

INSTITUTE FOR PERFORMANCE EXCELLENCE



BALDRIGE | PERFORMANCE EXCELLENCE | QUALITY | LEADERSHIP

# **The Baldridge Foundation Institute for Performance Excellence**

*Presents:*

## **State-Based Baldridge Programs: *The Gateway to Performance Excellence***

**May 26th, 2022**



### Mac Baldrige Society Institute Trustees



## A Special Thanks to Our Donors & Sponsors!



# Opening Remarks/Agenda

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

**Guest Presenters**                **Brian Lassiter, Chair, Alliance for Performance Excellence**

**Dr. Margot Hoffman, President & CEO, The Partnership for Excellence (TPE)**

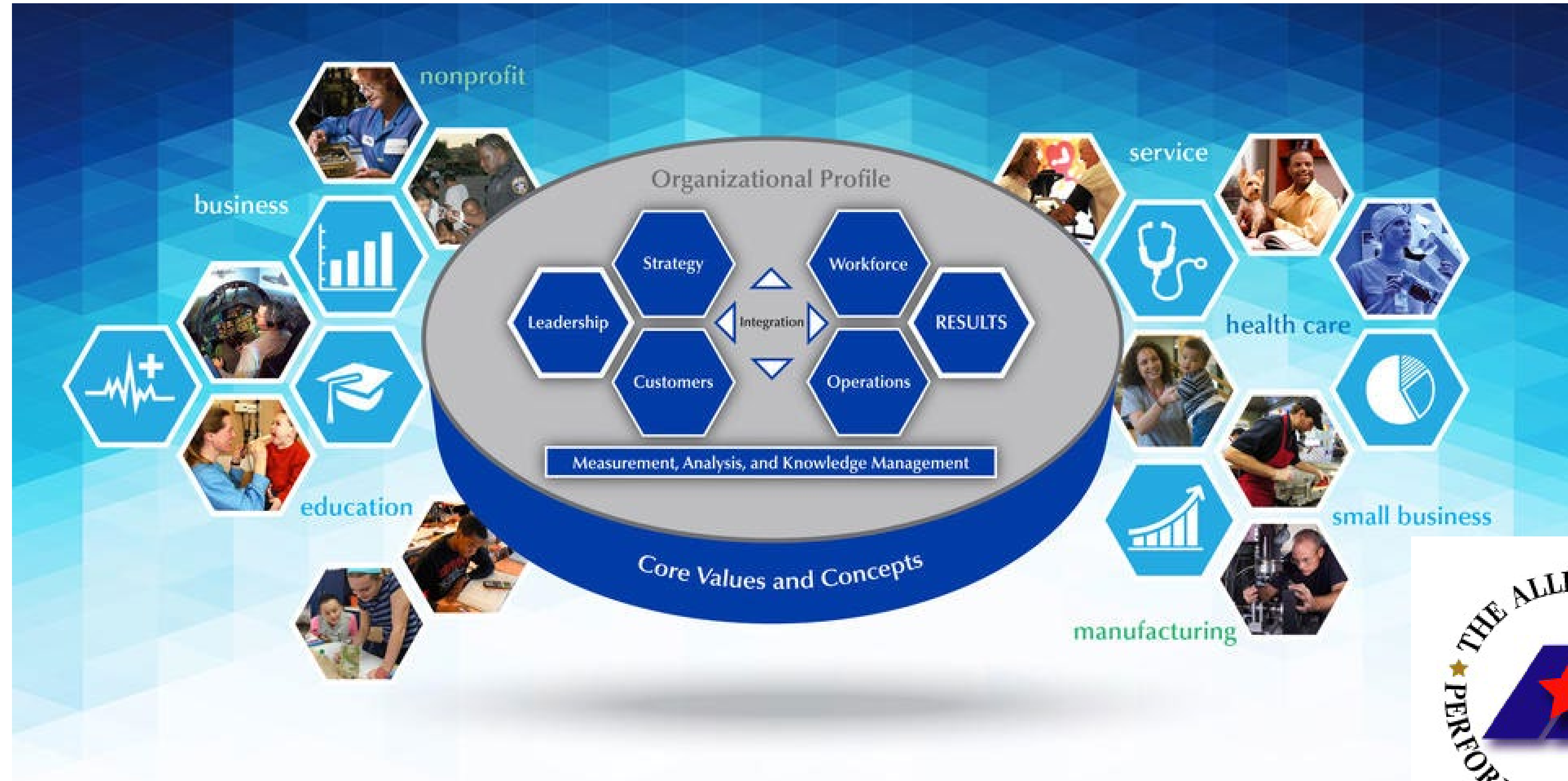
**Dr. Mac, McGuire, CEO, Quality Texas Foundation**

**Questions**                         **Moderator**

**Closing Remarks**                **Al Faber**



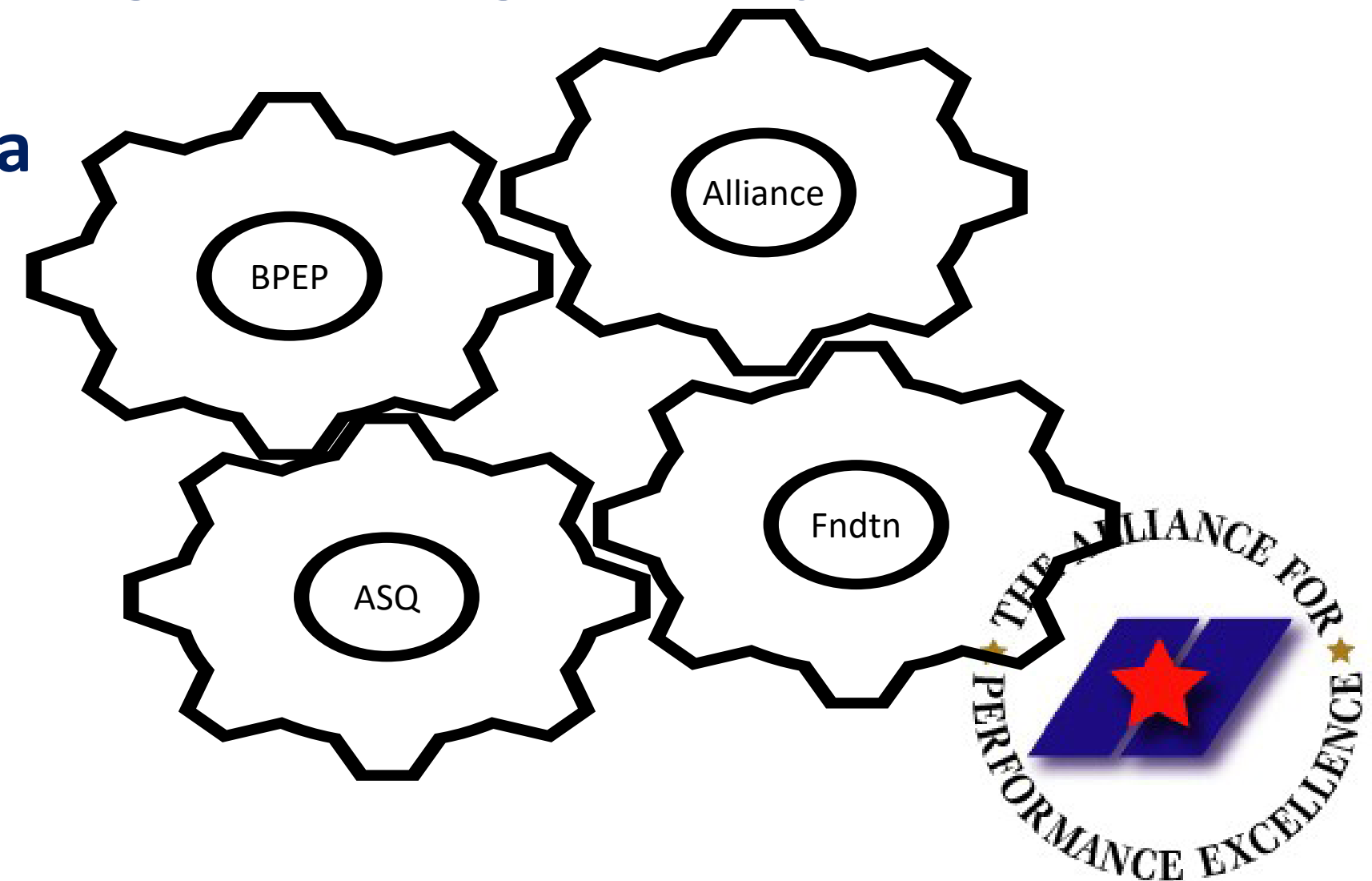
# For Those of You Who Need It...



*Learn. Share. Connect.*

# Baldrige Alliance: Excellence Journey's "Front Door"

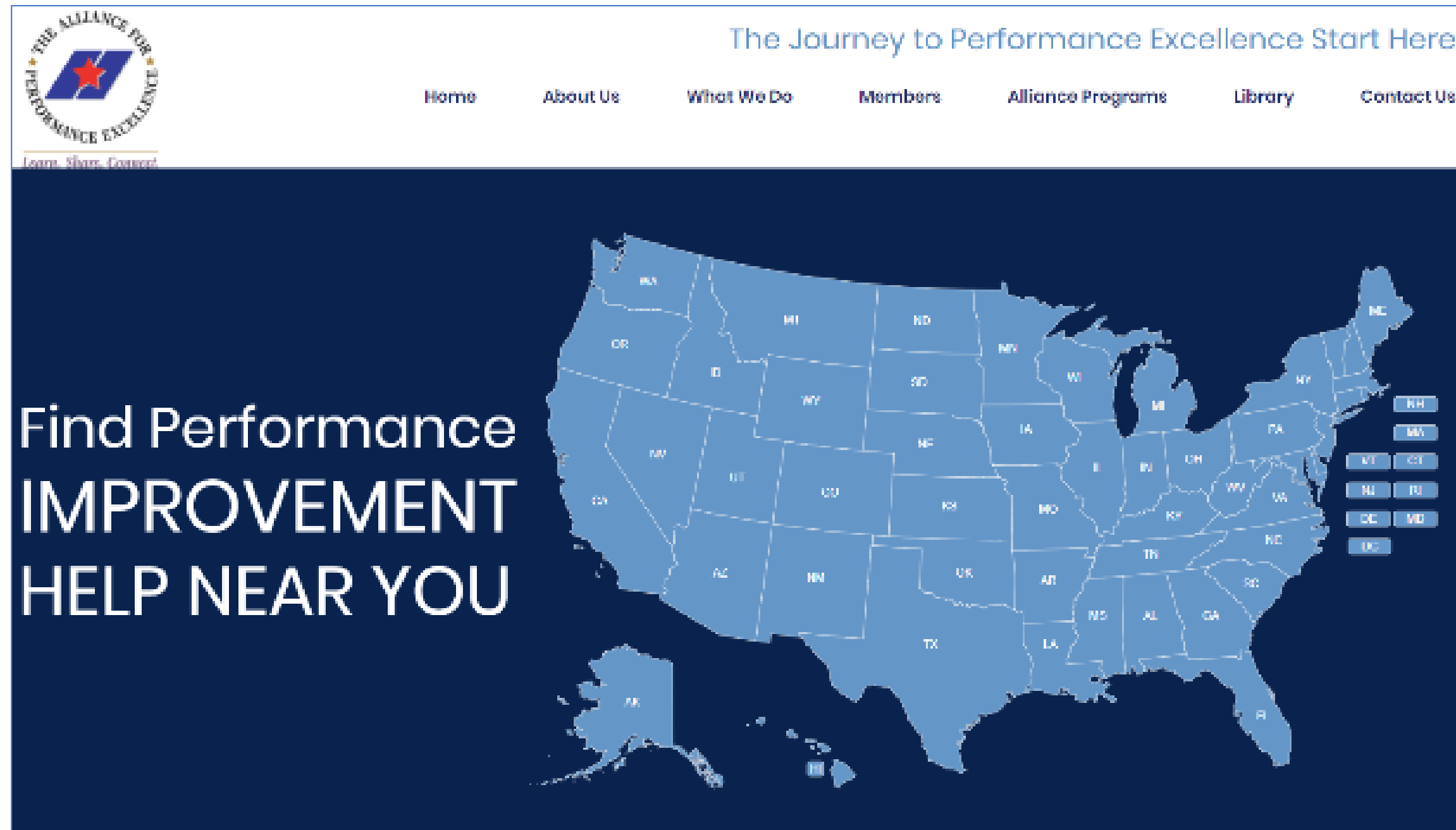
- **Purpose:** Founded in 2005, the Alliance for Performance Excellence is the network of Baldrige-based programs and other interested members throughout the US
- **Mission:** Enhance our members' ability to grow Baldrige-based performance excellence
- **Vision:** to be the premier resource for a thriving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



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# A National/International Footprint

## Local, State, Regional Programs:



## National/International Programs:

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

## Other Members:

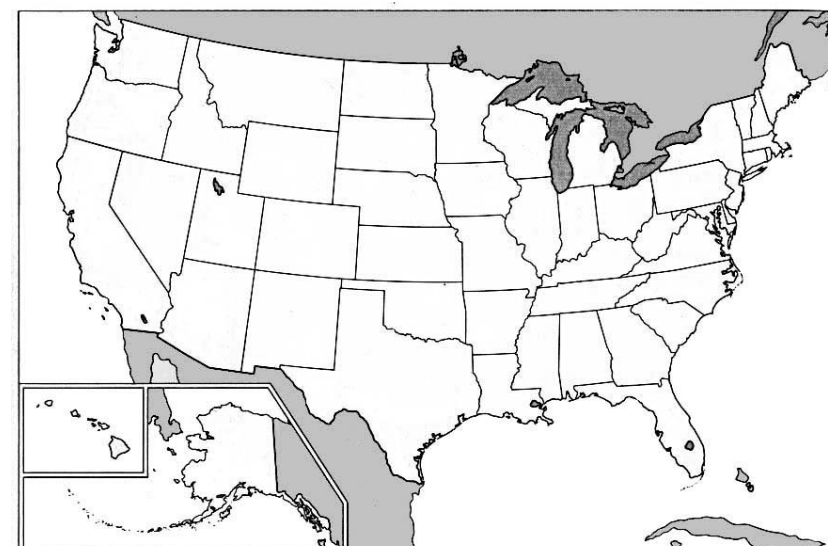
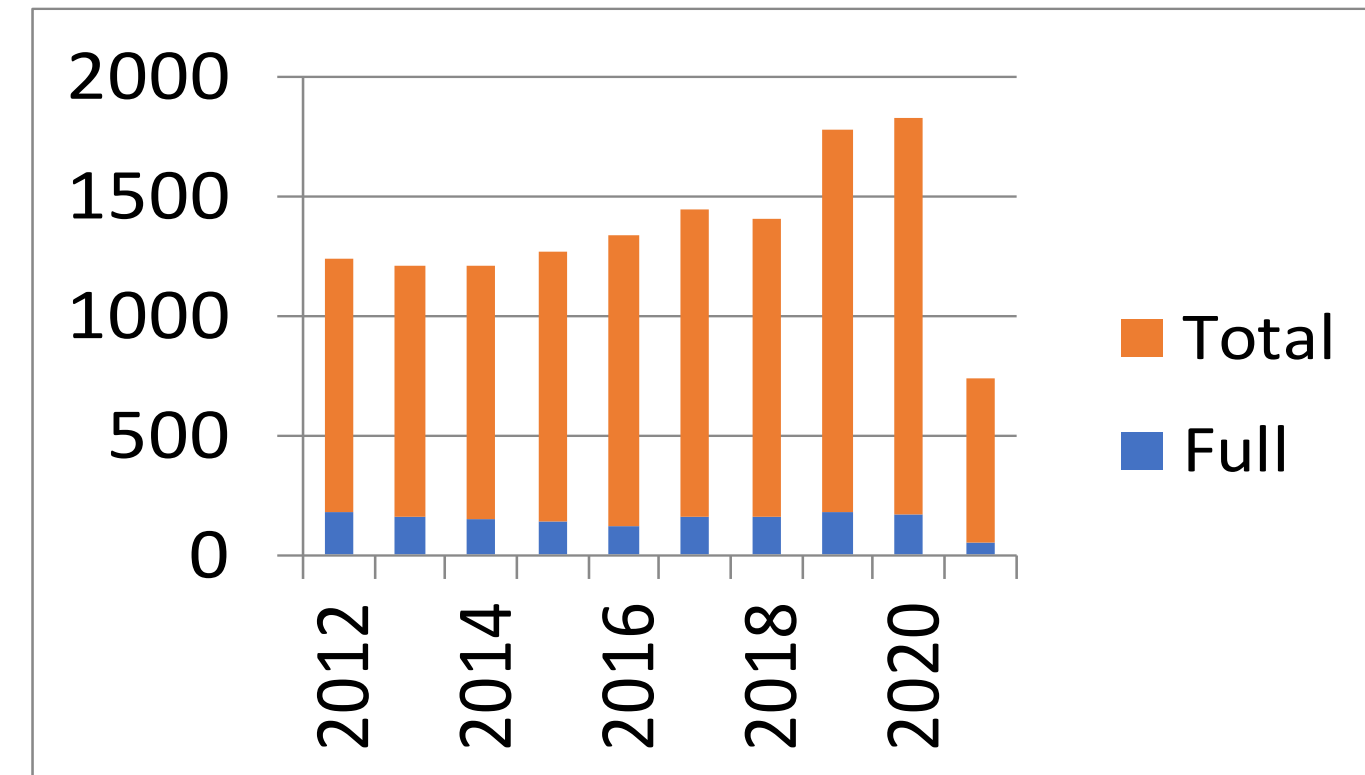
- LBL Strategies, Chicago
- Stratex Solutions, Kansas City
- Walden University, Minneapolis
- Mike Belter, Columbus



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# 2021 Alliance Statistics

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



\* 2018 estimate





# Alliance 2022 Plan on a Page

## Year of the Member

2022 dues suspended

Monthly emails from Executive Committee

Feature info on a couple of members each month

## Mission

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

## Vision

To be the premier resource for a thriving Baldrige community.

## 2022 Strategic Priorities

### 1. Define Alliance Identity

- Update Alliance Org Profile
  - Purpose & Values; Core Competencies; DEI

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

- Build from OP to determine key processes
- Inventory processes currently documented
- Identify: Align with core competencies;
- Select 1-2 to design/refine based on SWOT & other strategic priorities

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

- ✓ Hire Marketing specialist
- Create common message & collateral
- Develop Turnkey Marketing Materials
- Educate members on using Social Media

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

- Work within Enterprise from a position of strength
- Promote Alliance as onramp to Performance Excellence
- Share stories of Alliance recipients across the country

## Value Proposition

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

## Core Values

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

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

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

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

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

## Scorecard (proposed; pending 2022 initiatives)

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

# Baldrige Fall Conference

## Save the Date!

Check back in here soon for more information on the  
**2022 Baldrige Fall Conference in San Diego, CA on October 19-20th.**

Excellence Ahoy!

Subscribe to get info on the 2022 Baldrige Fall Conference

Email \*

Subscribe



*Learn. Share. Connect.*

# Check Out Your Local Program!...

- To explore the value of getting started (or accelerating) your journey to excellence using Baldrige, contact your local Alliance member program at <http://baldrigealliance.org>
- But let's first hear from a couple!...



# Why start with your state/regional program?

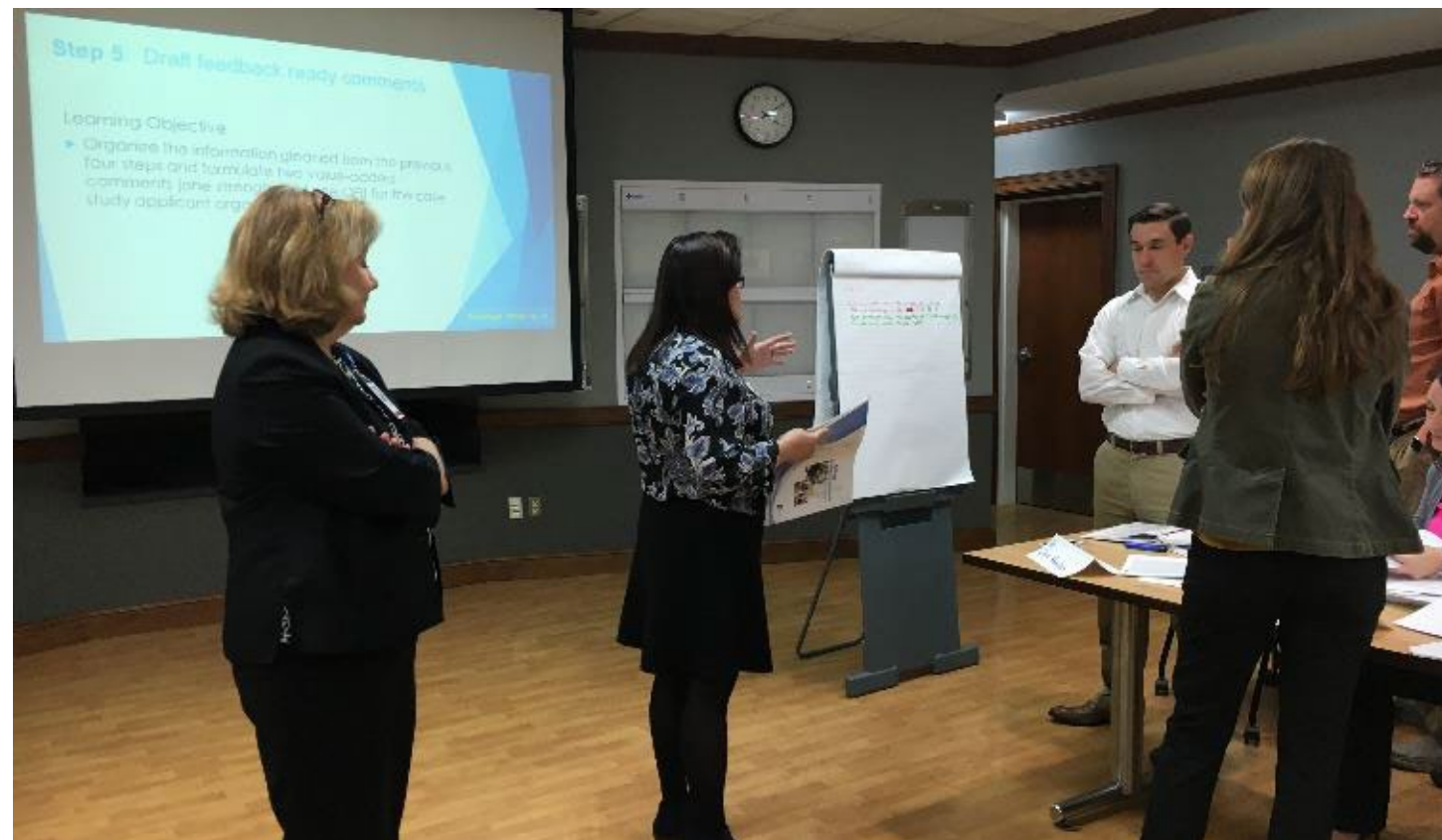
- First step in Baldrige journey
- Feeder system to national Baldrige program
  - Mirrors national process
- Most economical way to start with Baldrige!

*State programs engage & on-board organizations and provide training & mentoring*



# Training

- Examiner Training
- Baldrige Criteria Training
- Workshops & Webinars
- Leadership Development
- Conducted virtually, in-person, LMS Modules





# Assessments

- Tiered Assessments
  - Organizational Profile
  - 20- or 25-page Application
- Full 50-page Application with Site Visit



# Recognition

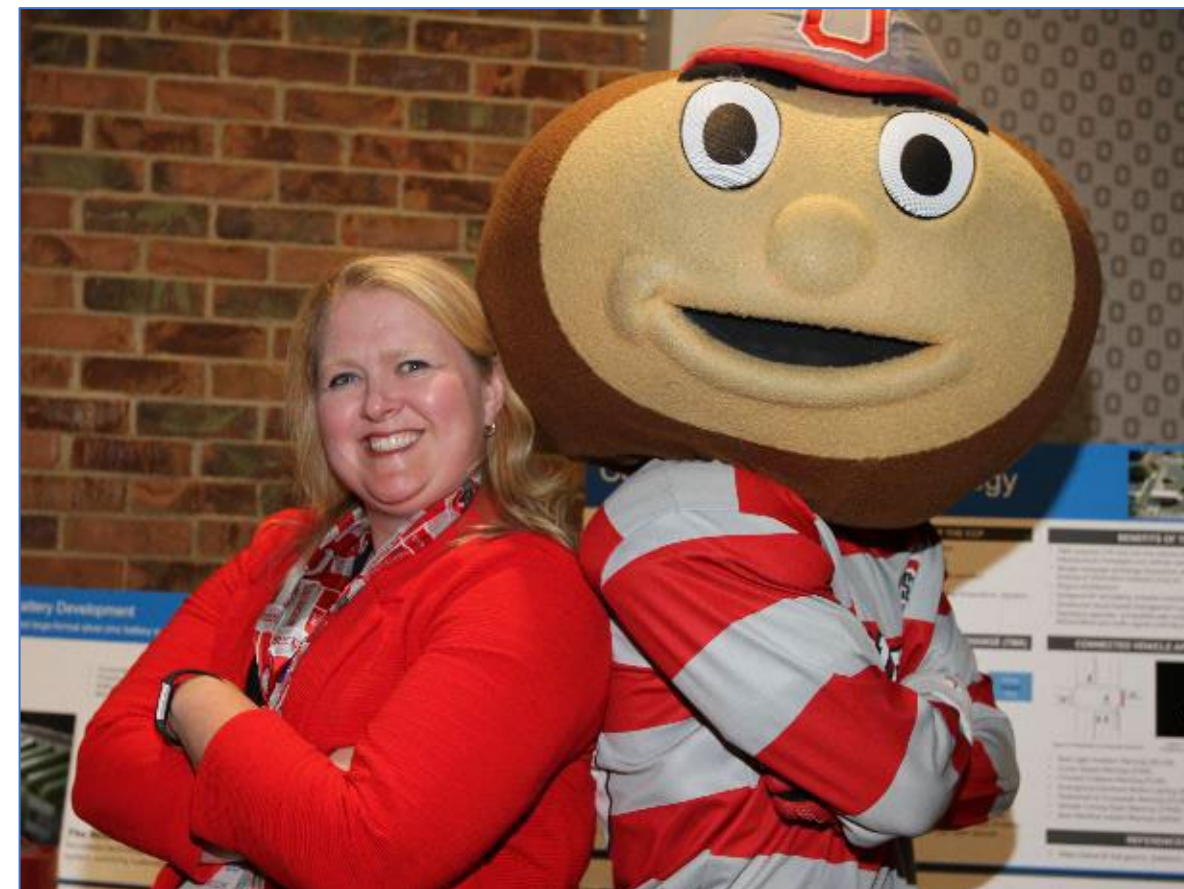
- Tier Level Recognition
- Top Tier Awards
- Individual Awards

*Top Tier state/regional recipients invited to apply for national MBNQA*



# Conferences

- Best practice sharing
- Learning
- Networking
- Recognition
- Fun!

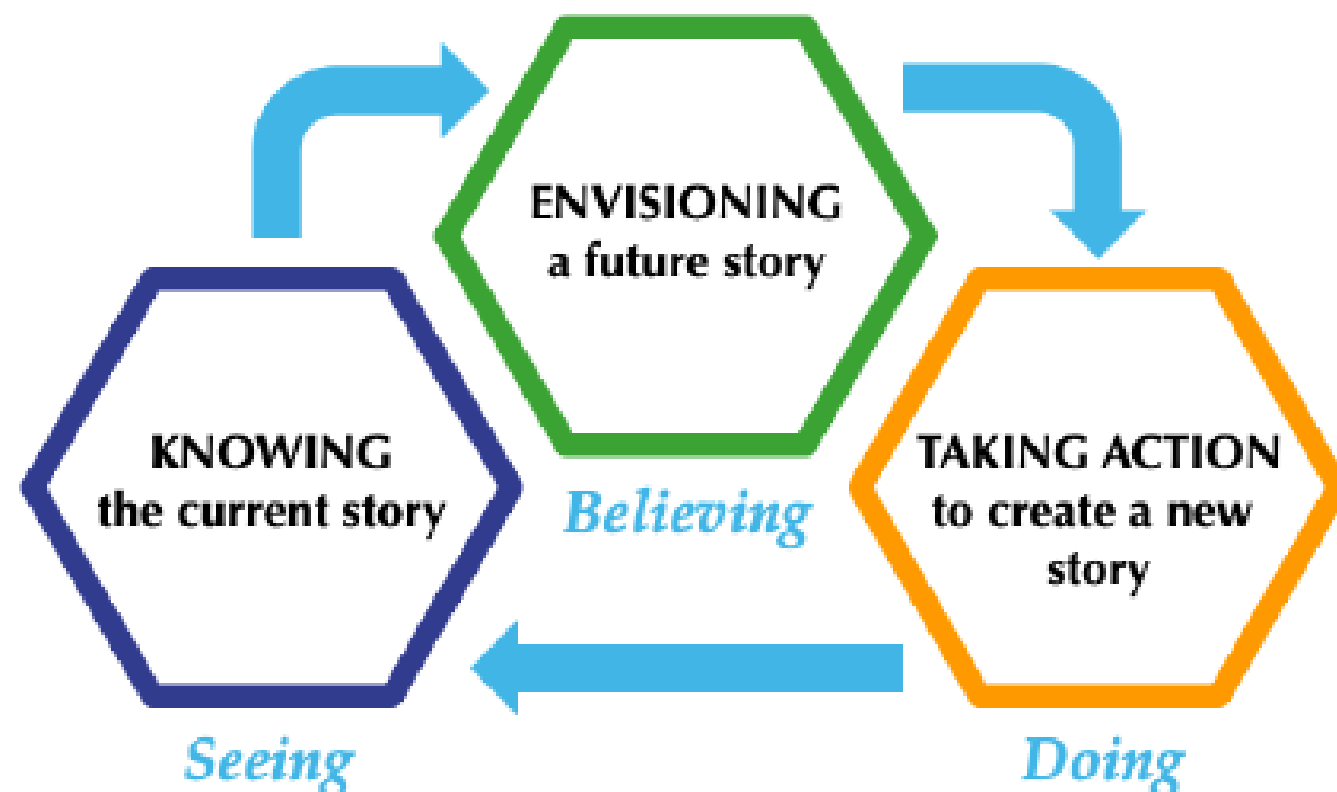




# communities of excellence 2026™

- Communities of Excellence Framework
- Learning Collaborative
- Assessments
- Recognition

## A Systems Approach in Communities



## FOUNDATION STATEMENT

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.

## OUR CORE PURPOSE

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

# *Get Involved with your State/Regional Program!*

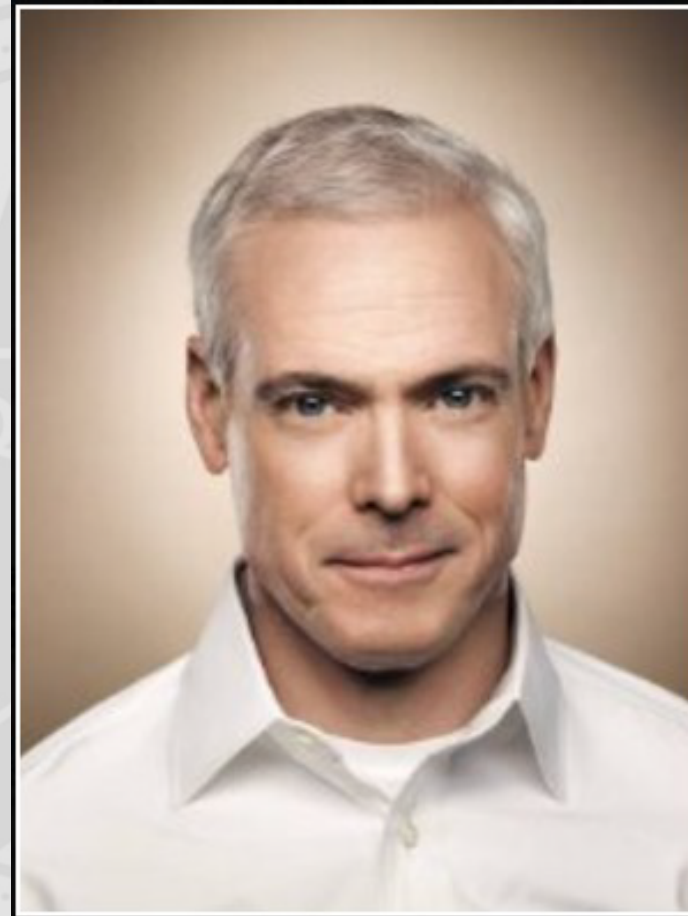


- Become an Applicant
- Be an Examiner
- Get Training
- Attend a Conference
- Volunteer



# Education, Health Care, and Not-For-Profit Focus

- Alamo Colleges District,  
Education, 2018
- **Memorial Hermann Sugar  
Land Hospital, Health  
Care, 2016**
- Mid-America Transplant,  
NFP, 2015, 2021



I see the Baldrige process as a powerful set of mechanisms for disciplined people engaged in disciplined thought and taking disciplined action to create great organizations that produce exceptional results.

— James C. Collins —

AZ QUOTES

# Alamo Colleges, Education

- Four-year graduation rate increased 150%; best in the state.
- Students' scholarships increased from 580 to 2,175; amount awarded from \$500,000 to over \$2 million since 2010.
- Degrees/certificates awarded; doubled to 12,750 from 2013 to 2017, three times the state norm.
- Student satisfaction with overall educational experience is 88.4%, more than two percentage points higher than national norm.

# Memorial Hermann Sugar Land, HC

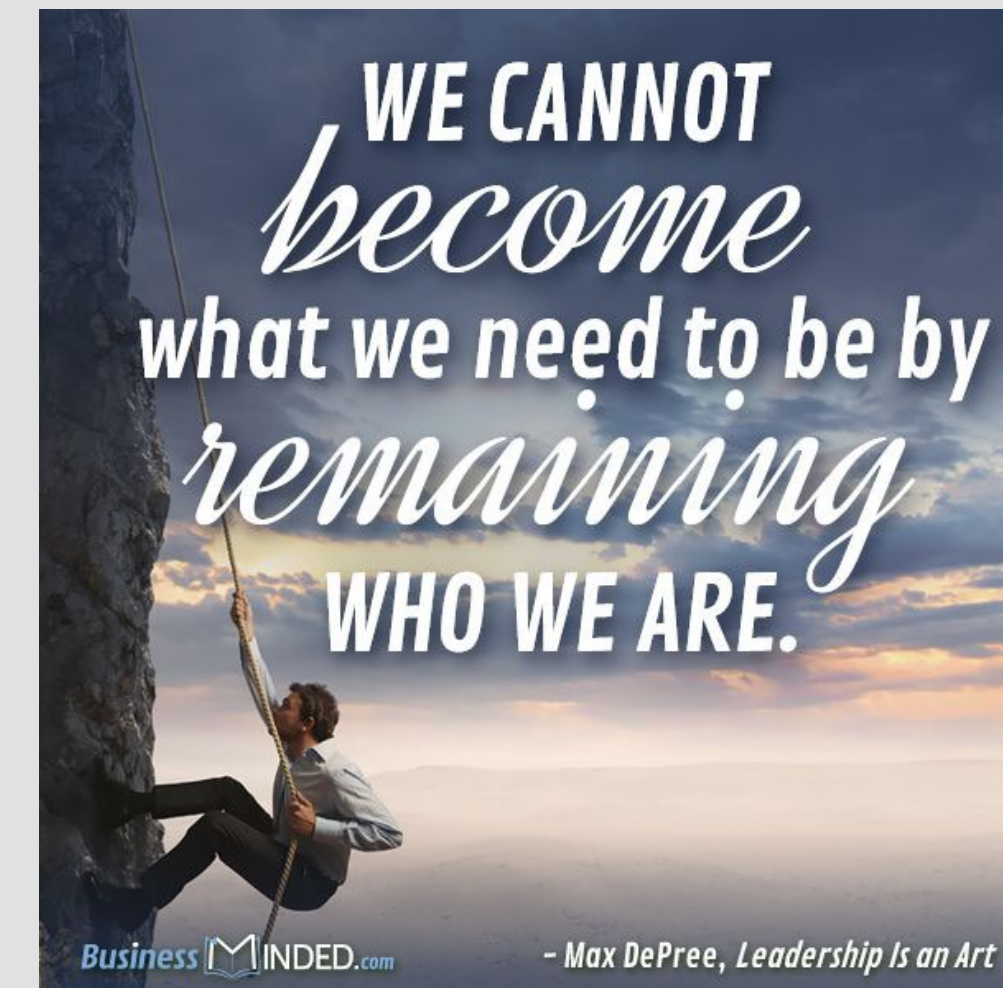
- MHSL ranks among top 10% nationally.
- Retention with partners 90% workforce, 100% physicians, and 90% volunteers, all comparable/exceeding national benchmarks. First-year retention near 75%, exceeding the national level.
- Patients “likely to recommend” several service lines/departments—MHSL in Press Ganey’s 90th percentile for this measure.
- Operating earnings since 2014 have exceeded S&P’s national median for AA-rated nonprofit hospitals.
- Operating margin has met or exceeded the S&P benchmarks for the same group since 2013.

# Mid-America Transplant, NFP

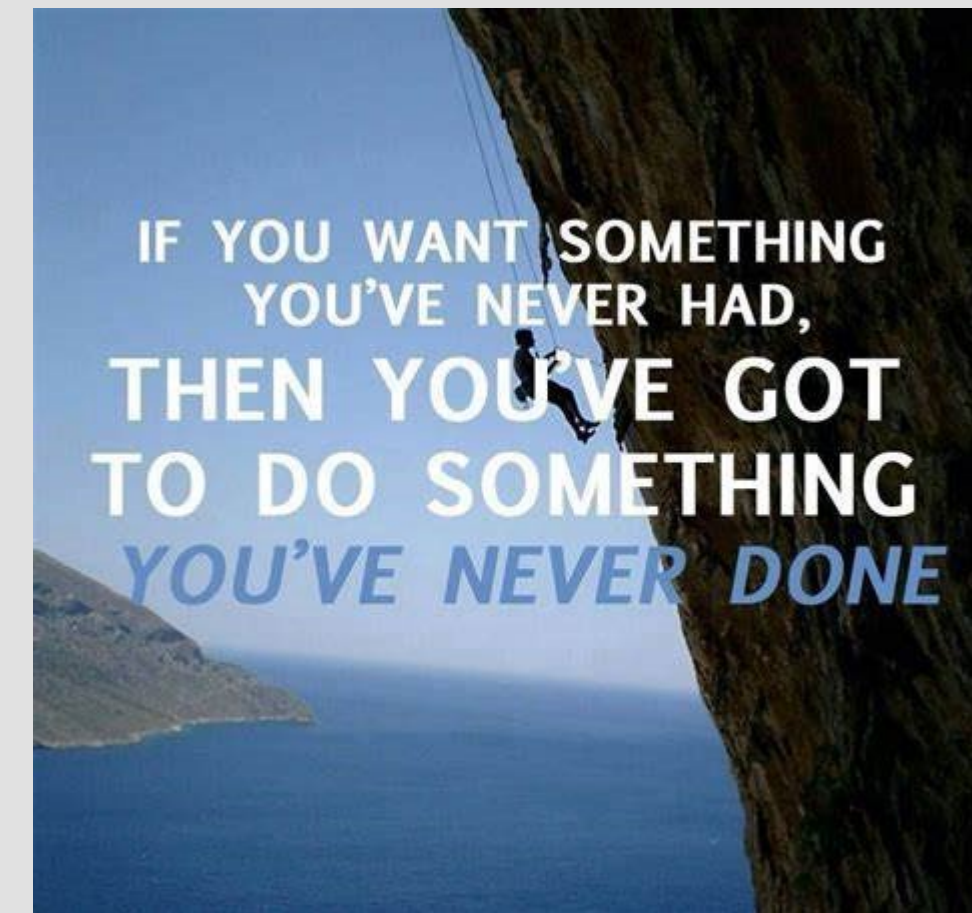
- Staff members in residence at key partner hospitals; results 0.08% missed organ referrals since 2012, outperforming reported best-in-class industry benchmark of 2%.
- Since 2012, the cost-per-donor for in-house cases has decreased from \$7K to under \$4K, approximately \$20K when completed in the hospital.
- Selected as a "top workplace" by the *St. Louis Post-Dispatch*. Overall retention rate approaches 90%; exceeds industry average.
- Customer Complaints per case have been close to zero since 2013 for eye and tissue donations. Declined from approximately 7% in 2013 to approximately 3% in 2015 for organ donations.

# Other success!

- Texas Nameplates, small FP (35), over \$40 M in last 20 years; 2-time Baldrige Recipient
- Radiation Detection Company (4 years w/Baldrige; (39) applied Baldrige; marginal profit; selling company \$30M)
- City of El Paso (6600), 2-time QTF Recipient, submitted to Baldrige, saved over \$80 M five years;
  - over 100 people trained as Internal Coaches/Examiners;
  - over 500 people trained in Leadership I has led to courageous conversations/improvements
- Routinely, 10-20% improvements across the board in customer, workforce, and financial management.



- **Baldrige Application Writing Seminars – 5 Levels of Recognition/Awards**
- **Pre-Examiner Seminars (new first-time examiners)**
  - **Organizational Leadership/Examiner (OL/E) Seminar (Continuous Improvement Certification from University of Texas at El Paso)**
  - **Some state programs offer tailored training and individual Category Training**
- **Some states offer Baldrige Plus: Latest information from the best business books, HBS, MIT/Sloan, major MBA Programs, Hudson Institute, Hoover Institution, Stanford, Kellogg, and other research institutions.**





# Final Topics

- **Preparing state Examiners to become national examiners, judges, etc.**
- **Baldrige State Programs apply the Baldrige Criteria to their operations. As an example, QTF has a Baldrige Application completed annually; led to explosive growth (over \$800K profit in 7 years; small NFP; 2 employees)**
- **State Programs are focused on continuous improvement. As an example, the QTF Regional Program (TX, PR, MO, KS, LA, OK one entity) focuses on 3 components:**
  - **customer (patient/family HC; student/family ED); service, engagement, and satisfaction,**
    - **workforce engagement and satisfaction, and,**
      - **financial management.**

# Panelist Questions and Discussion



**Brian Lassiter**  
Chair  
Alliance for Performance Excellence



**Margot Hoffman**  
President & CEO  
The Partnership for Excellence



**Dr. Mac McGuire**  
CEO  
Quality Texas Foundation



**Al Faber**  
President & CEO  
Baldrige Foundation  
(Moderator)



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