



**BALDRIGE:
America's Best Investment!**



**JOURNAL OF
PERFORMANCE
EXCELLENCE
2019-2020**





The Year in Review

by Al Faber
President and CEO, Baldrige Foundation

“ I am proud of the team here at the Baldrige Foundation as we continue our own Baldrige journey. We are incorporating feedback on our Organizational Profile received in late 2018 from our state-based program, The Partnership for Excellence. We will begin working on our 25-page application in the 2020-2021 timeframe as our next step in the process.”

As President and CEO of the Foundation for the Malcolm Baldrige National Quality Award, it is an honor to present this year’s *Journal of Performance Excellence*®, celebrating the achievements of the Baldrige Community.

To all the dedicated volunteers, examiners, judges, state program leaders and their Boards, as well as the Baldrige Program staff, thank you for another successful year filled with achievement and progress in pursuit of performance excellence. And to those in the greater Baldrige Community—consultants, members of ASQ, and other Baldrige-based organizations like the American Health Care Association—thanks for your continued support and collaboration.

Sustaining the government’s commitment to our public-private partnership remains the Foundation’s number one advocacy priority. Our strategy to engage the current administration, along with members of Congress, coupled with support from influential leaders throughout the Baldrige Community who help tell our story, has resulted in a renewed commitment to financially support the Baldrige Performance Excellence Program (BPEP). We continue to recognize leaders who are helping us make a difference.

We awarded the E. David Spong Lifetime Achievement Award to Senator Richard Shelby of Alabama in 2019. Senator Shelby has been an advocate for Baldrige since its inception, both in Alabama and across the nation.

We also recognized Representative Sam Graves Jr. from Missouri’s 6th congressional district with the Award for Leadership Excellence in Government. Representative Graves was the primary champion helping us build support for the Baldrige FY2018 appropriation in the U.S. House of Representatives.

In 2020 we will recognize Senator Jeanne Shaheen for her leadership and support. Senator Shaheen has been a champion for cost effectiveness, quality, and value in health care for many years and her leadership has been instrumental in health care reform legislation. Along with leaders from other sectors, this year’s select group of individual recipients exemplify role-model leadership.

The Baldrige Program’s mission is precisely aligned with the National Institute of Standards and Technology (NIST) and the Department of Commerce. This public-private



Foundation President and CEO Al Faber (right) welcomes U.S. Secretary of Commerce Wilbur Ross (left) and his wife, Hilary Geary Ross, to the Malcolm Baldrige National Quality Award Ceremony at the 31st Quest for Excellence Conference, National Harbor, Maryland, April 7, 2019.



Showcasing the 2018 Baldrige National Quality Award winners, from right, Al Faber, President and CEO of the Baldrige Foundation; Mike Flores, Chancellor, Alamo Colleges District; Sue Dunn, President and CEO, Donor Alliance, Inc.; Lindel Fields, Superintendent and CEO, Tri County Tech; C. Richard Panico, President and CEO, Integrated Project Management Company, Inc.; Kyle Bennett, President and CEO, Memorial Hospital and Health Care Center; and P. George Benson, Ph.D., Chair of the Baldrige Foundation Board of Directors; April 7, 2019, National Harbor, Maryland.

partnership, which improves the performance and competitiveness of U.S. organizations, has an economic impact of more than one billion dollars annually, as noted by Secretary of Commerce Wilbur L. Ross in his remarks during the 2017 Awards Ceremony.

The Baldrige Program had another successful year in 2019, managing the awards process and delivering exceptional training experiences like the Baldrige Executive Fellows Program and national examiner training. This year, more than 25 high-performing organizations applied for the nation's highest honor for performance excellence and the only award for quality that carries the seal of the President of the United States. After a demanding and thorough analysis, six organizations emerged as national role-model organizations and the 2019 Malcolm Baldrige National Quality Award Winners:

- Adventist Health White Memorial, Los Angeles, California (Health Care)
- Center for Organ Recovery and Education (CORE), Pittsburgh, Pennsylvania (Nonprofit)
- City of Germantown, Germantown,

Tennessee (Nonprofit)

- Howard Community College, Columbia, Maryland (Education)
- Illinois Municipal Retirement Fund, Oak Brook, Illinois (Nonprofit)
- Mary Greeley Medical Center, Ames, Iowa (Health Care)

Congratulations to each of these stellar organizations.

Advocacy

Throughout 2019, the Foundation continued to champion the Baldrige Program, State-based Programs, and Communities of Excellence 2026 (COE 2026) with leaders at the national, state, and local levels. Once again, we had the opportunity to meet with the Commerce, Justice, Science and Related Agencies (CJS) staff in both the House and the Senate. There were several new members on each committee staff and we invested considerable time explaining the many benefits of Baldrige throughout the nation and across every sector of the economy. Once again, we impressed upon them the excitement behind Communities of Excellence 2026, cybersecurity, and our work in rural health care. In 2020, working along with COE 2026, BPEP, and the Alliance, we will be coordinating

support for “Community” to become the 7th Baldrige Award Category.

We have received strong bipartisan support in the Senate from both Senator Jerry Moran of Kansas, the Chairman, and Senator Jeanne Shaheen the ranking member, of the CJS Subcommittee on Appropriations. In fact, all of the Senators we have engaged on the CJS Subcommittee have indicated they will continue to support our efforts.

This year we have the honor of presenting the Baldrige Foundation Award for Leadership Excellence in Government to Senator Shaheen from New Hampshire. Her leadership in health care reform, growing a stronger economy, and numerous other areas have made her one of the nation’s most respected senators. We are excited to recognize her and thank her once again for her leadership. Bipartisan support will be critical in both the House and Senate over the next two years as we advocate for “Community” to become the 7th Category of Baldrige Award. This will be a joint effort between the Foundation, COE 2026, Alliance for Performance Excellence, and the Baldrige Program. Our planning is currently on track and we are optimistic that we will soon see this exciting new category become a reality.

To help build and sustain grass roots support for our efforts and align the Baldrige Community, the Foundation continued its popular quarterly webinar series in 2019. For years, there has been a need for more communication and coordination across the Baldrige Community. The webinars are free, and designed to inform, educate, and synchronize our efforts. In addition to guest speakers on topics of interest to the Baldrige

Community and Foundation information, the Baldrige Program and Alliance have segments to share key information that keep our stakeholders updated and engaged. Filling a long-overdue gap, these webinars have become an ideal communication tool and attendance continues to grow steadily each quarter.

Fundraising

First and foremost, thanks to all our individual and organizational donors, sponsors, and partners over the past year listed in this *Journal*. During 2019, the Baldrige Foundation continued its transformation into a more successful and sustainable fundraising organization and advocate for the Baldrige Program. We are growing corporate interest in sponsorships for the Quest for Excellence® conference and continue to increase the number of channel partnerships by welcoming Constellation, Inc., joining Walden University, Beyond Feedback, The Synergy Organization, SOAR Vision Group, and AmazonSmile.

On October 8, 2019, Constellation and the Baldrige Enterprise announced, “a strategic collaboration which has a common mission to define, recognize, and foster excellence in health care.”

“Since 1988, the Baldrige Award, which carries the presidential seal, has been the highest recognition in the nation for excellence across the critical performance areas of the Baldrige criteria found in the Baldrige Excellence Framework. As a medical professional liability (MPL) insurance company, we have achieved an industry milestone in our collaboration with Baldrige. It’s a way for Constellation to incorporate Baldrige standards of quality and excellence in what we do,” said Vince Gallucci, head of national programs





Foundation President and CEO Al Faber with Youngstown Mayor Tito Brown and Team Mahoning Valley in Nashville, Tennessee at the Communities of Excellence 2026 and Baldrige Fall Conference. The Mahoning Valley Communities of Excellence team is now part of COE 2026's third cohort and off and running to become recognized as a Community of Excellence! Congratulations Mayor Brown and thanks for your leadership!

more importantly—to reward those results using premium adjustments, gainsharing arrangements, multi-year rate locks, and expert support for risk management programs.”

We look forward to our growing relationship with Constellation as we together offer incentives for performance excellence through use of the Baldrige Excellence Framework.

The Foundation continues to cultivate major gifts and strengthen corporate and individual giving to include online donations as part of national campaigns like #GivingTuesday. This year, we achieved an unprecedented 168 percent increase in donations as part of our #GivingTuesday campaign. We are also supporting state-based programs throughout the Alliance for Performance Excellence. We increased sponsorships more than 82 percent over 2018 levels for the 2019 Baldrige Fall Conference in Nashville!

In 2018, we expanded our individual awards program to include the Foundation Awards for Leadership Excellence and the Dr. Curt Reimann

and client relations. “Specifically, it embraces our own Constellation Aligned Performance Initiative (CAPI), which is a way we partner with our health care and senior living clients to acknowledge and advance their performance metrics. CAPI’s proprietary scoring system enables us to identify performance results, as indicated by their scorecard or dashboard, and—



In studio with Leader Dialogue Radio with Ben Sawyer (far left) President and CEO of the SOAR Vision Group; Jennifer Strahan (from left, facing), COO of the SOAR Vision Group; Sherry Farrugia, Chief Operating and Strategy Officer, Pediatric Technology Center at Georgia Tech; Lisa Counsell (back to the camera, right), Chief Commercial Officer, SOAR Vision Group, and Duffie Dixon, Host of Leader Dialogue Radio.

Baldrige Scholarship. The Baldrige Foundation Awards for Leadership Excellence recognize leaders in the Business (Manufacturing, Service, Small Business), Nonprofit, Government, Health Care, Education, and Cybersecurity sectors. The award recognizes leaders who provide exceptionally outstanding support to Baldrige and the Foundation's mission. The Dr. Curt Reimann Baldrige Scholarship provides recipients an opportunity to attend the Baldrige Examiner Training Experience, held each spring at NIST in Gaithersburg, Maryland. The scholarship was created to recognize and honor the important role played by examiners in the Baldrige Award process.

We are strengthening and scaling up our partnership with SOAR Vision Group as part of a long-term strategy to grow Baldrige in all business verticals. We continued to promote our co-branded leader dialogue website to provide virtual collaboration and thought leadership opportunities for leaders throughout the Baldrige Community and beyond. The leaderdialogue.com website helps leaders deepen their understanding of the Baldrige Framework and provides insights on what they can do to strengthen organizational deployment, strategy execution, and accelerate their performance excellence journey.

Complementing online resources is our radio show, Leader Dialogue Radio, co-hosted by the Baldrige Foundation and SOAR Vision Group, which now averages over 124,000 podcast downloads weekly. This year's guests included well-known Baldrige thought leaders like Dr. George Benson, Former President of the College of Charleston;

Our 2020 Individual Award Recipients are:

E. David Spong Lifetime Achievement Award

W. Paul Worstell, (Former CEO)
PRO-TEC Coating Company

Harry S. Hertz Leadership Award

Jayne Pope, Chief Executive Officer, Hill Country Memorial

Award for Leadership Excellence recipients are:

Lawrence "Larry" Adams, Vice President (Retired), Florida Power and Light, in the Business sector

Gerry Agnes, CEO, Elevations Credit Union, in the Business sector

Linda Vincent, Executive Director, Alabama Performance Excellence Program, in the Nonprofit sector

Gary Floss, Retired Business Leader, in the Business sector

Janice Garfield, Ph.D., Director, Professional Doctorate Innovation and Assessment, Walden University, in the Education sector

Mac McMillan, CEO Emeritus, CynergisTek, Inc., in the Cybersecurity sector

Ray Montgomery, Special Projects Executive; Former President and CEO, Unity Health, in the Health Care sector

Tom Raffio, CEO, Northeast Delta Dental, in the Health Care sector

Senator Jeanne Shaheen, US Senate, New Hampshire, in the Government sector

Michelle Tierney, Ph.D., VP of Organizational Development and Innovation, Southcentral Foundation, in the Health Care sector

Dr. Robert Trenchel, President and CEO, Yuma Regional Medical Center, in the Health Care sector

Dr. Curt Reimann Baldrige Scholars are:

Alan Lee Gunnerson, Ph.D., Director of Consulting – Service Delivery, CGI Federal Program Manager (ATIS) [Army Training Information System]

Jason Hazelrigg, Regional Practice Manager, Pain Management, Mount Carmel Health System



Scott McIntyre, CEO of Guidehouse; Dr. Dave Gifford, Director, Center for Health Policy Evaluation in Long-term Care and CMO, American Health Care Association/National Center for Assisted Living; Rulon Stacy, Program Director, University of Colorado Business School; Lowell Kruse Chair, COE 2026 and Former President and CEO, Heartland Health, and non-Baldrige leaders like Geoff Duncan, the Lieutenant Governor of Georgia.

Every leader has a strategy, executing on that strategy is the challenge. If you want to learn how to effectively achieve what you have set out to accomplish, then this show is for you. Gain keen insights and listen in as leaders share their stories and best practices. The show airs live each Friday at 1:00 p.m. ET, and podcasts are available to download on the Leader Dialogue website.

The Foundation staff also spent a great deal of time in 2019 planning for our announcement of the Baldrige Foundation's Institute for Performance Excellence and Mac Baldrige Society later this year. The Institute for Performance Excellence will be a thought leader on performance excellence, leadership, and management. Our team will carry out this mission by undertaking research projects, hosting conferences and activities, conducting executive-level training, and publishing and distributing a wide variety of educational materials. The mission of the Institute is to improve the practice of leadership and management in pursuit of performance excellence and its impact in an ever-changing world.

The Mac Baldrige Society is our campaign to raise the funding required to establish the Institute and consists of its first 20 Trustees. The Institute is one of the most exciting developments in creating a long-term vision for the Foundation and securing its sustainability.



The Institute's signature publication will be the *Chronicle of Leadership and Management*, a new peer-reviewed periodical scheduled to debut in late 2020. James R. Evans, Ph.D., Professor Emeritus at the Lindner College of Business, University of Cincinnati, is the *Chronicle's* Editor-in-Chief.

The goal of the *Chronicle* is to facilitate the sharing of knowledge by providing insightful and practical perspectives and thought leadership for leading and managing performance excellence in business, health care, education, government, nonprofit organizations, and in community and cybersecurity applications. The call for contributing papers for this peer-reviewed publication is available on the Foundation's website and in this edition of the *Journal*.

Promoting Performance Excellence

An important part of the Foundation's mission is promoting performance excellence in the United States and throughout the world. In addition to our very successful online initiatives through social media, and our weekly radio talk show, I have had the opportunity to attend and speak at numerous state-program conferences and other venues again this year.

Early in the year I attended the Quality New Mexico conference and also

paid a visit to Texas where Dr. Mac McGuire, his wife Lin, and Board Chair, Tommy Gonzalez, are driving one of the largest and best state-based programs in the country, helping to make Texas a “quality state.” I had the chance to publicly recognize Dr. Mac and Lin, who are planning to retire soon, and thank them for their dedicated service to Texas and the Baldrige Enterprise nationwide. I then made a visit to Denver and spoke at the Rocky Mountain Performance Excellence (RMPEX) state conference. The team at RMPEX is doing an outstanding job as a regional program across a four-state region that includes Colorado, Montana, Wyoming, and Nebraska.

We held two CEO Innovation Roundtable Events for health care leaders this year. The first was in Atlanta where we specifically addressed the challenges facing nonprofit health care organizations. The theme of the event was *Performance Excellence in the Age of Consumerism: Board Leadership*, focusing on effective strategy development, deployment, and the role of governance. The event started with a dinner at which Morten Hansen, Ph.D. provided the keynote address. Dr. Hansen is

a world-renowned organizational consultant who is a thought leader in many areas of business, some of the most notable being collaboration and developing high-performance organizations. Ben Sawyer and Jennifer Strahan from SOAR Vision Group; Pam Knecht, President and CEO of ACCORD LIMITED and faculty member at The Governance Institute; and Dr. Roger Spoelman, Executive Advisor, Strategic and Operational Integration at Trinity Health, all served as skillful facilitators, guiding attendees in meaningful and engaging dialogue.

The second CEO Roundtable was a collaboration between the Baldrige Foundation, SOAR Vision Group, and the University of Alabama at Birmingham’s (UAB) Department of Health Services Administration. We co-branded our Roundtable with UAB’s National Symposium for Healthcare Executives. The event featured a keynote presentation from Chuck Stokes, President and CEO of the Memorial Hermann Health System, Houston, Texas, and former Chair of the Board of Directors of the American College of Healthcare Executives. This was one of the most engaging events to date and immediately led to



Working session at the CEO Innovation Roundtable, co-sponsored by the Foundation, the SOAR Vision Group, and the University of Alabama at Birmingham.





Chuck Stokes, President and CEO of the Memorial Hermann Health System and former Chair of the Board of Directors of the American College of Healthcare Executives, addresses the National Symposium for Healthcare Executives at the University of Alabama at Birmingham, co-sponsored with the Foundation and the SOAR Vision Group.

another planned event in Denver, Colorado, in collaboration with Benjamin Anderson and the Colorado Hospital Association.

I also had the opportunity to serve again in 2019 as a judge for the Health Administration Case Competition at UAB. Graduate students from colleges and universities across the United States compete in a rigorous process to offer ideas on improving quality and access to a rural health care system. It was exciting to discuss the Baldrige Excellence Framework with these future leaders and provide them another tool in their leadership and academic experience. Connecting Baldrige with future leaders is a key strategy for the Foundation and we are making progress in several ways.

First, I have had the pleasure to work with the CEO of the Commission on Accreditation of Healthcare Management Education (CAHME), which is the accrediting body for graduate programs in health care management across the United States and Canada. Recently, I was named to their Standards Council and have enjoyed participating in the

current review of their Accreditation Criteria for participating colleges and universities. The Foundation has also developed a Baldrige Course for MHA programs which includes a syllabus and all supporting materials needed to effectively teach a full semester graduate course covering the Baldrige Excellence Framework and performance excellence in health care. Dr. Jim Evans developed the course based on his work at the University of Cincinnati. The Foundation will begin to promote the course in MHA programs throughout the United States in 2020.

I was also proud of the team here at the Baldrige Foundation as we continue our own Baldrige Journey. We are incorporating feedback on our Organizational Profile received in late 2018 from our state-based program, The Partnership for Excellence. We will begin working on our 25-page application in the 2020-2021 timeframe as our next step in the process.

My last event of 2019 was the Baldrige Program's Board of Overseers meeting in Gaithersburg, Maryland. Deborah Bowen, CEO of the American College of Health Care Executives, is the Board Chair and along with all the Board members are working to guide the



Foundation President and CEO Al Faber (left) recognizes Phil Singerman for his service to the Baldrige Community. Mr. Singerman retired from the National Institute of Standards and Technology in early 2020.



Baldrige Program and serve as ambassadors for Baldrige in every sector of the economy.

On a personal note, I had the opportunity during the meeting to recognize Phil Singerman. Phil is the Associate Director for Innovation and Industry Services at NIST. He was appointed to this position in January 2011 after a 35-year career in tech-based economic development. He is responsible for the NIST suite of technology partnerships, quality, and advanced manufacturing programs, including the Hollings Manufacturing Extension Partnership, the Baldrige Performance Excellence Program, the Office of Advanced Manufacturing, the Technology Partnership Program, and other extramural activities. Phil retired in early 2020 and we will miss him. His support for the Baldrige Program has been extraordinary. We wish him all the best in retirement.

The year 2020 is also a transition year for the Foundation's leadership. Board Chair, Dr. George Benson, was replaced by Dr. Kathryn Eggleston. George served the Foundation as chair for more than seven years and did a superb job during one of the most turbulent times in the Foundation's history. He will remain on the board as immediate past chair, and we look forward to Kay's leadership moving forward!

In summary, 2019 proved to be very successful for the Baldrige Program, Foundation, Alliance programs, and ASQ. With a clear sense of purpose, mission, and strategy, we continue to grow fundraising operations and increase awareness through advocacy. The Foundation's operating costs remained under budget, demonstrating our responsible stewardship of the Foundation's endowment and commitment to sustainability.



Outgoing Foundation Board Chair P. George Benson, Ph.D. (from left), Foundation President and CEO Al Faber, and starting January 1, 2020, Foundation Board Chair Kathryn Eggleston, Ph.D., with the Baldrige Award at the Malcolm Baldrige National Quality Award presentation ceremony, April 2, 2017, Baltimore, Maryland.

On behalf of the Foundation's Board of Directors and staff, I wish to once again thank all the dedicated men and women across America who volunteer and support this great program. The Baldrige Excellence Framework continues to keep our nation on the leading edge of validated management best practices, and competitive in the global economy, returning enormous benefit to all U.S. citizens.

After three decades, Baldrige continues to be *America's Best Investment!*

Sincerely,

Al Faber
President and CEO





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The Foundation would like thank the staff at the Baldrige Performance Excellence Program for their assistance in creating and curating much of the content of this collection. Thanks to the Alliance for Performance Excellence and Communities of Excellence 2026 for their important contributions to this work. We also want to acknowledge the fine photographic work of Mark Hamilton and Hamilton Studios who provided the bulk of the images used here. Thanks also to Rebecca McQuigg of Encompass Media Group for her great skill and vision that guided the design and layout of the Journal.

Editor: Mark Wayda

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“The Board acknowledges with gratitude the exemplary leadership legacy of former Board Chair, P. George Benson, Ph.D. Dr. Benson served with distinction as the Foundation’s master of board governance policy and practice for the past seven years..”

Baldrige Insights from the Foundation Board Chair

by Kathryn K. Eggleston, Ph.D.
President, Richland College

The Baldrige Foundation is entering its next chapter, so this is an exciting time for us to focus on growth and sustainability.

We begin the 2020 decade with a renewed commitment to the Baldrige Foundation’s aspirational vision: “To be recognized around the world as the premier foundation for the promotion of performance excellence in all sectors of the economy.”

The Foundation exists to ensure the long-term financial viability and growth of the Baldrige Performance Excellence Program (BPEP). We will accomplish this through two key overarching strategies: permanent restoration of annual funding in the federal budget (the public partnership) and rebuilding the endowment to support the program and operations beyond a year-to-year existence (the private partnership). Sustainability is the Foundation’s contemporary Big, Hairy, Audacious Goal.

Focused Action #1 Increase Support from Policy Makers

Recent successes in advocacy efforts restored \$2.2 million dollars in program support in each of the last two federal fiscal years; yet this status is not permanently guaranteed. The Foundation, along with its President and CEO, Al Faber, continues to work closely with Dr. Walter G. Copan, Under Secretary of Commerce for Standards and Technology and Director of the National Institute of Standards and Technology (NIST), and U.S. Department of Commerce Secretary Wilbur Ross, along with key members of the House and Senate Commerce, Justice, Science, and Related Agencies (CJS) Subcommittees to sustain federal funding for the Baldrige Program.

The Foundation, along with the entire Baldrige community, must continue to educate and advocate on both sides of the aisle in the House and Senate and within state legislatures. Our message must consistently advance awareness of Baldrige’s significant contributions to building a prosperous economy, to achieving higher educational attainment outcomes, and to ensuring high quality health and well-being in our communities.

Focused Action #2 Fundraising in Multiple Forms

The Foundation’s fundraising will take many forms from small donations to major gifts, planned giving, participation in the U.S. Government’s Combined Federal Campaign, and #GivingTuesday, all aimed at growing the Foundation endowment and supporting program operations. We will also pursue selective grants that advance our efforts.



U.S. Secretary of Commerce Wilbur Ross (right) and his wife, Hilary Geary Ross, talk with incoming Foundation Board Chair Kathryn Eggleston, Ph.D. (center) at the 31st Quest for Excellence Conference, National Harbor, Maryland, April 7, 2019.

Focused Action #3 Strengthen Key Partnerships, Strategic Alliances, and Baldrige Community Collaborations

The Foundation will cultivate even more key partnerships that can provide important revenue streams. These include sector-specific events, channel partnerships, online resources, and education and training.

The Foundation will continue to pursue strategic alliances and media relations that advance the Baldrige Performance Excellence Framework's value proposition to our U.S. and international stakeholders throughout the performance-excellence world.

The Foundation will also continue collaborating across the Baldrige Enterprise to help build stronger state programs and grass roots support of the Baldrige movement, including advocacy for the emerging Communities of Excellence 2026 approval efforts as the seventh Baldrige Award category.

Focused Action #4 Presidential Engagement

The Foundation is pursuing every avenue to restore consistent Presidential engagement in the Award Ceremony and recognition of Award recipients.





Foundation President and CEO Al Faber with incoming Board Chair Kathryn Eggleston, Ph.D., during the 31st Quest for Excellence Conference, National Harbor, Maryland, April 7, 2019.



Incoming Baldridge Foundation Board Chair, Kathryn Eggleston, Ph.D., with Dr. Walter G. Copan, Under Secretary of Commerce for Standards and Technology and Director of the National Institute of Standards and Technology (NIST). Photo taken at the Foundation Board quarterly meeting, Washington, D.C., November 27, 2017.

Acknowledging the Leadership Legacy of P. George Benson

The Board acknowledges with gratitude the exemplary leadership legacy of former Board Chair, P. George Benson, Ph.D. Dr. Benson served with distinction as the Foundation's master of board governance policy and practice for the past seven years. Thank you, George, for your wisdom and guidance, and for leading the Foundation Board during a critical period in its organizational journey.

Success Together: The Board's Commitments

The Directors of the Baldridge Foundation commit to you our highest service in support of advancing the vision, engaging in Board development, upholding fiduciary responsibilities, advocating, creating connections, offering expertise, and contributing financially toward our stated and clearly aligned performance goals. We will continue to support and advise Baldridge Foundation President and CEO Al Faber, as he expertly fulfills the expectations of the Board with the support of his excellent staff.

As always, the Board will be guided by the Core Values and Concepts of the Baldridge Excellence Framework, as together we launch this new decade of service committed to sustaining the positive impact and success of the Baldridge Performance Excellence Program.

Call for Papers

by Baldrige Foundation Institute for Performance Excellence

The *Chronicle of Leadership and Management* is a new periodical scheduled to debut in 2020, published by the Baldrige Foundation's Institute for Performance Excellence and edited by James R. Evans, Ph.D.

"The goal of the *Chronicle*," said Foundation President Al Faber, "is to facilitate sharing of knowledge by providing insightful and practical perspectives for leading and managing performance excellence in business, health care, education, government, nonprofit organizations, and in communities and cybersecurity applications."

According to Evans, Professor Emeritus at the Lindner College of Business at the University of Cincinnati, the articles published in the *Chronicle* are intended to provide actionable concepts to assist leaders in managing performance excellence within their organizations.

Call for Papers

All submissions should be sent via email to the editor at James.Evans@UC.edu.

Submissions for the first issue must be received by June 1, 2020 to allow for review and revisions as necessary.

All articles should draw upon the concepts and philosophy of the Baldrige Excellence Framework and must provide useful information of interest to organizational leaders. In addition, they should be grounded

in experience, innovative thought, and/or an adequate review of relevant literature as appropriate. Highly technical papers of limited scope or academic-type papers are not appropriate. Manuscripts submitted to the *Chronicle of Leadership and Management* must be original works not previously published or under review by another publication.

Types of articles suitable for publication in the *Chronicle of Leadership and Management* include, but are not limited to, the following:

- *Case studies* that highlight role model practices or implementation strategies for performance excellence, drawing upon Baldrige principles.
- *Innovative and insightful discussions* about Baldrige categories, items, areas to address, or key (and difficult to understand) criteria questions that provide practical value.
- *Articles* that translate cutting-edge research literature into practical language that would be applicable and useful to practitioners and may contribute to leading-edge validated practices in the future.

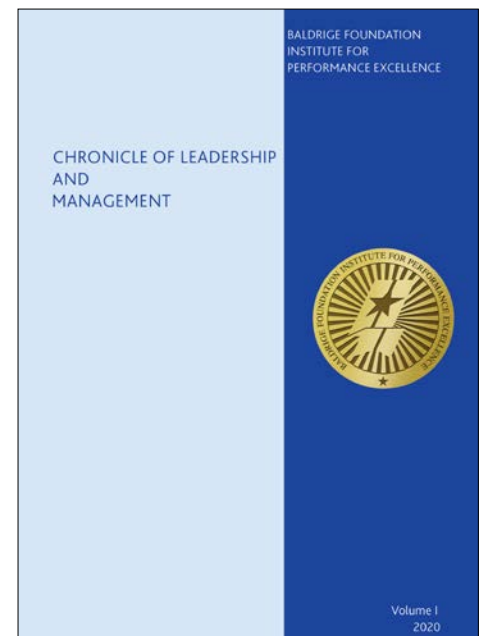
Submission Guidelines

Each submission will be reviewed by at least two members of the editorial board who evaluate the article based on the following attributes:

1. *Contribution to knowledge.* Does the article present innovative

- or original ideas, concepts, or results that make a useful contribution to knowledge of performance excellence?
2. *Significance to practitioners.* Are the concepts discussed of practical significance meaningful to organizational leaders and managers?
3. *Readability and clarity.* Is the article well organized and presented in a clear and readable fashion that will be understood by a wide audience?
4. *Figures and tables.* Are figures and/or tables used appropriately to enhance the ability of the article to summarize and/or communicate information and conclusions?
5. *Organization and style.* Is the content of the article logically organized? Is the title representative of the article's content?

Prospective authors should use these attributes as a checklist in reviewing their manuscript prior to submission to improve the likelihood of acceptance.





2018 Malcolm Baldrige National Quality Award Recipients

The 2018 Malcolm Baldrige National Quality Awards were presented on April 7, 2019, in National Harbor, Maryland, to five exemplar organizations. It was the 31st awards presentation since Congress established the Baldrige Award in 1988. A total of 123 Baldrige Awards have been presented over these thirty years to 114 organizations (including nine repeat recipients).

Originally, Congress authorized the awards to be presented in three sectors, Manufacturing, Service, and Small Business. Eligibility for the award was expanded in 1998 to include education and health care, and again in 2007 to include nonprofit or government organizations. The manufacturing sector has the largest number of award recipients all time with over 25 percent of the awards, but since Congress added the new sectors in 1998, health care

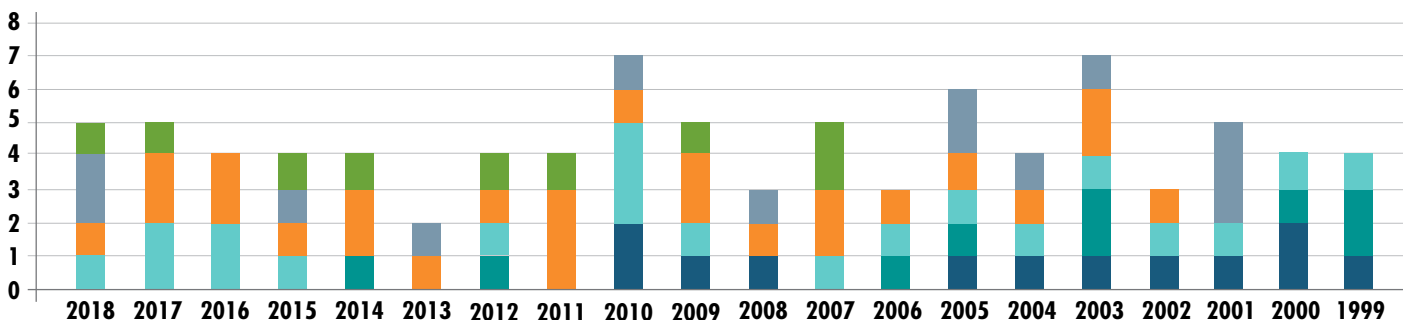
has dominated all recipients, with small business second.

There were five recipients in 2018, two from the Education sector, one from the Health Care sector, one from the Small Business sector, and one from the Nonprofit/Government sector.

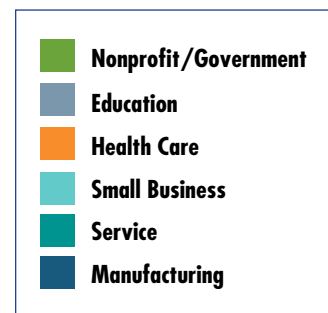
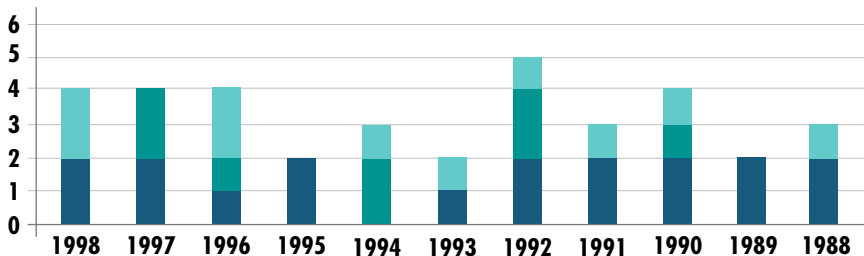
The 2018 Baldrige Award recipients are:

- Alamo Colleges District, San Antonio, Texas (education)
- Donor Alliance, Denver, Colorado (nonprofit)
- Integrated Project Management Company, Inc., Burr Ridge, Illinois (small business)
- Memorial Hospital and Health Care Center, Jasper, Indiana (health care)
- Tri County Tech, Bartlesville, Oklahoma (education)

BALDRIGE NATIONAL QUALITY AWARD RECIPIENTS BY SECTOR



CONGRESS AUTHORIZES THE HEALTH CARE AND EDUCATION SECTORS IN 1998, NONPROFIT/GOVERNMENT IN 2007



28.41% Percent of Baldrige Award Recipients from Health Care, Since 1999; 14.77% Percent of Baldrige Award Recipients from Education, Since 1999; 10.23% Percentage of Baldrige Award Recipients from Nonprofit/Government, Since 2007



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*January 1, 2019 through
December 31, 2019*

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Secretary of Commerce Wilbur Ross presided and presented the awards.



Alamo Colleges District San Antonio, Texas

Alamo Colleges District (ACD) is the largest provider of higher education in South Texas. Its five independent colleges—Northeast Lakeview College, Northwest Vista College, Palo Alto College, St Philip’s College, and San Antonio College—provide two-year degrees that focus on preparing students to transfer to baccalaureate-granting institutions and workforce development programs that help build new careers and meet the needs of business. Ten education and training centers that offer a wide range of education and training for the community and military; and three district support operations centers.

ACD leverages innovation, promising practices, and proof of concept as part of its commitment to student success. Two annual summits are held at each college and at the district level to share practices and initiatives that have had significant impact and may benefit other departments, colleges, or the entire Alamo Colleges District. AlamoADVISE and the Early College High School Program are examples of programs created by one college and shared district-wide.

- ACD has developed course maps with top universities in the state to increase degree-transferable credits for students who desire to transfer and receive a four-year degree. The four-year graduation rate for ACD’s students has increased 150 percent since 2009 and is best in the state and second among the Aspen national cohort of high-performing community colleges. The district graduation rate is first among all community college districts in the state in graduates as a percentage of full-time enrollment.
- ACD works closely with the community of San Antonio and several surrounding counties to implement its community-engaged value and belief that education is a pathway to promote a better life and fight poverty, hunger, and homelessness. Partnerships with businesses and advisory boards have helped to create grants and scholarships that further strengthen the connection between the city and the colleges. The number of students awarded scholarships has increased from 580 to 2,175 and amount awarded from \$500,000 to over \$2 million since 2010.

- ACD student satisfaction with the overall educational experience is 88.4 percent, more than two percentage points higher than the national norm as measured by the Community College Survey of Student Engagement (CCSSE).
- To promote the availability of top 10 percent and top 25 percent comparisons across all community colleges, ACD has formed a comparative data cohort with colleges that participate in the College Excellence Program of the Aspen Institute. ACD is one of the top-performing (top 15 percent) community colleges invited to compete for the Aspen Prize.



2018 Baldrige Award Winner: Alamo Colleges District. From left-to-right: Under Secretary of Commerce for Standards and Technology and NIST Director Dr. Walter Copan, Chairman of the Board of the Foundation for the Malcolm Baldrige National Quality Award Dr. P. George Benson, U.S. Secretary of Commerce Wilbur L. Ross, Jr., Joe Aldrete, Jr., Vice Chair of the Board of Trustees of the Alamo Colleges District, and Mike Flores, Chancellor of the Alamo Colleges District.



Alamo Colleges District Chancellor Mike Flores accepts the 2018 Baldrige National Quality Award.

Donor Alliance, Inc.

Denver, Colorado

One of 58 independent, nonprofit Organ Procurement Organizations (OPOs) designated by the Centers for Medicare and Medicaid Services (CMS), Donor Alliance's mission is to save lives through organ and tissue donation and transplantation. To achieve this mission, Donor Alliance employs effective family approach and recovery programs in more than 100 hospitals. Donor Alliance also inspires the public to register as organ and tissue donors through community partnerships, public outreach, and education campaigns throughout its donation service area. It serves Colorado and most of Wyoming, the third largest geographic service area, covering 184,151 square miles. It has two locations in Denver, CO, and regional offices in Grand Junction, CO; Colorado Springs, CO; and Casper, WY.

- Donor Alliance has consistently been ranked as one of the top 10 OPOs in the nation due to its high organ donor conversion rate of more than 80 percent. (Organ donor conversion rate is the actual number of organ donors divided by the number of patients who are regarded as a potential organ donor.) The organization consistently outperforms the top 25 percent of organ procurement organizations in the percentage of donors who have registered themselves to be donors. Results have improved from 64 percent to 74 percent for organ donors since 2014 and from 65 percent to 68 percent for tissue donors (e.g., skin, bone).
- Donor Alliance's rate for authorization of eligible organ donors has been between 80–84 percent, a rate that has met or exceeded top 25 percent national comparison performance since 2014. Its authorization rate for tissue donation has been between 74–79 percent since 2014 and is in the top 10 percent nationally. Tissue donation referrals from hospitals consistently have been between 99–100 percent since 2014, outperforming two OPOs that benchmark each other.
- The number of organ donors has increased from 109 in 2014 to 144 in 2017, and is projected to reach over 160 in 2018, exceeding the national top 25 percent comparison for number of organ donors per



2018 Baldrige Award Winner: Donor Alliance, Inc. From left-to-right: Under Secretary of Commerce for Standards and Technology and NIST Director Dr. Walter Copan, Chairman of the Board of the Foundation for the Malcolm Baldrige National Quality Award Dr. P. George Benson, U.S. Secretary of Commerce Wilbur L. Ross, Jr., Sue Dunn, President and CEO of Donor Alliance, and Jennifer Prinz, Chief Operating Officer of Donor Alliance.



Donor Alliance President and CEO Sue Dunn accepts the 2018 Baldrige National Quality Award.

10,000 inpatient hospital deaths. Donor Alliance is an industry leader in the number of tissue donors, which has increased from 1,590 in 2014 to 1,752 in 2017 and is in the top 10 percent nationally.

- All four local transplant center customers reported 100 percent satisfaction in the 2018 survey. Tissue processors, who are responsible for the preparation, preservation, storage, and distribution of final tissue grafts for transplantation, also reported 100 percent customer satisfaction with Donor Alliance on three measures: overall satisfaction, relationships, and requirements met.



Integrated Project Management Company, Inc. Burr Ridge, Illinois

With a current workforce of 182 employees in seven locations throughout the United States, Integrated Project Management Company, Inc. (IPM) is a privately-held business consulting company, providing leadership to transform strategies and solutions into sustainable results. President and CEO C. Richard Panico founded IPM in 1988 as the first project management consulting firm in the United States. It helped evolve the discipline of project management while creating proprietary methodologies to supplement the practice.

IPM's origin was manufacturing-related projects, but the company now serves virtually every area of an organization's model, from transforming strategy to reality, to planning and implementing a myriad of functional and cross-functional operational improvement initiatives. IPM offers specialized services in ten areas essential to its targeted industries, which are life sciences, consumer products, industrial products, and health care.

- "Quality and Culture" are the hallmarks of IPM. These translate to relationships that engender trust between and among all employees, and to value for IPM's customers. To achieve IPM's Vision and reinforce a focus on collaboration and action, senior leaders engage the workforce through a formal, comprehensive survey to launch the annual Business Planning Process, which results in identifying imperatives, translating these to strategic initiatives, and then appropriately prioritizing these for action.
- IPM's company-wide annual revenue has increased 62 percent from 2013 to 2017. Annual revenues per consultant are 50 percent higher than the national comparison. The current ratio, a liquidity ratio that measures a company's ability to pay short- and long-term obligations, stands at 6.1 compared to the benchmark of 1.5. The debt-to-equity ratio has averaged 0.2 for the last five years, outperforming the benchmark of 2.2 in the same timeframe.
- IPM's Net Promoter Score (NPS), a key metric of customer engagement, was 61 in 2017, exceeding



2018 Baldrige Award Winner: Integrated Project Management Company. From left-to-right: Under Secretary of Commerce for Standards and Technology and NIST Director Dr. Walter Copan, Chairman of the Board of the Foundation for the Malcolm Baldrige National Quality Award Dr. P. George Benson, U.S. Secretary of Commerce Wilbur L. Ross, Jr., Richard Panico, President and CEO of Integrated Project Management Company, and Larry Meyer, Managing Director for Knowledge and Process Management at Integrated Project Management Company.



Integrated Project Management President and CEO Richard Panico accepts the 2018 Baldrige National Quality Award.

- the excellent benchmark of 50. (Disney, Sony, and Harley-Davidson have NPS scores of 50.)
- From 2015 to 2017, the Bid-to-Win Ratio has consistently exceeded the benchmark (in 2017, 6.5 vs 4.9). In addition, the Proposal Acceptance Rate at 65 percent in 2017 exceeds the average benchmark of 48 percent and places IPM above the 95th percentile.

Memorial Hospital and Health Care Center Jasper, Indiana

Based in Jasper, Indiana, and sponsored by the Sisters of the Little Company of Mary, Memorial Hospital and Health Care Center (MHHCC) provides inpatient and outpatient care through an acute care community hospital, which includes 32 outpatient primary and specialty care clinics and medical practices, and an ambulance service. Memorial Hospital, which opened its doors in 1951, employs more than 1,700 people and provides medical care for 6,600 inpatients; 254,000 outpatients; and 29,000 emergency department visits annually. Nearly 950 babies are born at Memorial Hospital each year.

MHHCC expands service offerings by acting on market intelligence gathered via techniques such as patient and family advisory councils, analysis of Truven and Crimson data as well as Hospital Consumer Assessment of Healthcare Providers and Systems (HCAHPS) and other patient surveys, and MHHCC's website and diverse social media tools. Leveraging this intelligence, MHHCC introduced a new stroke telemedicine product to prevent market share loss and expand access; gained insight into the opportunity for secondary market entry into Davies County, including the need for the construction of a new clinic to provide services to the Amish community; and targeted the expansion of the oncology service line and use of the tag line "Closer to You" to strengthen its brand and expand into new markets.

- MHHCC has received a Centers for Medicare and Medicaid Services (CMS) 5-star rating for overall quality of inpatient care since the ratings were released, and it achieved national top-10 percent, net-positive, value-based-payment performance since 2017. MHHCC has also achieved performance excellence outcomes with zero early elective deliveries before 39 weeks (since 2015), zero pressure ulcers in the Skilled Caring Center (since 2016), zero central line-associated bloodstream infections (CLABSI) (since 2016), and zero hospital methicillin-resistant staphylococcus aureus (MRSA) infections (since 2015).
- MHHCC's nationally recognized benchmark performance is demonstrated by an "A" Leapfrog

Hospital Safety Grade since 2016. A two-year reduction in total harm from 6.2 to 1.1 per 1,000 patient days from 2016 to 2018 was achieved. Bedside medication verification results have exceeded the Leapfrog benchmarks from 2013 to 2018, sustaining a level of more than 97 percent, and MHHCC has sustained CMS top-10 percent performance in its PSI-90 patient safety composite results since 2017.

- MHHCC's patient experience and engagement results demonstrate its core competency of "being for others." Inpatient overall satisfaction and HCAHPS Rate the Hospital have remained in the top 10 percent nationally since 2015, and overall satisfaction with outpatient primary care has been in the top 10 percent since 2016—all with 80 percent or greater of "top-box" scores.



Memorial Hospital and Health Care Center President and CEO Kyle Bennett accepts the 2018 Baldrige National Quality Award.



2018 Baldrige Award Winner: Memorial Hospital and Health Care Center. From left-to-right: Under Secretary of Commerce for Standards and Technology and NIST Director Dr. Walter Copan, Chairman of the Board of the Foundation for the Malcolm Baldrige National Quality Award Dr. P. George Benson, U.S. Secretary of Commerce Wilbur L. Ross, Jr., Lori Persohn, Associate Vice President for Patient Services at Memorial Hospital and Health Care Center, and Kyle Bennett, President and CEO of Memorial Hospital and Health Care Center.



Tri County Tech Bartlesville, Oklahoma

One of 29 public technology centers in the Oklahoma Career and Technical Education System, Tri County Tech (TCT) serves the residents of three counties and has a vision of inspiring success through life-changing learning experiences. It provides high school programs, adult programs, customized business and industry training, and conference and event meeting services.

TCT strives to break the cycle of poverty for the students it serves by offering them opportunities that they would otherwise not have, providing support services, and keeping tuition low for the adult students.

With the goal that no student should be denied access to education based on his/her ability to pay, TCT launched its own foundation. (Many of TCT's students come from generational poverty, with more than 70 percent of high school students qualifying for free or reduced lunch.) Students receive financial tuition assistance (only adult students pay tuition); gas cards; and money for medications, clothing, and food, including backpacks filled with food for the weekends. Between fiscal year (FY)2014 and FY2018, foundation scholarships grew from \$60,000 to \$250,000. Flex programs for adults permit these students to participate in career programs while still employed in less-skilled positions.

- Rates for completion/retention and placement for students after graduation have been in the top 25 percent nationally for eight fiscal years. TCT has also delivered the top state completion/retention rate for full-time students in five of the past seven years. The adult average wage for graduates is above the growth rate for state and national wages, increasing to \$19 per hour in FY2018 compared to a state and national average of about \$15 per hour.
- TCT has been named a *Fortune* magazine top-50 best small/medium workplace in the nation for two straight years. Workforce climate results, especially for safety, benefits, and pay, have been consistently near or above the 95th percentile of the national GPTW survey each year from FY2014 to FY2017; for example, rates of staff responding favorably to the phrases “we have special and unique benefits here” and “people

are paid fairly here” have been in the 95th percentile of all participating national organizations.

- TCT places a strategic emphasis on local controllable revenue to solidify viability and ensure sustainability. The responsibility for raising local controllable revenue is shared throughout the organization. Despite a strategic decision to forego federal funding beginning in FY2015, and despite a 24 percent reduction in state funding from FY2009 to FY2018, overall revenues grew 16 percent from FY2009 to FY2019. During this same period, TCT increased the total fund balance, which provides cash flow, by 103 percent.



2018 Baldrige Award Winner: Tri County Tech. From left-to-right: Under Secretary of Commerce for Standards and Technology and NIST Director Dr. Walter Copan, Chairman of the Board of the Foundation for the Malcolm Baldrige National Quality Award Dr. P. George Benson, U.S. Secretary of Commerce Wilbur L. Ross, Jr., Tammie Strobel, Deputy Superintendent and Chief Quality Officer, Tri County Tech, and Lindel Fields, Superintendent and CEO, Tri County Tech.



Tri County Tech Superintendent and CEO Lindel Fields accepts the 2018 Baldrige National Quality Award.

AARP's CEO Talks About Leadership (and the Value of Baldrige)

by Christine Schaefer, Baldrige Performance Excellence Program
National Institute of Standards and Technology



Jo Ann Jenkins, CEO of AARP, receives from Foundation President and CEO Al Faber the Foundation's Award for Leadership Excellence in the nonprofit sector, National Harbor, Maryland, April 9, 2019.

Jo Ann Jenkins, CEO of AARP since 2014, was recognized by *Fortune* magazine this year as one of the world's greatest leaders (<https://fortune.com/worlds-greatest-leaders/2019/jo-ann-jenkins/>). Undoubtedly, members of her cohort of Baldrige Executive Fellows (<https://www.nist.gov/baldrige/products-services/baldrige-executive-fellows-program>) who gained new insights from learning from and with Jenkins were pleased for her (and not surprised). As Jenkins shared recently, "My interactions with other Baldrige Fellows have consistently been enlightening, inspiring, and illuminating."

Jenkins also graciously answered the following questions recently about leading an organization for excellence.

Congratulations on being honored among the best leaders worldwide for 2019. What experiences have strengthened your leadership skills?

I'm always on the lookout for learning experiences. I'm afforded an outstanding experience to learn, on an ongoing basis, from working closely with the network of chapters that AARP has built over the last 60 years.

AARP operates chapters in all 50 U.S. states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands. A network of that size and scale provides a powerful resource for staying directly connected with what's happening on the ground in people's communities. Tuning into that feedback on a consistent basis helps us to sharpen our relevance and value to the everyday lives of people age 50-plus and their families.

As you know, leadership is the first of seven categories of organizational performance of the Baldrige Excellence Framework (<https://www.nist.gov/baldrige/about-baldrige-excellence-framework>); the framework's self-assessment questions ask senior leaders how (1) they set their organization's vision and values, (2) promote legal and ethical behavior, (3) communicate, (4) create an environment for success, and (5) create a focus on action. Would you please comment on the importance of these dimensions of performing as a senior leader in a U.S. organization today?

They're all equally important, but certainly the fifth one—create a focus on action—is especially pertinent to our work at AARP.

An example is the leadership role that AARP—as a fierce defender in the arena of health care for people age 50-plus and their families—is currently taking in the fight to drive lower prescription drug costs. Americans pay the highest prices in the world for prescription medicines, and it's time to do something about making them more affordable for more people. Inevitably, that effort starts at the local and state level. As of this moment, 16 states have recently signed into effect 27 new laws that take concrete steps to drive down prescription drug prices—with more new laws expected soon.

After you became a Baldrige Executive Fellow in 2012, you used the Criteria for Performance Excellence (part of the Baldrige framework) to benefit your organization's improvement efforts, as described in our previous blog interview (<https://www.nist.gov/blogs/blogrige/why-and-how-aarp-uses-baldrige-criteria-performance-excellence>). For example, you stated then, "With the Baldrige Criteria as our guide, we have implemented a

customer feedback loop for all of our programs and for the volunteers that serve in our programs. It is providing us with actionable feedback that allows us to excel at living up to our mission." Would you please share an update on your organization's customer listening practices or other improvements toward excellence?

We're very proud of AARP's Voice of the Customer program. In the same way that being an effective communicator starts with being a good listener, we also know that providing outstanding customer service is founded not just on listening to what people tell you, but also in acting on that feedback to implement improvements.

Our Voice of the Customer program enables us to take in what people are saying about AARP on social media, on blogs or other media sources, via our call center, in email, or even in person at one of our many local events and to analyze that information on a daily basis.

Using a real-time customer-sentiment analysis tool, we are able to take care of requests, anticipate challenges, and improve our level of service to people on an ongoing basis. A lot of organizations are heavily focused on what they want to tell people. Via our Voice of the Customer program, we have found that really listening to what people want to tell you (and acting on it) is even more valuable.

You've evidently inspired others to also participate in the Baldrige Performance Excellence Program's one-year executive leadership program in recent years. How do you view the value of a Baldrige Fellow's learning from peers (and senior leaders of Baldrige Award-winning organizations) from different sectors and industries?

Organizations around the world face many of the same opportunities and challenges regardless of their industry, and I always find it interesting to hear and learn from how others have approached something similar to what AARP might be facing.

As a CEO, I'm afforded lots of opportunities to network, and I always go into them with an open mind. But I have found the ideas and areas of



AARP CEO Jo Ann Jenkins with Bob Barnett, retired president and CEO, Motorola Commercial, Government & Industrial Solutions Sector, and executive-in-residence of the Baldrige Executive Fellows Program.

expertise I've encountered as a result of Baldrige to be of a really special quality. My interactions with other Baldrige Fellows have consistently been enlightening, inspiring, and illuminating.

Would you please share a tip or insight on leading an organization to high performance?

I think the way forward for any nonprofit is to spend less time on administration and more time on advancing your mission. Of course, a certain amount of internal processes are inevitable and even necessary, but staying focused on core elements matters most.

- Why does your organization exist?
- What are your core competencies?
- Who are you helping?

- What do they need?
- How can you help provide it?

The principles of the Baldrige Criteria (<https://www.nist.gov/baldrige/baldrige-criteria-commentary>) are a vital tool in answering—and acting upon—those questions!



Opening Remarks at the 2018 Malcolm Baldrige National Quality Awards Ceremony

by Wilbur L. Ross, Jr.
Secretary, U.S. Department of Commerce

These remarks were delivered at the ceremony recognizing the recipients of the 2018 Malcolm Baldrige National Quality Award, April 7, 2019.

Thank you, Dr. Benson, for that very kind introduction.

It's great to be here again with the Baldrige Community. The way things are here in Washington, this is a much more hospitable audience than I'm usually faced with.

But yesterday, the United States lost an important and venerable national figure who helped shape the program we are celebrating today. Senator Fritz Hollings from South Carolina was an instrumental force behind the success of the National Institute for Standards and Technology (NIST), and he was a good friend to many of the old-timers in this room. He was a steadfast supporter of all that you are doing at NIST to assure the continued prosperity of the United States. The Manufacturing Extension Partnership is named in his honor, for Fritz was instrumental in the program's creation and in his unwavering support of American manufacturing. He was erudite, respected, and was one of the few Senators who actively addressed the economic challenges facing our country. We at Commerce honor him for all that he did, and we mourn his death. Let's have a moment of silence in his memory.

That said, we are here to welcome the five new winners of the Malcolm Baldrige National Quality Award. They are the Alamo Colleges District, Donor Alliance, Integrated Project Management Company, Memorial Hospital and Health Care Center, and

Tri County Tech. Congratulations from everyone at NIST, the Commerce Department, President Trump, and the American public for your devotion and unwavering commitment to quality and excellence within your organizations.

Winning this award is a big accomplishment. It means that you have gone through a rigorous evaluation by a cadre of specialists who know a great deal about organizational excellence. You are held in the highest esteem in your own communities and, now, in the nation.

By winning this award, you have made the ultimate commitment to leading by example and of sharing your best practices and processes with hundreds of other companies and organizations that can benefit from them. Thank you for devoting your time to this worthy cause.

“Congratulations from everyone at NIST, the Commerce Department, President Trump, and the American public for your devotion and unwavering commitment to quality and excellence within your organizations.”

Our thanks to Dr. Benson and the Baldrige Foundation for your tireless support of the Baldrige Performance Excellence Program. You have stood by the program through many lean years, and I am very glad there is \$2.2 million of funding in the federal budget this year for the Baldrige Award.

It says a lot about the dedication of the Foundation and the staff at NIST that this award continues to



Wilbur L. Ross, Secretary of the U.S. Department of Commerce, presents the 2018 Malcolm Baldrige National Quality Awards.

function more than three decades after having been established. It has changed a lot over the years but it remains the nation's highest Presidential Award for performance excellence. Thanks also to Walt Copan for your leadership at the National Institute of Standards and Technology. We really appreciate all that you are doing. Walt, you're rebuilding our industrial base and you're helping the competitiveness of the American economy.

Thank you also to Bob Fangmeyer, director of the NIST Baldrige Performance Excellence Program for streamlining your operations and creatively adapting to changing times and budgets.

And a very special thank you to the hundreds of private sector volunteers who contribute generously of their time and expertise as Baldrige examiners, overseers, judges, and board directors. Your civic participation is greatly appreciated. You are making a direct and noble contribution to the health and

prosperity of the 328 million citizens of our country. It is people like you who should be receiving awards for all that you do for our nation.

I now will recognize Representative Kevin Hern from Oklahoma who is here to celebrate with Tri County Tech. Where is Kevin? He must be hiding somewhere. Thank you for showing your support for such a fine enterprise.

Mac Baldrige was one of the longest-serving Secretaries of Commerce and was a champion of American industry, of American workers, and of American-made products and services. Like me, Mac Baldrige came to the role of Commerce Secretary from a long career in business. He knew first-hand how important quality and productivity were, not only to an organization's success, but to the nation's success.

Having spent my career in industry, working with lots of companies, I know it is essential to have a



dedicated CEO and a leadership team devoted to continuous improvement, employee empowerment, and the relentless pursuit of excellence.

The Baldrige Performance Excellence Program keeps Mac Baldrige's legacy alive by promoting these core business principles.

The impact of the Program has been amazing. The Baldrige Award process alone generates an estimated \$1 billion a year in benefits to the applicants of the award and their customers. It does this through cost savings for companies that use the criteria, gains to U.S. customers who have access to higher quality products and services, and gains from the improved use of valuable resources. We see such benefits in the five organizations we are honoring this very evening.

“A very special thank you to the hundreds of private sector volunteers who contribute generously of their time and expertise as Baldrige examiners, overseers, judges, and board directors...You are making a direct and noble contribution to the health and prosperity of the 328 million citizens of our country.”

Alamo Colleges District has five two-year colleges in southern Texas. Your graduation rate for students is the best in the entire state. The rate and number of degrees and certificates you awarded doubled from 2013 to 2017. And amazingly, you achieved a triple-A bond rating from Standard & Poor's, one of only 11 community college districts to do so.

Donor Alliance saves lives in Colorado and Wyoming through organ and tissue donation and transplant. You consistently rank in the top ten of donation organizations because you successfully receive organs or tissues from over 80 percent of eligible donors, and your revenue nearly doubled from 2014 to 2018. And meanwhile, you achieved cost savings of more than 65 percent.

Our third honoree is Integrated Project Management Company, Inc., located in Burr Ridge, Illinois. It is



Secretary Ross officiating at the 2018 Baldrige National Quality Awards, April 7, 2019.

a private consulting business with seven locations around the country. Your revenues increased 62 percent from 2013 to 2017 and are 50 percent higher per consultant than the national average for project management teams. Your total on the net-promoter score of customer engagement was more than 10 points higher than the excellent ratings achieved by such successful companies as Disney and Harley Davidson.

The fourth winner is Memorial Hospital and Health Care Center of Jasper, Indiana, a community hospital with 32 outpatient care clinics and medical practices. The hospital received a 5-star rating for inpatient care from both Medicare and Medicaid. And in southern Indiana, you deliver more than 70 percent of inpatient, and more than 80 percent of

outpatient care, in the area. And amazingly, your turnover rate for registered nurses is less than 2 percent per year, well below the 8 percent average turnover rate for a top-tier hospital. There are a lot of hospitals in this country with unhappy nurses who could learn a lot from you.

“For more than 30 years the Baldrige process has helped thousands of organizations enhance their competitiveness for the benefit of their employees, customers, communities, and the country.”

Last but not least—I don’t know why anyone ever thinks last just meant least—but anyway, last but not least is Baldrige Award winner Tri County Tech, which produces customized business technology training to students and adults in Bartlesville, Oklahoma. Your training-completion and employment-placement rates are regularly the best in the state for full-time students, and you rank in the top 25 percent nationally. Tri County Tech strives to have students graduate without debt—that’s a very, very powerful achievement—by having low tuition costs and providing lots of scholarships. Your

highest-priced tuition is \$4,500, compared with \$36,000 for equivalent training at other regional training centers.

For more than 30 years the Baldrige process has helped thousands of organizations enhance their competitiveness for the benefit of their employees, customers, communities, and the country. It has changed with the times, and continues to change as the nation confronts challenge, those challenges associated with cyber threats and a shortage of skilled workers.

I would like to see more manufacturing and service firms engaged in the Baldrige process and hope that NIST and the Foundation can redouble their efforts to help that important sector of our economy become even more successful in domestic and global markets.

So congratulations again to our 2018 Malcolm Baldrige National Quality Award recipients. Thank you for helping to keep the American economic resurgence going and our nation competitive. Thank you for being such great role models for so many other companies and organizations in your industries and beyond. And thank you everyone in the audience for travelling to Washington and joining us in this celebration.



Commerce Secretary Wilbur Ross (left) and his wife, Hilary Geary Ross, speaking with Baldrige Foundation President and CEO Al Faber following the 2018 Baldrige National Quality Awards Ceremony.





The Evolution of the Baldrige Foundation

by P. George Benson, Ph.D.
College of Charleston
Baldrige Foundation Chair (2013 -2019)

“ Suddenly, and shockingly, the Baldrige Foundation’s world was turned upside down. Without warning, the Baldrige Program’s Congressional appropriation for FY 2012 was cut to zero.”

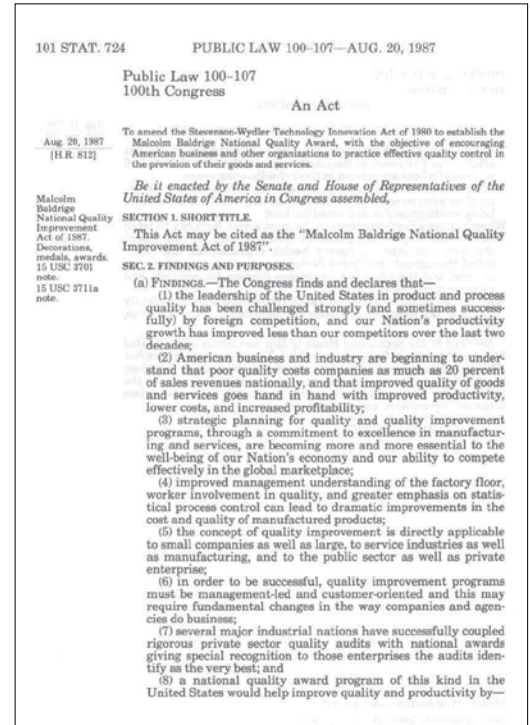
I. The Early Years

In August 1987, President Reagan signed the Malcolm Baldrige National Quality Improvement Act into law. It created a Presidential Award—the Malcolm Baldrige National Quality Award—the goal of which was to call attention to the urgent need for businesses to improve the quality of their products and services and to help them do that. The award would identify role-model U.S. businesses from which other businesses could learn.

The Foundation for the Malcolm Baldrige National Quality Award was established on February 8, 1988 to raise and administer private-sector funding to cover the operational expenses of the public Baldrige Program that was formed to manage the award process. No government funds were appropriated.

The Foundation’s first Chair (then called president) was Sanford McDonnell, Chairman Emeritus of McDonald Douglas Corporation. The Vice President was John Hudiburg, Chairman of Florida Power and Light Company. Hudiburg succeeded McDonald in 1989. There were nine different Chairs during the 1990’s including the CEOs of Hewlett-Packard, Westinghouse, Milliken, Xerox, AT&T, Texas Instruments, Eastman Chemical, and Corning.

Driven by the need to match the high quality of products being produced



in the 1970s and 1980s by Japanese firms—particularly cars and electronic products like televisions, U.S. businesses were quick to support the Baldrige Program and \$10 million was raised by the Baldrige Foundation in the first year.

In the mid 1990’s, the funding for the Baldrige Program was further solidified by Congressional action to initiate appropriations to support the basic operations of the Baldrige Program. Given the Foundation’s private endowment and the new federal support, the need for on-going fundraising by the Foundation became less pressing and was pursued on an as-needed basis. For example,

**THE FOUNDATION FOR THE MALCOLM BALDRIGE NATIONAL QUALITY AWARD, INC.
BOARD OF DIRECTORS PRESIDENTS & CHAIRPERSONS**



1988
Sanford McDonnell
Chairman Emeritus
McDonnell Douglas
Corporation



1989
John J. Hudiburg
Chairman
Florida Power and
Light Company



1990
John A. Young
President & CEO
Hewlett-Packard
Company



1991
John C. Marous, Jr.
Chairman & CEO
Westinghouse



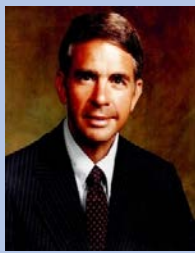
1992
Roger Milliken
Chairman & CEO
Milliken & Company



1993
James R. Houghton
Chairman & CEO
Corning Incorporated



1994
Paul A. Allaire
Chairman & CEO
Xerox Corporation



1995
Robert E. Allen
Chairman & CEO
AT&T



1996
Jerry Junkins
President & CEO
Texas Instruments,
Incorporated



1996-1997
**Earnest W.
Deavenport**
Chairman & CEO
Eastman Chemical
Company



1998-1999
Roger G. Ackerman
President & CEO
Corning



1999-2000
James L. Broadhead
CEO
Florida Power & Light



2000-2001
Dr. Michael B. Wood
CEO
Mayo Foundation



2001-2002
Richard Norling
President & CEO
Premier, Inc.



2002-2003
Richard K. Davidson
President
Union Pacific
Corporation



2003-2004
John A. White, Ph.D.
Chancellor
University of Arkansas



2004-2006
Dale Crownover
President
Texas Nameplate



2006-2008
E. David Spong, Sc.D.
President, Aerospace &
IDS Support (Ret)
The Boeing Company



2009-2010
Joe Alexander, Ph.D.
Associate Dean & Sr
Prof Performance
Excellence
Belmont University



2011-2012
Debbie Collard
Director, Business Ops
& Business Programs
The Boeing Company



2013-2019
P. George Benson, Ph.D.
President (former)
College of Charleston



2020-Present
Kathryn Eggleston, Ph.D.
President
Richland College



Throughout his seven years as Foundation Board Chair, P. George Benson, Ph.D., has been the face of the Foundation, serving as emcee of seven consecutive Malcolm Baldrige National Quality Award ceremonies.

additional private funding was raised when the Baldrige Award's three sectors—Manufacturing, Small Business, and Service—were expanded in 1998 to include Education and Health Care and in 2006 to include Nonprofit and Government Organizations.

For a more detailed description of the early years of the Baldrige Award Program and the Baldrige Foundation, see the Baldrige Performance Excellence Program (2012), "How the Baldrige Program Began: The Birth of a Unique Public-Private Partnership."

II. 2007 – 2011: Steady State

After three years as a Baldrige Judge (1997-1999) and three years as a member of the Baldrige Program's Board of Overseers (2005-2007) – the last two as Chair—I was elected to the Baldrige Foundation Board in 2007 (Benson, 2017).

With about \$10 million flowing annually from Congress to the Department of Commerce to the National Institute of Standards and Technology (NIST) and on to NIST's Baldrige Program, all was well. During this stable era, the Foundation Board was primarily concerned with managing the Foundation's endowment and from time-to-time providing funding for special projects like the purchase of a new software system. There was very little cultivation of new donors or stewardship of previous donors.

The Foundation had only one employee, its Executive Director, Thom Schamberger. For the most part, Board meetings were one-hour and 15-minute phone calls three or four times a year. The Board tried to meet in person in Washington D.C. before the Baldrige Award Ceremony each year, but the lack of urgency for funding and the narrow scope of the Foundation's mission meant these meetings were short and not well attended.

I was voted Chair-Elect of the Foundation Board for 2011-2012 in preparation for becoming Chair in 2013. Debbie Collard, an executive of two-time Baldrige Award recipient The Boeing Company, was Chair of the Board.

Suddenly, and shockingly, shortly after Debbie and I took office, the Baldrige Foundation's world was turned upside down. Without warning, the Baldrige Program's Congressional appropriation for FY 2012 (October 1, 2011 through September 30, 2012) was cut to zero. That meant the Foundation would need to dramatically increase its funding of the Baldrige Program to keep it alive. And that meant the Foundation's current endowment would rapidly descend to zero.

III. 2012 – 2013: Sink or Swim?

Neither the Baldrige Program nor the Baldrige Foundation Board were prepared for this sudden loss of funding. Was the Baldrige Program no longer valued by the President, Congress, and the Department of Commerce? What happened? The Board eventually learned that a 50 percent budget cut had been proposed by the Secretary of Commerce and that the Senate's Commerce, Justice, and Science Subcommittee had further reduced it to zero. But why all the way to zero? The primary reason is that not enough members of Congress understood the Program's value and importance to



the nation. Congress had understood in the early years of the Program, but we were now nearly a quarter of a century beyond the program's founding. Congress had not been continuously educated about the Program's value. Through the Foundation's recent lobbying efforts, we learned that many members of Congress didn't know what the purpose of the Baldrige Program was and simply thought of it as "some kind of expensive awards program."

The Foundation quickly realized that it had made three critical but related misjudgments during the past decade. First, the Foundation had relied too heavily on the Baldrige Program's confidence in its ongoing federal appropriation. Second, the Foundation was advised that it was legally precluded from lobbying Congress because of its connection to the Baldrige Program. The Foundation should have questioned that advice, because it was wrong. Third, the Foundation never strategically questioned the narrowness of its historical mission. There was much more that could have been done to support the Baldrige Program and the larger Baldrige Enterprise, which today includes 28 state-based Baldrige programs that make up the Alliance for Performance Excellence.

In evaluating its role and value to the Baldrige Program and the nation, the Foundation Board had failed to think strategically and to apply systems thinking — both of which are fundamental elements of the Baldrige Excellence Framework (Baldrige Performance Excellence Program, 2019). In effect, the Board viewed the system it was part of and concerned with as consisting of just four subsystems: The Baldrige Program, the Baldrige Foundation, corporate donors, and individual donors. But systems thinking encourages the evaluation and understanding of a particular system in the context of the larger or higher-level system of which it is a part (Benson, 2019). In this case that system includes NIST, the Department of Commerce, Congress, and the President of the United States. The Board was largely blind to this higher-level system and, as a result, did not think about or anticipate the disruptions that could emerge from above. Unfortunately, the Baldrige Program was similarly caught by surprise.

The loss of funding prompted the Board to begin a careful and thorough year-long analysis of why the Foundation exists and what it could and should do to

support the Baldrige Program, the Baldrige Enterprise, and the practice of performance excellence.

Among the many, many, questions considered by the Board were: Is there anything the Foundation can do to restore the lost appropriation? If the funding can't be restored, should the Baldrige Program become a private institution? If it were privatized the Baldrige Award would no longer be a Presidential Award. Would that loss of gravitas doom the award and the Baldrige Program? If the Baldrige Program were privatized, how would it be funded? How many years would the Foundation's \$18 million endowment keep the public Baldrige Program alive? How large an endowment is needed to keep the program alive in perpetuity? Would it be possible to raise that much money and how quickly could that be done? Should the Foundation assist with or take over some of the financial functions performed by the Baldrige Program? Should the Foundation promote performance excellence worldwide?

As a result of this analysis the Foundation Board knew five things for sure:

- (1) The purpose, values, and envisioned future of the Foundation and the strategies needed to achieve that envisioned future needed to be formally developed, documented, and pursued.
- (2) The Foundation needed to be aggressive in educating Congress on the value that the Baldrige Program adds to our economy and our way of life. Said another way, the Foundation had to launch a never-ending process to both educate Congress and lobby to restore the budget and to keep the Baldrige Program funded from both public and private sources.
- (3) A professional fundraising system needed to be designed and implemented.
- (4) In order to achieve (1), (2), and (3) the Foundation's Board members—who are all volunteers—needed to become more actively engaged in the governance of the Foundation and in the required strategic planning, lobbying, and fundraising processes.
- (5) It was clear to all Board members that in order to achieve (1) through (4), the Board needed to



Outgoing Board Chair P. George Benson, Ph.D., (left) shown here with Baldrige Foundation President and CEO Al Faber and the Baldrige Award, just prior to the Baldrige Award Ceremony, April 7, 2019, in National Harbor, Maryland.

find a CEO who could lead the development and execution of what would be “the new Baldrige Foundation.”

In 2013, the Board launched a national search for a full-time CEO of the Foundation. I was the President of the College of Charleston at that time and the Board decided to hold the interviews for finalists in Charleston, South Carolina. Board members enthusiastically traveled to Charleston to participate in the interviews.

In the spring of 2014, after an extensive national search, the Board chose a leader. On July 14, 2014, Al Faber became the President and CEO of the Baldrige Foundation. Al is a retired U.S. Army Colonel who had led his organizations to two consecutive national awards in the Army Communities of Excellence competition using the Baldrige Criteria. Upon retirement from the Army, Al served four years as President and CEO of The Partnership for Excellence (TPE), a top Baldrige-based state program encompassing Ohio, Indiana, and West Virginia.

IV. 2014 – 2019: The Transformation

Al hit the ground running by hiring three full-time team members: Jerry Rees, Chief Operating Officer; Mark Wayda, Vice President of Marketing; and a Director of Corporate Development who was recently replaced by Josh Racette. Al established offices in Worthington, Ohio and Washington, D.C. and

immediately engaged the Board in the development of the much-needed strategic plan. He also quickly initiated the missing Congressional education and lobbying processes, involving Board members as needed. But Al did most of the heavy lifting.

Always working hand-in-hand with the Foundation Board, Al and his team converted Board meetings from 1 hour and 15-minute phone calls to in-person meetings—usually in Washington D.C.—that lasted 4 to 6 hours plus dinner. We strengthened Board By-laws and Committee Charters and committees began meeting more regularly. In addition, the Board was refreshed with the addition of CEOs of recent Baldrige Award recipient organizations.

The Foundation’s new lobbying initiative resulted in \$2.2 million being appropriated by Congress for the Baldrige Program in FY 2018. That funding was sustained in FY 2019 and for the first time since 2011 was included in the President’s Budget for 2020 and will be again in 2021.

During this transformational period the following additional significant accomplishments were realized:

- National excellence awards were created for leaders in each sector of the U.S. economy.
- The E. David Spong Lifetime Achievement Award was established.
- The *Journal for Performance Excellence* was launched to celebrate and share best practices in organizational performance management.
- The Baldrige Foundation Institute for Performance Excellence was created to improve the practice of leadership and management in pursuit of excellence in organizational performance management.
- An on-going series of CEO Innovation Council Roundtables was established to bring together CEOs to share thoughts and ideas about performance excellence.
- A series of strategic business partnerships was developed to support the organizational growth and financial sustainability of the Baldrige Foundation.
- Strategic approaches to communication were initiated including a new website, social media activity including a YouTube channel, regular radio



podcasts, and quarterly webinars.

- The “Mac Baldrige Society” was recently created to attract major Foundation donors to support the Institute for Performance Excellence.

While the most noteworthy recent accomplishment of the Foundation is clearly the restoration of federal funding for the Baldrige Program, it’s important to also understand the extent of the emergency funding provided by the Foundation to keep the Baldrige Program alive. From FY12 when the Baldrige Program’s Congressional appropriation was cut to zero, to FY18 when Congress partially restored the funding, the Baldrige Foundation invested over \$20 million in the Baldrige Program to keep it from going under.

V. Kay’s Turn

As the Baldrige Foundation Board and its management team worked through the significant transition described in Sections III and IV, the Board thought it best not to change the Board Chair every

two years as had been the custom since 1996. To maintain consistency of purpose and stability within the Foundation leadership team, the Board chose to re-elect me as Chair three times in a row. I served for seven years, from 2013 through 2019. But given the successful transformation of the Foundation, in November 2019 the Board concluded that it was time to return to a more regular rotation of the Chair. And I agreed.

On January 1, 2020, Kay Eggleston took over as Chair of the Baldrige Foundation Board. Kay has been the President of 2005-Baldrige-recipient Richland College in Dallas since 2012 and had been Interim President since 2010. She had previously worked in a variety of leadership roles at Richland College since 1998. She served as the Baldrige Foundation Vice Chair and Governance Committee Chair during my seven years as Chair. I worked closely with Kay during the CEO search process and throughout my time as Chair.

Kay has deep knowledge of both the Baldrige Program and the now transformed Baldrige Foundation. She will be a strong, energetic, and engaged leader.

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Kathryn K. Eggleston, Ph.D., President of Richland College in Dallas, Texas, was named on January 1, 2020, as the 22nd Chair of the Board of Directors of the Foundation for the Malcolm Baldrige National Quality Award, succeeding multi-term Chair P. George Benson, Ph.D., who will remain a Board officer in the role of Immediate Past Chair.



A long time ago in a land far, far away... My Baldrige Journey

by Russ Branzell

“A person or organization doesn't have to be the smartest or most innovative to achieve greatness. You must be willing to humble yourself, admit the areas that need to improve and then dogmatically pursue excellence.”

I was first formally introduced to the concept of Baldrige when I joined Poudre Valley Health System in Fort Collins, Colorado, as the VP/CIO. Although Poudre Valley has changed since then, it still operates under the combined organization of UCHealth based in Denver, Colorado.

When I joined in 2003, Poudre Valley had been on its Baldrige journey just a few years and was entering into the formal application and process phase of the program. It was the perfect time to join and jump into the program. Without really knowing what it was all about, my assignment was leadership of the Category 4 of the Criteria (Knowledge Management), which as I found out later covers the entire organization, similar to the Category 7 (Results) section.

One of my first lessons in helping lead the Baldrige journey in an organization is that it takes an extremely strong (some would say stubborn and freakishly determined) leader at the top who has a clear vision for the best possible future for the organization and all that serve within it. Well, that is the perfect description of our CEO/President at the time, Rulon Stacey. Like many things in life, you are either 100 percent bought into something or you're not bought in. Ninety nine percent doesn't count. Rulon led many of us on the senior team and most in our organization into believing that we really could be the best organization in the country. Not just great, the BEST! Especially at the senior level, either you believed this, or you didn't last long.

The second greatest lesson in our journey was that a person or organization doesn't have to be the smartest or most innovative to achieve greatness. You must be willing to humble yourself, admit the areas that need to improve and then dogmatically pursue excellence. Never be so proud that you won't learn from someone else and yes, blatantly borrow (steal!) best practices from other organizations. Just imagine a health care system, manufacturing plant, school system, or government that was completely built on the best practices from dozens or even hundreds of other great organizations. Yes, it would probably be the best in the country or world. That organization didn't need to do anything more than learn from others and adapt the learned principles to itself. Over and over again!

The third lesson was simply to celebrate the amazing people you get to serve with and the amazing accomplishments they work towards day after day. As a leader in the organization, the greatest thing you can provide is hope. Yes, hope. Hope is the most powerful fuel to the human spirit. With hope, we all can try a little harder and make the progress necessary to climb the peak of that next mountain.



Kent Rochford (left) Acting Under Secretary of Commerce for Standards and Technology and Acting Director of the National Institute of Standards and Technology, and U.S. Secretary of Commerce Wilbur Ross (right), recognize Russ Branzell for his service on the Baldrige Board of Overseers, April 2, 2017, Baltimore, Maryland.



Russ Branzell was a member of the inaugural cadre of winners of the Baldrige Foundation Award for Leadership Excellence, shown here accepting the award at the 30th Quest for Excellence Conference, April 9, 2018.

Although there are so many amazing lessons of learning, growth, and change, the last major lesson is that Baldrige applies to everything in life. Whether personal or professional, Baldrige just works. We can always lead our organization a little better, get better results, and make that next step to greatness. We can also do the same thing in our personal lives. We can make better progress at being a better spouse, parent, and friend.

I am far, far from a perfect person, leader, CEO, spouse, father, or man. I do know this, though: Baldrige has made every one of these areas in my life better.

End of the story: Poudre Valley Health Systems received the 2008 Presidential Baldrige Award along with two Colorado State-level Awards. In professional life, not many things come close to the journey and to the people on the journey with you to that peak!

The amazing part is that I get to do it all over again with a new organization. CHIME (College of Healthcare Information Management Executives) started a Baldrige journey just a few years ago. Yes, the results are amazing, but watching amazing people succeed and achieve greatness is the best part.

Blessings to all and may the Baldrige force be with you!





A Students-First Approach to Success and Performance Excellence

by Mike Flores
Chancellor, Alamo Colleges District

Thirteen years ago, the Alamo Colleges District Board of Trustees and the district leadership adopted the Baldrige Excellence Framework as an organizational self-assessment and self-improvement approach to increase efficiency, operate effectively, and be accountable to all stakeholders. The district focused on the seven Baldrige categories: leadership; strategy; students; measurement, analysis and knowledge management; workforce; operations; and results. The Baldrige framework served as the foundation for a district-wide strategic plan that would take us a long way toward achieving our vision of “becoming the best in the nation in student success and performance excellence.”

We adopted the Baldrige Excellence Framework as the model to begin our journey to improve our services and, ultimately, to ensure that we provide students with the very best services and support to reach their goals.

In 2018, after more than a decade of dedication and hard work at the district, which includes five individually-accredited colleges and a support operation, we achieved a major milestone. The Alamo

Colleges District was named as the only community college system ever to be recognized with the Malcolm Baldrige National Quality Award, and at the time one of only five higher education institutions to win the award, a testament to our achievement of excellence in higher education.

The Board and leadership agreed achieving the highest level of excellence in student success is vital because Alamo Colleges District is the largest provider of higher education in the San Antonio region and the number one provider of workforce education as well. We serve many students who are first-generation-in-college and economically disadvantaged, so the highest level of excellence aligns with our vision of providing students with an education that leads to economic and social mobility for themselves and their families, which is essential in combating the generational poverty so prevalent in our area.

I know this because a college education allowed my parents and me to achieve this economic and social mobility and led to my fulfilling my father’s hope that I would become the first Hispanic chancellor of the Alamo Colleges District. Although I became chancellor shortly before the district’s Baldrige win was announced, I was familiar with the Baldrige model from my many years at Palo Alto College (PAC), one of the Alamo Colleges, where I previously served as president. During the district’s Baldrige journey, our progress was reflected in the fact that three of the colleges, along with the District Support Operations (DSO), were recognized with the Governor’s Texas Award for Performance Excellence, the state level recognition of performance excellence.

The district’s Baldrige win was made possible by the hard work of our outstanding faculty, administrators, and staff, who embodied our value of collaboration over the length of our journey. It took many years of planning, teamwork, and dedication to lead us to the



Mike Flores, the Chancellor of Alamo Colleges District, accepts the 2018 Malcolm Baldrige National Quality Award.

moment when we accepted our Baldrige Award at the national conference.

The award is important to us as an organization, but what is more important is that it helped us to put in place effective strategies and processes to increase student success, resulting in more students completing their degree or certificate. This completion is crucial because we know that a college degree is the best way for people in our community to achieve economic and social mobility. A graduate from one of our colleges will earn \$9,400 more annually and \$400,000 more in their working life than someone with a high school diploma working in Texas.



Mike Flores, the Chancellor of Alamo Colleges District, addresses the nearly 1,000 attendees at the 2018 Malcolm Baldrige National Quality Award Ceremony, explaining how the Baldrige Excellence Framework helped Alamo put students first.

“The Baldrige Award has increased community awareness of the educational excellence of the Alamo Colleges District. As a result of our Baldrige win, we are sought after by other educational institutions and organizations from as far away as New Zealand as a model of how to achieve organizational excellence, and we have shared our experience and what we have learned through workshops and presentations.”

Among the strategic initiatives that have resulted from our Baldrige journey are AlamoADVISE, our personalized pathways model that guides students to choosing their career and educational goal and keeps them on the path to completion. A related initiative is our AlamoINSTITUTES, which encompass these pathways, along with Transfer Advising Guides that help all their credits count when they transfer and continue their education. Other best practices arising from the Baldrige process include the Student Advocacy Centers at all five colleges that help students meet basic needs and receive support to ensure completion of their educations. Our Baldrige journey also assisted in the implementation of AlamoONLINE, which increases access to college by providing classes and support services online.

Our Baldrige journey also has culminated in our latest initiative, AlamoPROMISE, which eliminates the financial barriers that keep many students from attending our colleges by providing funds to bridge the gap between a student's financial aid and the cost of tuition and fees for three years. This program, which was launched this year, is open to high school

seniors from an initial 25 high schools and is projected to enable 9,000 students to enroll at our colleges in fall 2020. The recognition and high profile which our Baldrige win provided has been invaluable in garnering the support and raising the funds to make AlamoPROMISE a reality.

The Baldrige Award has increased community awareness of the educational excellence of the Alamo Colleges District. As a result of our Baldrige win, we are sought after by other educational institutions and organizations from as far away as New Zealand as a model of how to achieve organizational excellence, and we have shared our experience and what we have learned through workshops and presentations.

Our Baldrige win has brought us accolades at the local, state, and national level, including kudos from our city and county governments, chambers of commerce, state and national legislators, business and community partners, trustee organizations, and fellow educational institutions. This recognition contributes to the economic prosperity of our community by helping to attract employers considering bringing their companies to our area and also helps in obtaining funding from the state as well as private donors.

Ultimately, the Baldrige Award is important for us to celebrate because it recognizes that we have made significant progress that benefits our students, who are at the heart of all we do. Our success is their success, and I want to congratulate all of them on their achievements and assure them, and our community, that we will continue to strive to be “the best in the nation in student success and performance excellence,” because they deserve the best.

Leadership Enlightenment as a Baldrige Executive Fellow

by Dawn Bailey, Baldrige Performance Excellence Program
National Institute of Standards and Technology



Following is my abbreviated version of a Chinese parable called “The Wisdom of the Mountain.” (<https://hbr.org/1992/07/parables-of-leadership>) For me, it gives leadership development a whole new perspective:

In ancient China, an enlightened master dwelled in a mountain temple. His disciple, Lao-li, studied and meditated for years but decided to retreat down the mountain when he could not find enlightenment. The master joined Lao-li for the descent, but before

they left, the master asked his disciple to look out at the mountain peak. “Tell me, Lao-li, what do you see?” “Master, I see the sun beginning to wake just below the horizon, meandering hills and mountains that go on for miles.”

When they approached the foot of the mountain, the master again asked Lao-li what he saw. “Great wise one, in the distance, I see roosters as they run around barns, cows asleep in sprouting meadows, and children romping by a brook.”

The master replied, “The road to enlightenment is like the journey down the mountain. It comes only to those who realize that what one sees at the top of the mountain is not what one sees at the bottom. Without this wisdom, we close our minds to all that we cannot view from our position and so limit our capacity to grow and improve. But with this wisdom, Lao-li, there comes an awakening. We recognize that alone one sees only so much—which, in truth, is not much at all. This is the wisdom that opens our minds to improvement, knocks down prejudices, and teaches us to respect what at first we cannot view. Never forget this last lesson, Lao-li: what you cannot see can be seen from a different part of the mountain.”

Enlightened Views on Leadership, and the Baldrige Executive Fellows

I’ve written many times about the benefits of the executive leadership development program (<https://www.nist.gov/baldrige/products-services/baldrige-executive-fellows-program#benefits>), the Baldrige Executive Fellows, but this parable helps me see the program in a new light. The Fellows program is not just about bringing senior leaders together to discuss all aspects of leadership through the lens of the Baldrige Excellence Framework (<https://www.nist.gov/baldrige/publications/baldrige-excellence-framework>), but it’s the peer network of senior leaders that allows more enlightened views on leadership—including its challenges and opportunities. The Fellows together create a network of peer leaders who continue to network and be a sounding board for each other well after the year-long fellowship ends.

Another great benefit of the Baldrige Executive Fellows Program is the capstone project, where each Fellow tackles an issue of strategic significance at his or her own organization to innovate or improve. Some Fellows (<https://www.nist.gov/baldrige/products-services/baldrige-executive-fellows-program#interviews>) have addressed the issues of expansions or mergers and acquisitions and used the Fellows program as a way to seek inspiration and ideas about the considerations and challenges ahead, including how to meld together various organizational cultures and values. Some Fellows have done capstone projects on the launch of new products or services, or a new communications and

engagement plan for their workforce, or strategic planning, or scorebooks to capture key data, or simply ideas on how to innovate—the sky is the limit. The capstone project each Fellow chooses is personal to him or her and the organization; thoughtful feedback from the Baldrige Fellows staff members, including an executive-in-residence, and peer Fellows is unique to this fellowship.

Program Details

The Baldrige Executive Fellows Program includes five meetings on-site with Baldrige Award recipient organizations and their senior leaders (<https://www.nist.gov/baldrige/baldrige-fellows-program-key-information#key>), seeing best practices in real-time through tours and on-site discussions. There are also four one-hour conference calls after each session to talk about what was learned and implemented, as well as to answer a leadership challenge question. The kick-off and capstone/graduation sessions take place in conjunction with the annual Quest for Excellence® Conference, where Fellows can attend sessions of interest to them.

Baldrige Executive Fellows Program Benefits

- In-depth learning from world-class organizations and their senior executives
- A peer network of fellow executives to tap into now and in the future
- Best practices and solutions to drive improvement in your organization’s results
- A capstone project to address a unique strategic challenge or opportunity facing your organization
- A deeper understanding of strategy; sustainability; integration of processes, plans, resources, and goals; and measuring the right things

<https://www.nist.gov/baldrige/products-services/baldrige-executive-fellows-program#benefits>



PHOTOS FROM THE 31ST ANNUAL QUEST FOR EXCELLENCE® CONFERENCE





The Baldrige Community Celebrates the 31st Annual Quest for Excellence®

National Harbor, Maryland | April 7-9, 2019

The 31st annual Baldrige Quest for Excellence® Conference, held from April 7-9, 2019, honored America's role-model organizations for 2018. Nearly a thousand senior leaders, quality professionals, friends, and supporters of Baldrige gathered to celebrate the accomplishments of the 2018 Baldrige Award recipients and to share best practices and to learn from one another.

"College basketball coaching legend John Wooden of UCLA once said that the most powerful way of educating others, is by being a role model," recalled George Benson, Chair of the Baldrige Foundation Board of Directors and master of ceremonies for the award ceremony. "For 31 years now the Baldrige Program has been developing and recognizing role-model organizations like these." Benson continued, "With the presentation of the Baldrige Award, the United States of America is saying to each of these organizations, 'You are a role model that the whole country can learn from! You have the power to inspire excellence and greatness in the rest of us and in our organizations. You can ignite chain reactions of learning, of systems thinking, of innovation, of productivity, of societal responsibility. You are national role models, and we are very proud of you!'"

The highlight of the Sunday evening ceremony was the presentation of the Malcolm Baldrige National Quality Award to the 2018 recipients. Wilbur Ross, Secretary of Commerce, presided and presented the awards.

"We were honored to have Secretary Ross present the awards this year," said Al Faber, President and CEO of the Baldrige Foundation, the private-sector partner of the Baldrige Program. "As the Secretary said in his remarks, Baldrige helps to focus organizational leadership on the factors most closely associated with performance excellence."



"Having spent my career in industry, working with lots of companies," said Secretary Ross, "I know it is essential to have a dedicated CEO and a leadership team devoted to continuous improvement, employee empowerment, and the relentless pursuit of excellence. The Baldrige Performance Excellence Program keeps Mac Baldrige's legacy alive by promoting these core business principles."

Those familiar with Baldrige have long understood its value, including a documented return on investment

of \$820 in realized economic activity for each dollar spent on the Baldrige Program.

As Secretary Ross put it, “The impact of the Program has been amazing. The Baldrige Award process alone generates an estimated \$1 billion a year in benefits to the applicants of the award and their customers. It does this through cost savings for companies that use the criteria, gains to U.S. customers who have access to higher quality products and services, and gains from the improved use of valuable resources.”

The celebration was highlighted by the presentation of the National Quality Awards. The 2018 honorees are:

- Alamo Colleges District, San Antonio, Texas, education sector
- Donor Alliance, Denver, Colorado, nonprofit sector
- Integrated Project Management Company, Burr Ridge, Illinois, small business sector
- Memorial Hospital and Health Care Center, Jasper, Indiana, health care sector
- Tri County Tech, Bartlesville, Oklahoma, education sector

Advocacy and the Public Option

The focus of the Baldrige Foundation consists of two main efforts: Fundraising to provide operating resources for the Program and to rebuild the Foundation endowment, and second, Advocacy to retain public funding and commitment for the Program while promoting organizational performance excellence throughout the U.S. and the world.

John Hudiburg, former Chairman and CEO of Florida Power and Light, and an original board member of the Foundation for the Malcolm Baldrige National Quality Award, testified before Congress in 1995.

The words he spoke about the benefits of the Baldrige Program continue to ring true today:

“The Baldrige Award process is not about an award, nor is it a corporate welfare program. It’s about encouraging a system of management in American business. During the past five years, Americans believe, by a wide margin, that U.S. quality has improved, as a result of this process. As all suppliers adopt quality, it lowers cost, drives out defects and improves global competitiveness.”



The prize: the Malcolm Baldrige National Quality Award



Winning organizations also receive a recognition from the Secretary of Commerce

“Not only have the companies that have applied for the award and those who have won improved, but also the many others who use the criteria to guide the improvement of their businesses. There have been thousands of representatives from companies who attend the annual Quest for Excellence® conference to learn from the award winners each year in order to improve their own business.”

The power of Baldrige has always come from the fact that it is a public/private partnership. We all know the story of President Ronald Reagan convening a lunch with the CEOs of America's top corporations and putting the squeeze on them to endow the Foundation. John Hudiberg and Larry Adams, the Foundation's first Treasurer, remember being part of that effort which brought in the endowment's first \$10 million.

Over the years, as greater numbers of businesses embraced Baldrige and Congress expanded the eligible sectors, the need grew for public dollars to supplement the private funding. That dependency became painfully clear in 2012 when Congress zeroed-out public funding for the Baldrige Program.

The Foundation stepped up, draining funds from its endowment to continue supporting the work of the Baldrige Program, while at the same time launching a priority effort to re-establish the public funding. The Baldrige Program contributed significantly by streamlining operations and cutting staff to help stretch the Foundation dollars.

As of 2018, the hard work of the Foundation, in conjunction with the foresight shown by the leadership of the Department of Commerce, Secretary Ross and Under Secretary Walt Copan in particular, that hard work paid off. The public funding for the Baldrige Program was restored and was renewed again for this year. But Foundation President and CEO Al Faber has vowed never to rest. The Foundation will continue to work every day to ensure the public funding continues to flow.

Friends, Sponsors, and Ambassadors

At the same time the Foundation advocates for sustained public funding for Baldrige, it recognizes that it can and must continue to solicit for those private dollars to rebuild the endowment and allow it to make annual contributions to the Program's funding, supplementing the public funding, as was long the practice.

Because of the continuing importance of the private dollars, the Foundation took time at Quest to recognize some of its partners and supporters that had been with them through the many difficult years.

Specifically, Dr. George Benson, Chair of the Foundation Board of Directors, thanked Mid-America Transplant, which made a major gift last year as a Platinum sponsor of Quest and returned in 2019 as gold sponsors, continuing their major financial support of Baldrige. Dr. Benson presented Diane Brockmeier, President and CEO, of Mid-America Transplant, with the first-ever Foundation Ambassador Award.

"You heard this morning from Donor Alliance about their phenomenal success driven by Baldrige. We are here now to recognize another pioneer and Baldrige Award winner from the organ and tissue recovery industry.

When you look at Diane Brockmeier's LinkedIn page, it says that she is President and CEO at Mid-America Transplant. It might just as well say "Professional Lifesaver."

For more than 32 years, Diane has been working in the organ and tissue recovery industry, working, as she has so eloquently put it, at the intersection of life and death. In 2005, when Diane was Executive Vice President and Chief Operating Officer, Mid-America Transplant began its path to excellence through Baldrige. Its mission is to save lives through excellence in organ and tissue donation.



Joint Services Color Guard posts the colors for the playing of the National Anthem to open the 31st annual Malcolm Baldrige National Quality Award presentation ceremony, April 7, 2019, National Harbor, Maryland.

Over ten years, Mid-America Transplant earned five site visits and two Missouri Quality Awards. But the ultimate recognition came in 2015 when Mid-America Transplant received the Malcolm Baldrige National Quality Award.

Their numbers speak for themselves, setting records for organ and tissue donations. They helped hundreds of donor and recipient families navigate the emotional shoals inherent in this difficult process. And they saved hundreds of lives and changed for the better many more.

Not content with their own success, Mid-America Transplant set out to change an industry. It spurred efforts at data collection and best-practice sharing within the organ and tissue procurement sector to make it possible for other organizations to benchmark, to learn, to achieve excellence, and to save lives.

For some people, the phrase “Pay it Forward” is little more than cliché. For others, like Diane and her team at Mid-America Transplant, it is a way of life.

One of Mid-America Transplant’s best practices is paying forward in a very direct and meaningful way. The Baldrige Excellence Framework is like a piece of critical infrastructure—let’s think of it as a bridge to the future.

It is not enough to use that bridge and to help other successfully navigate that crossing. Someone has to maintain the bridge, or it fails.

As a Baldrige Award recipient, Diane and Mid-America Transplant believe it is a best practice and the responsibility of all Baldrige Award recipients, to support the Baldrige infrastructure.

At last year’s Quest, as you may recall, Mid-America Transplant was the sole sponsor of the Baldrige Award ceremony and the celebratory 30th anniversary dinner that followed the ceremony.

This year, they returned as Gold Sponsors, helping the Foundation execute on its mission to secure the financial future of the Baldrige Program.

We are proud of, and very grateful to all our sponsors. Today, we offer special thanks to Diane Brockmeier, President and CEO of Mid-America Transplant.”



Commerce Secretary Wilbur Ross (standing, right) recognizes the role-model organizations that will receive the 2018 Malcolm Baldrige National Quality Award, April 7, 2019, National Harbor, Maryland.



Foundation President and CEO Al Faber (left) and Chair of the Foundation Board of Directors P. George Benson, present the inaugural Foundation Ambassador Award to Diane Brockmeier, President and CEO of Mid-America Transplant, April 8, 2019, National Harbor, Maryland.

Examiner Recognition

Each year more than 400 professionals from across all sectors of the economy serve the National Baldrige Performance Excellence Program as examiners. Hundreds more serve in state and regional Baldrige-based programs. They deserve all our thanks.

“And a very special thank you to the hundreds of private sector volunteers who contribute generously of their time and expertise as Baldrige examiners, overseers, judges, and board directors,” said Commerce Secretary Wilbur Ross in his remarks on Sunday evening. “Your civic participation is greatly appreciated. You are making a direct and noble contribution to the health and prosperity of the 328 million citizens of our country. It is people like you who should be receiving awards for all that you do for our nation.”

Examiners provide the expertise to evaluate award applicants, and without them, there would be no Baldrige Award. The examiners also develop the feedback that provides the basis for process improvement, and without them, the benefits derived from the Baldrige Framework would be lost. Much of the 820-1 return on investment documented to derive from Baldrige is generated through the efforts of the examiners and judges.

According to the Baldrige Performance Excellence Program, “Baldrige examiners may be some of the hardest-working volunteers in America. After being competitively selected each year, Baldrige examiners individually spend up to 40 hours in self-study and group training in the spring. Then, from May to mid-August, those who serve on teams for the Baldrige Award process typically contribute 100 hours each conducting confidential evaluations of organizations’ performance. In the fall, for the final-stage site visits of the award process, examiner teams spend dozens of hours preparing for and then working together for an intense week at the locations of organizations being evaluated for the prestigious Baldrige Award.” (<https://www.nist.gov/blogs/blogrige/oh-work-baldrige-examiners-do-interview-kay-kendall>)

Time is set aside every year at Quest to recognize these great volunteers for their work. The Foundation thanks AARP for continuing to sponsor the examiner

recognition event. Each of the current examiners is recognized by name and invited to the stage where a cast of Baldrige luminaries present them with a certificate of appreciation for their work.

In Closing...

Al Faber, President and CEO of the Baldrige Foundation, noted in 2018 that the entire Quest conference exuded a spirit of celebration in response to the news that Congress had, after nearly six years, re-instituted the public portion of the funding for the Baldrige Award and the Baldrige Performance Excellence Program.

That celebratory spirit continued in 2019, bolstered by the continuing public funding, and the prospect for sustaining the funding into the future.

But also, it has to be recognized that Baldrige is a community. It is composed of many people who not only share an intellectual commitment to the Baldrige Excellence Framework, but who share an emotional commitment to fostering performance excellence as deeply and broadly as possible in organizations from all sectors of the economy, and all corners of the nation.

Baldrige professionals share a vision for a future better than the present, and the annual Quest conference is a shared expression of that commitment.



Our 2018 role-model organizations prepare to receive their Baldrige Award.



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On behalf of the Baldridge Foundation and the Baldridge community, thank you to our 2019 Quest Sponsors!



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Thirty one years of experience with Baldridge has generated substantial data to show that Baldridge-based manufacturers make fewer faulty products. Baldridge hospitals provide better care to more people and are saving lives. In Baldridge schools our students perform better, stay in school longer, and teachers are happier. Baldridge offers the ability to revitalize our communities and protect our critical cyber infrastructure. The evidence also shows that Baldridge organizations achieve these outcomes at lower cost.

We give our most heartfelt thanks to these Quest sponsors who are helping the Baldridge Enterprise change our world. – Al Faber, President and CEO, Baldridge Foundation.



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The Baldrige Foundation and the Baldrige Program would like to thank these organizations for their support of this year's Quest Conference. All of our sponsors are wearing a sponsor ribbon, and signage located throughout the conference identifies who our critical conference sponsors are for conference items, refreshments, and events.

Interested in becoming a Quest sponsor for our 32nd conference? For more information, stop by the Baldrige Foundation Display Table or contact:

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Saving Lives and Making an Impact: Donor Alliance's Quest for Excellence

by Sue Dunn
President and CEO, Donor Alliance

Each day at Donor Alliance we are responsible for saving lives in Colorado and Wyoming through the power of donation and transplantation. Members of our community depend on our work during some of the most vulnerable times in their lives. Those waiting for a transplant rely on our processes to get a second chance at life, while the families of donors also lean on us to honor their loved one's heroic decision to become a donor. The simple, yet powerful mission to meet those needs is at the foundation of our culture.

Being awarded the Malcolm Baldrige National Quality Award in 2018 was the culmination of a near decade-long performance excellence journey for our organization. Our Baldrige journey began in 2010 with the goal of improving Donor Alliance's overall effectiveness in maximizing donation and transplantation. At first glance, the framework seemed straightforward. However, we quickly realized it was deceptively simple. The Baldrige Criteria categories identify key areas of organizational focus and call for an assessment of your own identified processes. Our "ah-ha" moment came when we tried aligning our strategic planning process (SPP) with the Baldrige Criteria. Our work and diligence paid off as nine years

later, when we received the award, it was our SPP that was identified as a key theme and a bolded strength.

We found it useful to have a proven methodology for improvement. Identifying our core competencies, strategic advantages, and strategic challenges informed our improvement efforts. Establishing key objectives followed and included achieving mission impact, sustaining a high engagement culture, delivering the "Donor Alliance" experience, and maintaining financial sustainability. Focusing on these objectives and keeping them top of mind during planning and decision-making helped guide us along our journey.

Achieving Mission Impact

Using the Baldrige Excellence Framework, we were able to implement a number of innovative processes that helped us achieve incredible results. During the last five years of our Baldrige journey, we steadily increased the number of organ transplants by 45 percent, directly translating to more lives saved and healed through transplantation. In 2018 alone, a record 489 people were removed from the waiting list for a lifesaving organ transplant in Colorado—and tens of thousands of people have been or will be healed by the tissue donations recovered in our region.

We have consistently ranked as one of the top ten organ procurement organizations in the nation due to our high organ donor conversion rate of more than 80 percent. Also, consistently outperforming the top 10 percent of organ procurement organizations in the percentage of donors who have registered themselves to be donors, our organization far surpasses the national averages.

Sustaining a High Engagement Culture

People make our lifesaving work possible. We work continually to engage and nurture relationships with the families of donors, our staff and partners, truly



The Baldrige Award Ceremony is a celebration of excellence. Here Sue Dunn, President and CEO of Donor Alliance, speaks to the audience about how the Donor Alliance leverages the Baldrige Excellence Framework to save lives through maximizing donor services.

putting people first. Through our Baldrige experience, and grounded by our core competencies—building strong relationships and being a mission-driven organization—we have cultivated a culture of consistent communication and feedback, which was key in helping us achieve our goals.

Much of our success is attributed to the energy and resources we have put into a variety of communication mechanisms, creating a sense of involvement and confidence with our workforce, customers, and other stakeholders. While the early years are tough in getting Baldrige integrated throughout the organization, there is a point when it becomes how you do your work, and that is a wonderful thing!

Delivering the “Donor Alliance” Experience

We are one of 58 independent organ procurement organizations across the United States. Our service area stretches across more than 180,000 square miles and includes more than 5.8 million residents and 110 hospitals. To best serve our region by maximizing each donation opportunity, we use 20 different approaches to listen to, interact with, and observe partners. Our methods include satisfaction surveys, in-person and video interviews, meetings, scorecards, follow-up reporting, and a leadership liaison assigned to each of our local transplant centers and key tissue processors (the organizations that prepare, preserve, store, and distribute tissue grafts for transplantation).

“Using the Baldrige Excellence Framework, we were able to implement a number of innovative processes that helped us achieve incredible results. During the last five years of our Baldrige journey, we steadily increased the number of organ transplants by 45 percent, directly translating to more lives saved and healed through transplantation.”

Ongoing, real-time communication is key and occurs daily among clinical staff and partners throughout our organ and tissue work system processes. These processes and level of communication have helped us achieve a 100 percent satisfaction rate with both our key tissue processors and all four of our local transplant centers.

Of course, our work would not be possible without the heroes that have made the selfless decision to



Donor Alliance President and CEO Sue Dunn presents Bob Fangmeyer, Director of the Baldrige Performance Excellence Program with a large piece of Donate Life art to decorate the Program’s offices.

register as donors. Part of the lifesaving work that we do also includes sharing the stories of those donors, their families, and recipients in order to educate and inspire the community. We create and support local partnerships, events, public outreach, and education campaigns throughout our region to encourage more people to register as organ and tissue donors.

A Commitment to Sustained Excellence

Throughout my career, which has now spanned more than three decades, I have always been passionate about organ and tissue donation. However, seeing our team embrace the Baldrige process and be able to celebrate the nearly immediate positive impact on not only the way we work, but the incredible results of that work, continues to provide inspiration.

We are so proud to have met our key objectives and positively contribute to our mission to save lives through organ and tissue donation and transplantation. Achieving that mission is far too critical for us not to be fully committed to having and maintaining systematic processes that enable a meaningful legacy to be created for the families of organ and tissue donors, while also giving recipients of organ and tissue donations a second chance at life.

We are honored to have been recognized for this achievement, but we will continue to be dedicated to continuous improvement as an organization because our work saves the lives of thousands of people in our community and across the country.

communities of excellence 2026



A gathering of Communities of Excellence thought leaders (From left to right): Tommy Gonzalez, City Manager, City of El Paso, COE 2026 Board Member; Brian Lassiter, President, Performance Excellence Network, COE 2026 Board Member and National Learning Collaborative Faculty; Stephanie Norling, Director of COE 2026; Brenda Grant, Performance Excellence Coach, Western Maryland Health System, COE 2026 National Learning Collaborative Faculty; Lowell Kruse, COE 2026 Co-Founder and Chair and member of the Baldrige Foundation Board of Directors at the 31st Quest for Excellence Conference, April 9, 2019, National Harbor, Maryland.

Success for Communities of Excellence 2026 is Good News for Communities Across America

by Stephanie Norling, Director, Communities of Excellence 2026



Stephanie Norling,
Director, Communities
of Excellence 2026

In 2010, two former health care CEOs, whose organizations won the National Baldrige Quality Award under their leadership, brainstormed ways to confront systemic problems that are eroding freedom, including inequitable access to education, seismic shifts in the nation's and world's economy, and escalating costs of health care that were not improving outcomes.

They believed that a systems-based approach built on the same principles of performance excellence that

created significant and sustained improvements in performance, quality, and cost savings in their former organizations could also address today's concerns about key areas of community performance.

In 2013, Communities of Excellence 2026 (COE 2026), named in honor of the United States' upcoming 250th anniversary, became a nonprofit 501(c)(3) organization to test this belief through a nationwide community development pilot initiative.

Ten years into the COE 2026 era, it feels like the right time to reflect on our progress and consider the future of our organization and the communities with which we work.

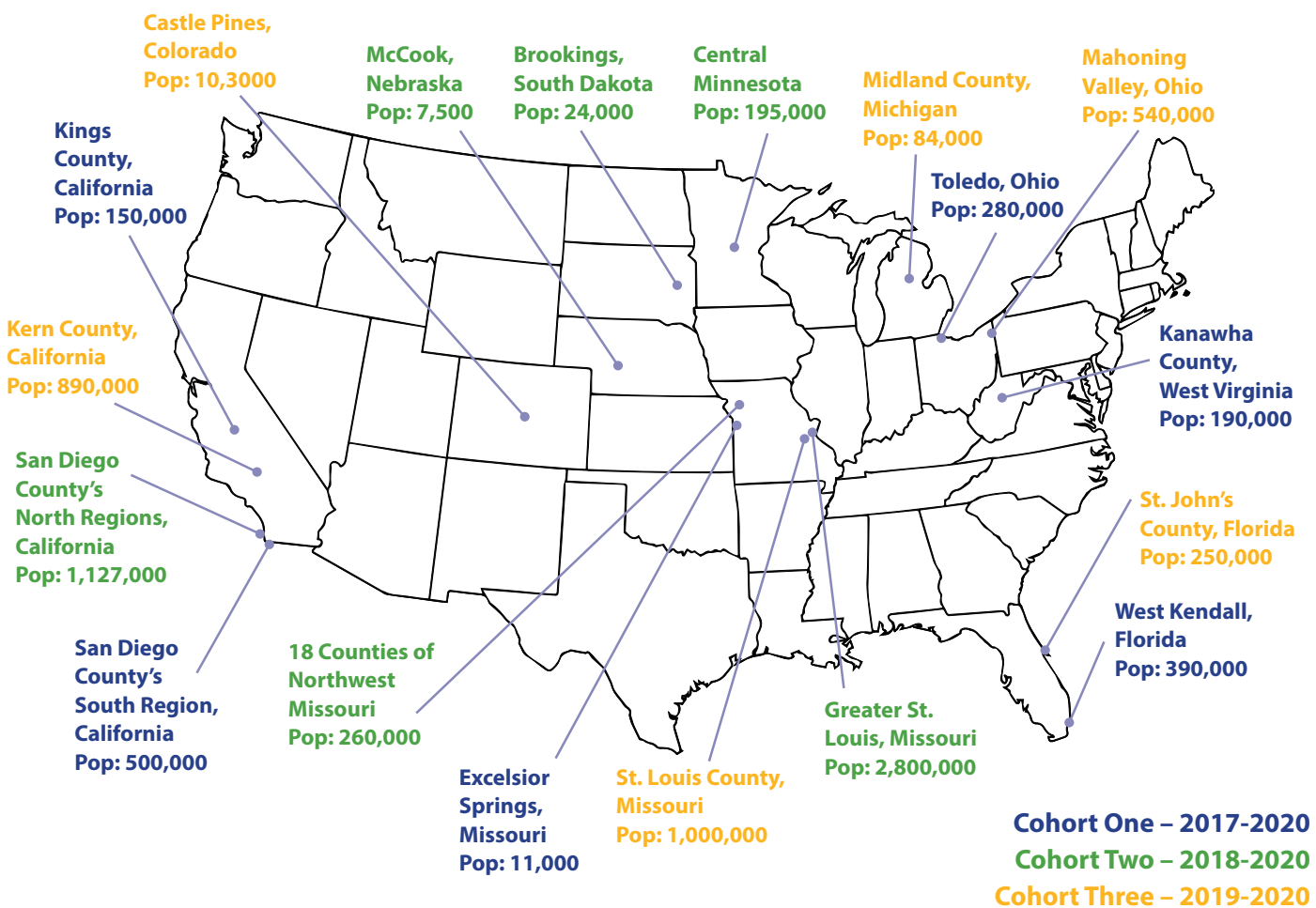
Here are some of our accomplishments to date:

- 18 communities with populations ranging from 7,500 to 2.8 million are engaged in COE 2026. Within these 18 communities our performance excellence message has reached over 400 organizations representing all sectors of the economy.
- The National Learning Collaborative, started in 2017, is graduating its first cohort of six communities this year. For the past three years leaders in these communities have learned and worked together, sharing successes, challenges, ideas and best practices on their journeys to community excellence.
- In partnership with the Alliance for Performance Excellence and their Baldrige Fall Conference, our annual conference attendance continues to grow; from 46 attendees in 2017 to 60 in 2018,

to 80 last year in Nashville. COE 2026 attendees spend one day together as a kickoff to the Learning Collaborative, and one day attending the sessions at the Baldrige Fall Conference.

- The third revision to the Communities of Excellence Framework was completed in 2019 and a fourth revision cycle is underway.
- In 2019, 12 communities submitted applications for our Assessment and Recognition Program. For the first time three of those applications responded to the entire Communities of Excellence Criteria—currently our top level assessment opportunity.
- Our dedicated team of staff and volunteers has grown. We have eight volunteer faculty members leading the online Learning Collaborative sessions, 11 community mentors, and last year 51 volunteer Examiners reviewed applications for our Assessment and Recognition Program.

communities of excellence 2026





While the growing success of our organization is exciting, it is the progress that we are seeing in the communities in our Learning Collaborative that truly deserves recognition. This year I asked some of the communities in our first cohort to reflect on their experience with COE 2026 over the past three years:

“Since embarking on the COE journey 3 years ago, San Diego South Region has made great efforts in refining our strategic planning processes and developing action plans that benefit the community. The South Region Leadership Team convened work groups, which have made tremendous strides in the areas of chronic disease prevention, economic vitality, and education. This includes coordinating and convening a Vaping Forum with community leaders in cities, healthcare, and schools to inform and collaborate on ways to decrease vaping; working with policy makers to change four (4) smoking ordinances to eliminate smoking in public places; developing and implementing a program called “I’m Ready” to address economic disparities in the community for unemployed or underemployed

youth ages 18-24 empowering them with skills to access jobs in the local economy; and developing a systematic process so the “I’m Ready” program can be replicated and scaled. Additionally, the leadership team developed and implemented a new partner orientation for those joining the South Region Leadership Team. Looking ahead, the South Region Leadership Team will continue to strengthen partner collaborations in the area of education and has recently partnered with San Diego State University on a Capstone project to establish surveys and modes of communication to capture the voice of the resident. San Diego South Region is excited to continue the COE journey and furthering the Live Well San Diego vision of healthy, safe and thriving communities!” – *Barbara Jiménez, San Diego South Region, California*

The Kanawha Coalition for Community Health Improvement, which serves as the backbone organization for our Communities of Excellence work, conducts our community’s Community Health Needs Assessment (CHNA) every three years.



The San Diego South region representatives receive recognition for their work with Communities of Excellence 2026 at the Baldrige Fall Conference, Nashville, Tennessee, October 24, 2019. Shown here (from left): Stephanie Norling, Director, Communities of Excellence 2026; Barbara Jiménez, Director of Regional Operations, County of San Diego Health and Human Services Agency-Central & South Regions; Rachel Pinuelas-Morineau, Community Engagement Director, South Bay Community Services; Jacqueline Reynoso, President/CEO, National City Chamber of Commerce; Nicole Villa, Community Health Promotion Specialist, County of San Diego Health and Human Services Agency-Central & South Regions; Hussein Hamed, Human Services Operations Manager, County of San Diego Health and Human Services Agency-Central & South Regions; Manuel Castañeda, Chief, Agency Operations, County of San Diego Health and Human Services Agency-Central & South Regions.



The West Kendall, Florida region representatives were also recognized for their work with Communities of Excellence 2026 at the Baldrige Fall Conference, Nashville, Tennessee, October 24, 2019. Pictured here (from left) :Stefan Schwindeman, Supervisor, Community Development, West Kendall Baptist Hospital; Maria Luisa Gonzalez, Corporate Manager, Govt and Community Relations, West Kendall Baptist Hospital; Karen Vassell, Director, Community Development, West Kendall Baptist Hospital; Michelle Mejia, AVP Health Promotion and Strategic Partnerships, West Kendall Baptist Hospital; Katy Wilhelm, Health Promotion Specialist, West Kendall Baptist Hospital; Ximena Figueroa, Director of Quality and Performance Excellence, Florida Department of Health in Miami-Dade County.

Whereas past assessments compelled us to address mostly topics around wellness promotion and chronic disease prevention, our newly redesigned process has resulted in priorities that take into account the Social Determinants of Health. Now, in addition to health promotion and chronic disease prevention, our 2020-2023 priorities include: road safety; access to affordable and adequate childcare options; barriers to employment; and access to safe and adequate recreation, exercise and play opportunities. Additionally, the COE Framework has led our Community Coalition to engage our residents in a more meaningful way. Now, residents will have representation on our working issue teams and participate alongside topical experts in the development and implementation of our Community Improvement Plan. We now have new systems and processes in place to help us make decisions that are informed from the input of diverse customer groups and across all the areas of social determinants to health. As we strive for Kanawha County to be a great place to LIVE, LEARN, WORK and PLAY, we do so collectively. We look forward to improvements in our offerings, including systems, policy and

environmental changes that will result in long-lasting change. – *Judy Crabtree, Kanawha County, West Virginia*

Healthy West Kendall was recently recognized/honored in our State Capital for our activities in helping to improve the health of West Kendall residents—as part of Communities of Excellence. West Kendall Baptist Hospital and the Florida Department of Health launched the Economic Vitality driver and formed an economic council having assembled the stakeholders needed to effectuate change. We are looking to design and implement a buy local campaign as one of the recommendations from the study. We will be adding new economic metrics to the Healthy West Kendall dashboard as well as an evaluation tool. Although we have not launched our Safety driver, we partnered with FDOT (Florida Department of Transportation) and installed a non-motorized counter. This counter is to count pedestrian and cyclist traffic in order to understand how to improve safety measures in the vicinity. After much discussion we are aligning the education goals to better match our economic efforts. We will be creating



an education resource guide as well as helping to bridge the employment gap. With the help and support of our local United Way, this year we will also be creating “Healthy West Kendall Ethical guidelines.” After an exercise and reflection at the COE/Baldrige conference we have re-written our vision statement. Our efforts through Communities of Excellence has helped us realize that we have evolved in our thinking and actions. Our new vision statement is: To be a blueprint for a healthy and thriving community. – Michelle Mejia, West Kendall, Florida



Judy Crabtree, Executive Director, Kanawha Coalition for Community Health Improvement in Charleston, West Virginia, describes Kanawha County West Virginia’s Communities of Excellence journey during a reflection exercise at the Communities of Excellence/Baldrige Fall Conference in Nashville, Tennessee, October 24, 2019.

In October of 2019 we welcomed six new communities to the Learning Collaborative—Castle Pines, Colorado; Kern County, California; Mahoning Valley, Ohio; Midland County, Michigan; St. Johns County, Florida; and St. Louis County, Missouri. All the communities that participated with us from the prior year continued into year two. In addition, three of our Northwest Missouri communities consolidated their efforts and rejoined the Collaborative as a large rural region, the 18 counties of Northwest Missouri. For all the Learning Collaborative communities, the commitment to this journey, and to improving their communities, is inspiring.

other, and still be able to access the expertise of our COE 2026 faculty and mentors.

“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.” – Communities of Excellence 2026 Foundation Statement

In partnership with the entire Baldrige Enterprise, we are working hard to secure authorization for Community as the seventh category of the Malcolm Baldrige National Quality Award. This year we received the support of Dr. Walt Copan, Under Secretary of Commerce for Standards and Technology and Director of the National Institute of Standards and Technology (NIST). We are currently pursuing the next steps needed to bring our request to Congress and the Secretary of Commerce. We strongly believe that adding Community to the Baldrige National Quality Awards will help to bring national recognition to the importance of improving community performance.

Looking ahead, we will add a fourth cohort of communities in the Fall of 2020. We will continue to work with our current cohorts, collectively sharing promising practices, and shining the spotlight on excellence in our communities. We are starting to compile our own resource library of promising practices and documenting our successes.

I want to express my gratitude to all those that have supported us on our journey including those in the Baldrige Performance Excellence Program, the Baldrige Foundation, the Alliance for Performance Excellence, and the greater Baldrige Community. COE 2026 has prospered because of the support of so many, including our faculty: Manuel Castaneda, Gary Floss, Ellen Garshick, Brenda Grant, Harry Hertz, Brian Lassiter, Sandy Potthoff, and Dee Springer and our dedicated Board of Directors. In addition, many others volunteer their time and expertise to support our work and it is this kind of advanced citizenship that will help our communities prosper.

In September 2020 our first cohort will be graduating from the three-year Learning Collaborative experience. We are forming an alumni network so that these communities can sustain their success, continue to share their efforts and learn from each

Sustaining the Music Arts in New Mexico, with a Little Help from Baldrige

by Dawn Bailey, Baldrige Performance Excellence Program
National Institute of Standards and Technology



New Mexico Philharmonic Orchestra with music director, Brazilian conductor Roberto Minczuk.

In “Orchestra Faces Bankruptcy, Meets Baldrige, Brings Beautiful Music Back to Life,” (<https://www.nist.gov/blogs/blogrige/orchestra-faces-bankruptcy-meets-baldrige-brings-beautiful-music-back-life>) I wrote about the New Mexico Philharmonic (NMPhil) (<https://nmphil.org/>), which was created in 2011 when its predecessor had to declare bankruptcy. In 2016, Maureen Baca, president of the NMPhil Board of Directors and a 25+-year Baldrige alumna examiner (<https://www.nist.gov/baldrige/products-services/become-baldrige-examiner>), told me that the predecessor orchestra faced a perfect storm:

budget growth beyond community capacity, dramatic changes in the economy, unsustainable overhead, labor/management issues, personality/individual issues, and no apparent systematic processes.

That all changed when Baca brought her passion for Baldrige and process-based organizations to NMPhil. By introducing Baldrige concepts slowly and showing board members and staff results, what evolved at NMPhil was a process-focused culture, beginning with workforce-focused processes, including for volunteers; product/service processes;

and a new focus on measurement and management by fact.

So, has the orchestra sustained its improvements?

Not Only Survived but Thrived

Said Baca, “We are continuing very much with using the Baldrige framework. . . .

“The organization has not only survived but has thrived and is becoming stable, as demonstrated by the achievement of the Roadrunner Award (<http://www.qualitynewmexico.org/nmpea>) [the second highest honor from Quality New Mexico (<http://www.qualitynewmexico.org/>), a Baldrige-based member of the Alliance for Performance Excellence (<https://www.baldrigealliance.org/>), a network of state Baldrige-based programs]. We now have a fairly stable financial base that supports us.”

She added that most arts organizations don’t typically think about performance management, but NMPHil is different.

“One of the significant ways that NMPHil uses the Baldrige Criteria is to measure stakeholder satisfaction across six segment to really understand its results. The organization has attained 97 percent stakeholder satisfaction as measured by the number of fours and fives on a five-point scale.”

“We are creating a sustainable organization,” said Baca. “We don’t want what happened before—to not be properly managed and to face another bankruptcy. And that’s something that many orchestras in this country have been through. Some of them have come back [from bankruptcy]. Unfortunately, many have not.”

“Sustainability is a real challenge for the arts these days. And [Baldrige] is the principle way we are creating sustainability.”

For six years, the orchestra has been tracking and trending data, with about 40 percent benchmarked against external sources. One of the significant ways that NMPHil uses the Baldrige Criteria, said Baca, is to measure stakeholder satisfaction across six segments to really understand its results. The organization has attained 97 percent stakeholder satisfaction as measured by the number of fours and fives on a five-point scale. The orchestra has received similar ratings, at around 97 percent for how the audience judges its artistic excellence.

“This is an important measure on keeping people coming to performing arts,” she said.

Baca said she and the executive director of NMPHil, Marian Tanau, who also is a practicing violinist with the Detroit Symphony Orchestra, now talk very publicly about organizing around the Baldrige framework and have given joint presentations at Quality New Mexico, sharing how their small organization uses the Baldrige framework and its Criteria.

NMPHil staff members have become so engaged with the Baldrige process that two of the six full-time employees serve as examiners in the state Baldrige-based award process. Part of their success as examiners, attributes Baca, is that they have practiced the Baldrige framework on a daily and strategic way in their own organization.

Baca has been helping the staff and board “understand what the [Baldrige] framework is and what it has to offer. . . . It’s getting people exposed to the concepts a little at a time, so they’re not overwhelmed by it.” The next opportunity, added Baca, is to engage the musicians in the Baldrige framework.

Young Musician Initiative

One of NMPHil’s most proud accomplishments is the Young Musician Initiative (YMI), which is offered to economically and socially challenged elementary school students in the community’s poorest neighborhoods. The program reaches about 100 children in public schools and about 40 children on a neighboring Navajo reservation. The kids are in the program 12–14 hours a week after school and have mastered the instruments enough to now



New Mexico Philharmonic for economically and socially challenged elementary school students in the community's poorest neighborhoods.

comprise the youngest performing orchestra in the state.

The students' academic improvements are measured at the end of each academic year and compared with children who are not participating. Baca said that because the "student body" of YMI changes each year as students graduate to middle school and new students join, the organization does not necessarily expect to see "improving trends" in improvements; rather the goal is to achieve at least 40 percent improvements, which exceed the nonparticipating peer average most years.

"We've seen significant changes and academic improvements over the course of the school year," said Baca, adding that Albuquerque's new mayor has an interest in after-school programs that produce results so information on YMI is being shared with him.

Commitment to Long-term Longevity

NMPhil is excited about the future. For long-term sustainability and to help with funding issues, it has created the New Mexico Philharmonic Foundation, Inc., as a completely legally and financially separate entity. The foundation has seen pretty good success in its first few months and is starting to have some endowments, as well as some unexpected donations for which stewardship and resource use are taken very seriously and thoughtfully, she said.

There's also a new performance arts center being discussed for Albuquerque. "People here are beginning to recognize that the arts are a vibrant part of a healthy economy," she said.

In 2017, NMPhil hired its first music director, Grammy® Award-winning Brazilian conductor Roberto Minczuk, who divides his time between Albuquerque and São Paulo, Brazil.

Said Baca, "It's a big deal for an orchestra who hasn't had a music director, a regular conductor, to hire one."

"NMPhil staff members have become so engaged with the Baldrige process that two of the six full-time employees serve as examiners in the state Baldrige-based award process."

It's such a big deal, that I asked Baca how the orchestra managed this. Said Baca, "We had a structured, defined process that was based on best practices from orchestras in the east. We adapted those to our local needs. . . . I think by virtue of [the music director job candidates] understanding of both the organization's commitment to the future as well as the opportunity here, I think that's why we've been able to have some really serious candidates interested in Albuquerque. And I know it's a big driving force behind why . . . because we do not have the highest pay in the world, but we do have exciting possibility here. They all saw an organization that is healthy and committed to growing and committed to long-term longevity."

To learn more about the New Mexico Philharmonic, you can go to their website at www.nmphil.org.



Lessons Learned and Shared on IPM's Baldrige Journey

by C. Richard Panico

Founder, President, and CEO of Integrated Project Management Company (IPM)

IPM's Baldrige journey was a roller coaster: thrilling, fast, and sometimes scary.

I learned about Baldrige during my time with Johnson & Johnson more than 30 years ago, and I understood it would be a significant undertaking. Though Integrated Project Management Company (IPM) has always been a very process-oriented company—driven by my strong bias toward the importance of efficient processes to ensure scalability and quality—pursuing the journey was not an easy decision. It would impose a large amount of work on top of managing the challenges of exceeding clients' expectations and growing our business. As part of our strategic planning process, we considered it and deferred it several times.

“If you are considering pursuing the Baldrige Award, know that it requires deep and sustained leadership commitment. There will likely be several attempts, lessons learned to be applied, improvements to be made, and momentum to be reestablished before accomplishing the ultimate goal. However, there are many benefits along the way—as with each step and each application submittal, you will improve your operations and know clearly the best path forward.”

What changed our minds was the desire for a highly credible, objective assessment of our strategy development, competitiveness, business model, processes, performance measures, and results. Up until the Baldrige journey, my performance review was based on my own critical assessment, our employees' annual survey, third-party surveys, and our top- and bottom-line results. While the executive team is self-critical, an objective third party would either validate or challenge

our assessment. Mostly, our desire was to improve our performance, competitiveness, and sustainability. We wanted to take our well-embedded continuous improvement process to a higher level.

One of the primary elements of our vision is to celebrate our 100th anniversary. To accomplish this, we must remain relevant and competitive in the marketplace. This requires IPM to continually evolve every aspect of our business model and processes. We identified the Baldrige Excellence Framework as a methodology that would enable greater discipline in planning our future while improving our competitiveness along the way.

The journey was every bit as challenging, exhilarating, and rewarding as we expected. We learned things about our processes and ourselves that could not have otherwise been readily discovered and addressed. Although the head of our Knowledge and Process Management department, Larry Meyer, and I went through examiner training, and he participated in a site visit, there are things you can't learn until you are on your own journey.

Because of IPM's project management core competency, I felt we had a significant competitive advantage. We know how to work toward a deadline, how to focus resources, and how to get things done. We managed the journey as a project and made it one of our strategic initiatives within our 2014–2015 Strategic Plan.

The investment was high—both in dollars and even more so in the time and effort required. Keeping the organization engaged required strong and continual executive sponsorship, involvement, and promotion. Along the way, there were approximately 80 people involved to various degrees; these included personnel from Operations, Finance, Marketing, Human Resources, Office Administration, IT, Knowledge and Process Management, and each of our seven offices.

The high level of activity and progress created positive, measurable improvements, fueled engagement, and helped sustain and accelerate our rapid four-and-a-half-year journey.

The Malcolm Baldrige National Quality Award is validation of the high performance caliber of our people. At the risk of bragging, we have an awesome family. We hire people who share our Fundamental Values of Honesty, Integrity, Caring, Responsibility, Excellence, Humility, Respect, and Spirituality. These deeply caring and committed individuals are IPM's secret weapons.

The award also validates the effectiveness of IPM's business model and processes that enable our sustained growth and competitiveness. For our clients, it puts us in a league of prestigious organizations; shows that we are a high-performance, high-quality firm; and further differentiates IPM. Some of the most gratifying reactions have been from clients who stated they weren't surprised.

Earning the Baldrige Award has also provided us with the opportunity to share what we've learned with organizations in almost every sector of our economy. We have been honored to present our experiences and results at many national and regional Baldrige conferences. If you are considering pursuing the Baldrige Award, know that it requires deep and sustained leadership commitment. There will likely be several attempts, lessons learned to be applied, improvements to be made, and momentum to be reestablished before accomplishing the ultimate goal. However, there are many benefits along the way—as with each step and each application submittal, you will improve your operations and know clearly the best path forward.

Be prepared to accept criticism and to encourage the organization to embrace it. The first time we applied for the Illinois Performance Excellence (ILPEX) Recognition Program, Illinois's state-level affiliate to the Baldrige Program, we received a Silver award and a lot of critical, constructive feedback. We were disappointed, but instead of being discouraged, we were more emboldened to succeed. We didn't apply the next year, but it was probably one of our most intense years of the journey, because we worked hard on addressing the opportunities for improvement (OFIs) that were revealed. When we applied the



Richard Panico, Founder, President, and CEO of Integrated Project Management Company, shares with the Baldrige examiners his insights for driving performance excellence with the Baldrige Excellence Framework.

following year, we received a Gold ILPEX award and submitted our application the following year for the national award.

For immature organizations, Baldrige is an excellent process for establishing a model and practices that will support insightful strategy development to ensure competitiveness and controlled scalability. For mature companies that have been successful and continually evolved, it provides an opportunity to accelerate growth and competitiveness. The process will uncover previously obscure improvement opportunities and drive a more objective and critical review of every aspect of the business.

It is most important to understand and accept that it's not about the award at all, but rather the opportunity to position the organization for continued, profitable growth. Our Baldrige journey is not over despite the achievement of the award. We have embedded Baldrige continuous improvement methodologies into our business to continue to defy complacency. I have already poised the organization for resubmittal of an application in 2023. The results will validate whether we were able to maintain a disciplined approach to continuous improvement.

If your company is considering the journey, get ready for a challenging, exciting, and rewarding ride.



The Alliance for Performance Excellence

The Alliance for Performance Excellence is the 501(c)(3) nonprofit front door to performance excellence across the country. The Alliance represents 29 Baldrige-based programs covering all 50 states and U.S. territories and several sector-based programs.

More than 1,600 examiners and 34 paid staff serve in these Baldrige-based state and regional programs. In the 2019 award cycle Alliance organizations received over 1,250 award applications, 160 of which were full applications. Alliance-member programs have nearly 15,000 members nationwide and a combined budget of nearly \$9 million. These programs help many local organizations start and continue their performance excellence journeys. Most Malcolm Baldrige National Quality Award recipients began their performance excellence journeys with their state quality award programs.

The Baldrige Fall Conference

In 2017, the Alliance began managing this important product, in cooperation with the Baldrige Program and the Baldrige Foundation, hosting a successful conference in Tempe, Arizona.

On October 24-25, 2019, the Tennessee Center for Performance Excellence, along with a consortium of programs in the Southeast, spearheaded and hosted the Fall Conference at the Gaylord Hotel in Nashville, Tennessee. More than 300 performance excellence enthusiasts attended the 2019 Baldrige Fall Conference proudly presented by the Alliance for Performance Excellence, once again in partnership with the Baldrige Program and the Baldrige Foundation.

The schedule included three pre-conference workshops: Excellence is in the Details, presented by 2001 Baldrige Award-winning Pal’s Sudden Service; Introduction to Excellence: Baldrige 101, facilitated by JoAnn Sternke, leader of 2013 Baldrige Award winner Pewaukee School District and the 2019 recipient of the Foundation’s Harry S. Hertz Leadership Award; and Surprising Secrets of the Most Cyber-Resilient Companies, a cybersecurity workshop facilitated by Steve Hunt, CEO of Hunt Business Intelligence.



Leadership of the Alliance (Brian Lassiter, Chair) and Communities of Excellence 2026 (Stephanie Norling, Director) work together at the 31st Quest for Excellence, April 9, 2019, National Harbor, Maryland.

The 2019 Fall Conference featured presentations on best practices from ten Baldrige Award recipients, plus a number of other significant leaders presenting key notes, panels, breakouts, and intensive sessions. It was a great event for learning, sharing, and networking.

This conference for 2020 is being planned by the Alliance and will be co-hosted by the Wisconsin Center for Performance Excellence and the Michigan Quality Council. The dates are October 21-22, 2020, in Milwaukee, Wisconsin. More information on the program, registration, and other details will come after Quest.

Task Forces

The Alliance has been active in several task forces focusing on issues of interest to the Baldrige Community. Two of the task forces are specific to the

Alliance, both of which had nearly completed their work as 2019 came to a close.

One has to do with establishing guidelines for lower-tier state-level Baldrige awards. The Alliance has already established standards for the top-tier awards, representative of the eligibility requirements to apply for the national award. But there is quite a bit of variation between states where the lower-tiered awards are concerned. The Alliance is working through this task force to provide some guidelines and best practices that would help ensure consistency across state-level award.

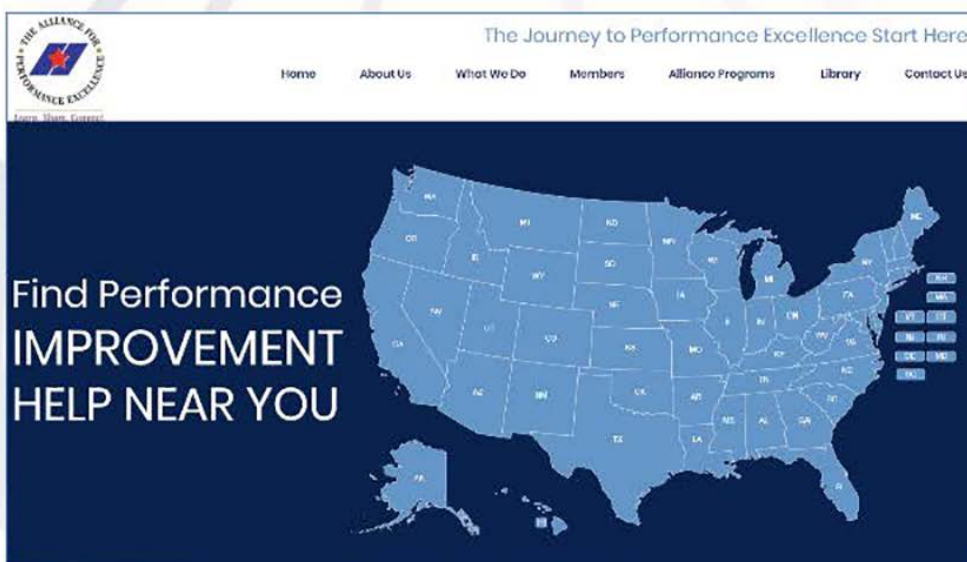
The Alliance is also working with Communities of Excellence 2026 (COE 2026) to determine how COE 2026 and the state and regional programs will work together going forward. Together, they agreed on a five-year vision for how COE 2026 and the state and regional Alliance programs will interact, including some state programs already offering Baldrige awards in the Community space. The Alliance and COE 2026 will next focus on implementing that

vision, developing and employing action plans to make the vision a reality.

The enterprise-wide task forces bring together the Alliance, ASQ, the Baldrige Foundation and the Baldrige Performance Excellence Program to address issues of concern across the Community. The first is focused on business development, that is, working to get more and different organizations to adopt the Baldrige Excellence Framework across all sectors of the economy and areas of the country. As the feeder into the national award, the Alliance is in a unique position to help expand the universe of Baldrige organizations.

The Enterprise has also come together to work on examiner training issues, ensuring that training is available, attractive, and consistent across the state and national programs.

All of these efforts are in pursuit of the Alliance mission: “Enhancing Our Members’ Ability to Grow Baldrige-based Performance Excellence.”



Brian Lassiter
Chair

Alliance for Performance Excellence

To learn more about the Alliance and its members, go to the website at www.baldrigealliance.org.



The Baldrige Impact: It's the Journey, Not the Award

by Kyle Bennett

President and CEO, Memorial Hospital and Health Care Center

We had been on our Journey to Excellence using the Baldrige Excellence Framework for about three-and-a-half years by the time I personally attended the Quest for Excellence® Conference in 2015. As I settled into my seat before the opening plenary presentations began, I was somewhat distracted with managing some things back at our organization in Jasper, Indiana. While I had been a part of Memorial Hospital and Health Care Center for nearly 18 years by that time, I was in my 12th day as the CEO! Lori Persohn, our Director of Organizational Excellence at that time, was sitting next to me, and she noted my level of distraction. She simply said, "You need to pay attention. You are going to be up there someday." She had a bit more faith than I did that day.

Memorial Hospital and Health Care Center is an independent community hospital with a regional presence in a rural setting in southwest Indiana, and we knew we needed a structured approach for continued improvement and to remain independent in order to meet the needs of the communities we serve. The Baldrige Excellence Framework closely aligned with our mission, and the framework assisted us as we

created definitions of excellence and discipline around our strategic planning process and focused on quality and financial improvements. The early years of our journey presented the challenge of adapting to the framework while we identified and worked through process changes. The Baldrige framework really felt like something else on our to-do list. Thankfully, it has now become how we accomplish our work.

The keys to our success as we continue to pursue excellence have centered on our mission, our workforce, and our strategic planning process. Our mission is the foundation of who we are. We are a faith-based organization, and one of our core competencies of "Being for Others" strengthens and sustains our culture by encouraging our workforce that is committed to be in the present and to take action to meet the needs of our patients and their families. The framework helped us hardwire systematic communication that has increased transparency and built trust with our workforce. Each week we identify and discuss Really Impressive Moments (RIMs) created by members of our workforce who reflect excellence and compassion to those they serve. Along the way, we have learned that an organization's culture changes one person at a time, and we have to be purposeful to create awareness and opportunity for change to occur. We have a workforce who accepted our culture immediately, and some have adapted over time. Others were not comfortable with the culture we supported and decided to move on. Unfortunately, there were even those we had to help with that decision.

Thankfully, we have many folks who live our mission each and every day. They go about their work living in the present in order to respond with compassionate excellence when they encounter a need. One of the most powerful examples I share is an opportunity that Nancy, one of our Environmental Services Technicians, encountered as she was going about her day in our Critical Care Services Unit. Nancy was cleaning rooms



Kyle Bennett, President and CEO of Memorial Hospital and Health Care Center, accepts the 2018 Malcolm Baldrige National Quality Award.



Staff, families, and well-wishers of Memorial Hospital and Health Care Center join the celebration at the 2018 Baldrige Award Ceremony.

and working her way down the hall when she noticed an older gentleman in a patient room who seemed to need something. Nancy stopped, entered the room where the gentleman's wife was a patient, and asked him if she could do anything for him. Nancy expected a request for a cup of coffee, a warm blanket, or anything else she could provide. But his request was much different. He explained that his wife was very ill and was not expected to live long. He further explained that during the course of his wife's treatment her wedding ring had been removed. His request was simple. He didn't want his wife to pass away without her wedding ring on her finger. He had tried but was unable to get the ring on her hand. Nancy helped him. They got the ring onto his wife's finger, and Nancy participated in a moment the gentleman would not forget. Sadly, the patient passed away within the next couple of days. But it was clear that Nancy made a difference for this gentleman as he struggled with the likelihood of losing his wife.

“The early years of our journey presented the challenge of adapting to the framework while we identified and worked through process changes. The Baldrige framework really felt like something else on our to-do list. Thankfully, it has now become how we accomplish our work.”

We completed our second Baldrige application to The Partnership for Excellence (TPE) in 2014 after being on our journey for more than two years. It was then

that we truly recognized the gap between where we were and where we wanted and needed to be as an organization. We began working immediately on our strategic planning process and changed many elements of it even before TPE examiners arrived for our site visit.

Our focus on our strategic planning process ultimately resulted in the implementation of a 90-day team structure used to plan and deploy strategic initiatives. This discipline keeps initiatives on track and exposes barriers that need to be resolved. Our 90-day team structure also creates an accountability for results that had been absent in the past. Our strategic planning process includes senior management conducting a quarterly business review to evaluate key performance indicators, establish 90-day teams for the next quarter, and to respond to needs or changes since the strategic plan was established. Our strategic planning process also resulted in a focus on our operational rhythm that helps us align timing of projects with the availability of appropriate resources.

It was a wonderful honor to receive the Malcolm Baldrige National Quality Award in 2018, but our journey continues. We made a decision on the afternoon that we unveiled that beautiful piece of crystal in our lobby. We decided that we did not want the award to be a monument to our past success. We wanted the award to represent a signpost along the way that continues to point us toward excellence. We want to continue to improve for our patients and the communities we serve. Our journey continues.

Yes, You Can Measure and Improve Your Leadership

by Christine Schaefer, Baldrige Performance Excellence Program
National Institute of Standards and Technology



Dennis Brouwer

Dennis Brouwer delivered the keynote address to the Quest for Excellence® Conference on April 10, 2018.

Why do some organizations thrive in fast-changing environments while others stumble in the face of similar challenges?

No matter the size or sector of your organization, Dennis Brouwer (<https://www.linkedin.com/in/dlbrouwer/>) will answer that question for you—and provide practical advice for improving your leadership—during his keynote presentation at the Baldrige Performance Excellence Program’s upcoming 31st Annual Quest for Excellence® Conference.

A successful business author, analyst, and leadership coach, Brouwer has identified a set of measurable leadership practices as the key difference between thriving and struggling organizations. And he stresses that leaders can learn from findings of neuroscience and other research to improve their personal actions for the benefit of their organizations.

Creative Leadership

“One of the most significant predictors of an organization’s success or failure is whether senior leadership embodies a clearly defined, measurable set of behaviors,” Brouwer said recently. He calls this kind of successful leadership practice creative leadership.

“Creative leaders breathe new life into stagnant organizations by taking ownership of a key set of processes,” explained Brouwer. “They create and communicate a vision of the organization’s future that’s worth caring about, ensuring that every individual team member understands their role in achieving that vision, and unlocking the full potential of each and every member of the team.”

“In the process, creative leaders build resilient cultures that challenge the status quo, corner the chaos inherent in human systems, and defuse the complacency that can cripple unsuspecting organizations,” he said.

Drawing from Diverse Careers

Brouwer is CEO of The Brouwer Group, a business analytics firm that focuses on helping organizations become more competitive, agile, and customer-focused. In his leadership coaching and two books he’s authored in recent years, Brouwer illuminates leadership practices for achieving peak performance and business strategy.

In coaching leaders, Brouwer often draws from his own leadership experiences in the military and business sectors, including as a flight officer in the U.S. Navy and as a business leader. A formative experience in Brouwer’s early career was achieving success through “collaboration in service to the mission” among Navy aviators like himself and air crew. Brouwer recounted the saying “there’s no rank in the cockpit.” Later, in the private sector, Brouwer turned around a faltering IT

services company to successfully manage \$300 million in annual revenue.

Insights from Brain Research

Those experiences influenced Brouwer's decision to study and teach leadership practices. "I wanted to understand in detail what was going on in cases of successful leadership and help others replicate that success," he said. What he learned and now shares about leadership aligns with the Baldrige Excellence Framework (<https://www.nist.gov/baldrige/publications/baldrige-excellence-framework>), he affirmed.

Brouwer also pointed out how his guidance for leaders reflects findings from neuroscience. "As the social sciences have disseminated brain research, the connection between neuroscience and leadership is becoming clear," he said. "About 70 percent of leaders' actions are dominated by fears of some kind—fear of failure, fear of what they may have forgotten, etc."

The risk-averse stances that leaders often reflexively take are based on deep-seated fears that helped ancient human beings survive, he explained. "If you think about it, if you're a cave man, almost all changes are bad. Those who weren't risk-averse didn't survive. So in our brains, we equate change with risk—change, to our brains, is a risky behavior. And that's what we have to overcome. Because we don't live in a slow-changing world anymore. Risk-averse behavior can become a problem in our day-to-day work life."

A good example of how risk-averse behavior can be overcome, Brouwer said, can be found in his military training. "Naval aviators go through a course of carefully curated experiences designed to challenge our fears, enable us to understand the limits of our capabilities, and keep thinking in highly stressful situations instead of just reacting."

Universal Concepts

The leadership concepts Brouwer shares are "absolutely universal" across military, government, business, and other sectors; and they apply equally to for-profit and nonprofit organizations and those of different sizes, he said. "That universality shouldn't surprise us because all of these issues are about human relationships and about the human need for purpose and clarity."

As an example, he described key similarities of health care and military work environments. "There's a team dealing with risks and challenges, supported by advanced technology; there's a need for very open communications, and the consequences of people's actions can be catastrophic—because lives are at stake in a very real and immediate sense," he said. "In both cases, we've found that the most effective units have highly effective, cohesive teams."



Improving Leadership

Brouwer hopes those who hear his Quest presentation in April will be convinced they can take action to improve their leadership practices.

"There's an assumption that leadership is like magic—that it's something you can't really measure because it's not quantifiable," he said. "That's not true: leadership is definable, measurable, and teachable." He added, "It's become fashionable to view leadership as a combination of authenticity and transparency. In other words, 'I know myself, and if I communicate often and clearly, that's enough.' What's missing there is that you must also hold yourself accountable to practice and display leadership behaviors that are consistent with the Baldrige framework."

"That's what my leadership [guidance is] all about: what concrete things you can do to become more effective," he concluded. "Leadership is defined by behaviors, and incremental improvements are the building blocks of success."

BALDRIGE FOUNDATION AWARDS



APRIL 9, 2019

The Baldrige Foundation Leadership Awards and the Dr. Curt Reimann Baldrige Scholars for 2019

The Malcolm Baldrige National Quality Award is presented to organizations that meet strict criteria to be considered role-model organizations. The Foundation Leadership Awards are intended to recognize individual role-model leaders.

“Taken together,” said Foundation Board Chair George Benson, “these awards recognize the hard work and dedication—often over decades—of our Baldrige volunteers and staff, practitioners, and champions. Each, in their own way, has supported, promoted, and advocated for the Baldrige community.”

For 2019, the Foundation Awards included the seventh annual presentation of the Harry S. Hertz Leadership Award, the third presentation of the E. David Spong Lifetime Achievement Award, the second cadre of winners of the Baldrige Foundation Awards for Leadership Excellence, and the second class of Dr. Curt Reimann Baldrige Scholars.

“The leadership awards represent the Baldrige Community coming together to recognize individuals who demonstrate outstanding leadership and support for the continuation of Baldrige,” said Foundation President and CEO Al Faber. “They are made possible by the support of a number of sponsors and friends.”

Specifically, the Foundation would like to show appreciation for Navigant, sponsor of the 2019 Baldrige Foundation Awards luncheon, Ken Cohen and the Synergy Organization, Founding Sponsor of the Harry S. Hertz Leadership Award, and George Taylor and Beyond Feedback for his continuing support.



Recipients of the Foundation Award for Leadership Excellence are awarded a sector-specific medal that is suspended on a color silk moiré ribbon, matched to the color representing the sector. The medal also comes with a sash, lapel pin, and framed certificate.



Rulon Stacey, Managing Director in the Health Care practice at Navigant, welcoming attendees to the Foundation Leadership Award luncheon, with George Benson (left), Chair of the Foundation Board of Directors and Al Faber, President and CEO of the Baldridge Foundation.

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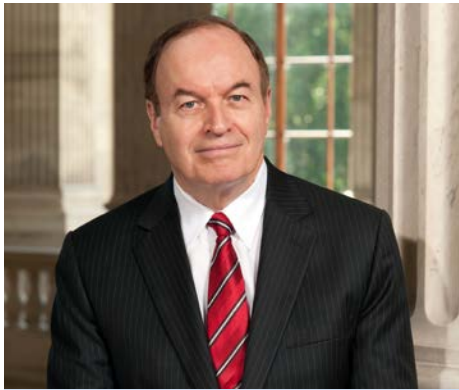
Thanks to our 2019 Awards Luncheon Sponsor, Navigant, recently acquired by Guidehouse.



The Harry S. Hertz Leadership Award (right), and the E. David Spong Lifetime Achievement Award.

The E. David Spong Lifetime Achievement Award

“To receive the Spong Award, an individual must have made sustained, exceptional, and far-reaching contributions to the Baldrige community in a manner worthy of recognition at the national level,” said Foundation Board Chair George Benson, Ph.D. “Lifetime Achievement Award recipients change their worlds and inspire others to do the same.”



Official Senate photo of the Honorable Senator Richard Shelby.

No one better embodies those characteristics than 2019 Spong Award recipient, the Honorable Senator Richard Shelby of Alabama. “Senator Shelby has dedicated his life to servant leadership,” continued Benson. “He has over 55 years of public service at the local, state, and federal level, including casting more than 10,000 votes in the U.S. Senate.”

He was one of the original supporters of the Malcolm Baldrige National Quality Award when it was passed by Congress in 1987.

“The E. David Spong Lifetime Achievement award recognizes an

individual who has performed truly extraordinary service and made a sustained impact throughout one’s career which will serve as inspiration for future leaders” said Faber, “and few have done more to sustain the Baldrige Program in difficult times than our 2019 awardee, the Honorable Senator Richard Shelby of Alabama. Senator Shelby was instrumental in starting the Alabama state-based Baldrige program and was a strong supporter of the Malcolm Baldrige National Quality Award from its inception. He continues to champion the program in Congress and serves as a role-model leader and ambassador for quality and performance excellence in government and throughout the private sector.”

“It is important that we continue to focus on ways to grow fiscally, while also maintaining a level of high performance as we advance down on a path of success for this great country.” said Senator Shelby. “The Baldrige Performance Excellence Program aims to achieve these important goals, and I am humbled to have been chosen to represent the Foundation.”

Dr. Benson noted Senator Shelby’s Baldrige-like commitment to process. “As Chair of the Senate Appropriations Committee,” Dr. Benson noted, “he has worked across the aisle to restore regular order to the appropriations process. For example, he completed a markup process in 2018 that reported out all twelve spending

bills faster than any time in more than three decades.”

It was unfortunate that Senator Shelby was unable to attend the ceremony in April, but the business of governing takes precedence, and his thoughts were with us as he sent this message:

“It is an honor to receive the Baldrige Foundation’s E. David Spong Lifetime Achievement Award. The work implemented here to ensure the economic stability of our nation is truly remarkable. Thank you for honoring me with this distinguished award. I have great respect for those preceding me as recipients. I am proud to be entrusted with the opportunity to live out the legacy of E. David Spong and the Baldrige Foundation.”



The E. David Spong Lifetime Achievement Award and its inspiration at the 31st Quest for Excellence Conference, National Harbor, Maryland, April 9, 2019.

The Harry S. Hertz Leadership Award

“JoAnn Sternke,” began Foundation Board Chair George Benson, “you are an innovator and a transformational leader of national scope. The Baldrige Foundation is honored to recognize you with the Harry S. Hertz Leadership Award.”

“The Hertz award recognizes role-model leaders that challenge, encourage, and empower others to achieve performance excellence,” said Al Faber, Foundation President and CEO. “Our 2019 recipient, Dr. JoAnn Sternke, led the Pewaukee School District to the National Quality Award in 2013, and has spent decades teaching others how to use Baldrige to transform the lives of students in K-12 schools and higher education.”

JoAnn Sternke is a senior director and coach with Studer Group, a 2010 Baldrige Award recipient, and previously was the superintendent of the 2013 Baldrige Award-winning Pewaukee School District. She has served as a Baldrige examiner and senior examiner, led a team through Site Visit Review in 2017, and is now a member of the Baldrige Judges Panel.

It is difficult to read the Harry S. Hertz Leadership Core Value Attributes and NOT think of Dr. JoAnn Sternke. Since being exposed to the Baldrige Criteria in 2006, JoAnn has been the very model of a Hertz-Baldrige leader.

The Pewaukee School District began using the Education Criteria for Performance Excellence at the prompting of a school board member. They had been executing their strategic plan for a number of years, and while there were some improvements in performance, they were not seeing the results for which they had hoped.

Dr. Sternke was interested in the systems-level approach, tying the diverse components of an organization into support of a single mission. She once described it as going from being a cheerleader to a leader, not only being able to create and motivate her team, but to provide direction for them to apply that enthusiasm.



Foundation President and CEO Al Faber welcomes 2019 Harry S. Hertz Leadership Award winner JoAnn Sternke to the stage.



2019 Harry S. Hertz Leadership Award recipient, Dr. JoAnn Sternke, with the award's Founding Sponsor, Kenneth R. Cohen, Ph.D., Founder and Chief Executive Officer of The Synergy Organization.

When first looking at the Criteria, the complex jargon, and multitude of questions, it seemed so regimented that Dr. Sternke could not imagine it driving innovation. Yet, as she has advised hundreds of fellow Baldrige travelers, the dichotomy is that thinking systematically allows you to think more innovatively. She has recognized that one of the most critical jobs of leadership is to create a culture of innovation.



Dr. JoAnn Sternke accepts the 2019 Harry S. Hertz Leadership Award with (from left) Foundation Board Chair P. George Benson, Harry S. Hertz, and Foundation President and CEO Al Faber.

Dr. Sternke has been a ferocious advocate of the Baldrige Excellence Framework, giving selflessly of her time and expertise to help others transform the lives of students. As she said, “I believe in the Baldrige Excellence Framework and how it fosters performance excellence in every sector and size of organization. I am passionate in assisting leaders to leverage the framework to attain results and improve outcomes for those we are trusted to serve.”

On receiving the Hertz Award, Dr. Sternke said, “I am humbled to be the recipient of the Harry Hertz Leadership Award. I thank the Baldrige Foundation for considering me for this honor and for all of their diligent work to support the Baldrige Program.”



After warmly expressing her gratitude to the support and assistance of long-time friend and collaborator Liz Menzer, we see Dr. JoAnn Sternke, winner of the 2019 Harry S. Hertz Leadership Award (left) with Liz Menzer, Executive Director of the Wisconsin Center for Performance Excellence and a Consultant with Studer Education.

Baldridge Foundation Awards for Leadership Excellence



2019 Foundation Award for Leadership Excellence Recipients

In introducing the Baldrige Awards for Leadership Excellence, Dr. Benson noted, “The purpose of the Baldrige Awards for Leadership Excellence is to recognize individuals who actively support the Baldrige Foundation and its mission. That support could be anything from helping us promote or grow the Baldrige Program, to supporting organizational performance excellence anywhere in the world, to helping us raise funds to support the Baldrige Community.”

Foundation Leadership Excellence Awards are presented to individuals working in each of the six sectors of our economy for which Baldrige Awards are given plus cybersecurity.

“There are so many people doing such important work promoting the Baldrige Framework,” continued Faber. “Through their efforts to grow the Baldrige community, they help thousands of organizations across the country to improve their performance. Baldrige makes health care safer and more accessible, education more effective, businesses more efficient and customer-focused, cyber systems more secure, governments more streamlined, and nonprofits more responsive across the spectrum,” said Faber. “These great leaders are helping to ensure the sustainability of Baldrige into the future.”

In Their Own Words

The 2019 awardees provide their thoughts on Baldrige and how it impacts their organizations and sectors



MARYRUTH BUTLER • HEALTH CARE
Executive Director, Mountain Valley of Cascadia

“My passion to provide quality health care in my hometown began over 25 years ago, leading the way to the first skilled nursing and rehabilitation center to earn the Malcolm Baldrige National Quality Award in 2016. I attribute using the Baldrige Framework for shifting my leadership approach and creating a culture of performance excellence. Utilizing the framework, the team at Mountain Valley is committed to sustaining our culture of innovative thinking and intelligent risk taking, knowing that quality stands for providing excellent clinical care, measurable improvements through systematic approaches year to year, and exceeding the needs and expectations of our patients, residents, and families. Now, more than ever, the health care industry needs leaders that are innovative and visionary, adding value into the lives of others through servant leadership, and the Baldrige Framework is key!”



GLENN CROTTY • HEALTH CARE
Executive Vice President, Chief Operating Officer, Charleston Area Medical Center Health System, Inc.

“Leaders must run the business, manage the quality and improve the organization at the same time. Having a systematic approach to lead helps the organization achieve sustained success.

A leadership system that is well deployed and linked with customer key requirements helps to create on-going customer value. Leadership that drives and sustains high performance is important, year over year, to manage inflation and business growth costs.

Improvement and learning that is systematic and integrated across the organization’s business processes help an organization sustain patient-focused excellence. The deployment of key learnings from clinical and operations help achieve results that achieve organizational sustainability.”



JAMES EVANS • EDUCATION
Professor Emeritus, Lindner College of Business, University of Cincinnati

“Baldrige has been an important part of my life for more than half of my 43-year career in academia. I learned an incredible amount from the many colleagues with whom I worked as an Examiner and Judge in both the national and state award programs. Through my teaching, research, textbooks, and service to professional organizations and the Baldrige community, I am proud to have promoted Baldrige and its philosophy of performance excellence to many thousands of students and faculty in colleges and universities, as well as other organizations in the United States and around the world. It has been the most fulfilling and rewarding activity in which I have engaged.”



TOMMY GONZALEZ • GOVERNMENT

City Manager, City of El Paso, Texas

“One of the greatest benefits to using the Baldrige Framework is the impact it has had on alignment of community priorities with our strategic plan. This integration has broken down silos in our organization by creating cross-functional teams and basing our decisions and actions on our vision, mission, and values. The discipline within the Framework guides our organization to focus on what is most important: our workforce. This intense focus on our workforce strengthens our commitment to customer service by developing and investing in our people. By deploying the Baldrige Framework, we’ve been able to achieve a vast list of accomplishments, to include \$50 million in cost-savings and revamping the entire city’s budgeting process to reduce the cycle time from four months, to three weeks, to one day. The Baldrige Framework has also served as a great segue into the Communities of Excellence focus, opening up dialogue with community partners to share best practices; improving quality of life, healthcare, and education for our residents.”



SAM GRAVES • GOVERNMENT

Member of the United States House of Representatives, Representing Missouri’s 6th Congressional District

“The State of Missouri and my Congressional district have greatly benefited from the Baldrige Performance Excellence Program. Using its proven Baldrige Excellence Framework, we have been able to address the unique economic challenges our rural communities face. However, there are many stories of success across the nation as a result of the Baldrige Program. Its nationwide presence is improving competitiveness in all fifty states and the quality of life of citizens nationwide by raising the standards of excellence in health care, business, and education.”



CARY HILL • BUSINESS

CEO, MESA

“Baldrige has had a significant impact on my professional and personal life. At MESA, the Baldrige Excellence Framework provided the “playbook” that we have used for nearly two decades to drive sustainable, profitable growth that has outpaced every competitor in our industry and creating jobs and opportunities for our MESA family. Additionally, my participation as a Baldrige examiner for nearly a decade has been the most significant influence in my development into the CEO position. On a personal level, the Baldrige Framework and process have allowed me to give back to my home state as Executive Director of Oklahoma Quality, helping others to enjoy many of the same benefits as we have enjoyed at MESA. I am very grateful to the Baldrige program.”



**JO ANN JENKINS •
NONPROFIT
CEO, AARP**

“To be successful in today’s constantly changing world, you need talented, innovative and trusted leaders at all levels of the organization, not just at the top. As the CEO, it is my job to help those leaders succeed. That means having a clear vision and mission and communicating it to all employees to ensure they understand it in the same way. I’ve found the Baldrige Excellence Framework to be an incredibly valuable tool for obtaining the input and feedback we need to ensure we are fulfilling our mission to empower people to choose how they live as they age.”



**BRUCE KINTZ • NONPROFIT
President and CEO, Concordia
Publishing House**

“The Baldrige framework is a powerful tool for business leadership. I was confident that my background at McDonnell Douglas and Boeing had equipped me to lead Concordia Publishing House through the Baldrige journey. At Concordia Publishing House, our Baldrige journey was laser-focused on the improvement of our systems and processes to better serve our customers. Without it, we would not have experienced the results we have seen in the last decade and expect to see long into the future. The lasting benefit has been long-term sustainability. If I were to take over another business tomorrow, I would immediately examine it for applicability to the Baldrige process.”



**DEBORAH LARKIN-CARNEY • HEALTH CARE
Vice President of Quality,
Barnabas Health**

“As leaders, we face the challenge of transforming the entire culture in our organizations to become highly reliable in quality and patient safety. This requires strong oversight but at the same time a willingness to listen to patients, communities, and the workforce, providing hands-on support to front-line staff so that they are able to generate excellent results each day. The Baldrige Excellence Framework has been a valuable asset to our system in constantly improving upon performance excellence, using clearly stated expectations, building competence in skills and behaviors, and reinforcing structure and accountability.”



ROBERT PENCE • BUSINESS
Chairman of the Board, Freese and Nichols

“The Baldrige Excellence Framework has been transformative for Freese and Nichols and has propelled our company on a very positive trajectory for many years. The Baldrige concepts begin with leadership and this drives the success of a company. Using the Baldrige criteria to first understand your company and how it operates, identifying areas for improvement, and implementing and tracking actions to affect change are the basic foundation stones for achieving success. The leadership aspects require developing a clear vision for the future and gaining stakeholder support to have everyone pulling in the same direction. We attribute the Baldrige Excellence Framework as the key to our success since starting our journey.”



PATTIE SKRIBA • HEALTH CARE
Vice President for Business Excellence, Advocate Good Samaritan Hospital

“To me, the Baldrige journey is how senior leaders create a legacy, a ‘process-honoring culture’ which creates and sustains excellence in the face of any headwind. Playing a role in Advocate Good Samaritan’s performance excellence journey of moving from ‘Good to Great’ and achieving the 2010 Malcolm Baldrige Award was a profound learning experience for me. I am grateful for the opportunities over the past 12 years to share my passion for excellence as an examiner, Chief Judge for the Illinois Baldrige Program, Illinois Performance Excellence (ILPEX), and as a national speaker. Regarding the Baldrige Excellence Framework, I am a dedicated student; I am an avid practitioner; and yes, I am a passionate evangelist. I, too, believe America needs Baldrige!”



ALLYSON YOUNG • BUSINESS
Human Resources & Brand Director, K&N Management

“I was first introduced to Baldrige over 15 years ago when I took my first trip to Pal’s Sudden Service and attended the Pal’s Business Excellence Institute. Our whole team was completely in awe of their systems, processes, and measures. At that point we were all in. K&N Management uses the Baldrige Excellence Framework to align the actions of our company toward one common goal, to delight each guest that walks into our restaurant. Since 2012, I have shared our best practices with over 2,000 leaders from 125 organizations. Our team members are proud to work for an award-winning organization and at the end of each day, they are proud of the legendary experiences they have created for our guests. I am honored to be a part of the Baldrige community.”



The Dr. Curt Reimann Baldrige Scholarship

The Dr. Curt Reimann Baldrige Scholarship premiered in 2018, conceived and brought to the Board by long-time Baldrige examiner and consultant Lori Kirkland, the scholarship honors the foundational work in Baldrige accomplished by Dr. Curt Reimann.

“This scholarship provides an opportunity for two graduate students or recent graduates to attend Baldrige Examiner Training,” said Baldrige Board Chair George Benson. “This experience not only gives them deep exposure to the Baldrige Excellence Framework but provides the opportunity for them to build relationships with more seasoned members of the Baldrige community. And, hopefully, they will become part of the next generation of Baldrige champions!”

“The Foundation Board of Directors established the Dr. Curt Reimann Baldrige Scholarship because the Directors understand that the sustainment of Baldrige also requires an investment in future generations of Baldrige scholars and practitioners. The Reimann Scholars are the future,” said Foundation President and CEO Al Faber. “Through the Dr. Curt Reimann Baldrige Scholarship, by attending Baldrige Examiner training, Reimann Scholars can learn about and ultimately integrate the concepts of the Baldrige Excellence Framework throughout their various career paths, creating the next generation of Baldrige professionals.”

The 2019 Dr. Curt Reimann Baldrige Scholars are Robin Eckhardt and Allen Turner.



Lori Kirkland (right) and Dr. Curt Reimann with 2019 Reimann Scholar Allen Hunter.



Lori Kirkland (right) and Dr. Curt Reimann with 2019 Reimann Scholar Robin Eckhardt.

Robin has a Bachelor of Science degree in Social Policy and Bioethics from Northwestern University and will be graduating with a Master’s in Health Administration from the University of Cincinnati. She is also owner and senior consultant of NMF Healthcare Consulting in Cincinnati, Ohio.

Allen Turner recently completed his doctorate in Business Administration at Walden University. Through the Baldrige Consulting Capstone option offered by Walden, Allen served as a scholar-consultant for a nonprofit organization that trains and supports at-risk young workers. He also holds an MBA from St. Leo University and a Master’s in Strategic Intelligence from American Military University. He is currently the Emergency Manager for NASA’s Glenn Research Center in Cleveland, Ohio.



The 2019 Dr. Curt Reimann Baldrige Scholars Robin Eckhardt (second from left) and Allen Turner (second from right), shown here with Foundation Board Chair George Benson (right), Dr. Curt Reimann (center) and Foundation President and CEO Al Faber (left).



Tri County Tech: A Story of Grit and Grace

by Lindel Fields
Superintendent and CEO, Tri County Tech

I enjoy watching outtakes of old football games—the films are in black and white, the player’s pads were made of rolled-up cloth, and the helmets were constructed using sparse pieces of leather. Gritty guys who loved the game would show up after work and battle it out in a pasture that doubled as an open field. Much has changed in the one hundred years or so since football started. The equipment is much better. The grounds are pristine, thousands show up for the game, there are referees, super-hero athletes, and there are clear game plans. The goal of every team is clear—win the championship. The players of yesterday with their antiquated equipment would not likely qualify to carry the water in modern-day football. Still, no one can argue their love of the game was any less than the passion displayed by those that play today.

Tri County Tech, a 2018 Malcolm Baldrige National Quality Award recipient, committed to a decade long performance excellence journey and can appreciate the evolution of football. While the two are very different, both would agree that hard work and passion, while essential factors to success, aren’t enough to win a championship.

Tri County opened its doors as the first Oklahoma Vo-Tech center in 1967. The center has helped tens of thousands get training that led to great careers. Like the game of football, career tech education has evolved. The programs have changed. The facilities are modern, and teaching methodologies have improved. Tri County did a good job of keeping up with the changes, but not great. In some ways, we were playing with tattered leather helmets and without a solid game plan. We worked hard and loved what we did, but understood that wasn’t enough.

In 2003, we recognized we could do better. We knew that if we were going to help more students realize their hopes and dreams, then we had to have a game plan. So we began to look at Baldrige. When we examined

the criteria: **Leadership, Strategy, Customers, Measurement, Workforce, Operation, and Results**, they made sense. However, it wasn’t long before we realized the Baldrige criteria, or any plan for that matter, would not work until we had a workforce capable of executing a plan. We had good people who worked hard, but working hard without a clear vision is playing football in a field with no scoreboard.

“When you figure out what you want to be when you grow up, you realize that you are not that unique. You also realize there are plenty of world-class organizations with world class-results to learn from to benchmark. We looked at the very best educational organizations and also found tools like Net Promoter Score (NPS) to compare ourselves to other sectors.”

We spent several years learning the Baldrige criteria (the game plan) while getting our workforce in order. We were talking about getting the right people on the bus, but it wasn’t until we set a destination for the bus that things began to take shape.

In 2009, we rolled out Vision 2020 (**leadership**)—A bold vision intended to establish Tri County as one of the premier educational institutions in the United States. The Vision included earning the designation as a top place to work in the United States and earning the Malcolm Baldrige Award. We knew where we were going, and when you know where you are going, you can create a culture capable of making the journey (**workforce**).

We had a vision. Our workforce was clicking, but that was only the beginning. Each year, we would set out to win the championship. We were experiencing good years, but based on what? Did we have more



Lindel Fields, Superintendent and CEO of Tri County Tech, and his team celebrate winning the 2918 Malcolm Baldrige National Quality Award.

customers, were our completion/retention rates improving and were our customers satisfied and engaged (customers)?

We knew we needed to thread our years together to accomplish our long-term Vision. We began to focus on our strategic planning, which took place at off-site retreats, something I highly recommend (strategy). As a result of these sessions, our planning got sharper, and our plans more concise. We realized we were trying to be everything to everybody. As a result, we focused on the basics: blocking and tackling. We quit trying to run reverses and throw Hail Marys (operations). We stuck to the basics—our reason for being.

It was about that time we developed the “Tri County Way.” It was the spirit that emerged as a result of us focusing on being something more significant than anyone of us could accomplish alone. It is who we are, what we do, and how we do it. It is this grace-filled culture that makes me the proudest.

The game plan was working, or so we thought. We were getting better. We were attracting and retaining more students. We were benchmarking but often used the excuse that there was no one quite like us. When you figure out what you want to be when you grow up, you realize that you are not that unique. You also realize there are plenty of world-class organizations with world class-results to learn from to benchmark. We looked at the very best educational organizations and also found tools like Net Promoter Score (NPS) to compare ourselves to other sectors (measurement, analysis, and knowledge management). We discovered we stacked up well.

The discipline we exercised was working. We created a culture capable of attaining world-class results, and our



Lindel Fields, Superintendent and CEO, enjoys sharing the stories and lessons of Tri County Tech’s journey in pursuit of performance excellence. Here, he shares lessons with the Baldrige examiners at the Examiner Recognition event.

students and communities became the beneficiaries. By adopting the Baldrige framework, we earned a spot on Fortune’s Top Places to Work list four years in a row. Additionally, our enrollment grew from 8,000 in 2009 to over 20,000 in 2018. Our NPS matched that of the Ritz Carlton and Costco in 2018 and 2019. Furthermore, our student retention/completion rates averaged 93 percent over five years, with an average student debt of fewer than three hundred dollars (results).

Most would agree our results were significant. However, many things happened that didn’t or won’t make the stat sheets. I refer to these as the unintended positives.

We created a workplace where employees thrive by having friends they can call on when things go wrong. Everyone at Tri County has experienced this grace. We have helped many students in many ways, but when you learn you helped a family break the cycle of poverty is when it hits you. It is at that point that you win the real championship—Baldrige works.



The Baldrige Performance Excellence Program in 2019

by Bob Fangmeyer
Director, Baldrige Performance Excellence Program

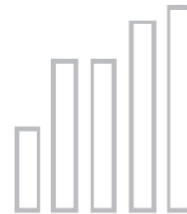
Looking back on 2019, I am pleased with the progress we have made and humbled once again by the support we have received from the Baldrige community. From our examiners, judges, and Board of Overseers to the Baldrige Foundation, the Alliance for Performance Excellence, NIST, and the extended Baldrige community, we are fortunate to be part of a family that is passionate about promoting excellence, sharing best practices, and helping others improve. And included in this family are the members of the Baldrige Program staff, who are devoted to the program and its purpose.

In 2019, thanks to the efforts of our 360 volunteer examiners and judges, we welcomed six new organizations to the group of Baldrige Award recipients, bringing the total awards given to 129 over 32 years: Adventist Health White Memorial; Center for Organ Recovery & Education (CORE); City of Germantown, Tennessee; Howard Community College; and Illinois Municipal Retirement Fund. We look forward to hearing from these organizations during the Quest for Excellence Conference and beyond as they help improve the quality of life in our nation by sharing their many best practices.

And since the program and the award process are as much about helping organizations improve as we are about recognizing role models, we are especially pleased that over the past five years, all participants in the national Baldrige Award process have given the framework a Net Promoter Score of 86 to 100. And their improvement efforts

benefit a circle of stakeholders that goes far beyond their organizational borders: in 2019 alone, applicants for the Baldrige Award represented 71,590 jobs, more than \$30 billion in budgets or revenue, and about 8 million customers served.

Additional evidence of the benefit derived from the use of Baldrige



The ratio of the Baldrige Program's benefits for the U.S. economy to its costs is estimated at **820 to 1.**

2010–2019 award applicants represent **650,093 jobs**, 3,209 work sites, over \$181 billion in revenue/budgets, and over 590 million customers served.

121 Baldrige Award winners serve as national role models.

348 Baldrige examiners volunteered roughly **\$7.8 million** in services in 2019.

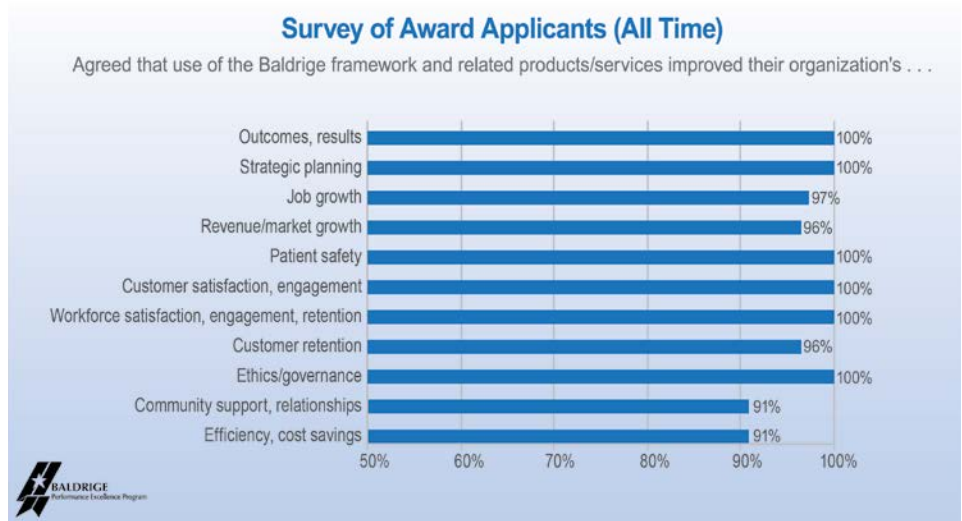
State Baldrige-based examiners volunteered around **\$29 million** in services in 2018.

comes from a recent perception survey that was sent to every applicant that has ever applied for the Baldrige Award. Although we didn't receive responses from all 1,700-plus applicants, it was a very robust sample. The results show that organizations overwhelmingly realized tremendous value from the use of Baldrige products and services.

Also in 2019, the number of participants in the Baldrige Executive Fellows Program reached 130 over nine years. With Net Promoter Scores, a broadly-accepted assessment of customer perceptions of a business used by millions of businesses in all sectors of the economy, typically at or close to 100, this year-long, nonresidential executive development program allows Fellows to learn from award-recipient leaders and one another, with an emphasis on leadership and completion of a strategically important capstone project.

Revised Award Process to Launch in 2021

Continuing the progress made in 2018, and refining the proposed changes even more, we held a full pilot of a streamlined Baldrige Award process in 2019. Feedback echoed previous pilots: examiners told us that the evaluation process and feedback preparation was easier and less time-consuming, with more time spent on meaningful, value-added work. And the increased dialogue from pre-consensus interviews with the applicant resulted in a more accurate consensus evaluation and a more focused, more efficient on-site visit. Best of all, the applicant told us that the revised feedback



was more transparent, easier to understand and utilize. And the cycle time was shorter, benefiting the applicant and the examiners.

Based on the results of this pilot and previous ones, including several at the state program level, the revised process will be put in place for the 2021 award process. During 2020, we and members of the community will revise all affected processes and materials in time for the 2021 launch.

Communities of Excellence

In 2019, Communities of Excellence (COE) 2026, with support from us and from members of the Baldrige community, revised the COE Framework and expanded the communities served by the Learning Collaborative to 18, with 12 from the previous year's collaborative participating in a Baldrige-based recognition process. These communities continue to show the potential impact of a Baldrige-based framework and assessment process that pulls together all sectors in a community (business, education, government, health care, and nonprofits) to create an integrated community leadership

system with a clear vision, shared goals, and shared ownership of key results. The Baldrige Board of Overseers continues to support this partnership and the shared effort of COE 2026, the Baldrige Foundation, the Alliance for Performance Excellence, and the program to expand the Baldrige Award to include a "Community" category by 2023.

Workforce Excellence

In July 2018, presidential Executive Order 13845 established the President's National Council for the American Worker. One task mandated by the order is to develop a plan for "recognizing companies that demonstrate excellence in workplace education, training, and retraining policies and investments, in order to galvanize industries to identify and adopt best practices, innovate their workplace policies, and invest in their workforces." We continue to work with a cross-agency task group and the American Workforce Policy Advisory Board to finalize and implement the proposed award. We remain excited by the potential of this initiative to recognize excellence



in a narrowly focused area, with the opportunity to encourage them to broaden their excellence efforts using the various resources available to them throughout the Baldridge Enterprise.

Expanding the Borders

Once again in 2019, we met with our excellence program counterparts from around the world, this time in Beijing to help the China Association for Quality celebrate their 40th anniversary. The 12 programs make up the Global Excellence Council (formerly the Global Excellence Model). Since we helped found the organization in 2000, we have looked forward to these meetings as a way of benchmarking the Baldridge Excellence Framework, award process, and other products and services with leading excellence programs in other countries, while



supporting our shared mission of spreading excellence across the globe.

2019 was a very good year, and the efforts of the Baldridge staff and our partners have set the stage for an even better, more exciting future.

As has been proven over the past 30 years, Baldridge will change and evolve, but its purpose and promise will always attract those passionate about improving the quality of life in our organizations, our communities, the nation, and the world.



The staff of the Baldridge Performance Excellence Program at the Malcolm Baldrige National Quality Award ceremony, honoring the 2018 role-model organizations, April 7, 2019

Culture and Strategy Eat All Three Meals— When Leaders Set the Menu

by Harry Hertz, Baldrige Performance Excellence Program
National Institute of Standards and Technology



Spring 2019

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

Each year when I return from the Baldrige Program’s annual Quest for Excellence® Conference (QE) (<https://www.nist.gov/baldrige/qe>), I sift through my notes and look for themes that characterize what I have heard from multiple Baldrige Award recipients. I

perform this analysis for two reasons. First, the themes point me in the direction of areas where I may want to review my own organization’s performance or adapt a best practice from the new award recipients. Second, sometimes the themes reveal an emerging area of importance to organizational performance broadly. This year, my experience was somewhat different. The themes pointed me in a more holistic direction through the combination of themes I noted. Specifically, I noted the importance of culture and strategy combined with visionary leadership as an integrated driver of organizational excellence. In regard to the Baldrige Excellence Framework (<https://www.nist.gov/baldrige/publications/baldrige-excellence-framework>), we frequently reference the concept of integration, the ability of an organization to function like a living organism, with all the parts operating in unison.

Of importance for the validation of this integrated driver, there are five 2018 Baldrige Award recipients from four different economic sectors: education, nonprofit, business, and health care. These organizations are Alamo Colleges District (<https://www.nist.gov/baldrige/alamo-colleges-district>), Donor Alliance (<https://www.nist.gov/baldrige/donor-alliance>), Integrated Project Management Company, Inc. (IPM) (<https://www.nist.gov/baldrige/integrated-project-management-company-inc>), Memorial Hospital and Health Care Center (MHHCC) (<https://www.nist.gov/baldrige/memorial-hospital-and-health-care-center>), and Tri County Tech (TCT) (<https://www.nist.gov/baldrige/tri-county-tech>). Their products and services are widely different, but their leadership's integration of culture and strategy with operations have yielded spectacular outcomes.

Three Themes

While the importance of culture, strategy, and visionary leadership is not new, the observation of the three functioning together so well gave me new insight into the holistic systems perspective presented by the Baldrige Excellence Framework and how this holistic system can contribute to remarkable organizational performance.



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

I will cover the three topics separately in this publication, but many of the examples presented could have fit in more than one of the three categories. This realization is part of what led me to the conclusion about the integrated nature of the organizational excellence the 2018 Baldrige Award recipients achieved. Furthermore, I detected some clear sub-themes related to culture and visionary leadership. For culture, these sub-themes are that the five organizations are great places to work and that they pause to celebrate success in numerous ways. For visionary leadership, these sub-themes are effective communication, leadership by all, and building trust. And true to the theme of "integration," these leadership sub-themes are part of the organizations' culture.

CULTURE

All five organizations know and display daily the importance of their workforce as a key factor in their success. At MHHCC, the culture is defined by to "be" and to "act." Workforce members are each there for their colleagues and their patients. They have a "no pass" zone, never passing anyone in the hallway without a greeting. MHHCC has a six-step leadership system. Step two is to create a culture of compassion and excellence. This culture is built on MHHCC's core competency of cultivating collaboration. IPM defines four essential leadership responsibilities: inspiring culture, strategy, execution, and evolution. This simple statement from IPM demonstrates the holistic approach to the three themes I identified this year.

Furthermore, IPM's vision to be "the best" is exemplified by excellence, ethical leadership, community involvement, and the highest commitment to our family (i.e. staff) members (emphasis is IPM's). At Donor Alliance, People First is the "anchoring" core value. The organization has four strategic objectives; number two is "high-engagement culture." At Tri County Tech, Mantra Two is "If you're not taking care of the student, take care of someone who is." That's how you fit in at TCT! In TCT's words, this makes the CEO a support staff member. In analogous fashion, Alamo Colleges District leaders believe in service over self and practice servant leadership.

Great Place to Work

Does the culture pay dividends in these five organizations? Certainly yes, as demonstrated by their workforce results. Here are some data from their employee engagement results:

- Alamo Colleges District exceeds the national norm in the Personal Assessment of the College Environment (PACE) survey for workforce overall climate scores, with two of the district colleges in the top 10 percent for overall climate.
- In 2018, Donor Alliance scored 90 percent (top decile) in employee engagement, steadily increasing from 79.9 percent in 2015.
- Employee recognition of IPM as a Great Place to Work (GPTW) stands at 94 percent, which is within 2 percent of the GPTW best-in-class benchmark.
- At MHHCC, the registered nurse (RN) turnover rate, a popular indicator of employee engagement, has remained below 2 percent since the first quarter of 2016, easily outperforming the national top decile level of 8 percent.
- Tri County Tech has been recognized as a GPTW for 2015–2018, with 96 percent of employees saying it is a great place to work.

Celebrating Success

Too often organizations focus only on opportunities for organizational and personal improvement and do not build on successes as great organizational and personal motivators. These five organizations focus on improvement and celebrating success. Following are a few examples of motivating the organization through celebrating success:

- Tri County Tech gives employee awards for demonstrating the organization's values, and employees willingly give back, with 100 percent of employees donating to the Tri County Tech Foundation.
- MHHCC celebrates successes with "Really Impressive Moments" recognition programs.
- Giving back is a core principle at IPM. The organization and its people celebrate their community by supporting over 150 charities with time, talent, and financial support.
- At Donor Alliance, the CEO sends out 750 handwritten notes a year celebrating staff successes.
- Alamo Colleges District holds a monthly meeting to celebrate successes.

STRATEGY

Developing strategy and monitoring execution of the strategy is critical to the success of all organizations. These five organizations each have their own, different approach, but in all, the leadership takes responsibility (through the leadership system) and involves all key stakeholders. The Alamo Colleges District leadership cycle starts with establishing goals. The approach uses a BIG WIG (Wildly Important Goal) and creates a line of sight from the District's vision (to be best in the nation in student success) to each of the colleges' classrooms. The process starts by asking whether Alamo is student-ready, rather than asking if the student is college-ready. Being "ready" as a college has led to setting goals for student retention and employment for graduates. For example, with many of the organization's students going hungry, a focus on studies was difficult. To retain such students, Alamo established a food pantry. This strategy has paid off with a 326 percent increase in the three-year graduation rate from 2006 to 2018.

Donor Alliance has a five-box leadership system that starts with the leadership and the board of directors setting direction. This is followed by developing strategies; aligning people, process, tools, and technology; deploying the plan; and finally, evaluating and improving. With a strategic mission impact goal of maximizing donations, the organization chartered a mission impact team, set action plans and metrics, and implemented the action plans. The result over the last five years has been a 47 percent increase in organ donors, a 45 percent increase in organs transplanted (compared to a national average of 25 percent), a 44 percent decrease in deaths of those on Colorado's transplant waitlist, and a 43 percent increase in tissue available for implant.

To achieve IPM's vision of profitable growth until its centennial and beyond (the company is currently 30 years old), strategy and execution are essential responsibilities for its leadership. IPM uses an OODA model for planning (Observe, Orient, Decide, and Act). It operates with a ten-year vision and a two-year plan. Measurement is critical, and strategic goal metrics are accessible anytime and reviewed quarterly. To ensure that strategy and operations are in sync, IPM also regularly reviews 17 key leading and lagging measures, manages the business metrics for regular management

decisions, and monitors metrics that must at a minimum be stable over time. The results are a 70 percent increase in its growth rate since IPM started using the Baldrige framework. The organization is well on its way to 100 years—smartly scaling growth.

The MHHCC leadership system has six leadership requirements: set organization direction/determine priorities; create a culture of compassion and excellence; engage the workforce; execute the plan; achieve results; and monitor performance. Every department at MHHCC has a copy of the organization's one-page strategic plan for ready reference. Faced with a perfect storm that created a primary care physician (PCP) shortage in 2016, MHHCC started with a TOWS analysis (SWOT backwards) knowing that its external environment was where it had to look. The priority was clear. With a plan in place, a two-person nurse practitioner clinic was opened in early 2017, three additional PCPs were added in 2017, and for the long term MHHCC has engaged in a unique consortium with four competitor hospitals to collaborate with Indiana University on a family medicine residency program.

TCT's work is defined by its Plan for Excellence, which is based on its mission, vision, values, and core competencies. TCT does annual strategic planning, all employees are involved, and progress is tracked through key performance measures. TCT follows two of its mantras when planning: "when you try to be everything to everybody, you can't be anything to anybody" and "less is more, stick to the core." Following these mantras and its plan, in 2005 TCT made the bold move of declining federal funding to focus on delivering the best education to its students. Sticking to the core, 90 percent of TCT's Vision 2020 goals have been met. The organization has grown from serving 7,500 students to serving more than 23,000 in the fiscal year 2018, and it has been recognized as a top place to work by *Fortune* magazine.

VISIONARY LEADERSHIP

Four aspects of leadership were points of particular mention by all or many of the senior leaders of the 2018 Baldrige Award recipient organizations. The first is setting vision and direction, as described in the previous sections. The remaining three aspects are important because they are significant drivers of

employee engagement and signs of high-performing organizations. The three aspects are communication, leadership by all, and ethics and trust.

Communication

Successful leaders are visible, transparent in their communication, and good listeners who respond to employee input and concerns. Sue Dunn of Donor Alliance, in addition to her 750 handwritten notes a year, holds staff meetings at all three sites, has multiple methods for listening to employees, and has been conducting executive rounding for 11 years. Rich Panico personally interviews all candidates for employment at IPM. He sends a birthday card with a personal note to every employee. Other communication mechanisms with the geographically distributed IPM staff include email messages, podcasts, a newsletter, face-to-face meetings, and a quarterly all-staff meeting bringing the whole "family" to one location. Lindel Fields makes a point of being visible among the TCT staff, holds monthly superintendent forums for two-way interaction, and has a weekly Facebook live update. He believes email almost always gives someone else work to do, so it should always include a "hello" and a "thank you." At TCT if the email includes a "complaint," it is held for 24 hours, reviewed, and then sent if still appropriate. Kyle Bennett of MHHCC does formal and informal rounding at all sites, sends a Friday email to all staff members that includes weekly "really impressive moments" as well as his personal cell phone number so anyone can contact him. Mike Flores of Alamo Colleges District meets weekly with all principals, does rounding at Alamo's five sites, holds a morning huddle with leaders each day, and has a monthly meeting that includes celebrations.

Leadership by All

Leadership by all is evident in the cultures of the five organizations, as illustrated in the earlier section. With Alamo Colleges District's commitment to student completion, not student enrollment, the Alamo Way is about "a leader in every seat." As an example of listening, before starting as the official chancellor, Mike Flores (with board of directors' agreement) spent six months listening to all the organization's leaders. Leadership by All is one of the four values at TCT. It is brought home by the organization's fifth mantra: "it is not what you do in a day, rather, what you do daily that matters."



Leaders of the 2018 Malcolm Baldrige National Quality Award recipient organizations on stage for the presentation ceremony, National Harbor, Maryland, April 7, 2019.

Ethics and Trust

I believe that trust in leadership and ethical behavior role-modeled by leaders are pre-requisites for a high-performing organization and among the key measures of senior leader performance. The focus on ethics and trust building in the five Baldrige Award-winning organizations this year was demonstrated throughout the QE presentations. To share a few of the data points I heard during the conference, Donor Alliance’s workforce has given a 95 percent favorable rating of its trust in senior leaders. TCT is in the top 10 percent nationally in the Great Places to Work survey for workforce perception of ethical leadership. And I found the most interesting commitment to ethical behavior conveyed by the leadership of IPM. To demonstrate its commitment to the IPM values, if a client breaches IPM’s ethical behavior principles, IPM will “fire” the client and donate the income from that client to charity. It is, therefore, no surprise that IPM scores 9.3 (on a ten-point scale) in workforce ratings demonstrating the belief that the company is managed in alignment with its mission and beliefs.

Two Gems

In addition to the powerful messages from the 2018 Baldrige Award recipients, here are two gems I heard from other leaders at the conference:

Benito Flores, chair of the board of ASQ (<https://asq.org/>), shared that research performed by the Mexican Quality Award examining its award recipients over time for correlations between performance in the six process categories in the Mexican Quality Award criteria and category 7, Results. Category 1, Leadership, correlated the best by far with the scores in category 7.

Gerry Agnes, president and CEO of Elevations Credit Union (<https://www.nist.gov/baldrige/elevations-credit-union>), a 2014 Baldrige Award recipient, shared that his personal measure of success is “Did I create a safe environment for our employees to contribute?” Did I create an environment of trust?

How Are You Leading Your Organization?

What culture are you creating or contributing to in your organization? Are you open and transparent in your communication? Are you celebrating success as well as looking at opportunities for improvement? Are you encouraging leadership by all members of your team? Are you approaching the future strategically? Are you creating an environment of trust?

Are you on the road to performance excellence?

Baldrige Economic Impact: #BaldrigeForGrowth

The Malcolm Baldrige National Quality Award was born of the quality crisis in American manufacturing in the 1970s and 1980s. Manufacturers in Germany, Japan, South Korea, and others of America's competitors had gained market share due to their reputations for high-quality products. American manufacturing was slipping.

Many of America's competitors had also developed quality award systems and prizes, like the Deming Prize in Japan. Within the Secretary Mac Baldrige Department of Commerce and elsewhere, people began to consider whether such a solution could also work for American businesses.

It was widely believed that American companies needed to refocus on quality. Following the death of Secretary Baldrige in 1987, there was a new Congressional impetus behind some proposals along this line that had stalled in Congress.

The Malcolm Baldrige National Quality Award emerged from the broad consensus among policymakers to recognize the late Secretary and continue his work. It would be the prize that would motivate companies to undertake the Baldrige challenge and refocus on quality.

"The Baldrige Criteria challenged us to become leaders by any measure, and we succeeded—seeing productivity, customer loyalty, employee engagement, and financial returns. This award sets the standard for U.S. organizations, driving innovation and economic competitiveness." – Sam Liang, CEO and President, MEDRAD, Inc.

While the prize may motivate some organizations to begin their Baldrige journey, it has become apparent over 30-plus years of experience with the Baldrige Excellence Framework that the true payoff comes from the journey. The leaders of virtually every Baldrige Award recipient organization say that very same thing, that it is the improvement in performance from undertaking the Baldrige journey that is the real prize.



"The economic environment is difficult for Cargill Corn Milling, as it is difficult for many manufacturing companies today. But the reality is that by utilizing the processes and tools that we've learned from Baldrige, we're able to not only meet these challenges but actually excel in them. The Baldrige Criteria teach us how to put processes in place that allow us to actualize the things that are most important in driving our business success." – Alan Willits, President, Cargill Corn Milling

Assessing the economic impact of the Baldrige Performance Excellence Program over 30 years means that assessing the improvements in profits, reductions in costs, enhancement of customer and employee satisfaction, higher levels of employment, and other benefits achieved by the Baldrige Award recipients. But that assessment will yield only a small percentage of the total value generated for the American economy. Such an assessment will fail to capture the gains achieved by the hundreds of organizations on the journey that have not yet, or may never, win a Baldrige Award or one of the state-level Baldrige-based awards.

The total value generated by the Baldrige ecosystem derives from three distinct sources. The first and most obvious is the actual process and performance changes of the organizations employing the Baldrige Framework. Over the years, BPEP has collected data from the Baldrige Award recipient organizations, and their gains are impressive. The Bureau of Economic Analysis and Labor Statistics report that organizations that have twice won the Baldrige Award demonstrate a stunning 86 percent increase in median revenue growth in the period between winning their awards; job growth at 55.5 percent, over 10 times greater than

matched industries which recorded 4.56 percent job growth in the same period; and growth in the number of business sites of 84 percent.

The second source of value is the performance excellence multiplier of the Baldrige Award. One of the commitments made by Baldrige Award recipient organizations is that they will share their best practices and serve as role models for other organizations. George Benson, Chair of the Baldrige Foundation Board of Directors, explained that impact in his introduction to the Baldrige Award ceremony in 2016.

“The purpose of the awards we present today is not just to reward these top-performing organizations. From the beginning, the Baldrige Criteria and the Baldrige Awards were designed to trigger transformational chain reactions that would yield a stronger, more competitive economy and a better quality of life for the people of this country.”

“In simple terms, these organizations used the Baldrige Criteria to assess repeatedly their performance and deploy improvements until they achieved role-model status. Then we, in our own organizations, learn from them and repeatedly assess and improve our performance. That, in turn, motivates our competitors, our collaborators, our suppliers, and our customers to improve their performances, and so forth.”

“A very crucial step in that chain reaction is the identification of role models, living and breathing organizations that we can relate to, can communicate with, and therefore can learn from.”

“We’ve always had a passion for customer satisfaction, continuous improvement, our industry, and our way of life. But Baldrige helps us serve customers better than we ever imagined. We are truly thankful for this gift of Baldrige to America.” – Matt Fleming, President, MidwayUSA

The third source of value is the vast army of highly trained volunteers that donate thousands of hours of consulting and teaching to organizations on the Baldrige journey. These are the examiners and judges for the Baldrige Performance Excellence Program at the national level and for the state and local Baldrige-based programs. The estimate of the cash-value equivalent for management consulting by the volunteer Baldrige

examiners in 2018 was more than \$37 million. There have been some efforts to quantify the total economic impact of the Baldrige Program. U.S. Secretary of Commerce Wilber Ross said in April 2017, that the Baldrige public-private partnership generates \$1 billion each year in economic impact. In 2011, economists Albert Link of the University of North Carolina at Greensboro and John Scott at Dartmouth College, calculated that the benefit-to-cost ratio of the Baldrige Performance Excellence Program was 820 to one—that is, each dollar invested to keep BPEP operational results in \$820 of economic benefit. And remember, those assessments are only looking at part of the picture.

“I cannot think of a better way to verify the sustainability of a business model than using the [Malcolm Baldrige National Quality Award] process to confirm that your founding business principles continue to be the foundation upon which you grow.”
– Michael Luker, President, Cargill Kitchen Solutions (formerly Sunny Fresh Foods, Inc.)

Some of the specific company-level improvements driven by Baldrige include the following:

- Lockheed Martin Missiles and Fire Control realized cost savings of \$225 million annually through process and performance improvement programs driven by its Baldrige assessment, and attained a leading market share and sustained growth in the four years leading to its receipt of the Baldrige Award in 2012.
- MEDRAD, a business of Bayer HealthCare, achieved revenue increases from \$120 million in 1997 to \$625 million in 2009.
- Since 1999, Sunny Fresh Foods (now Cargill Kitchen Solutions) experienced rapid growth: three plants grew to five, revenue increased 93 percent, and Sunny Fresh became a net exporter of talent to its parent company.
- At Honeywell Federal Manufacturing & Technologies, customer satisfaction exceeded 95 percent, and customer product quality and reliability reached 99.9 percent for traditional customers, and 99 percent for non-traditional customers.
- The Bama Companies, Inc., increased sales by 72 percent and grew revenue from \$123 to \$211 from 1999 to 2004.

The evidence proves that Baldrige is America’s best investment. #BaldrigeForGrowth.



Baldrige Small Business Impact: #BaldrigeGrowsSmallBusiness



When Congress established the Malcolm Baldrige National Quality Award in 1987, it identified three sectors in which an organization could apply for the Award: Manufacturing, Service, and Small Business.

“I’m a car guy [who] believes in the Baldrige framework. I speak car, not Baldrige. If we can do this, anyone can. We are a testament to the Baldrige framework capacity to provide organizational sustainability and success.” – Gary Housley, President and Dealer Principal, Don Chalmers Ford

In keeping with the initial intent to challenge foreign competitors, the first award recipients in 1988 and 1989 were American giants with names like Motorola, Westinghouse, and Xerox. But among those Goliaths, in that very first year, was a David

called Globe Metallurgical, Inc. (now Globe Specialty Metals, Inc.).

Globe Metallurgical had just 210 employees in two locations in Ohio and Alabama. With sales just under \$100 million in 1987, serving about 300 customers, it fit neatly into the Small Business sector, with room to spare!

Through the current award cycle, 29 of the Baldrige Award recipients have been in the Small Business sector, accounting for nearly 24 percent of all awardees, proving that the Baldrige Excellence Framework is scalable to virtually any size organization.

That Baldrige works for small business is not inconsequential. Small businesses comprise the vast majority of the U.S. economy. U.S. Census Bureau data

in 2014 showed that there was a total of 5.83 million employer firms in the United States, meaning firms that had employees in addition to a single owner-proprietor. Companies with fewer than 500 workers accounted for 99.7 percent of those businesses. If you were to narrow the definition of “small business” to mean those with fewer than 20 workers, the category still accounts for a whopping 89.4 percent of all U.S. firms.

“I have always envisioned Stellar Solutions to be a company that is built to last. And if you ask how we can ensure that we are built to last, I would say the answer is Baldrige.” – Celeste Volz Ford, Founder and Board Chair, Stellar Solutions, Inc.

It is not just raw numbers of businesses that underscores their importance, but also the economic activity generated by American small businesses. A 2012 report from the Small Business Administration’s Office of Advocacy found that small businesses produced 46 percent of private, nonfarm Gross Domestic Product. From 1992 through 2013, small businesses generated 63.3 percent of net new jobs in the United States, and by 2015, small businesses employed almost 59 million people or 47.5 percent of the private workforce.

“We were searching for a path to improve our business, but what we discovered was so much more. It’s not about the award. It’s about how this process benefits our clients. Our improvements have strengthened our relationships with our clients and allow us to deliver better service and value. Is it worth the years of hard work and effort? Unquestionably YES. We have seen our profits increase, employee satisfaction go up, and we have achieved sustainable, managed growth.” – Robert Pence, President and CEO, Freese and Nichols Inc.

There have been some efforts to quantify the total economic impact of the Baldrige Enterprise. U.S. Secretary of Commerce Wilber Ross said in April 2017, that the Baldrige public-private partnership generates \$1 billion each year in economic impact. In 2011, economists Albert Link of the University of North Carolina at Greensboro and John Scott at Dartmouth College, calculated that the benefit-to-cost ratio of the Baldrige Performance Excellence Program was 820 to one. Much of that growth is generated by small businesses on the Baldrige journey.

“MESA had the opportunity to make ourselves a better organization by using the Baldrige Criteria. Every person at MESA prepared by learning and working to improve the way we do business. Baldrige gave us a business management model.”
– Terry May, president, MESA Products, Inc.

The evidence also shows how small businesses improve as they pursue excellence through Baldrige. Some of the specific company-level improvements driven by Baldrige include the following:

- Stellar Solutions has seen revenue grow from a rate of 1.18 percent in 2013 to 6.81 percent in 2016. Such growth has occurred despite the constraints in government funding being identified as a key business challenge for the organization.
- Don Chalmers Ford’s total sales volume increased from \$109 million in 2012 to \$126 million in 2015. Total dealership gross profit increased by 13 percent during the same period, with the percentage of gross profit growth in 2015 exceeding Ford’s national benchmark level by 8.4 percent.
- Momentum Group has invested in process upgrades that have reduced sample production time by 50 percent and improved sample yield per yard by 20 percent.
- From 2006 to 2012, MESA more than doubled in size, demonstrating a growth rate during this period that exceeded that of its closest competitor by almost 40 percent.
- MESA increased its profitability as a percentage of its revenue from 5 percent to more than 10 percent from 2006 to 2012.
- Freese and Nichols achieved revenue growth between 12 and 16 percent over the four years leading to its 2010 Baldrige Award, exceeding the industry benchmark by 10 percentage points in 2009.

“Baldrige is the key to winning results and world-class excellence.” – Ken Schiller, Co-Owner and Co-Founder, K&N Management

The evidence proves that Baldrige is America’s best investment for organizations of all size.
#BaldrigeGrowsSmallBusiness.

Rethinking Innovation

by Harry Hertz, Baldrige Performance Excellence Program
National Institute of Standards and Technology



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

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

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

The Criteria have evolved significantly in the intervening twenty years, including significantly greater emphasis on innovation, starting with the addition of Managing for Innovation as a core value in 2000. The current Baldrige definition of innovation has not changed significantly since 2005. The definition in the 2019-2020 Baldrige Excellence Framework (<https://www.nist.gov/baldrige/publications/baldrige-excellence->

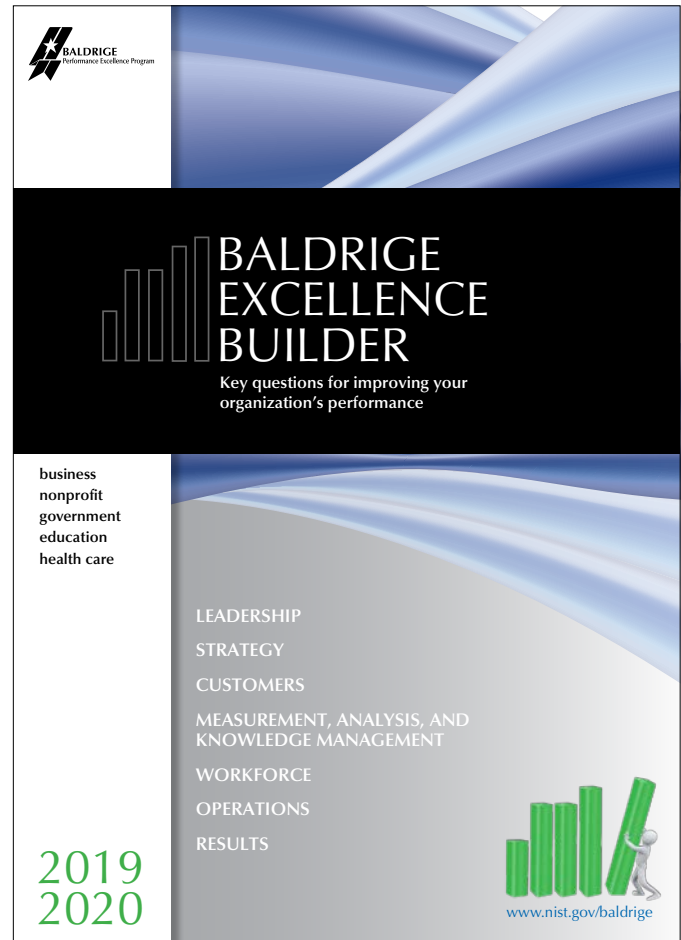
framework) and the 2019-2020 Baldrige Excellence Builder (<https://www.nist.gov/baldrige/products-services/baldrige-excellence-builder>) Glossary is:

Making meaningful change to improve products, processes, or organizational effectiveness and create new value for stakeholders. The outcome of innovation is a discontinuous or breakthrough change.

Is the Definition Still Appropriate?

Readings over the last few years and observations of people's behaviors and organizational strategy lead me to believe that this definition is no longer sufficient. Let me share some data.

- From a recent article in Deloitte Insights (<https://www2.deloitte.com/us/en/insights/focus/human-capital-trends/2018/corporate-citizenship-social-impact.html>) based on their 2018 Global Human Capital Trends study, "Stakeholders today are taking an intense look at organizations' impact on society, and their expectations for good corporate citizenship are rising. In an effort to meet these expectations, leading organizations are making citizenship a core part of their strategy and identity." Deloitte concludes that corporate citizenship is now a CEO-level business strategy. Furthermore, a lack of commitment to societal responsibility can quickly damage a company's reputation, sales and its ability to attract workers.
- Millennials currently comprise more than half the workforce in many countries. According to a 2017 Deloitte study (<https://www2.deloitte.com/us/en/pages/about-deloitte/articles/millennial-survey.html>), 88 percent of millennials believe their employers should play a vital role in addressing societal issues such as income inequality, hunger, and the environment.
- According to a 2015 article in Fast Company (<https://www.fastcompany.com/3041738/millennials-want-to-work-at-organizations-that-focus-on-purpose-not-just-p>), "Millennials want to work at organizations that focus on purpose, not just profit."
- From a 2015 Deloitte survey (<https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-wef-2015-millennial-survey-executivesummary.pdf>) of 7,800 millennials representing 29 countries, "millennials believe companies should spend less time on short-term roles and more time on broadly building contributions to society..."
- A 2012 meta-study published in Scholarship@Claremont (<https://scholarship.claremont.edu/>



- [cgi/viewcontent.cgi?referer=&httpsredir=1&article=1502&context=cmc_theses](https://www2.deloitte.com/us/en/insights/focus/human-capital-trends/2018/corporate-citizenship-social-impact.html)) found a direct correlation between CSR (corporate social responsibility) ranking and profitability.
- A 2007 longitudinal study (published in a book entitled *Firms of Endearment*) of purpose-focused companies found that they outperformed their S&P 500 peers by a factor of eight.

Consider this Update to the Definition

I believe societal well-being is now another key outcome of innovation and should be reflected in the definition of the term. I propose considering the following updated definition:

Making meaningful change to improve products, processes, organizational effectiveness, or societal well-being. The outcome of innovation is a discontinuous or breakthrough change that results in new value for stakeholders.

While the change in wording is minimal, the potential impact is very significant. Let me know what you think!

Baldrige Impact in Health Care: #BaldrigeSavesLives



Health care organizations became eligible for the Malcolm Baldrige National Quality Award after Congress expanded the scope of the award in 1998. SSM Health Care, headquartered in St. Louis, Missouri, became the first health care organization to receive the award. That was in 2000.

Since then, a total of 25 health care organizations have received the Award. Hundreds more have been recognized for their role-model performance in their respective state-based programs and nationwide through a number of Baldrige-based health care quality award programs. It has been estimated that over 65 percent of hospitals and health care systems

employ some form of a Baldrige-based performance excellence management system.

Baldrige is adaptable and applicable in many different settings, including across the health care spectrum. Each hospital, hospital system, or long-term care

“The healthcare industry has increasingly relied on the Baldrige Criteria as a key means to improve patient care and organizational performance. As we navigate healthcare’s changing landscape the Baldrige Framework will continue to be a vital resource.” – Deborah J. Bowen, President and CEO, American College of Healthcare Executives

facility has its own unique set of needs and goals, determined in part by location, demographics, and a variety of other factors. Whether an organization is involved in ambulatory service, health maintenance, long-term care, or another health care service, the Baldrige Excellence Framework is a valuable tool for measuring performance and leading organizations of all sizes and levels of complexity in an uncertain environment.

“We continue to look for ways to seize our opportunities for improvement. We continue these things because this journey has been more than fruitful. It’s been life-saving. Though a vast majority of our patients will never realize it, the care they receive is more effective, more efficient, more empathic because of the Baldrige Framework.” – Kathy Raethel, President, Adventist Health Castle

The Baldrige Framework is such a powerful leadership and management tool for health care organizations that the President’s Council of Advisors on Science and Technology recommended that the Department of Commerce and the Department of Health and Human Services build on the Baldrige Award to help bring down the cost and improve the quality of health care across the United States.

We now have more than 15 years of experience with Baldrige in the health care sector, and there is overwhelming evidence that Baldrige makes a significant, positive impact on the provision of quality health care.

The improvements reported by the individual award-winning organizations are impressive, spanning patient morbidity and mortality outcomes, to cost and process efficiencies, to medical, support staff, and patient and family satisfaction. Some of the life-saving improvements in clinical outcomes include:

- Adventist Health Castle has met or surpassed top-quartile levels—improving its performance by 12 percent from 2014 to 2016—on composite measures of patient safety, evidence-based care, and mortality related to its clinical care processes.
- Advocate Good Samaritan Hospital’s risk-adjusted mortality decreased from 0.73 in 2004 to 0.25 in 2010.
- Memorial Hermann Sugar Land ranks among

“In my heart, I believe that because we applied the Baldrige Criteria, there are people alive today who would not have been had we not been so committed to the Baldrige process.” – Rulon Stacey, Former CEO, Poudre Valley Health System

the top 10 percent of hospitals nationally for its performance on measures of emergency center arrival-to-discharge time, compliance with regulations to reduce medication errors, bed turnaround times, radiology and laboratory result turnaround times, and the use of computerized physician order entry. The hospital’s readmission rates for patients treated for acute myocardial infarction, congestive heart failure, and pneumonia were lower than those of hospitals nationwide, according to data from the Centers for Medicare and Medicaid Services (CMS).

- According to the Institute for Healthcare Improvement, Henry Ford Health System’s evidence-based global harm campaign is a national best practice. From 2008 through 2011, the campaign led to a 31 percent reduction in harm events.
- Schneck Medical Center has maintained rates of hospital-acquired infections at or below 1 percent since 2008, and no patient has acquired ventilator-associated pneumonia since 2009.
- AtlantiCare Regional Medical Center achieved Centers for Medicare and Medicaid Services top 10 percent performance in 2008 for patient care measures related to congestive heart failure, acute myocardial infarction, and pneumonia.

“Since beginning our Baldrige journey, we have more than doubled the number of organs transplanted from 300 in 2005 to a record-breaking 718 in 2017. In the same timeframe, we also increased our number of bone marrow donors by 88 percent. These improvements are more than statistics. They represent real lives were able to save and help heal through the gift of donation.” – Diane Brockmeier, President and CEO, Mid-America Transplant

More than the year-over-year performance improvement of health care organizations as they pursue their Baldrige journey, broader studies comparing Baldrige-based health care organizations with peer organizations that have not adopted the Baldrige Framework, show that Baldrige



organizations significantly outperform their non-Baldrige peers.

According to Thomson Reuters, hospitals using the Baldrige Criteria were six times more likely to be in the top 100 hospitals and outperformed non-Baldrige hospitals in:

- Risk-adjusted mortality index
- Risk-adjusted complications index
- Patient safety index
- CMS core measures score
- Severity-adjusted average length of stay
- Adjusted operating profit margin

A study by Ronald Schulingkamp and John Latham compared Baldrige Award-winning hospitals with non-Baldrige hospitals across 39 process of care,

“I retired at the end of 2009, after 25 years as CEO of Heartland Health, with the knowledge and belief that any organization that adopts and implements fully the Baldrige Framework as its management model will ultimately rise to levels of performance excellence exceeding all their expectations.” – Lowell Kruse, Former CEO, Heartland Health

“The Charleston Area Medical Center Health System is a better organization today because we made the choice to use the Baldrige Criteria as a guiding framework for quality improvement. This performance improvement framework helps us to achieve our mission of ‘striving to provide the best healthcare to every patient every day.’” – Dr. Glenn Crotty, Jr., Executive Vice President and Chief Operating Officer, Charleston Area Medical Center

patient satisfaction, and outcomes of care metrics, and concluded that, “Although not all measures were statistically significant, Baldrige Award recipient hospitals had higher mean values representing higher performance than non-Baldrige Award recipient hospitals in 37 of the 39 (95 percent) study measures.”

Substantial data from case studies and comparative analyses shows that health care organizations improve their performance by adopting the Baldrige Excellence Framework for Health Care, and that they become significantly better performers than peer organizations that have not adopted Baldrige. The data prove that #BaldrigeSavesLives.



Board of Director Responsibilities

by Harry Hertz, Baldrige Performance Excellence Program
National Institute of Standards and Technology



The Baldrige Excellence Framework (<https://www.nist.gov/baldrige/publications/baldrige-excellence-framework>) is underpinned by a set of 11 core values and concepts (<https://www.nist.gov/baldrige/core-values-and-concepts>). These core values have guided both the development and understanding of the Baldrige Criteria for many years. They have served as the basis for defining role model leadership attributes (<https://www.nist.gov/baldrige/self-assessing-improvement-tools/are-you-role-model-leader>). These leadership attributes, with a focus on the roles that Boards of Directors play, are also applicable to their performance. The core values are listed below with examples of their meaning for Boards.

The values and examples are equally appropriate to public and privately held businesses, nonprofits, and

public sector organizations. Depending on a board's current focus and challenges, different attributes may have greater relative importance at a given time.

Selects and Guides Visionary Leadership

Exemplified by:

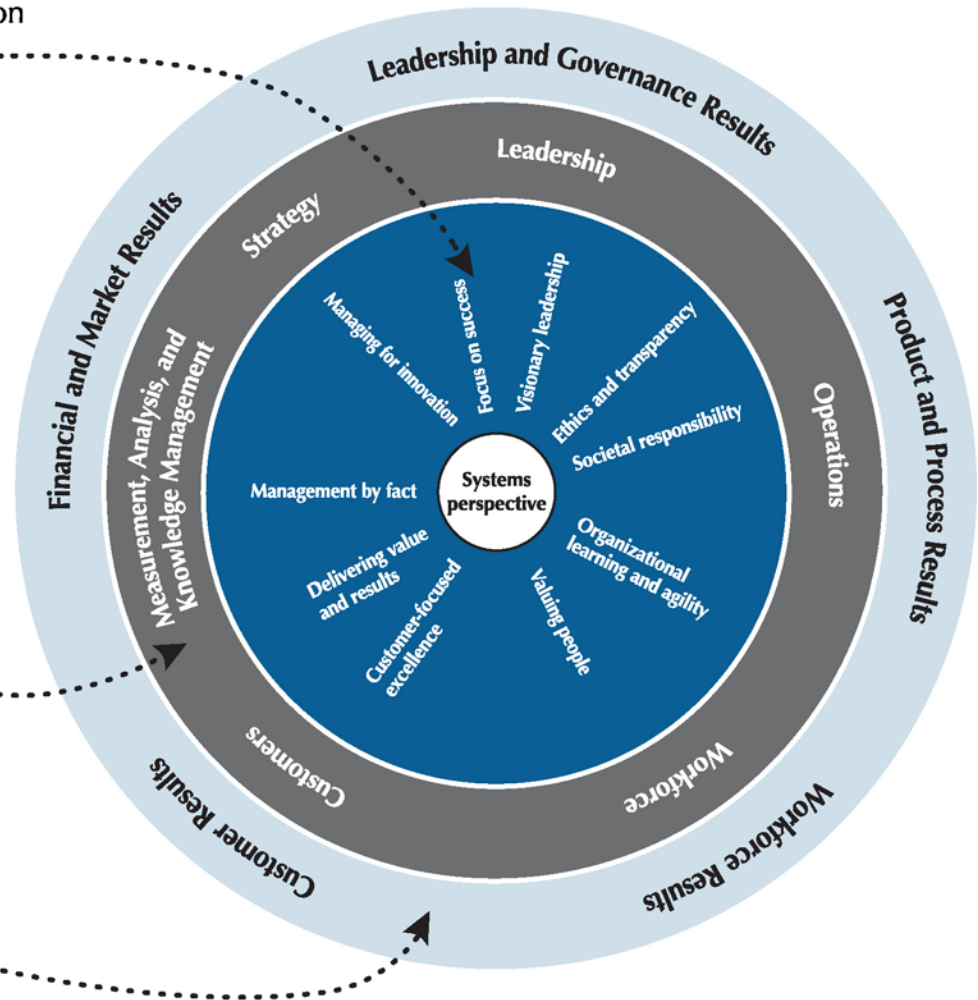
1. Holding the CEO (the designated senior leader) accountable for adherence to the organization's values and mission
2. Reviewing organizational vision, strategies, CEO performance, and systems for achieving ongoing organizational success
3. Inspiring and motivating the organization to achieve high performance, with high employee engagement
4. Encouraging authenticity, allowing leaders to admit to missteps and encouraging them to report bad news

The Role of Core Values and Concepts

The Baldrige Criteria build on **core values and concepts**

which are embedded in **systematic processes...**
(Criteria categories 1–6)

yielding **performance results**
(Criteria category 7).



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

Ensures a Systems Perspective

Exemplified by:

1. Holding the CEO accountable for setting a systems perspective across the organization, guiding and assessing the organization holistically
2. Requiring a focus on strategic direction and customers to improve overall performance
3. Ensuring utilization of the larger ecosystem (partners, suppliers, customers, communities) in which the organization operates to achieve efficiency and innovation

Holds Leaders Accountable for Customer-Focused Excellence

Exemplified by:

1. Holding leaders accountable for a customer-focused culture in the organization, integrating customer engagement and loyalty as a strategic concept
2. Requiring leadership attention to changing and emerging customer and market requirements
3. Holding leaders accountable for the organization's development of innovative offerings and customer relationships that serve as a differentiator from competitors

Values People

Exemplified by:

1. Reviewing organizational culture to ensure a focus on meaningful work, engagement, empowerment, accountability, development, and well-being of workforce members
2. Holding leaders accountable for an organizational environment of safety
3. Ensuring a culture of inclusivity that capitalizes on the diversity of the workforce and the Board

Holds Leaders Accountable for Organizational Learning and Agility

Exemplified by:

1. Reviewing organizational capacity for rapid change and for flexibility in operations
2. Monitoring the organization's ability to manage risk and make transformational changes despite ever-shorter cycle times
3. Holding leaders accountable for embedding learning and improvement in the way the organization operates

Focuses on Organizational Success (Sustainability)

Exemplified by:

1. Working with leaders to create a focus on short- and longer-term factors that affect the organization, its reputation, its stakeholders, and its future marketplace success, including needed core competencies and skills
2. Accomplishing strategic succession planning for topmost leaders, selecting the CEO, and setting appropriate compensation
3. Focusing on the "big picture," ensuring that organizational planning anticipates future marketplace, economic, and technological influences and disruptions

Guides the Organization for Innovation

Exemplified by:

1. Holding leaders accountable for an environment where strategic opportunities are identified, and the workforce is supported in taking intelligent risks

Governs by Fact

Exemplified by:

1. Compelling the organization to measure

performance both inside the organization and in its competitive environment

2. Ensuring that data and analysis are used in operational and strategic decision making
3. Challenging leaders and the organization to extract larger meaning from data and information
4. Conducting audits and overseeing financial controls

Encourages Societal Contributions

Exemplified by:

1. Acting as a governance role model for public and community responsibility
2. Holding leaders accountable for organizational actions leading to societal well-being and benefit, thereby contributing to organizational success
3. Motivating the organization to excel beyond minimal compliance with laws and regulations

Ensures Ethics and Transparency

Exemplified by:

1. Demonstrating and requiring highly ethical behavior in all board and organizational activities and interactions
2. Governing with transparency through open communication of clear and accurate information
3. Holding leaders accountable for open communication of clear and accurate organizational information

Ensures a Focus on Delivering Value and Results

Exemplified by:

1. Driving the organization to achieve excellent performance results
2. Driving the organization's leaders to exceed stakeholder requirements and achieve value for all stakeholders

How do members of your Board of Directors or your Advisory Body perform relative to these attributes and behaviors? Are they fulfilling all their responsibilities? Are they going beyond their roles and stepping into "leadership" roles? Would a discussion or self-assessment using these attributes enhance Board performance? This could start their journey into building a high performing organization in collaboration with the organization's senior leaders.



Accelerate and Sustain Exceptional Results

by Jennifer Strahan
Chief Operating Officer, SOAR Vision Group



You are a key leader and influencer within your organization. The senior leadership team has identified a focused strategic initiative to accomplish this year. Which scenario best represents your organization?

your organization up for sustainable success? The short answer: *Create a balanced system with integrated **Focus, Action, and Feedback*** (see Figure 1).

- The initiative never takes off. Politics are too polarizing, priorities are too vague or numerous, time is too limited, and teams are too busy.
- Full steam ahead! The initiative launches like the Titanic—strong and invigorating, only to eventually hit an iceberg and slowly slip away into the depths of the organizational ocean.
- This, like most major initiatives, was markedly successful. The organization was strategic and thoughtful in its planning and implementation, leading to the desired results. Sustainability of the results, however, can vary.

If you did not accomplish everything you set out to, you are not alone. A study by McKinsey identified that only 26 percent of executives acknowledged their transformations to be successful in improving and preparing for sustained performance (Jacquemont et al., 2015). *Despite the best of intentions, most efforts fail when it comes to execution*, so how can you set

Figure 1

A Balanced System: Focus + Action + Feedback Loop



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FOCUS: Organizational focus is demonstrated through an intentional, relevant, and cascaded strategy throughout the system. A good strategy provides direction in line with the “hedgehog” concept, clarifies what the organization should and (more importantly) should not pursue, and is clearly translated across every layer of the organization. The hedgehog concept simplifies complex ideas to unify, organize, and guide decisions through the iterative and candid analysis of (1) what the organization is best at, (2) what drives profitability and cash flow, and (3) what people are passionate about (Collins, 2001). The intersection of these three characteristics is where an organization’s strategy should lie.

How effective is your organizational strategy? Answer the following questions to check your assumptions:

- Do you have three or less top-level strategic objectives?
- Can you easily say “no” to your boss and/or peers when a new initiative arises?
- Is it clear where the organization does not play in the market?
- Is your strategy aligned with your organization’s strengths and current talent?
- Is the top-level strategy evaluated at least quarterly for relevance and potential updates?
- Can frontline teams translate top-level strategy into meaningful verbiage and relevant action?

ACTION: Strategic focus is meaningless if the organization cannot successfully implement that strategy. Implementation is driven through integrated operational mechanisms, which create *organizational agility* and *action*. The organization must be able to quickly and appropriately respond to market needs and environmental changes, then translate those into tangible actions. Thus, agility goes hand-in-hand with action; it’s impossible to be agile without timely and effective action tagging closely behind. Example operational mechanisms may include a definitive performance improvement approach or methodology; a defined “catchball” process for meaningful, two-way communication; a process for disseminating successes or best practices across departments or divisions; or proactive practices to respond to customer and team member experiences.

How do you know if your operational mechanisms are working? Consider the following key questions:

- How effective and efficient are your processes?
- How defined is your daily standard work?
- Do leaders and team members understand their role in performance improvement?
- Are expectations clearly articulated and cascaded across the organization?
- Are there pockets of success or replicable deployment and dissemination across the system?

FEEDBACK: Agility should only be tolerated in doses counteracted with stability. Just as organizations need adaptability, they also need structural integration points to both drive organizational strategy (*focus*) and support operational mechanisms (*action*). *Effective structural integration creates a **feedback system** to consistently recalibrate the organization’s focus and action.* Structural stability is created through effectual information flow, clear internal policies, accountability measures (e.g., incentives), meaningful technology, and even well-thought out physical spaces or budgetary guardrails.

Assess the effectiveness of your structural integration and feedback systems by thinking through the following questions:

- Are critical decisions made through slow, hierarchical committee structures?
- Are organizational goals and individual incentives aligned?
- Are annual goals approved and cascaded before the new fiscal year begins or months later?
- Are teams siloed across physical spaces and without transparent communication techniques?
- Do teams receive excessive emails and system notifications that are not applicable to them?
- Do teams receive relevant, timely, and meaningful updates to critical metrics at the front line?
- Does the budget predict organizational innovation and strategic decisions? Does it hinder it?

Focus, Action, and Feedback Interactions

High performing organizations require a balanced system of focus, action, and feedback. Relate this to a simple recipe – if any one of these is missing or the ratio is off, the recipe suffers. However, most



organizations struggle with at least one of these domains.

Think about the following scenarios. Which most accurately describes your organization and/or division (where A = Strategic Focus, B = Agile Action and Operational Mechanisms, and C = Feedback Mechanisms and Organizational Stability)?

Let's break down each of the scenarios in Figure 2 from top to bottom.

(1) **Only A:** Strategic focus without effective action or feedback leads to wishful thinking, or in the words of Albert Einstein, insanity (doing the same thing over and over while expecting different results). A new year's resolution to lose weight without any behavioral or dietary changes will not yield any results. The same concept applies to organizational strategic plans; no matter how polished and focused they are, they yield no results without intentional action and timely feedback.

(2) **Only B:** Consistent action without focus or feedback leads to a slew of operational initiatives and exhausted team members. Some initiatives may be relevant and meaningful, but the sheer volume of tasks often prevents accomplishment.

(3) **Only C:** A common struggle with long-standing or market-dominant systems can be the lack of response to market needs via a focused strategy or agile actions. This can result in irrelevant rigor or outdated structures for the organization. Market share may remain while the organization is limited by competitors, but there is a significant threat and the market is ripe for new entrants to steal unhappy patients or customers.

(4) **A + C:** Organizations with clear strategic focus and structural stability may be making gains, but they are typically slow moving and laggards in the market. The lack of operational mechanisms and agile action result in an innovation gap, often leaving team members disengaged and demotivated with outdated operational processes. "This is the way it's done" is a common phrase in the organization.

Figure 2

Finding the Right Recipe: Focus + Action + Feedback



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(5) **A + B:** On the other hand, organizations may have clear strategic focus and adequate operational mechanisms for agile action, yet a gap exists with balancing structural stability and feedback mechanisms. The constant response to new initiatives leaves an aftermath of unfinished efforts and short-lasting results. For example, an organization may have defined an annual objective to optimize throughput and created improvement teams. However, physicians and/or hourly staff are not paid to attend improvement meetings. The same passionate, overworked volunteers will continue to support efforts until they burn out or move on to new opportunities.

(6) **B + C:** Too often organizations overestimate their strategy, although it sits on a shelf that no one is privy to, is outdated, or is too vague. A bad strategy is as worthless as no strategy at all. A strategy without focused and ruthless prioritization results in organizations saying "yes" to too many efforts, leaving staff overstressed and overworked (Hansen, 2018).

(7) **A + B + C:** A balanced system requires strategic **focus**, agile **action**, and stable structures and **feedback** mechanisms to achieve and sustain exceptional results.

The Right Foundation for Sustainable Results

Sustainability is often the desired end-product that baffles organizations and leaders. The secret to sustainability is not a single ingredient; rather it is the right balance of Focus + Action + Feedback that results in sustainable success. Of course, other factors act as catalysts or counteragents to these three ingredients, such as organizational leadership and culture. Even the best organizations tend to perform better in certain domains of the Focus + Action + Feedback Loop than others but recognizing the crucial

interactions between these three domains enables the continuous fine-tuning of the organization’s formula for success.

Close the Focus + Action + Feedback Loop with SOAR Vision Group and PuLSE

SOAR Vision Group is proud to be an official partner of the Baldrige Foundation. SOAR’s **Purpose-Led Strategy Execution**, or PuLSE, software is an action-based software that assembles the numerous sources of data (*feedback*) aligned with your organizational strategy (*focus*) and team action plans (*action*) in a single source. In conjunction with a unified Strategy Execution System™ and systematic performance excellence infrastructure, PuLSE closes the Focus + Action + Feedback Loop for organizations.

Figure 3
SOAR Vision Group’s PuLSE™ Software



Sources:

Hansen, M. T. (2018). *Great at Work: How Top Performers Do Less, Work Better, and Achieve More*. New York, NY: Simon & Schuster.

Jacquemont, D., Maor, D., Reich, A., Ghelber, E., Johnson, C., & VanAkin, K. (2015). *How to Beat the Transformation Odds*. Retrieved from <https://www.mckinsey.com/business-functions/organization/our-insights/how-to-beat-the-transformation-odds>

Baldrige Impact in Education: #BaldrigeTransformsLives



Congress expanded the scope of the Malcolm Baldrige National Quality Award in 1998 to include the education sector. In 2001, three organizations became the first to receive a Baldrige Award in the education sector: the Chugach School District in Anchorage, Alaska; Pearl River School District in Pearl River, New York; and the University of Wisconsin-Stout (UW-Stout).

The data show that the benefits of improved performance associated with Baldrige begin to accrue long before an organization wins a National Quality Award, or even if they never become award recipients. Many of these organizations, like UW-Stout, continue to lead and manage by the Baldrige principles, and they continue to enjoy the benefits of performance excellence.

The adaptability of the Baldrige Framework is evident in the education sector as a wide variety of

organizations have used Baldrige to achieve success. To date, a total of 13 education organizations have received the Baldrige Award. Of those, eight are K-12 schools or school systems and five are in higher education, demonstrating that Baldrige can be scaled to many different-sized organizations. The school systems are from all parts of the country and are of different sizes with widely varying student demographics. Baldrige works in all of these varied circumstances.

“We have dedicated ourselves to being systematic in the use of the Baldrige continuous improvement process, and we have seen student achievement go up in ways that we never thought imaginable. We’ve become more efficient and more effective. And these successes aren’t just figures and statistics; they do change lives. And in the process, we’ve become an innovative force in education.” – JoAnn Sternke, Superintendent, Pewaukee School District

The true power of Baldrige for education is its focus on the systems level. Jeffrey Lucas, former Deputy Director of BPEP, makes the argument that many of the performance measurement systems used in education focus on student achievement data to the exclusion of measuring things that could truly innovate education to the betterment of students. “While the improvement of student learning must remain at the core of what education systems are about, achievement data alone are not sufficient to drive the types of performance improvements required and do not acknowledge that schools and districts are in fact complex systems.”

“America’s economic future—the health of our children and our grandchildren, the defense of those American values that we support—is dependent upon all kids in every neighborhood, urban or rural. We are committed to that, and Baldrige has helped us on our journey.” Mary Searcy Bixby, Founder, President, and CEO, Charter School of San Diego

The importance of this thinking becomes apparent when one examines the experience of Baldrige Award-winning school systems. Schools, administrators, and teachers are balancing multiple, often competing factors, that leave schools with inadequate resources, teachers with not enough time, and students with difficulty focusing on learning. As a systems-level tool, Baldrige can help school systems align their processes and smooth over many of those seemingly conflicting factors.

With its focus on the student, teachers, staff, and families as the customers, Baldrige also helps school systems recognize where frustrations may rise and satisfaction be diminished. Baldrige helps schools spend their limited resources and time on the things that really make a difference, which is why the data show that Baldrige schools improve education and change the lives of their students and families, often without any increase in budgets.

- Charter School of San Diego (CSSD) serves an at-risk student population with students on average 2-3 grade levels behind their peers in language arts and 3-4 grade levels in math achievement. Yet CSSD’s dropout rate of 2.4 percent outperformed the county-wide rate of 2.7 percent in 2013 and 3.1 percent in 2014.
- CSSD maintained overall student and parent satisfaction levels of close to 100 percent for 2010-2015.

- Despite having one of the most rigorous graduation requirements in the state, Pewaukee School District achieved a 97.4 percent graduation rate in 2013 and had a higher rate in 2009-2012 than any other county district.
- Montgomery County Public Schools (MCPS) achieved the highest graduation rate of any large school district in the nation in 2008 and 2009.
- MCPS narrowed the achievement gap between Caucasian and African American students by 13 percentage points from 2006 to 2010.
- Iredell-Statesville Schools improved its academic composite ranking from 55th to 9th in North Carolina, increased its graduation rate from 61 percent to 81 percent (11th in the state), achieved higher average SAT scores than the average score in peer districts, the state as a whole, and for the nation, while remaining 107th out of 115 school districts in North Carolina in expenditures per pupil.
- The dropout rate for Jenks Public Schools dropped from 6.3 percent in 1994 to 1.2 percent in 2004.

“It is a privilege to accept the Baldrige Award on behalf of Monfort College’s faculty, staff, students, alumni, and friends. We are here because of their continued commitment to performance excellence and investment in the approach of viewing yesterday’s performance as an opportunity for a better tomorrow.” – Joe F. Alexander, Dean, Kenneth W. Monfort College of Business

In higher education:

- The number of students completing the core curriculum at Richland College, preparing them to transfer to a four-year institution, more than tripled from 2002 to 2005.
- Student performance on nationally administered exit exams at Kenneth W. Monfort School of Business exceeded the national average and reached the top 10 percent in 2003-2004.
- From 1996 to 2001, the job placement rate for graduates of the University of Wisconsin-Stout was at or above 98 percent.

All of these colleges, schools, and school districts achieved these dramatic improvements while managing stagnant budgets and cuts in education funding. This is clear evidence that #BaldrigeTransformsLives.

Thank you for Your Support!

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By keeping Baldrige vibrant and growing, your donation:

- Makes hospital care safer, more widely available and less expensive
- Makes education more effective and give opportunities to our young people
- Makes businesses more competitive and protect American jobs
- Makes digital systems more secure

- Makes communities function more effectively to address the needs of all people

For those people whose lives are longer, healthier, and more full of opportunity because of Baldrige, thank you for supporting the Baldrige Foundation.





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