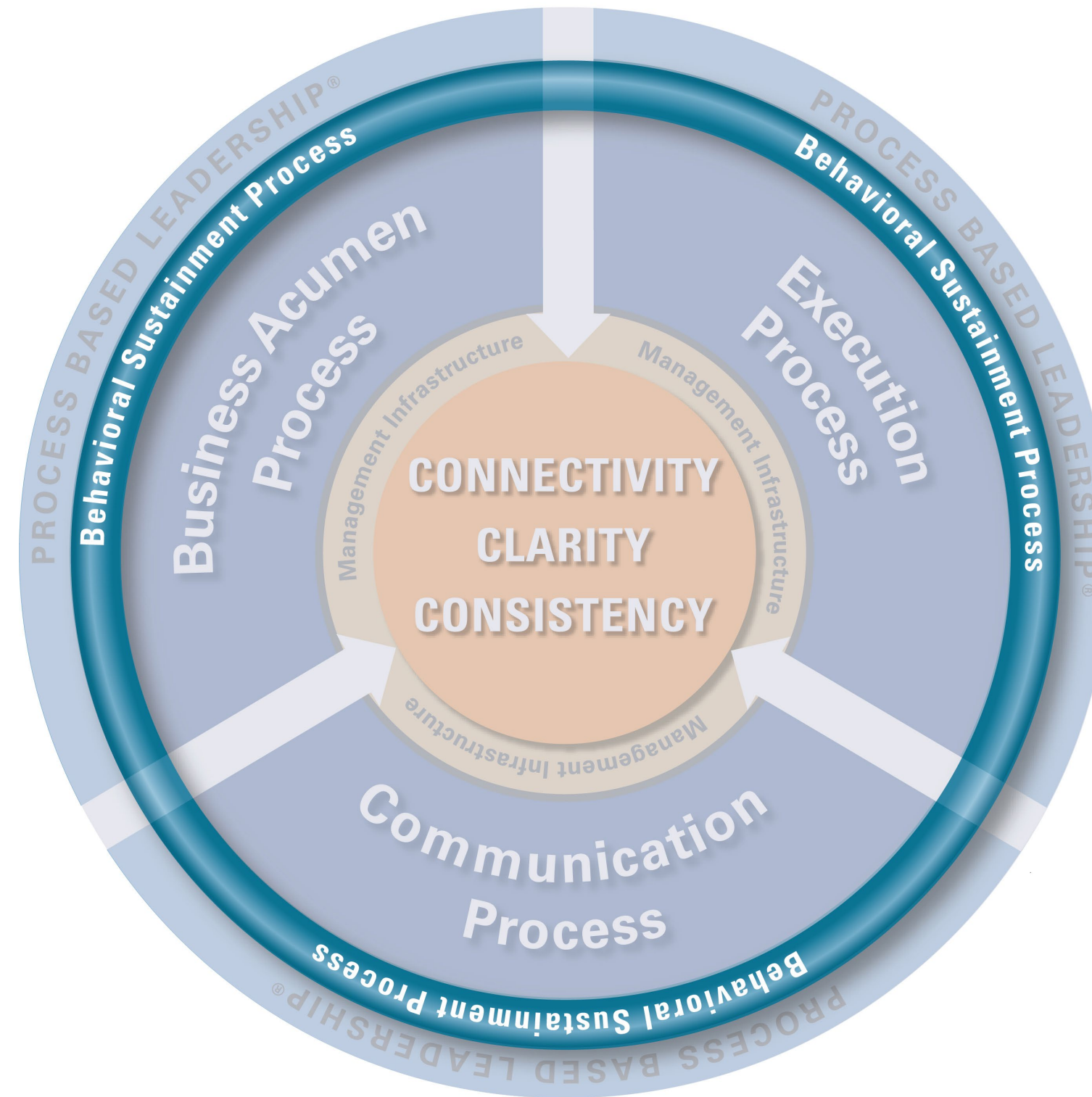
Associates



# Process Based Leadership®

## Low Functioning Culture:

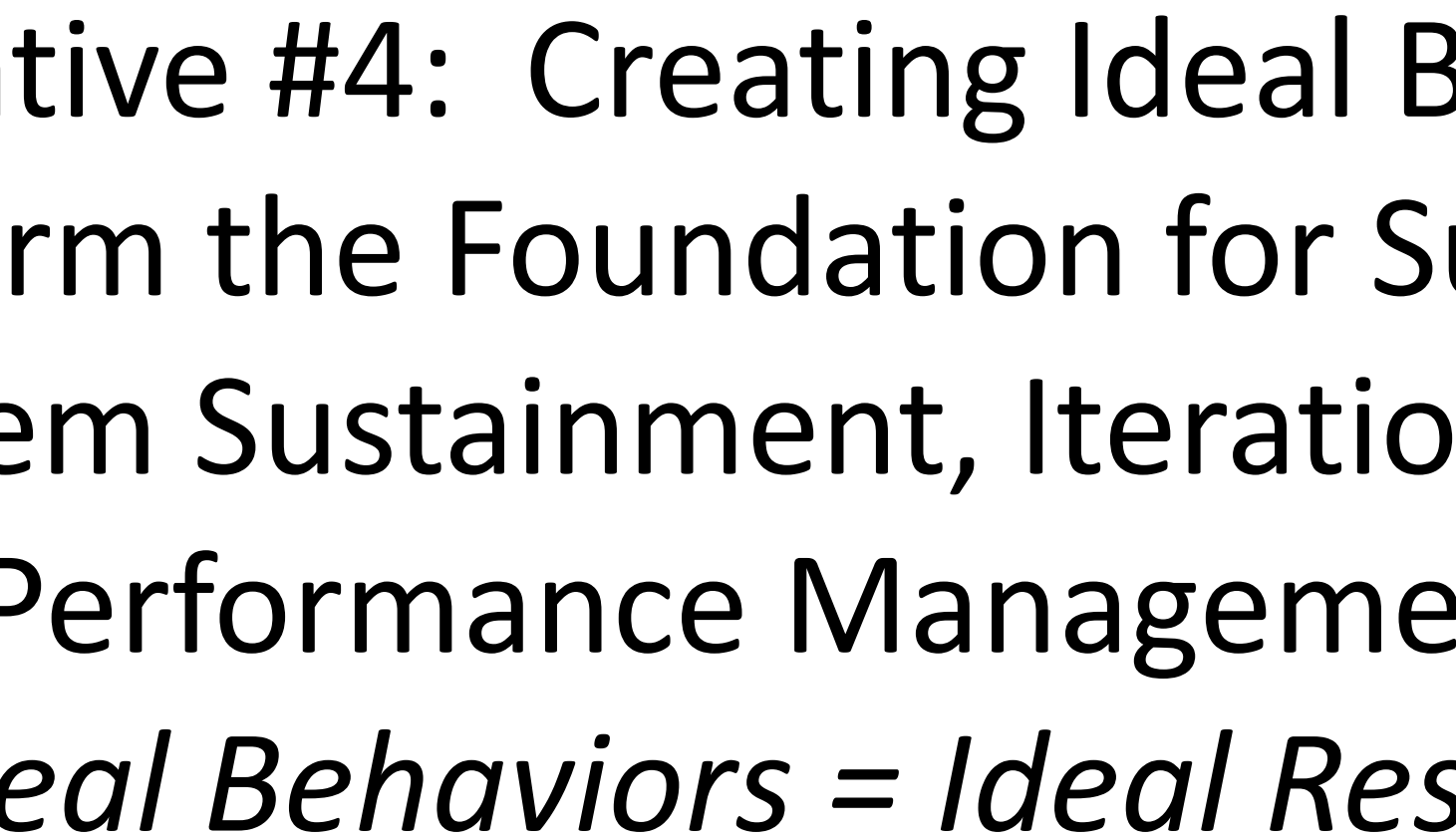
1. Purpose Statements and Values exist but no localized/translated tactical behaviors
2. Candid and crucial conversations don't occur as there is no agreed upon baseline of "Ideal Behaviors"
3. Sustainment is suspect – "Just wait till the next leader arrives – Revert to the Three P's..."



## High Functioning Culture:

1. Ideal Behaviors are built by the team
2. A Business Process Handbook is built and owned by the team
3. On-boarding is Robust – "Welcome to our team, here is how we do business..."
4. Foundation and process for having radical candor and business driven conversations





Imperative #4: Creating Ideal Behaviors  
that Form the Foundation for Successful  
System Sustainment, Iteration, and  
Performance Management  
*“Ideal Behaviors = Ideal Results”*

# Process Based Leadership®

## Run the Business

- High Functioning Cultures create the Non-Negotiable Architecture to dynamically “RUN THE BUSINESS” thereby creating Thermostatic Data and Process Driven Decisions

do Business.”





# Process Based Leadership®

When “RUN THE BUSINESS” Systems are Robust, Leaders can spend intentional time in the “TRANSFORM THE BUSINESS” Strategic Mindset

Tra

Strat

- Op
- Der
- Der
- Able to “Think In Time”
- Employ Creative & Critical Thinking



# Our Approach...

## Process Based Leadership®

*"Solutions are only solutions if they actually work..."*

Discovery & Immersion  
Process – Clarity,  
Connectivity, & Consistency



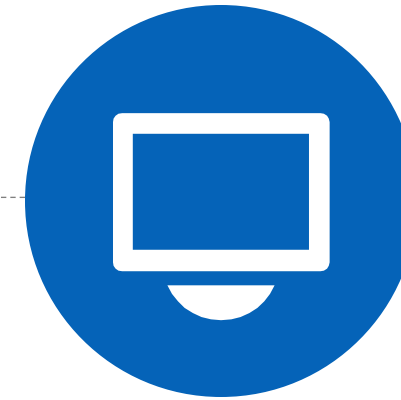
### Discover

Creating Customized  
Solutions through  
Immersion and  
Discovery



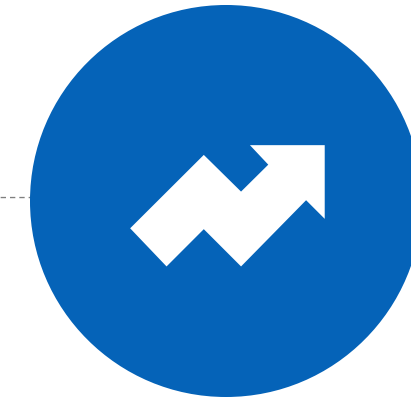
### Design

Collaborative and  
Customized Design  
from *"Best in Class"*  
Management Systems



### Deploy

Digital Management  
System designed to be  
the *"Adoption  
Accelerator"*



### Deliver

Bottomline Business  
Results and Enhanced  
Cultural Engagement





 Competitive Solutions Inc.



For additional information visit  
[csipbl.com](http://csipbl.com)

To request:

1. Copy of Slide Presentation
2. Guide to Scorecard Fundamentals
3. Schedule a Visuant<sup>®</sup> Demo
4. HR Metric Examples



Seth Davies  
[sethd@csipbl.com](mailto:sethd@csipbl.com)  
770-667-9071

# Panelist Questions and Discussion



**Seth Davies**  
Executive Vice President  
Competitive Solutions, Inc.



**Al Faber**  
President & CEO  
Baldrige Foundation

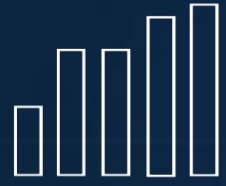




# Baldrige Performance Excellence Program

Robert Fangmeyer, Director BPEP





# Baldridge Program Updates

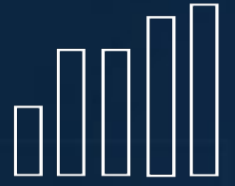


Baldridge Performance Excellence Program | [www.nist.gov/baldrige](http://www.nist.gov/baldrige)

- Congress authorizes “Community” as new award category
- Framework Revisions for 2023/2024
- Job Quality Toolkit
- Advanced Manufacturing Assessments
- External Program Review





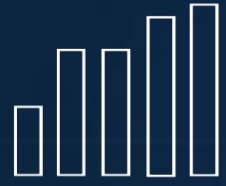


# Community Excellence

NIST

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

- Our nation's competitiveness is dependent on having a well- educated, appropriately trained, and healthy workforce in well-paying, future-oriented jobs
- Baldrige already helps improve the individual components of education, health, business, and social services, but only one organization at a time
- What is needed is a Baldrige-based systems approach that aligns and integrates the efforts across all community sectors
- Award implementation dependent on federal appropriations
- Continue to work with COE2026 and the rest of the Baldrige Enterprise



# Baldridge Excellence Framework



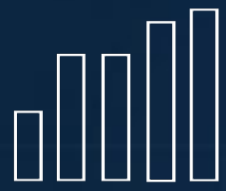
Baldridge Performance Excellence Program | [www.nist.gov/baldrige](http://www.nist.gov/baldrige)

Framework is core to our mission and critical to the success of the entire Baldridge Enterprise

- Ever evolving to address the drivers of long-term success and sustainability
- Cycle of refinement every two years
- Emerging themes for 2023/2024
  - Agility, resilience, and organizational transformation
  - Diversity, equity, and inclusion
  - Innovation
  - Risk management
  - Supplier management
  - Workforce retention

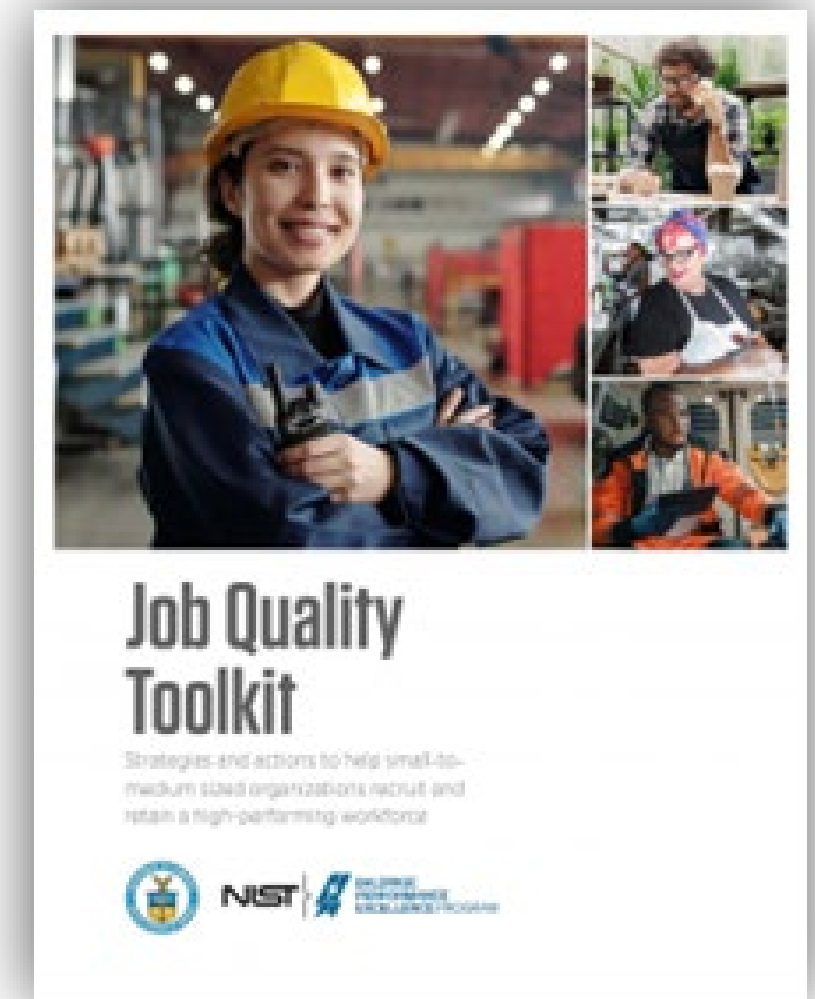


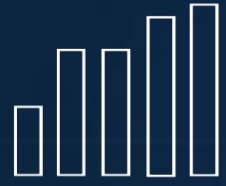




## *Strategies and actions to help small- to medium-sized organizations recruit and retain a high-performing workforce*

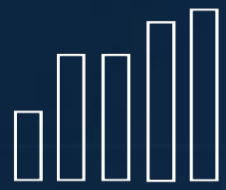
- Partnership with DOC, DOL, industry, and advocacy groups
- Identifies 8 key drivers that influence job quality
- Recognizes that needs, expectations, and desires vary
- Non-prescriptive – a menu of options
- Encourages dialogue, analysis, outside the box thinking, participative decision making, and tracking progress
- Provides potential strategies, actions, and resources, but...
- Many to most organizations will still need help





## *Assess preparedness for and adoption of AMTS (14.0)*

- MEP collaboration that includes Baldrige Program, Florida Makes and Florida Sterling Council, Illinois Manufacturing Excellence Center and Illinois Performance Excellence Program
- Small and Medium-sized Enterprises (SMEs) need to leverage AMTS
- SME's may not be ready to do so
- Provide a Baldrige-based assessment to help determine
  - Whether they are prepared to leverage AMTS
  - Efficacy of efforts to incorporate AMTS into their operations
- Create new opportunities to engage and serve SME's



# External Program Review

- Examine how the program can best advance U.S. competitiveness [economy] and address the challenges most relevant in today's environment
- Examine how to increase the reach and impact of the program and our offerings [*one of three BPEP strategic objectives*]
- Builds on recent efforts to identify and lower barriers of participation
- The output will inform how the program can best be positioned for maximizing future impact to our nation
- Goal is to obtain recommendations for the award process this December and implement changes for 2023
- Recommendations for the Program overall due end of February



# 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**



# 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.





# Alliance 2022 Plan on a Page

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



## 2022 Baldrige Fall Conference Oct. 19-20, San Diego, CA

Click here to learn how your  
company can reach excellence!

[www.baldrigeconference.org](http://www.baldrigeconference.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.”*



**Stephanie Norling**  
**Executive Director**  
**Communities of Excellence 2026**



## Why We Exist

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

## Envisioned Future

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 Areas of Concentration

- 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

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

## The Communities of Excellence Framework

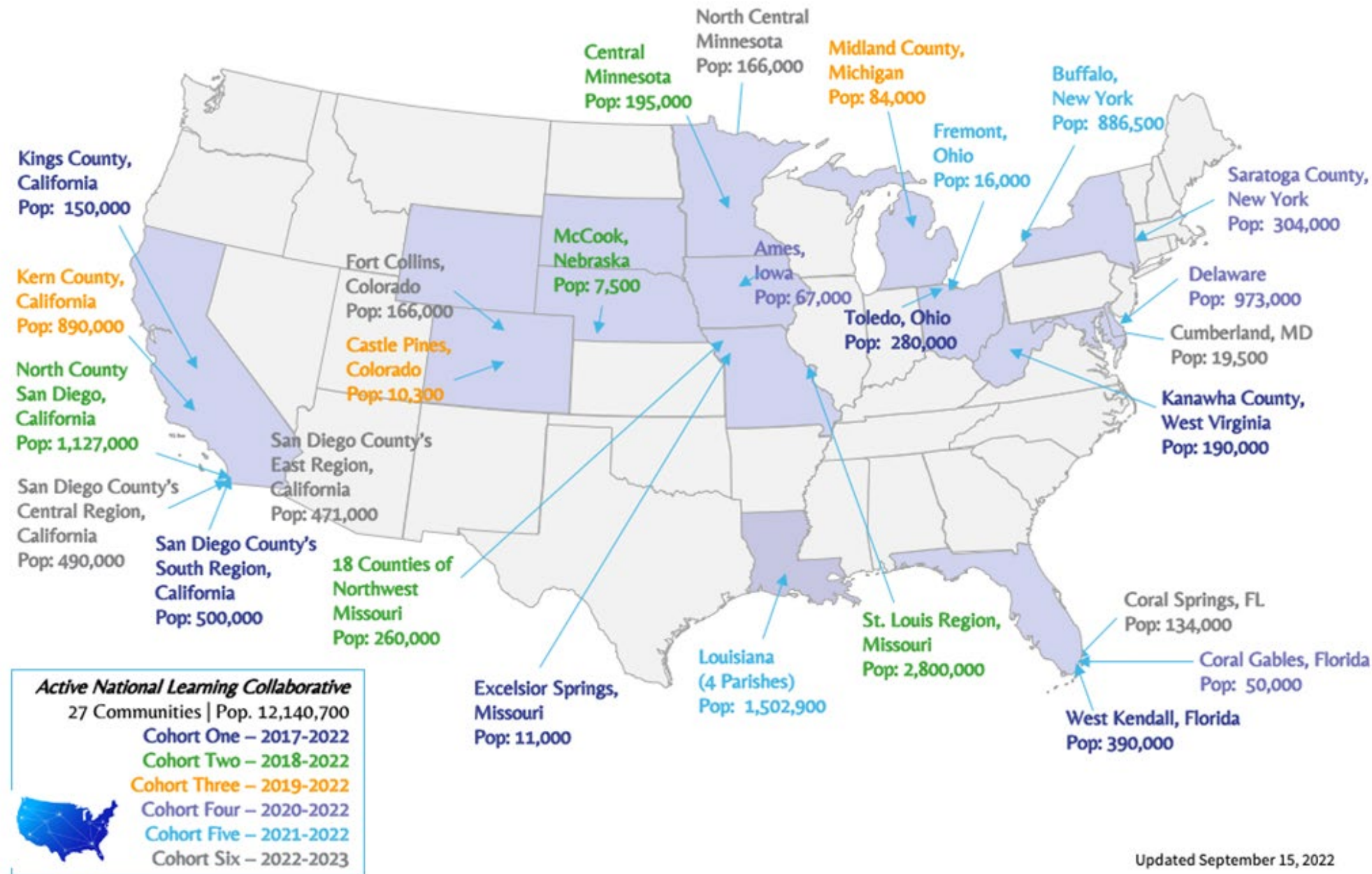
A BALDRIGE-ADAPTED RESOURCE FROM communities of excellence<sup>2026</sup>

## communities of excellence<sup>2026</sup> Assessment & Recognition

A CONTINUOUS IMPROVEMENT PROGRAM

## Preparing for Your Community Excellence Journey

A VIRTUAL COURSE FROM communities of excellence<sup>2026</sup>



communities of excellence<sup>2026</sup>

Lighting the Way to Excellence

2022 Fall Conference  
OCT 20 - Baldrige | OCT 21 - COE2026

### communities of excellence<sup>2026</sup> UNIVERSAL COMMUNITY SCORECARD TEMPLATE | 7.1(1)

**A Community Excellence Journey Resource**  
This template is a companion to the Communities of Excellence Framework and is designed to help you get to know your community's story and understand its strengths, weaknesses, and opportunities. This tool will also help you document your findings in one location for all members of your community excellence group. We encourage you to share it regularly with the completion and update of each section of questions and/or upload to a shared Google Drive, Microsoft Teams file, or some other cloud-based shared workspace for easy access by all members. There are no word limits or number of measurement indicator limits for this internal tool, although we encourage you to practice clear and concise communication skills for readability. You are also not required to use this. It is simply a suggested working document that will provide you with the content needed for your National Learning Collaborative share outs of progress, community engagement communications, and annual applications to Communities of Excellence 2026 for feedback through the Assessment & Recognition Program.

Communities of Excellence 2026 has established a Universal Scorecard Template (See separate document) of results that all communities are requested to track for the value of benchmarking participating communities across the country. Here is the summary table of the indicators included:

Health	Life Expectancy
Education	HS Graduation Rate
Economy	Median Household Income
Quality of Life: Social and Community	Adults with 14+ "Not Good" Mental Health Days Per Month
Quality of Life: Housing	Homes with Suboptimal Conditions

The five indicators have been chosen based on their long-term impact measurement and free access to data by any community in the United States, regardless of population size. They are high-level indicators that also demonstrate the interconnected and interdependent nature of the four core areas of communities: Health and Safety, Educational Attainment, Economic Vitality, and Quality of Life.



# 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.





## Training & Professional Development

### Mastering Strategy in Healthcare (bootcamp)

Join LBL Strategies, in partnership with the Baldrige Foundation and the George Washington University Center for Excellence in Public Leadership, for a live, online Mastering Strategy Bootcamp focused specifically on the technology, trends, and problems affecting the healthcare industry.

Dates  
October 17, 2022 – October 28, 2022, 9am-1pm ET

[Register](#)

[Want to learn more? Click here.](#)



### 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

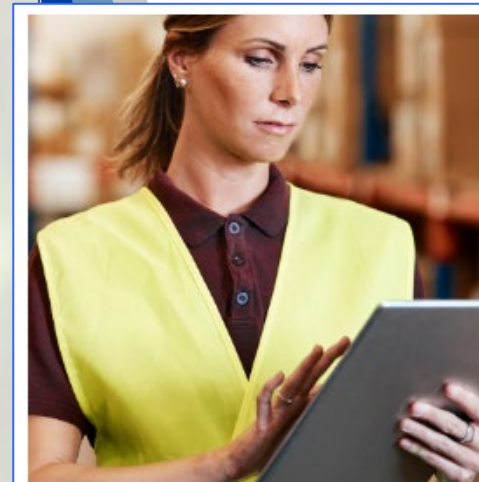
Provides a framework for planning in uncertain times by giving organizations a structured way to think about the future.

#### Strategic Thinking in the 21st Century

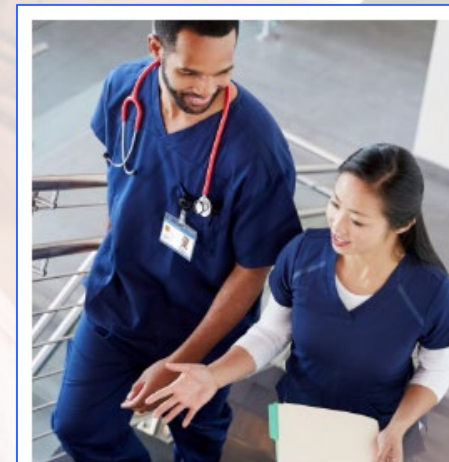
Align day-to-day decisions to your organization's strategic direction.

### 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



Supply Chain Management



Lean Healthcare Professional



<https://www.baldrigeinstitute.org/education>





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