

# The Foundation for the Malcolm Baldrige National Quality Award



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

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



# Opening Remarks/Agenda

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

**The Synergy Organization** **Ken Cohen, PhD, Founder & Chief Executive Officer, The Synergy Organization. With Bob Fangmeyer, Director, Baldrige Performance Excellence Program**

**Questions** **Audience**

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

**Baldrige Performance Excellence Program Update** **Bob Fangmeyer, Director, BPEP**

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

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



# The Synergy Organization

Transforming Healthcare Organizations, Lives & Careers Through Science



**Kenneth R. Cohen, Ph.D.**

**Founder & CEO**

**866-HIRE-123**

[ken@synergyorg.com](mailto:ken@synergyorg.com)



[synergyorg.com](http://synergyorg.com)





## Four Strategic Imperatives-

ORGANIZATIONAL ALIGNMENT: STRATEGY – BUDGET - ACCOUNTABILITY

### ADVOCACY

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

### FUNDRAISING

#### Message

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

#### Fundraising

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



### BOARD DEVELOPMENT

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

### FOUNDATION OPERATIONS

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



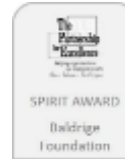
*" Ensure the long-term financial growth and viability of the Baldrige Performance Excellence Program..."*



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



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



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



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

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

(Photos courtesy of MBNQA Recipients)



# FY2020 - \$2.2million

Calendar No. 231

116TH CONGRESS |  
1st Session

SENATE

REPORT  
116-127

DEPARTMENTS OF COMMERCE AND JUSTICE, SCIENCE,  
AND RELATED AGENCIES APPROPRIATIONS BILL, 2020

SEPTEMBER 26, 2019.—Ordered to be printed

Mr. MORAN, from the Committee on Appropriations,  
submitted the following

## REPORT

[To accompany S. 2584]

The Committee on Appropriations reports the bill (S. 2584) making appropriations for the Departments of Commerce and Justice, Science, and Related Agencies for the fiscal year ending September 30, 2020, and for other purposes, reports favorably thereon and recommends that the bill do pass.

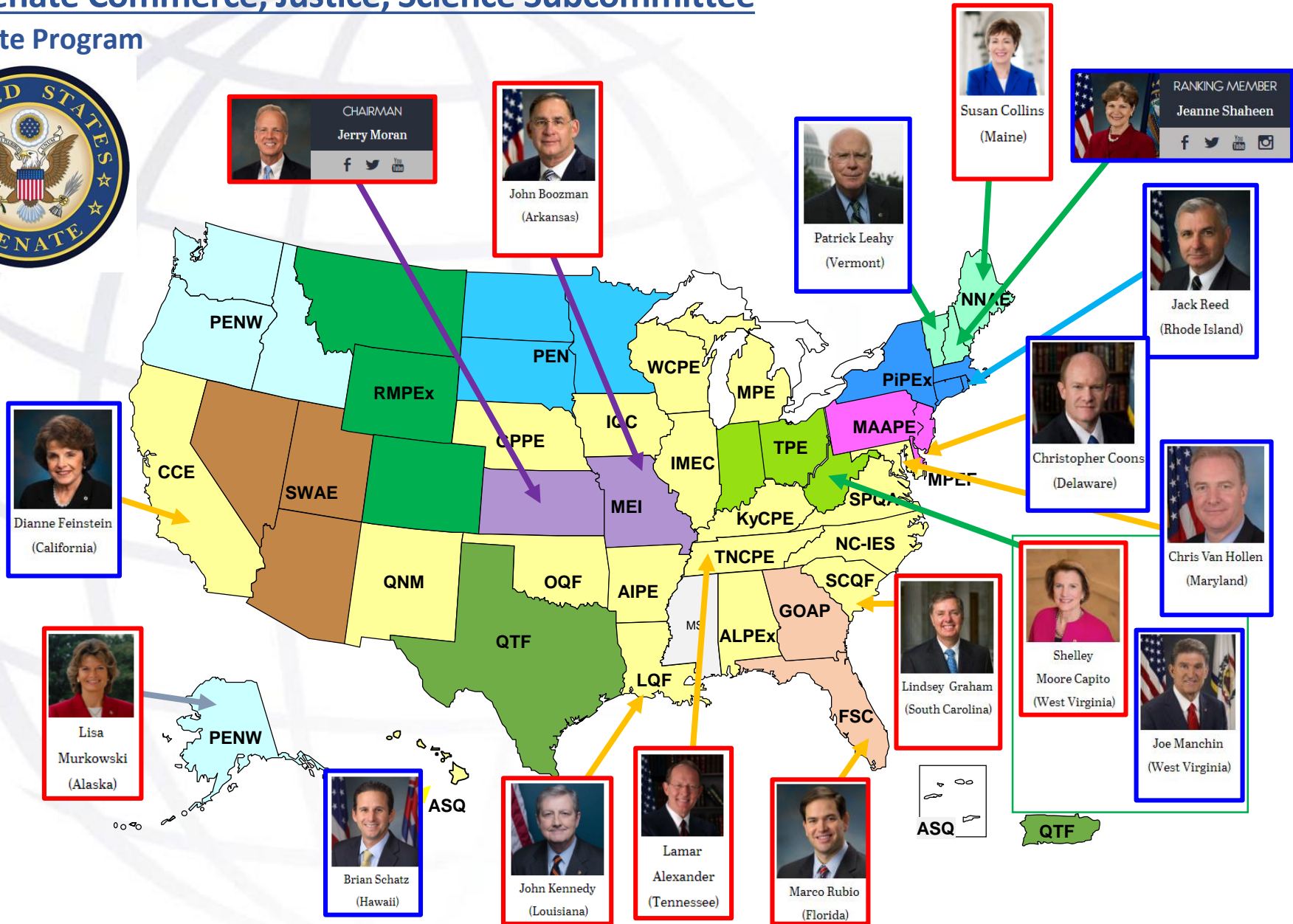
### Total obligatory authority, fiscal year 2020

Total of bill as reported to the Senate <sup>1</sup> .....	\$79,389,503,000
Amount of 2019 appropriations .....	73,007,306,000
Amount of 2020 budget estimate .....	72,381,233,000
Bill as recommended to Senate compared to—	
2019 appropriations .....	+ 6,382,197,000
2020 budget estimate .....	+ 7,008,270,000

<sup>1</sup>This level does not include —\$8,220,503,000 in adjustments, including the Census cap adjustment authorized in Public Law 116-37, that the Congressional Budget Office scores to the bill. With these adjustments, the bill is consistent with the subcommittee's base discretionary allocation of \$70,833,000,000.

# US Senate Commerce, Justice, Science Subcommittee

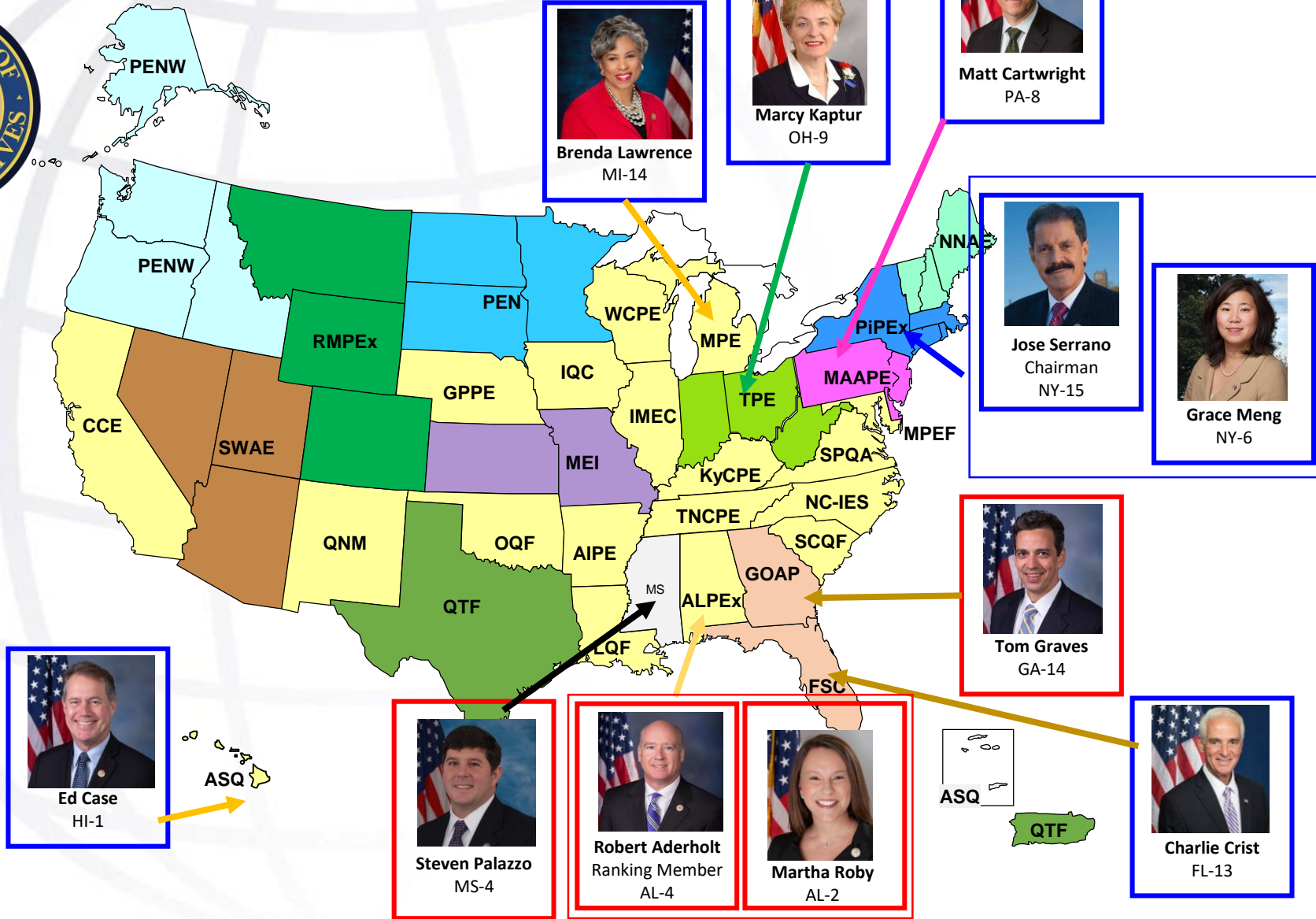
## By State Program





# US House Commerce, Justice, Science Subcommittee

## By State Program





# Re-engaging the White House



**The Foundation for the Malcolm Baldrige National Quality Award**

Baldrige Foundation  
1717 Pennsylvania Ave, NW  
Suite 1025  
Washington, DC 20005  
www.baldrige.org

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**Foundation Officers**

President and CEO: Al Faber  
Baldrige Foundation  
Chair: George Bernard, Ph.D.  
President, College of Charleston - retired  
Vice Chair: Kathryn K. Egleston, Ph.D.  
President, National College  
Secretary: W. Paul Woodall  
President - retired  
AEC Consulting Company  
Treasurer: Frank W. Foss  
Executive Director - retired  
Scott's Covered Bridge Development

Paul Case: Director, I. Cabell  
Director, Program Management, Inspiration  
& Development - retired, Boeing

**Foundation Directors**

Diane Buckmeier RN, BSN, MBA  
President and CEO  
Mid-America Transporter

David R. Gilford, MD, MPH  
Senior Vice President for Quality and  
Regulatory Affairs, AHCANICAL

Lucretia C. Kovic  
Chair, Committee of Excellence 2020  
President and CEO - retired  
HealthNet Health

Tony Miller  
CEO and Owner  
ALFA

Scott Robinson  
President and CEO  
AEC Public Sector

Robert McQuinn  
Customer Operations/Marketing Officer

Tony Smith  
Former Federal CEO  
US Government

Suzi Siska  
Director

Tara Jany - Middle East & North Africa

E. David Spang, D.Sc.  
President - retired  
Boeing Aerospace Support

**Honorary Board Member**

Malcolm Baldrige  
Director, TD Bank, NJ  
Malcolm Baldrige Family

January 18, 2018

The President  
The White House  
1600 Pennsylvania Avenue NW  
Washington, DC 20500

Dear Mr. President,

On behalf of the Baldrige community nationwide, we respectfully request the honor of your presence to recognize 40 recipients of the Malcolm Baldrige National Quality Award at the 30<sup>th</sup> Quest for Excellence Conference on April 8-11, 2018, in Baltimore, MD, or at your convenience in the White House this spring.

Thirty-three of the CEO's from national role-model organizations received the nation's highest honor for performance excellence during the Obama administration. However, President Obama was the first, and only, U.S. President since Ronald Reagan to not personally recognize award recipients during his tenure. It would be a lasting tribute to these organizations who represent thousands of employees from every sector of the economy for you to acknowledge their stellar achievements. Secretary Ross delivered an outstanding address at last year's awards ceremony, noting the Baldrige program's one billion dollar contribution to America's economy each year and congratulated the four 2016 recipients.

Established by Congress in 1987, the award is the highest honor bestowed by the President to U.S. organizations for performance excellence. The Baldrige program continues this legacy today and is making a true difference throughout the nation with an ROI 11 times on investment as measured by the National Institute for Standards and Technology (NIST).

This highly visible opportunity would provide inspiration to the thousands of organizations in manufacturing, health care, education, and government who are using the Baldrige Framework to create jobs and strengthen the economy, increase the quality and access to health care, and improve K-12 and higher education.

The Malcolm Baldrige National Quality Award is "your" award for winning and making America great again. It is the nation's highest honor for achievement by U.S. organizations and the only award which carries the Presidential seal. These award recipients are role-model organizations who have earned the respect and admiration of us all.

Your recognition of Malcolm Baldrige National Quality Award recipients from the previous ten years, including this year's recipients, will continue to inspire organizations across the nation to follow your stellar example of excellence and selfless-service to our country.

Respectfully,  
  
Al Faber







Oversight of Organizational  
Performance Management

BALDRIGE FOUNDATION  
INSTITUTE FOR  
PERFORMANCE EXCELLENCE



INACD



Upcoming Events

# Your Legacy...America's Best Investment

Planned Giving to The Foundation for the Malcolm Baldrige National Quality Award, Inc.



Charitable Giving through Bequests, Annuities & Trusts



# Planned Giving Program



BALDRIGE - America's Best Investment

Recognizing our donors, sponsors, and supporters!

Thank You for Your Support



The Honorable  
Malcolm  
"Mac" Baldrige

October 4, 1922 - July 25, 1987

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

- President Ronald Reagan

Planned Gifts Supporting a Legacy of Performance Excellence

• Al Faber

Your Legacy...America's Best Investment  
Planned Giving to the Baldrige Foundation

BALDRIGE FOUNDATION

Charitable Giving through Bequests, Annuities & Trusts

Planned Giving Gift Comparison				
	Bequest	IRA/Retirement	Charitable Trust	Annuity
Revocable	Yes	No	No	No
Minimum Gift Amount	None	None	\$100,000-\$1,000,000	\$10,000
Assets that can be used	Any	Monies within IRA or retirement savings account	Any	Any
Tax Benefits	Estate	Income and Estate	Dependent upon trust	Income and Estate
Will this gift create an income stream?	No	No	Yes	Yes
Can additional gifts be made?	Yes	No	Yes	No
Age limit to making the gift?	None	None	Dependent upon trust	Payment beneficiaries must be at least 60 years of age
Fees or costs to make the gift other than personal legal fees?	None	None	Administrative Fees	None





Constellation<sup>™</sup>  
Together for the common good.



*2019 Baldrige Fall Conference*  
*Nashville, TN*  
*October 24-25, 2019*





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

**Rural Healthcare Operations**  
**CEO INNOVATION COUNCIL**

THEME

**RURAL HEALTHCARE**  
**PERFORMANCE**  
**EXCELLENCE**  
**IN THE AGE OF CONSUMERISM**



**UAB** SCHOOL OF  
HEALTH PROFESSIONS  
The University of Alabama at Birmingham





# Foundation Radio Show & Leader Dialogue Website



**Leader Dialogue Radio Show – 1:00 pm ET**  
Episode Guest – P. George Benson, PhD  
Professor of Decision Sciences, College of Charleston  
**Boards of Directors (Current):**  
-Malcolm Baldrige National Quality Award: Chair, Foundation for the Malcolm Baldrige National Quality Award  
-Prometric, Inc: Lead Director, Corporate Governance Committee Chair  
-Crawford & Company: Governance Committee Chair  
-ASCO, Inc: 2004-present Governance Committee Chair

**Leader Dialogue Radio Show – 1:00 pm ET**  
Episode Guest – David Gifford, MD, MPH  
SVP Quality and Regulatory Affairs, American Health Care Association (AHCA)  
- ABOUT DAVID GIFFORD  
[LISTEN LIVE ON NOV 1](#)

**Leader Dialogue Radio Show – 1:00 pm ET**  
Episode Guest – Leigh S. Hamby, MD, MHA  
Chief Medical Officer, Piedmont Healthcare  
- ABOUT LEIGH HAMBY  
[LISTEN LIVE ON OCT 18](#)

**Leader Dialogue Radio Show – 1:00 pm ET**  
Episode Guest – Scott McIntyre  
Chief Executive Officer, Guidehouse  
- ABOUT SCOTT MCINTYRE  
[LISTEN LIVE ON OCT 4](#)

**Leader Dialogue Radio Show – 1:00 pm ET**  
Episode Guest – Rulan Stacey, PhD  
Managing Director, Healthcare Strategy business unit at Navigant  
- ABOUT RULAN STACEY  
[LISTEN TO THE PODCAST: LEVERAGING THE BALDRIGE FRAMEWORK TO TRANSFORM A HEALTHSYSTEM](#)

**Leader Dialogue Radio Show – 1:00 pm ET**  
Episode Guest – Nik Buchanan  
Venture Leader, Population Insights @ Care, Philips Healthcare  
- ABOUT NIK BUCHANAN  
[LISTEN TO THE PODCAST: PERFORMANCE EXCELLENCE CHALLENGES IN HEALTHCARE](#)

**Leader Dialogue Radio Show – 1:00 pm ET**  
Episode Guest – Lowell C. Krue  
Co-founder and Chair, Communities of Excellence 2020  
Board Member, Baldrige Foundation  
- ABOUT LOWELL KRUE  
[LISTEN TO THE PODCAST: THE POWER OF THE BALDRIGE FRAMEWORK](#)



Geoff Duncan  
Lieutenant Governor of Georgia



<http://businessradiox.com/our-studios/gwinnett-2/leader-dialogue/>

<https://leaderdialogue.com/why-baldrige/>



# Foundation Leadership Awards

The 2020 Foundation Awards Program will announce this year's recipients later this month.



- David Spong Lifetime Achievement Award
- Harry S. Hertz Leadership Award
- Baldrige Foundation Awards for Leadership Excellence:
  - Business (Manufacturing, Service, Small Business)
  - Non-Profit
  - Government
  - Health Care
  - Education
  - Cybersecurity
- Dr. Curt Reimann Baldrige Scholarship

Harry S. Hertz Leadership Award



JOANN STERNKE

JoAnn Sterнке is a senior director and coach with Studebaker Group, a 2010 Baldrige Award recipient and previously was the superintendent of the Pewaukee School District, which she led to the Baldrige Award in 2013. She has served on a Baldrige peer and senior examiner, led a team with Site Visit Review in 2017, and is a member of the Baldrige Judges Panel.

*JoAnn Sterнке is pleased to be the recipient of the Harry Hertz Leadership Award. She thanks the Baldrige Foundation for considering her for this honor for all of their diligent work to support the Baldrige Program."*

JoAnn Sterнке had to read the Harry S. Hertz Leadership Core Value Attributes and NOT read the Baldrige Foundation for considering me for this honor. She has been the very model of a Hertz-Baldrige leader.

Pewaukee School District began using the Education Criteria for Performance Excellence in 2006. The process of the prompting of a school board member. They had been executing a 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.

JoAnn Sterнке was interested in the systems-level approach, tying the diverse interests of an organization into support of a single mission. She once described being from being a cheerleader to a leader, not only being able to create and lead her team, but to provide direction for them to apply that enthusiasm.

After looking at the Criteria, the complex jargon, and multitude of questions, she had recognized that Dr. Sterнке could not imagine it driving innovation. She has advised hundreds of fellow Baldrige travelers, the dichotomy is that it systematically allows you to think more innovatively. She has recognized that it is one of the most critical jobs of leadership is to create a culture of innovation.

JoAnn Sterнке has been a ferocious advocate of the Baldrige Excellence Framework, dedicating a significant portion of her time and expertise to help others transform the lives of others. As she said, "I believe in the Baldrige Excellence Framework and how it can drive performance excellence in every sector. I am passionate in my role as a leader to leverage the framework to results and improve outcomes for those entrusted to serve."



CONGRATULATIONS, JO ANN JENKINS, CEO, AARP FOR RECEIVING THE 2019 BALDRIGE FOUNDATION AWARD

As AARP celebrates Jo Ann Jenkins' Baldrige Foundation 2019 Nonprofit Leadership Award for Excellence, we congratulate all of the award recipients for being true exemplars of transformational leaders and innovators. AARP looks forward to continuing our collaboration in carrying out our mission to empower people to choose how they live as they age.

ALLYSON YOUNG, SPHR

HR and Brand Director

Congratulations on receiving the 2019 Baldrige Foundation Leadership Award!

We are proud of you and appreciate your 22 years of dedication to K&N Management!



# Baldrige Program Update

**NIST** Search NIST Q NIST MENU

## BALDRIGE PERFORMANCE EXCELLENCE PROGRAM

*The Baldrige Program oversees the nation's only Presidential award for performance excellence while offering a wide array of award-winning products and services, including the world-renowned Baldrige Excellence Framework. We invite you to learn about the Baldrige community dedicated to helping organizations improve.*

**BALDRIGE**  
Performance Excellence Program

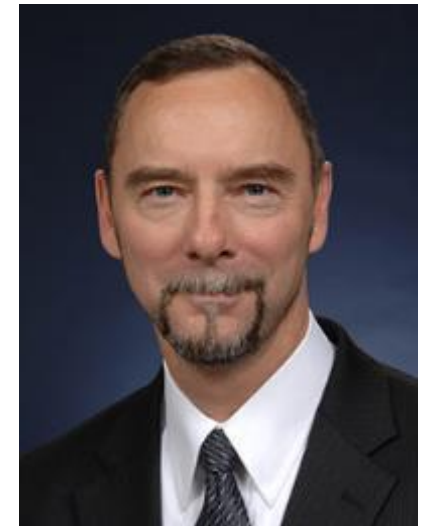
- How Baldrige Works +
- Self-Assessing +
- Products & Services +
- Publications +
- Conferences +
- Award Recipients +
- Baldrige Award +

CONNECT WITH US

**BALDRIGE**  
CYBER  
Baldrige Cybersecurity Initiative

**Leadership Development**  
Become a Baldrige Fellow

**BECOME A BALDRIGE EXAMINER**  
Become a Baldrige Examiner



**Bob Fangmeyer**  
**Director**

**Baldrige Performance Excellence Program**



# Baldrige Performance Excellence Program

A 32-year-old public-private partnership to improve the quality, performance, and sustainability of organizations in the US

Establish the standard of excellence

Identify role-model organizations

Foster use of the standard and share best practices



30<sup>th</sup> Anniversary  
Quest for Excellence® Conference  
BALTIMORE | APRIL 8-11, 2018

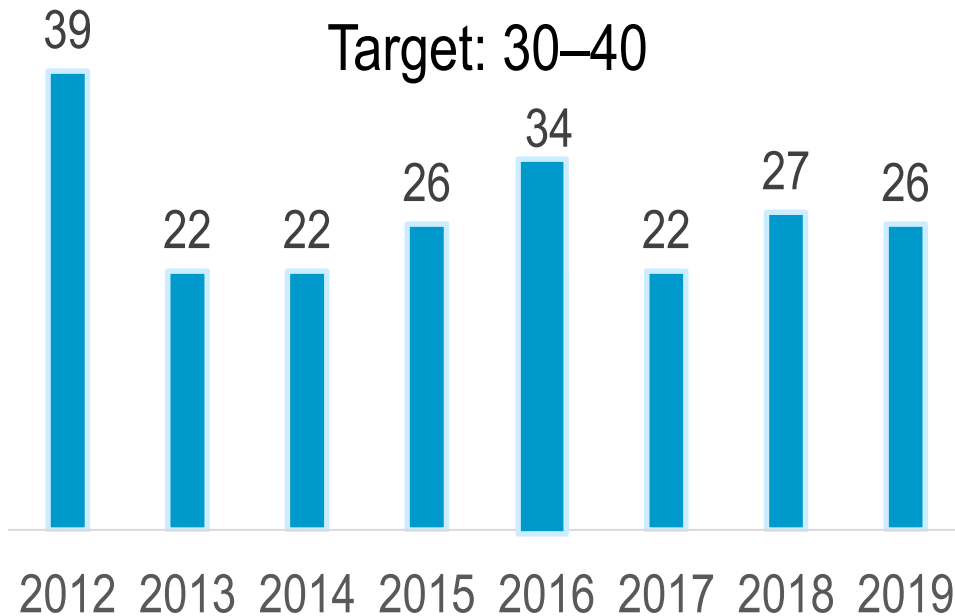


# Program Updates

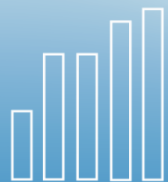
- 2019 Award Process
- Award Process Redesign Pilot
- Communities of Excellence - 5 year plan
- Global Excellence Council
- Workforce Development Excellence initiative
- Exploring two additional initiatives to enhance our ability to reach and serve
  - Small/medium sized manufacturers
  - Federal government agencies



# 2019 Award Applicants



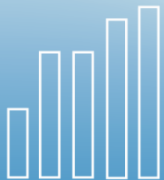
- 16 health care (14 in 2018)
- 5 nonprofit/gov't (6)
- 3 small business (2)
- 1 education (5)
- 1 service (0)
- 42% (11): first-time applicants
- 10: Alliance program top-tier award
- 1: Alternate eligibility process
- 11 of 21 eligible from 2018 reapplied in 2019.
- 12 Site Visits finishing this wk (6 HC, 3 NP, 2 SB, 1 ED)



# Award Process Redesign

Objective: Increase efficiency and value, maintain effectiveness

- Maintain integrity and rigor
- Reduce cycle time
- Better utilize examiner resources and enhance value to examiners and applicants
- Improve timeliness, clarity, transparency, and quality of feedback





# Award Process Redesign

- Streamline process eliminating low-value added steps
- Provide opportunity for every applicant to dialogue with team
- Simplify work product/output at every phase
- Provide easier to understand and more timely feedback
- Results in less time and effort, shorter cycle time, more valuable feedback
- Pilot Site Visit scheduled for Oct 14-17
- Constructive feedback from pilot participants is helping to improve the process
- Assuming pilots continue to result in favorable feedback, anticipate going live for the 2021 award process

# Communities of Excellence

- Improving the ecosystem that enables healthy, well-educated, and prosperous communities
- 17 Communities currently participating
- Large and small, rural and urban, spanning the nation
- Representing over 8 million residents
- Have support of the Baldrige Judges/Overseers/Examiners, NIST, Baldrige Foundation, and Alliance for Performance Excellence
- Developed a five year plan with the goal of having a new category for Baldrige Award approved and running by 2023



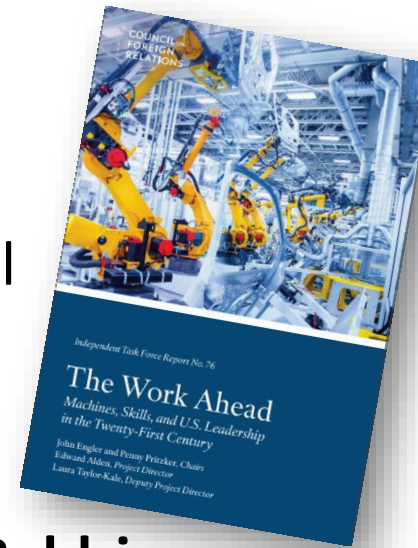
# Global Excellence Council

- BPEP is a founding member
- Partner with 12 international programs: Africa\*, Australia, Brazil, China, Dubai, Europe, India, Japan, Malaysia, Mexico, Singapore, Spain/Portugal
- Share information, insights, and best practices
- Committed to spreading excellence across the globe

# Workforce Development Excellence

“Recogniz[e] 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.**”

—Executive Order 13845, Establishing the National Council for the American Worker, July 2018



“Create a new award, **modeled after the successful Baldrige Awards**, to recognize and promote companies that follow high-road workplace practices.”

—The Work Ahead, Council on Foreign Relations, April 2018



# Exploring New Opportunities

## Advanced Manufacturing/Manufacturing 4.0

- BPEP is exploring partnerships with NIST's MEP program to develop and provide assessment, recognition, and best-practice sharing for small/medium sized manufacturers

## Government Excellence

- BPEP is exploring partnerships with Office of Management and Budget and the Office of Personnel Management to develop an assessment program for federal agencies

# Alliance for Performance Excellence Update

**THE ALLIANCE FOR PERFORMANCE EXCELLENCE**  
Learn. Share. Grow!

The Journey to Performance Excellence Start Here

Home About Us What We Do Members Alliance Programs Library Contact Us

Find Performance  
**IMPROVEMENT**  
HELP NEAR YOU



**Brian Lassiter**  
**Chair**  
**Alliance for Performance Excellence**



# Alliance for Performance Excellence

- **Mission:** “Enhancing Our Members’ Ability to Grow Baldrige-based Performance Excellence”
- **Vision:** To be the premier resource for a thriving Baldrige community
- 29 programs serving 50 states and US Territories
- Nearly 1250 annual applications received (160 full)
- Over 1600 examiners, 34 staff, 460 other volunteers
- Nearly 15,000 members, ~\$9M combined budget



# Key Updates this Quarter

- **2019 Baldrige Fall Conference is in 3 Weeks!**
  - **October 24-25 at the Gaylord, Nashville**
  - **Solid program – great learning, networking**
  - **Sponsorship opportunities still available**
  - **Information & registration: [baldrigeconference.org](http://baldrigeconference.org)**
- **Continuing work on strategic Task Forces:**
  - **Guidelines for lower levels of Tiered Awards**
  - **Communities of Excellence partnership**
- **Collaborating with Baldrige Enterprise on Task Forces**







Baldrige – *America's Best Investment*  
**A Special Thanks to Our Donors & Sponsors!**

The Baldrige Family  
Midge, Molly, &  
Megan

