



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



# JOURNAL OF PERFORMANCE EXCELLENCE

2022-2023





# The Year in Review

by Al Faber  
President and CEO, Baldrige Foundation

“We are learning to live with COVID...and re-investing in American manufacturing as we seek to re-balance our ability to remain self-sufficient in critical areas like computer chips which effect a plethora of industries. As never before, *America needs Baldrige!*”

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*®.

This past year has continued to test us in so many ways. The persistent COVID-19 pandemic, pending recession, steep inflation, and strained supply chains continue to challenge all sectors of the economy. The 2022 Russian invasion of Ukraine has forced global cooperation and alliances to unite against aggression in Eastern Europe, but at a high cost which is further straining international oil and gas markets. Tensions remain high between China and Taiwan, North and South Korea, and throughout the Middle East to include civil unrest in Iran. All of these factors are having an adverse impact on the global economy and forcing organizations to re-think their strategies and futures. But there have been positive developments as well. We are learning to live with COVID, developing new treatments that are proving to be more effective, and re-investing in American manufacturing as we seek to re-balance our ability to remain self-sufficient in critical areas like computer chips which effect a plethora of industries. As never before, *America needs Baldrige!*

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.

Shortly following the 33<sup>rd</sup> Quest for Excellence Conference, on July 25, 2022, NIST announced that, “Over the past 18 months, the leadership teams at Baldrige, the National Institute of Standards and Technology (NIST), and the Department of Commerce have been discussing the desire to enhance the reach and impact of the Baldrige Program. After much deliberation and consideration of multiple factors we have collectively decided to initiate a comprehensive, independent review to “reimagine” the Baldrige Program. This review will assess how the program can best advance U.S. competitiveness and address the challenges most relevant in today’s business environment, as well as examine how its impact and accessibility could be increased. The output of this process will inform how the program can best be positioned for maximal future impact to our nation.”

The independent review is expected to be completed in the first quarter of calendar year 2023 and we look forward to the recommendations and implementation strategies once approved by the Department of Commerce. The Baldrige Foundation and Baldrige Community will work closely with the national program on next steps to *increase the impact and accessibility to Baldrige and advance U.S. competitiveness.*

At the 33<sup>rd</sup> Quest for Excellence we did have the opportunity to recognize three national role-model organizations as the newest Malcolm Baldrige National Quality Award Winners! All three are

repeat winners and one, MidwayUSA, is only the second organization to ever win the National Quality Award three times. The organizations recognized in 2022 are:

- MidwayUSA, Columbia, Missouri (service; also won in 2009 and 2015 in the small business sector)
- Charter School of San Diego, San Diego, California (education; also won in 2015)
- Mid-America Transplant Services, St. Louis, Missouri (nonprofit; also won in 2015)

*Congratulations to each of these outstanding organizations!*

### ADVOCACY

Throughout FY2022, the Foundation continued to advance the Baldrige Program, State-based Programs, and Communities of Excellence 2026 (COE2026) with leaders at the national, state, and local levels. We are always looking for new opportunities to strengthen our relationships with members of the Commerce, Justice, Science and Related Agencies Subcommittees and their staffs in both the House and the Senate. We provide members and their staffs with important updates and developments on the many benefits of Baldrige throughout the nation and across every sector of the economy and impress upon them the excitement behind Communities of Excellence 2026, Cybersecurity, and our continuing work in Rural Health Care. The Baldrige approach to workforce development in all sectors of the economy has resonated with political leaders at every level, reinforcing our contribution to a stronger and more resilient America.

Most notably, we continued our work with COE2026 and BPEP to coordinate support for "Community" to become the 7th Baldrige Awards Category through the NIST reauthorization language. On August 9, 2022, President Biden signed into law the CHIPS and Science Act of 2022, which also authorized "Community" becoming the seventh category of the Malcolm Baldrige National Quality Awards. The

bill now authorizes communities across the United States to apply for, and receive, the highest-level of recognition for quality and performance excellence using the Baldrige Criteria. Award recipient communities will serve as national role-models and share their best practices, which will allow thousands of other communities across America to learn from them.



Recognizing Toledo, Ohio, Communities of Excellence leader Angela Brandt, President of Promedica Senior Care (center), along with Dr. Margot Hoffman, President and CEO of the Partnership for Excellence and Al Faber, President and CEO of the Baldrige Foundation.

As Tommy Gonzalez, City Manager of El Paso, Texas, who formerly led the City of Irving, Texas to win the Malcolm Baldrige National Quality Award using the Nonprofit Criteria in 2012 stated: "Engaging multiple organizations can take communities to the next level in the pursuit of excellence for the communities they serve. The City of El Paso has a history of collaboration that is rooted in growing opportunities and service excellence in our organization, and for our community. Through our award-winning Communities of Excellence (COE) efforts, we work collaboratively with over 40 organizations across our community, achieving better results, improving services, and changing people's lives. Future Baldrige award-winning communities will serve as role models for others, spreading the possibilities created by the Baldrige model in ways not possible before."

This is an historic achievement for the Baldrige Foundation and our advocacy

*“On August 9, 2022, President Biden signed into law the CHIPS and Science Act of 2022, which also authorized “Community” becoming the seventh category of the Malcolm Baldrige National Quality Awards.”*

efforts. Not since the addition of Health Care and Education in 1998 and the Nonprofit sector in 2005 has Congress expanded the Baldrige Award categories. This latest expansion is a continuing demonstration of the ability of the Baldrige criteria to improve, evolve, and remain relevant. The Baldrige Foundation will continue to provide organizational and administrative support to Communities of Excellence 2026 and in FY2022 was the sole sponsor of the COE Criteria and Framework. We look forward to helping scale-up participation in communities nationwide and securing additional funding to help us drive success using the new “Community” Baldrige Excellence Framework.

Additionally, the Foundation will recognize Lowell C. Kruse, Baldrige Award Recipient and Cofounder of Communities of Excellence 2026, and Richard A. Norling, Baldrige Award Recipient and Cofounder of

Communities of Excellence 2026 with the E. David Spong Lifetime Achievement award which recognizes individuals who have performed truly extraordinary service that has changed the world, and inspired others to do the same. Both Lowell and Richard did groundbreaking work to adapt the Baldrige framework to the Community setting, leading in 2022 to Congress officially authorizing Community as an eligible category for the Malcolm Baldrige National Quality Award. We will also recognize Stephanie Norling, Executive Director of COE2026 with the Foundation’s Award for Leadership Excellence for her work over the past decade leading the COE program and building support across the United States through its national collaborative and pilot programs.

We continue to enjoy strong bipartisan support in the Senate from both Jeanne Shaheen as the Chair, and Senator Jerry Moran, the ranking member, of the CJS



Baldrige Fall Conference and COE2026 Conference Co-hosts and guest speakers (from left), Nick Macchione, Director of the San Diego County Health and Human Services Agency; Stephanie Norling, Executive Director, COE2026; Denise Shields, Board Chair, California Awards for Performance Excellence; Molly Baldrige, daughter of Mac Baldrige, and Al Faber, President and CEO of the Baldrige Foundation.

Subcommittee on Appropriations. Most notably, the entire subcommittee continues to support our efforts. With their support, the Foundation was instrumental in growing the Federal Appropriation for the Baldrige Program from \$2.5 million to \$2.7 million for FY23. This year, we also have the honor of presenting the Baldrige Foundation Award for Leadership Excellence in Government to Congressman Robert B. Aderholt from Alabama, for his leadership in rural development and health care, agriculture, veterans' issues, education, labor, and numerous other areas which have made him one of the nation's most respected members of Congress.

As part of the Foundation's advocacy outreach, we continue to track each state-based program's highest award recipients, send a letter of congratulations to each of them, and encourage them to apply at the national level. Additionally, we send letters of congratulations to both U.S. Senators, and their Congressional Representative so they are aware of these award-winning organizations. We also do this for national award recipients as well.

## FUNDRAISING

Thanks to all our individual and organizational donors, sponsors, and partners over the past year who have helped us continue our mission to support the Baldrige Program and performance excellence in all sectors of the economy.

This year's giving campaigns, our *End-of-Year Campaign*, *Giving Tuesday*, *Planned Giving*, and growing membership in the *Mac Baldrige Society* were once again successful and we truly appreciate everyone's continued support. No gift is too small, from individual gifts through online donations resulting from social media outreach to transformational gifts as we grow membership in the Mac Baldrige Society. These collectively all work to advance the Baldrige Framework and grow its use across America and beyond. We are proud to showcase our FY2022-2023 donors on page 112 of this year's Journal.

On June 1, 2020, we established the Baldrige Foundation Institute for Performance Excellence. The Institute undertakes research projects, hosts conferences and other activities, and conducts executive-level and online skills training. It publishes and distributes a wide variety of educational materials including white papers, and the *Chronicle of Leadership and Management* to help organizations and individuals improve their leadership and management skills.

The Institute also makes available exclusive research materials and original content along with training and educational opportunities through online and classroom instruction. We have a best practice sharing online library and many other helpful resources, including instructional videos and webinars. The exclusive networking opportunities and sharing of best practices alone can provide organizations and their employees with invaluable assistance in pursuing their performance excellence goals.



The Institute is helping the Foundation move boldly into the next era of Baldrige with great confidence in our future, thanks to the support of our Institute Trustees who comprise the Mac Baldrige Society®. The Mac Baldrige Society is our campaign to establish the Institute with the generous support of the first twenty major donors who also serve as the Institute's Trustees. The first Institute Trustees are; the Baldrige Family, Adventist Health, MidwayUSA, Stellar Solutions, ABOUT Healthcare, and Freese and Nichols. Our newest members in 2022-2023 are Tata Sons, Mid-America Transplant, Center for

Organ Recovery & Education (CORE), and Adani Enterprises Ltd.

Commenting on becoming a Mac Baldrige Society Trustee, S. Padmanabhan, Chairman, Governing Council, Tata Business Excellence Group, and Baldrige Foundation Board member said, "We are delighted to become a founding member of the Mac Baldrige Society® and Trustee of the Baldrige Foundation's Institute for Performance Excellence. Tata is the first international company to be accorded this opportunity. The Tata group has implemented the Baldrige excellence model for improving organization performance and quality across multiple industry clusters for almost three decades, and we look forward to enhancing this relationship. In this new role, we will be able to contribute to the Society based on our experience, enrich the value of the Baldrige, and help create a future for the Framework."

As Diane Brockmeier, President and CEO at Mid-America Transplant stated: "Mid-America Transplant has been integrating the Baldrige criteria into its day-to-day operations for nearly two decades. We began our Baldrige journey in 2003 as a way to continuously improve how we operate, so we could save more lives through organ and tissue donation. Since then, the tenets of quality and performance improvement have become the Mid-America Transplant way, helping us set donation records year after year and giving more people a second chance at life.

Since adopting the Baldrige Excellence Framework with the goal of saving more lives, Mid-America has continuously improved processes and outcomes to increase the number of lifesaving organs transplanted by 167 percent and increase the impact of tissue donation by 385 percent."



S. Padmanabhan, newest Foundation Board member and Executive Chairman, Tata Business Excellence Group and Chief Ethics Officer, Tata Sons Private Ltd.

Susan Stuart, President and CEO of CORE commented "CORE's Baldrige performance excellence journey has empowered us to focus successfully on the mantra, 'Every Donor, Every Time.' Today, a decade into this journey, CORE is a results-driven organization, thriving in a culture of transparency and innovation. The result: CORE is saving and healing more lives than ever before – the most significant indicator of performance excellence and proof that the Baldrige framework affects positive change. 2021 was CORE's third consecutive record-breaking year Saving and Healing lives through organ, tissue, and cornea donation. The organization made possible more than 700 life-saving organ transplants, thanks to the generosity of an unprecedented number of organ donors. That is a 150 percent increase since CORE began its performance excellence journey in 2012. CORE is honored to become part of this distinguished group of Mac Baldrige Society trustees. In doing so, CORE hopes to signify that our performance excellence journey is one without a destination. We will, now and in the future, continue to follow the Baldrige Framework and the roadmap



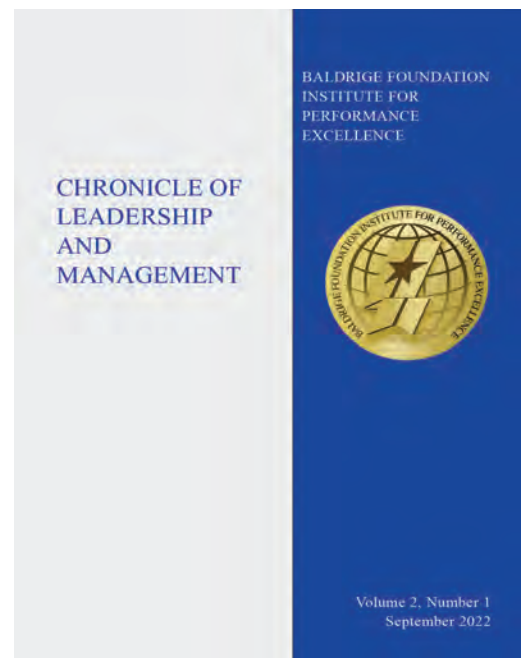
it provides us on our mission: Saving and Healing lives through donation.”

Under the visionary leadership of Mr. Gautam Adani, the Adani Group has witnessed unprecedented growth and has consolidated its position as India’s leading diversified business portfolio. The Group aligns its operational framework and leadership with its core philosophy of ‘Nation Building’ and ‘Growth with Goodness’ — a guiding principle for sustainable growth. The Group is committed to protecting the environment and improving communities through its CSR programs based on the principles of sustainability, diversity, and shared values. “The time has come to demonstrate and deeply institutionalize a culture of Business Excellence that covers all our businesses, as well as all our corporate functions. This is the most effective way to demonstrate benchmark performance and consolidate a strong foundation on which our enterprise can continue to achieve higher scales of performance and create high levels of stakeholder value on a sustainable basis.” said Mr. Gautam Adani. “Our pledge to join Mac Baldrige Society demonstrates the Group’s commitment to integrate Baldrige criteria for performance excellence in each aspect of business management and deliver long-term value to all stakeholders.”

The Institute Trustees are making a commitment to preserve and promote the Baldrige Framework and to help ensure that Baldrige remains relevant for future generations of organizations across all sectors of the economy. My sincerest thanks to each of these organizations for their leadership, and we look for others to join them in the coming months to help us continue in our mission.

In addition to the many resources available through the Institute, we released the Volume 2 of our flagship publication, the *Chronicle of Leadership and Management*.<sup>®</sup> I would like to thank all of our authors for their outstanding articles, and the entire

editorial board for reviewing the numerous submissions we received. I also want to recognize Dr. Mark Wayda, our Vice President of Marketing, for his final editing and coordination for publication.



Much of Volume 2 examines how organizations have used Baldrige principles to manage through the multiple crises experienced during the COVID-19 pandemic. The various authors have gleaned important lessons that may be applied by other organizations, in any sector of the economy, to create greater resilience when facing volatility and uncertainty. The Institute is also excited to publish Christel Gollnick’s article, “Key Success Factors in Communities of Excellence,” a particularly timely article on Communities of Excellence 2026 given that Congress has just authorized communities as the 7th sector for the Baldrige Award. Copies of the Chronicle are available for download, free of charge, on the Foundation website.

If Baldrige is to remain relevant and expand its reach, additional thought leadership in the domains of leadership and management will be required to inspire its application in every sector of the economy. The Baldrige Foundation’s Institute for Performance Excellence was created to serve as a platform for innovation, creative thought

leadership, and to provide individual and organizational resources to support transformative adult learning and help elevate organizational performance excellence. This philosophy guides the Foundation's staff and drives us to create opportunities for investment in our future as we work tirelessly to strengthen America's competitiveness in the global economy.

## LEADERSHIP AWARDS

Since the Hertz award was first established, we have grown our popular individual awards program which includes the E. David Spong Lifetime Achievement Award, the Foundation Awards for Leadership Excellence, and the Dr. Curt Reimann Baldrige Scholarship.

The E. David Spong Lifetime Achievement Award was authorized by the Baldrige Foundation Board of Directors in 2016. Recipients must have made sustained contributions of leadership excellence with exceptional and far-reaching magnitude in a manner worthy of recognition at the national level. The committee selects recipients for the Lifetime Achievement Award in recognition of an individual who has performed truly extraordinary service within the quality movement and Baldrige Enterprise. The award recognizes the entirety of an individual's career, rather than, or in addition to, a single contribution. Lifetime Achievement Award winners are credited with changing their world and inspiring others to do the same.

The Harry S. Hertz Leadership Award, authorized by the Baldrige Foundation Board of Directors in 2012, recognizes an individual whose behaviors provide a role model for others.

While no one person in an organization can be credited with the achievement of excellence, this award will recognize and set forth role-model behaviors that

## Our 2023 Individual Award Recipients are:

### E. David Spong Lifetime Achievement Award

- Lowell C. Kruse, Baldrige Award Recipient and Cofounder of Communities of Excellence 2026
- Richard A. Norling, Baldrige Award Recipient and Cofounder of Communities of Excellence 2026

### Harry S. Hertz Leadership Award

- Major General John C. Harris, Jr., The Adjutant General, Ohio National Guard

### Foundation Awards for Leadership Excellence:

- Honorable Robert Aderholt, Member of Congress from Alabama in the Government Sector
- James Barlow, Chief Executive Officer, BZI Steel in the Business Sector
- Dr. Mark L. Blazey, President (retired), Quantum Performance Group, Inc. in the Business Sector
- Michael Daniel, President and CEO, Cyber Threat Alliance in the Cybersecurity Sector
- Erik Decker, Vice President & Chief Information Security Officer, Intermountain Healthcare in the Cybersecurity Sector
- Richard A. Derrick, City Manager/Chief Executive Officer, City of Henderson, Nevada in the Government Sector
- Karen S. Evans, Managing Director, Cyber Readiness Institute in the Cybersecurity Sector
- David S. Finn, CISA, CISM, CRISC, CDPSE, Vice President, College of Healthcare Information Management Executives (CHIME) in the Cybersecurity Sector
- Dr. Michael Flores, Chancellor, Alamo Colleges District in the Education Sector
- Brenda Grant, Formerly Performance Excellence Coach, UPMC Western

Maryland and Chief Strategy Officer, Charleston Area Medical Center Health System in the Health Care Sector

- Deanna Herwald, Vice President of Quality Management Systems, MidwayUSA in the Business Sector
- William H. Kose, MD, Vice President of Special Projects, Blanchard Valley Health System in the Health Care Sector
- Sangita P. Mallik, Executive Vice President, SANPEC, Inc. in the Business Sector
- Theresa Z. Meadows, RN, MS, Senior Vice President and Chief Information Officer, Cook Children's Health Care System in the Cybersecurity Sector
- Stephanie Norling, Executive Director, Communities of Excellence 2026 in the Nonprofit Sector
- Philippe Salah, CEO, Dental Monitoring in the Health Care Sector
- Sunil Sinha, Director, Tata International West Asia in the Business Sector
- Tim Tuter, Executive Director, The Charter School of San Diego in the Education Sector
- Laura Viaches, Associate Vice President - Market Access, Lilly USA, LLC in the Business Sector
- Janet Wagner, CEO, Area CEO Sutter Health South Bay Medical Centers in the Health Care Sector

### Dr. Curt Reimann Baldrige Scholars are:

- Lewis W. Marshall Jr., MS, MBA, MD, JD, FACP, FACHE, FAADM, Fulbright Scholar Specialist; Affiliate Dean & Assistant Clinical Professor of Medicine, Weill Cornell Medicine at Lincoln
- Dr. Kathleen Moco, Retail Team Manager, Swedish Match North America





President and CEO of the Baldrige Foundation and Foundation Board Chair Dr. Kay Eggleston present a memento to outgoing Board member Rulon Stacey during the 2022 Quest for Excellence Conference.

management by fact, societal responsibility, focus on results and creating value, and systems perspective.

The Baldrige Foundation Awards for Leadership Excellence were authorized by the Baldrige Foundation Board of Directors in 2016. They recognize leaders in the following sectors: Business (Manufacturing, Service, Small Business), Nonprofit, Government, Health Care, Education, and Cybersecurity. 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, MD. The scholarship was created to recognize and honor the important role played by examiners in the Baldrige Award process.

have inspired, encouraged, challenged, and empowered others to achieve performance excellence. Award recipients will share how they lead their organizations and inspire their people to achieve high performance. Recipients of the award personify the Harry S. Hertz Award Core Value Attributes and Leadership Behaviors: visionary leadership, customer-focused excellence, organizational and personal learning, valuing workforce members and partners, agility, managing for innovation,

### PROMOTING PERFORMANCE EXCELLENCE

An important part of the Foundation's mission is promoting performance excellence in the United States and throughout the world. In furthering that mission over this past year, we strengthened several of our strategic partnerships and created new ones.



CEO Executive Roundtable in Atlanta, Georgia, co-sponsored by the Foundation's Institute for Performance Excellence and Institute Trustee ABOUT Healthcare.

Our partnerships with international organizations continue to grow through mutual support and engagement in a number of ways. I had the opportunity to serve as a guest speaker and panelist during several international conferences, and for the first time, we conducted skills training and certification for international stakeholders via zoom. On November 25, 2022, I served as a guest speaker at the 30th CII Excellence Summit in Bengaluru, India. The theme — “India Inc @2047 — Capabilities, Technologies & Business Models,” focused on India’s future with sessions led by global thought leaders and industry experts. Though leaders at the summit led deliberations on strategy, technologies, and operational models to improve quality and economies of scale.

We were excited for one of our Board members, Sunil Sinha, Resident Director at Tata Sons Middle East and North Africa, who was named an Academician in the International Academy for Quality (IAQ) in 2022. IAQ is an independent, self-supported, nonprofit, nongovernmental organization that is administered by an assembly of individuals who have been elected by their peers from among the most respected, active, and experienced protagonists of quality in the world. IAQ is a prestigious global organization comprised of about 150 professionals from the field of quality and Sunil’s inclusion in this group is a recognition of the global leadership role he has played in quality and performance excellence over several decades and reflects the professionalism and stature of the Foundation’s Board.

In May, 2022, Competitive Solutions Inc. became the newest Institute for Performance Excellence Channel Partner. Competitive Solutions Inc., is a professional consulting and software based organization, and since 1991 has assisted organizations on their journey to performance excellence through effective leadership training and utilization of data. CSI is giving organizations the power

and tools to move their business forward by creating cultures of accountability and engagement.

Competitive Solutions, based in Raleigh, North Carolina, has helped transform organizations such as 3M, Colgate Palmolive, Rockline, Alcon, and many more by providing the best metrics at the appropriate levels of their company to drive change, aligning and linking everyone in their organizations, and freeing company leaders to be more strategic. The inclusion of Competitive Solutions as a channel partner is yet another example of how the Institute for Performance Excellence is bringing key relationships to support the larger Baldrige Foundation mission: to promote organizational performance excellence in the United States by supporting the Baldrige Program.

In 2022, I had the honor of serving as a Judge for the National Center for Healthcare Leadership’s (NCHL) Gail L. Warden Leadership Excellence Award. For more than 16 years, this award and celebratory event honors a health care leader whose commitment, values, and contributions have improved the health of the public through leadership and organizational excellence. The Gail L. Warden Leadership Excellence Award was named in honor of Gail L. Warden, founding chairman of NCHL, president emeritus of Henry Ford Health System, and one of health care’s foremost leaders. This distinction recognizes his remarkable accomplishments as an innovator in health care delivery, community wellness, and health policy, and as a mentor and inspiration to future generations. The 2022 recipient was Eugene A. Woods, M.B.A., M.H.A., FACHE, president and chief executive officer of Atrium Health. Woods was presented with this award and honored during NCHL’s 2022 Gail L. Warden Leadership Excellence Award Celebration held on Tuesday, November 15, 2022, at the Field Museum of Natural History in Chicago.





Foundation President and CEO Al Faber served this year as a finalist judge for the Texas Woman's University Master in Healthcare Administration Case Study Competition.

As a member of the Board of Directors for the Commission on Accreditation of Healthcare Management Education (CAHME), I have the opportunity to network with health care professionals in higher education across the nation. In this role, we promote the Baldrige Framework with hundreds of graduate programs and their students who are currently pursuing an advanced degree. As a judge for the Texas Woman's University Case Competition this year, I witnessed first-hand how MHA programs across the United States are developing the future health care leaders of tomorrow. Exposing them to the Baldrige Framework now is an investment that will pay great dividends down the road.

The Baldrige Foundation and its Institute for Performance Excellence announced a new strategic partnership in 2022 with MindEdge Learning, bringing hundreds of new courses and certifications to the Baldrige community, including discounted tuition rates for partners of the Institute for Performance Excellence. MindEdge is a learning house with four different doors: higher education for credit, continuing education non-credit, professional development, and corporate solutions. The courses and certifications provided by MindEdge are high-quality, expertly designed, and learner-approved, and focus on helping adults learn the

fundamentals and master the skills needed to succeed personally and professionally. This new partnership will bring over 370 new educational offerings to the Institute, including certification programs and recognized continuing professional education credits, to meet the specific requirements of professional learning in the 21<sup>st</sup> Century.

We celebrated a third year with our co-branded cybersecurity awards in health care along with the College of Healthcare Information Management Executives (CHIME). *Digital Health Most Wired* recognition is the new standard for IT recognition throughout hospitals and hospital systems across the nation. This achievement celebrates and validates an organization's dedication to patient and community focused Digital Health. They have proven their commitment to leading performance excellence and pioneering advancements in the health care industry. Baldrige was established to help organizations improve in a meaningful and structured way. This is why the Baldrige Foundation is partnering with CHIME on the *Digital Health Most Wired* program. Together, we have worked to transform the entire survey, results, and recognition program to mirror the Baldrige program's improvement framework. More than 38,000 organizations were surveyed, benchmarked, and ranked, resulting in a



The Foundation, through its Institute for Performance Excellence has hosted a series of co-branded events including its popular Leader Dialogue events with Institute Trustee ABOUT Healthcare.

record number of organizations setting themselves apart on their excellence journey to achieve the highest-level of recognition.

We will continue to support Communities of Excellence 2026 and all of their great work across the nation in their pilot communities. We are excited to have been instrumental in securing congressional approval for “Community” to become the 7<sup>th</sup> Category of the Baldrige Awards. If we have learned anything over the past 2 years, it is the value of community solutions to help solve the most complex challenges, and the need for leaders from every sector to come together and develop strategies to continuously improve their communities by leveraging their unique strengths. The “Community” Framework and award process to identify role-model communities and share their best practices may truly become the brightest star in the future of Baldrige.

In summary, fiscal year 2022 proved to be another challenging, yet successful year for the Baldrige Program, Foundation, and State-Based Programs. With a strong commitment to our mission and strategy, we continue to grow fundraising opportunities and strengthen the Baldrige brand. The Foundation’s

operational costs remained under budget, demonstrating our responsible stewardship of the Foundation’s endowment and commitment to sustainability. Together, along with the Foundation’s Board of Directors, we navigated another tumultuous year dealing with the persistent COVID-19 pandemic, record inflation, and a pending recession to ensure a bright future for the Foundation, and the Institute for Performance Excellence.

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 Mark Hamilton and Hamilton Studios for many of the images used here. Thanks also to Rebecca Ryan 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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# Reinventing Ourselves for Long Term Success

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

“We remain optimistic and eager to resume the Malcolm Baldrige National Quality Award program in time for the 2024 applicant cycle, stronger and with a broadened mandate. Change is here.”

This year the Baldrige Quest will be different. Change has been coming. Change is here. And it is time for all members of the Baldrige community to reunite with a shared commitment, focus, and action for long term success.

## The Two-Year Pause

In June 2022, the Department of Commerce announced an external review of the Baldrige Performance Excellence Program (BPEP). The review timeline placed an abrupt hold on the national Baldrige award application cycle and paused many of the annual training opportunities for the 2022 year. In November, a further government announcement indicated that the 2023 application and award cycle would be paused as well, pending the recommendations of outside consultants: “The program review will assess how BPEP can best advance U.S. competitiveness and address the challenges most relevant in today’s business environment, as well as examine how its impact and accessibility could be increased.” While the consultants have sought broad-based input, their recommendations have yet to be announced or acted upon by NIST and the Department of Commerce.

The disruption of two award cycles is not insurmountable. We remain optimistic and eager to resume the Malcolm Baldrige National Quality Award program in time for the 2024 applicant cycle, stronger and with a broadened mandate. Change is here.

## Roles of the Baldrige Foundation

The Baldrige Foundation was designed to fulfill an advocacy role. During the challenging years of 2012-2018, when financial support for the Baldrige program was eliminated from the federal budget appropriation, the Foundation’s funding kept the program alive, but depleted the Foundation’s financial resources to a critical state. The Foundation has continued to work with Congressional offices on both sides of the aisle to restore the public part of the public-private partnership and to maintain Baldrige program funding as a recurring line item within NIST’s annual congressional appropriation. The Foundation has sustained the Baldrige program from the private partnership side, when the public partnership side, as administered by Commerce through NIST, has experienced times of diminished governmental support.

The Baldrige Foundation has also been instrumental in expanding the Baldrige program to include a new sector: “Community”



One of the responsibilities of the Baldrige Foundation Board Chair is to serve as Master of Ceremonies for the annual presentation of the Malcolm Baldrige National Quality Award. Here, in the first in-person event after the impact of the COVID-19 pandemic, Foundation Chair Kay Eggleston opens the ceremony recognizing the 2019, 2020, and 2021 Award recipients in National Harbor, Maryland, April 3, 2022.

has become the seventh industry sector and has received legislative approval to participate in the Malcolm Baldrige National Quality Award. The Foundation's legislative advocacy is working toward securing an increased funding appropriation to implement this new award category, beginning with the FY 2024 budget.

### Reaffirming the Baldrige Foundation's Mission and Purpose

The Baldrige Foundation has continued to reflect on why we exist – to what end? Our mission remains relevant in ensuring the long-term growth and viability of the Baldrige Performance Excellence Program, and in supporting performance excellence in the United States and throughout the world.

Continued fundraising is essential to maintaining the Baldrige Foundation's primary role in sustaining a healthy public-private partnership for the Malcolm Baldrige National Quality Award. The Foundation also advances performance excellence through the programming of its partner-based Institute for Performance Excellence. Our reach extends throughout the United States and globally. The Foundation also provides sponsorship development services to support the annual Quest for Excellence and other Baldrige-based conferences.

### Reinventing Ourselves for Long Term Success

Today's circumstances remind us of the times that led to the original founding of the Malcolm Baldrige National Quality Award some 35 years ago. It was a time when American manufacturing competitiveness and innovation were seriously lagging that of Japan. Secretary of Commerce Malcolm Baldrige challenged our most prominent corporations and businesses to innovate, not unlike we are asked to do today. Following Mac Baldrige's untimely death,



*Foundation Board Chair Kay Eggleston hosts the Foundation's first annual Mac Baldrige Society Member's Dinner during the 33<sup>rd</sup> Quest for Excellence® conference, National Harbor, Maryland, April 5, 2022.*

his successors continued to advance his vision, achieving congressional action to establish the Baldrige Performance Excellence program and the nation's highest recognition for performance excellence, the Malcolm Baldrige National Quality Award. It is again time to innovate, to affirm our core mission, and renew our commitments as a source of continuing strength. The Baldrige Foundation will be a valued partner with you in this work ahead.

### The Mac Baldrige Institute Trustees

The highest levels of the Baldrige Foundation's supporters are the Mac Baldrige Institute Trustees. Their commitments have been pivotal to sustaining our work ahead.

As a new trustee, you/your organization would engage with notable industry leaders through opportunities that are unique to the trustee level of support. Each of the Mac Baldrige Trustees has pledged exceptional donor engagement and support. We are honored to welcome Tata and the Adani Group as our two newest Trustee organizations. We invite you to join.





# 2021 Malcolm Baldrige National Quality Award Recipients

The 2021 Malcolm Baldrige National Quality Awards were presented on April 3, 2022, in National Harbor, Maryland, near Washington D.C. The Quest for Excellence® conference, which typically opens with the Baldrige Award ceremony, was postponed in 2020—the year the 2019 winners would be honored—due to COVID-19. The conference was presented virtually in 2021, also due to COVID, and so the ceremony honoring the 2020 Baldrige Award winners was also postponed. As a result, the Baldrige Award ceremony in 2022 featured all 14 award winners from the classes of 2019, 2020, and 2021.

Counting the three winners in the class of 2021, a total of 137 Baldrige Awards have been presented since 1988, to a total of 123 organizations, including 12 two-time recipients and two three-time winners.

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 2005 to include nonprofit or government organizations, with the

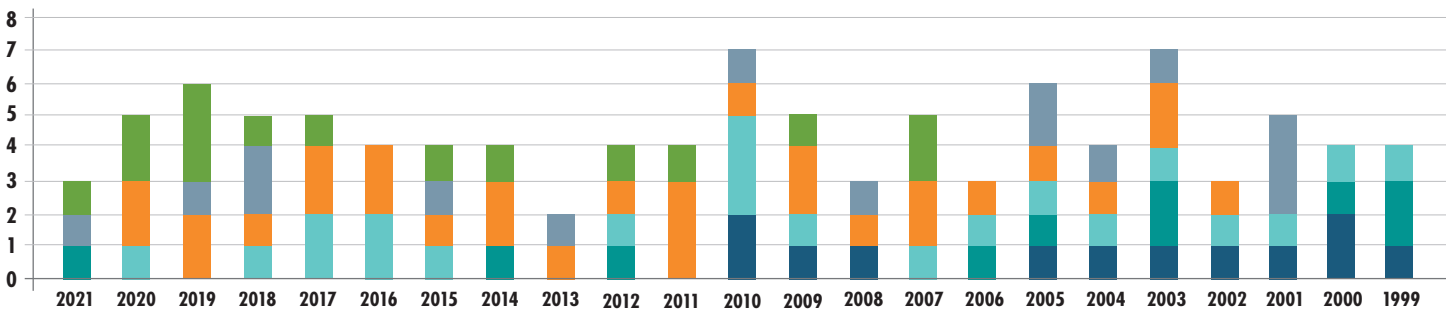
first recipients in the new sector in 2007. The manufacturing sector has the largest number of award recipients all time with over 23 percent of the awards, but since Congress added the new sectors in 1998, Health Care has dominated all recipients, with small business second.

There were three recipients in 2021. All were repeat winners, with two receiving their second Baldrige Award, and one becoming the second three-time recipient. The 2021 recipients represent the education, nonprofit, and service sectors. The service sector representative, MidwayUSA, won the Baldrige Award twice previously, both in the small business sector, but its business has grown so substantially over the years that it no longer meets the definition of small business.

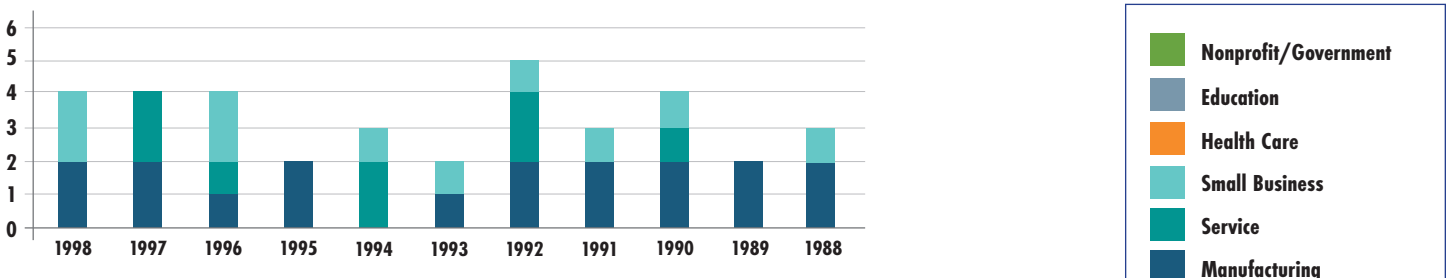
The 2021 Baldrige Award recipients are:

- MidwayUSA, Columbia, Missouri (service; also won in 2009 and 2015 in the small business sector)
- Charter School of San Diego, San Diego, California (education; also won in 2015)
- Mid-America Transplant Services, St. Louis, Missouri (nonprofit; also won in 2015)

## BALDRIGE NATIONAL QUALITY AWARD RECIPIENTS BY SECTOR



## CONGRESS AUTHORIZES THE HEALTH CARE AND EDUCATION SECTORS IN 1998, NONPROFIT/GOVERNMENT IN 2005



Since 1999, 28.4 percent of Baldrige Award recipients have been in the Health Care sector, and 14.7 percent have been from the Education sector. Since 2007, 23.8 percent of Baldrige Award recipients have been from the Nonprofit/Government sector.



# Baldrige Foundation Board of Directors

*January 1, 2022 through  
December 31, 2022*

## **Officers**

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# MidwayUSA Columbia, Missouri

MidwayUSA is a family-owned internet retailer offering “Just About Everything”® for shooting, hunting, and the outdoors. It is a world leader in its market sector, ranking in the top 3 percent of the best U.S. performers in customer satisfaction out of 3,500 internet retailers. Offering more than 165,000 products from more than 900 suppliers, across 18 categories. MidwayUSA’s gross sales exceeded \$700 million in 2021. Employing 615 employees at its facility in Columbia, Missouri, the organization is proud that its employees share its values and have a passion for serving its customers, in addition to many having a deep passion for shooting, hunting, and outdoor sports. Since first adopting the Baldrige Criteria for Performance Excellence in 2006, MidwayUSA has

continued to pursue its vision “to be the best-run business in America, and the most successful, most respected business in our industry, for the benefit of our customers.”

This is the third Baldrige Award for MidwayUSA; the company was honored in the small business category in 2009 and 2015.

- In support of its vision “to be the best-run business in America, and the most successful, most respected business in our industry, for the benefit of our customers,” senior leaders share the mission, vision, and values with all stakeholders. The mission statement is reviewed and



Deanna Herwald (center), Vice President of Quality Management Systems at MidwayUSA, and Matt Fleming (second from right) President and CEO of MidwayUSA, are presented the 2021 Malcolm Baldrige National Quality Award, with Bob Fangmeyer (from left), Director of the Baldrige Performance Excellence Program, Kay Eggleston, Board Chair of the Foundation for the Malcolm Baldrige National Quality Award, and James Olthoff, performing the non-exclusive functions and duties of the Under Secretary of Commerce for Standards and Technology and Director, National Institute of Standards and Technology (NIST), April 3, 2022.

affirmed during the Strategic Planning Process, with changes approved by the Board of Directors and shared during monthly and quarterly meetings and through campus postings. Employees' ratings that the actions of leaders and coworkers align with the mission, vision, values, and organizational culture improved from 79 percent in 2017 to 90 percent in 2021, better than the best benchmark of a national survey.

- Senior leaders monitor dashboards daily, with cascading measures for departmental accountability. They engage employees, suppliers, and partners through the 12-month, rolling Strategic Planning Process. During monthly results reviews, the Chairman, President/CEO, and departments review performance via scorecards to create a short- and long-term focus on the mission and operational goals.
- Senior leaders lead the development of company action plans and corrective action reports to ensure alignment with the vision. A "Bucket List" serves as a collection site for innovative ideas or intelligent risks generated by employees that are analyzed as potential company action plans to help achieve strategic objectives and long-term goals.
- The senior leadership team selects future leaders annually to be mentored for leadership positions. Nearly 80 percent of management positions are filled from within, surpassing the benchmark for the online KPI Library, a crowd-sourced repository of key performance indicators.
- A rolling 12-month, seven-step (with 26 supporting steps) Strategic Planning Process is designed to help MidwayUSA identify the need for, enact, and sustain change, and monthly meetings give the organization the agility to respond quickly. Strengths-weaknesses-opportunities-threats (SWOT) analyses are used to understand and determine higher-level strategic challenges and potential mitigation strategies. The strategic plan execution completion rate, which represents the percentage of company action plans completed within the allotted time frame, is more than 95 percent, well above the KPI Library benchmark of 77 percent.
- Through an open-door culture, employees engage with and share concerns with senior leaders through state-of-the-business meetings, department knowledge sharing meetings, daily department musters (frontline staff assemble to receive performance information), new hire orientation, and employee focus groups.
- Employee satisfaction and engagement have remained steady at about 85 percent since 2015, 10 points above a national survey-provider best benchmark. Employees rate their satisfaction with the right tools and support to do their jobs at nearly 90 percent; this improved 4 points



James Olthoff, performing the non-exclusive functions and duties of the Under Secretary of Commerce for Standards and Technology and Director, National Institute of Standards and Technology (NIST), congratulates Matt Fleming, President and CEO of MidwayUSA, for receiving the 2021 Malcolm Baldrige National Quality Award, April 3, 2022.



Deanna Herwald, Vice President of Quality Management Systems at MidwayUSA, being congratulated by Kay Eggleston, Board Chair of the Foundation for the Malcolm Baldrige National Quality Award, on receiving the Baldrige Award, April 3, 2022.



## 2021 MALCOLM BALDRIGE NATIONAL QUALITY AWARD RECIPIENTS

since 2020. Other satisfaction survey results also improved since 2020, including appropriate amount of work, clear communication, competitive benefits, meaningful jobs, and input into decision making.

- Sales dollars per employee cost have nearly doubled, from about \$9 in 2004 to \$22 in 2020. This increase in workforce capability and capacity has led to over \$1 million in sales per full-time employee in 2020, up from about \$500,000 in 2014.
- MidwayUSA has averaged 39 percent net income growth every year over the past 12 years. This supports the organization sharing profits with staff, which it has done for the last 17 years. 2020 was a record profit-sharing year for the organization.
- MidwayUSA projects sustained benchmark leadership performance in workforce climate results, including the Employee Rewards Index, which compares benefits, services, and policies offered at MidwayUSA to local, award-winning, and industry organizations.
- Employees have rated satisfaction with “competitive salary for my position” at close to or at 90 percent since 2014; in 2021, this rating was almost 25 points higher than a national survey comparison benchmark. Measures of “advancement opportunities and growth within my position” and “continuous learning, training, and development” also show benchmark leadership results, which are about 15 points higher than the national survey comparison best.
- In 2020, MidwayUSA adopted session replay technology allowing employees to watch customers’ on-site experiences and predict areas of the website that may dissatisfy customers in the future. Through customer behavior and a product recommendation engine, active and inactive customers are only sent advertisements for things that are or predicted to be of interest to them. The Customer Behavior Analysis process and algorithms are used to identify customers unlikely to purchase products in the short term. In addition, in-house website design/development and application development capabilities have allowed MidwayUSA to integrate multiple cutting-edge technologies, such as artificial intelligence.
- Due to its supplier and partner relationships, MidwayUSA secured a high level of product allocation (a strategic inventory method used when the quantity of products available for purchase is limited), allowing for a 65 percent in-stock product rate, outperforming its next-best industry competitor.
- MidwayUSA significantly outperforms the next-best online retail competitor in overall supplier and partner satisfaction with a 94 percent satisfaction rate in 2020 and 2021. Survey data for “friendly, courteous, ethical relationship with suppliers” improved from 93 percent in 2018 to 97 percent in 2020, better than the best-competitor’s benchmark.
- Results for timely and accurate payments show that MidwayUSA is the benchmark leader among its



Members of Team MidwayUSA gathering prior to the 2021 Baldrige Award presentation ceremony, wearing the Team MidwayUSA Baldrige jackets made famous by Larry Potterfield, founder of MidwayUSA, April 3, 2022.



Matt Fleming, President and CEO of MidwayUSA, shares organizational best practices after receiving the 2021 Malcolm Baldrige National Quality Award, April 3, 2022.

competitors, with sustained performance since 2014 around 95 percent and approaching 100 percent. The next-best competitor is at about 80 percent.

- MidwayUSA averages 94-95 percent Customer satisfaction each year, outperforming a national marketing research company's circle of excellence benchmark since 2018. In addition, since 2018, customer loyalty and advocacy have exceeded 90 percent, at or above the circle of excellence benchmark.
- MidwayUSA's customer retention is at an all-time high, with 2 million active customers, retention is at 80 percent, 20 points higher than the national Direct Marketing Association, demonstrating MidwayUSA's benchmark leadership levels in its industry.
- MidwayUSA is a 13-time winner of the national marketing research company BizRate's Circle of Excellence Award®, which it has won for the last seven years in a row. MidwayUSA ranks in the top 3 percent of the best U.S. performers in customer satisfaction out of 3,500 internet retailers. Measures of on-time delivery, customer advocacy (likelihood to recommend), and customer loyalty have all yielded results for several years equal to or better than the circle of excellence benchmarks.
- MidwayUSA's growth in gross sales outperformed the next-best competitor benchmark by nearly 30 points, reaching 100 percent 2020. The organization has grown on average 17 percent annually over the past 12 years, almost double

the average industry growth rate of 9 percent.

- Gross sales exceeded \$700 million in 2021. Net income surpassed a national risk management association benchmark by nearly 25 points in 2020. Gross margin has nearly doubled since 2017.
- Return on assets has averaged 75 percent since 2016. This percentage is better than a national risk management association benchmark and sets MidwayUSA as the benchmark leader in its industry.
- For the last several years, MidwayUSA has been in the top 3 percent (circle of excellence benchmark) of all organizations surveyed by a national marketing research company in terms of price relative to other online retailers; product availability; and "frequent, engaging, relevant promotions."
- Key communities are generously supported through monetary contributions, educational TV vignettes, and Key Conservation Group events. Over \$50 million was donated by MidwayUSA to key communities in 2020 with over \$4 million being donated directly to the local community. In addition, shareholders donated \$1 million to the Baldrige Foundation, to be awarded to the first Missouri public school to receive a Baldrige Award.
- Employees support their community by participating in biannual Red Cross blood drives. In 2021, 55 units were collected, a 45 percent increase over 2018.



# Charter School of San Diego

## San Diego, California

“Kids Come First” at The Charter School of San Diego, which was authorized by the public San Diego Unified School District. The charter school provides free, personalized education to engage and redirect grade 6–12 students at risk of not graduating from high school through a hybrid in-person/online study program. The ultimate goal is to transform students’ lives by helping them graduate with a diploma or by redirecting them back to a traditional school site. The Charter School of San Diego currently serves about 3,500 students annually and since its establishment in 1994 has served nearly 48,000 students. The Charter School of San Diego is headquartered in San Diego, Calif., operates 13 instructional and educational resource center classrooms in San Diego County, and employs 130 workforce members. It is designated as a Dashboard Alternative School Status (DASS) school, which means that at least 70 percent of its total enrollment comprises high-risk groups such as high-transiency (multiple schools), credit deficient, homeless, or habitually truant students.

This is the second Baldrige Award for The Charter School of San Diego; the organization was honored in the same category in 2015.

- The Charter School of San Diego’s Pathways Personalized Education Program (PPEP) results in a personalized education plan for every student. PPEP inputs include feedback from students and their parents on student needs, barriers to learning, desired outcomes, and academic and learning style assessments. The PPEP allows The Charter School of San Diego to understand the student experience and monitor student engagement on an ongoing basis.
- Resource Centers (classrooms) provide individualized attention focused on daily student progress toward successful high school graduation or transition back to traditional high school. Over the past five years, The Charter School of San Diego demonstrated an overall increase in successful transitions from 95.7 percent to 98.1 percent, exceeding its goal of 95 percent each year.
- The Charter School of San Diego’s Dashboard Alternative School Status (DASS) graduation rate for all students and student groups reached 77 percent in the 2019–2020 school year, outperforming competitors and county and

state DASS schools. A DASS school is designated by the state and must have at least 70 percent of its total enrollment comprised of high-risk groups such as high-transiency (multiple schools), credit deficient, homeless, or habitually truant students.

- The Charter School of San Diego student performance for grades 6–8 and 11 in the California Assessment of Student Performance and Progress is double that of all competitors and county and state DASS schools in English Language Arts and three times higher in math. The Charter School of San Diego has sustained this performance for five years.
- The Charter School of San Diego listens to, and seeks feedback from, students and their parents to obtain actionable information on its services through surveys, home visits, and social media platforms. The Charter School of San Diego maintained overall student and parent satisfaction levels of close to 100 percent from 2016–2021, compared to around 80 percent for brand-name, out-of-industry benchmarks.



Tim Tuter, Executive Director of The Charter School of San Diego, relays some of his organization’s best practices after having accepted the 2021 Malcolm Baldrige National Quality Award, April 3, 2022.



Tim Tuter (center), Executive Director of The Charter School of San Diego, and Tiffany Yandell (second from right) Director of Operations and Technology at The Charter School of San Diego, are presented the 2021 Malcolm Baldrige National Quality Award, with Bob Fangmeyer (from left), Director of the Baldrige Performance Excellence Program, Kay Eggleston, Board Chair of the Foundation for the Malcolm Baldrige National Quality Award, and James Olthoff, performing the non-exclusive functions and duties of the Under Secretary of Commerce for Standards and Technology and Director, National Institute of Standards and Technology (NIST), April 3, 2022.

- For the past six years, 95 percent of enrolled students would recommend The Charter School of San Diego to others, and 97 percent of students' parents would recommend the school to a friend or family member.
  - The Charter School of San Diego provides a small, personalized learning environment where students can receive one-on-one attention and social pressures are minimized. The Charter School of San Diego believes that engaged and self-disciplined students are less likely to participate in behaviors and activities that result in suspensions, which have been maintained at or near 0 percent.
  - Over the past three years, The Charter School of San Diego has had the highest overall workforce engagement in a national engagement and satisfaction survey among all Baldrige Award recipient peers and it averaged 13 points higher than the K-12 industry benchmark.
  - At The Charter School of San Diego, 100 percent of courses are taught by multi-certificated, specially trained teachers, which is a differentiator among The Charter School of San Diego and its competitors.
- Teachers with Leading Edge Certification—which ensures that they have the skills to effectively facilitate students' learning in online courses—increased from about 47 percent in the 2016–2017 academic year to 85 percent in 2020–2021.
  - In order to serve its unique, highly diverse student population, The Charter School of San Diego teachers engage, on average, in 100 hours of professional development per year compared to the national teacher average of less than 70. Over the past five years, 100 percent of The Charter School of San Diego instructional staff members attended at least one professional development activity in each quarter of the academic year.
  - Results from The Charter School of San Diego's Work Styles Behavior Survey of job candidates enable the school to identify individuals who are likely to be a good fit based on behavioral alignment with the organization's mission, vision, and values. The school's onboarding process includes training on best practices for new staff members and a shadowing program that pairs them with high-performing peers.





## 2021 MALCOLM BALDRIGE NATIONAL QUALITY AWARD RECIPIENTS

- The Charter School of San Diego has retained more than 90 percent of its instructional staff for the past six years. In 2019–2020, The Charter School of San Diego retained 91 percent of its staff, compared to the national average of 84 percent.
- The Charter School of San Diego senior leaders effectively communicate with and engage their staff and school community members through more than 20 different regular activities. These include the use of welcome cards, email, videos, social media, and open houses. Senior leaders communicate the vision and values through the sharing of student success stories and relaying thank you messages from students and families. In a 2021 survey, 97 percent of The Charter School of San Diego workforce members indicated that they were satisfied with their managers' communication, compared to the K-12 industry benchmark of about 70 percent.
- Leaders have embraced “kids come first” as an organizational value and defined the school's core competency as “transforming lives.” They are assigned to develop and cultivate relationships with community groups, partners, and social agencies. Teachers and all workforce members build relationships within their Resource Center (classroom) neighborhoods to help improve the community through a course called Pathways Exhibition. In addition, over the past five years, students have contributed more than 148,000 hours in community service (a graduation requirement) to San Diego.
- From FY2017–2018 to FY2020–2021, The Charter School of San Diego revenues have increased from \$21 million to more than \$23 million, net operating results have increased from \$1.45 million to \$1.69 million, and the end-of-year fund balance has increased from \$32.98 million to \$35.87 million. The current fund balance represents 156 percent of the annual operational budget, which would allow the school to remain afloat for more than one fiscal year without receiving any additional revenue.
- At the start of the COVID-19 pandemic, the California Legislature approved Senate Bill 98, which resulted in flat funding for FY2019–2020 and FY2020–2021. CSSD implemented action plans to sustain fiscal solvency by applying for multiple competitive, application-based grant funds. Based on strong strategic planning, the 2020–2021 school year resulted in the largest increase of the end-of-year fund balance over the last five years.



Kay Eggleston, Board Chair of the Foundation for the Malcolm Baldrige National Quality Award, greets Tim Tuter, Executive Director of The Charter School of San Diego, and James Olthoff, performing the non-exclusive functions and duties of the Under Secretary of Commerce for Standards and Technology and Director, National Institute of Standards and Technology, congratulates Tiffany Yandell, Director of Operations and Technology for The Charter School of San Diego, on their receipt of the 2021 Malcolm Baldrige National Quality Award, April 3, 2022.

- The Charter School of San Diego has established a leading market position as the largest independent charter school in its operating area, and it has had the largest market share in San Diego for the past five years, outperforming three competitors on each of three indicators (California Basic Education Data System, Second Principal Apportionment Average Daily Attendance, and Annual Average Daily Attendance).
- The Charter School of San Diego did not miss one single day of instruction during the COVID-19 pandemic. Senior leaders deployed a sustainable plan to all workforce members within hours. In addition, The Charter School of San Diego's strong fiscal position allowed it to implement major process innovations such as e-signature capability, a cloud-based phone system, expansion of online meeting software, and the Wave (the school's intranet).
- The Charter School of San Diego manages and supports innovation through its Process Design Introduction, Improvement, and Innovation System and Plan-Do-Learn-Act process. If a need to innovate is identified, a champion is assigned, and a timeline and goals are established. Data are collected, and research is done to identify technology and resources needed. Senior leaders determine if financial and other resources should be made available, and measures are identified to test the viability of the process. If goals are met, the innovation is formalized and implemented, and then improved if needed. One such innovation is the development of the Altus University Portal, which provides efficient access to professional development courses and increased secure knowledge sharing.
- The Charter School of San Diego's Collaboration and Knowledge Management System (CKMS) aligns and integrates data collected and tracked electronically from students, the workforce, assessments, and operations and enables the transfer of knowledge to and from stakeholders. The Charter School of San Diego's Best Practices portal facilitates the sharing of best practices among workforce members. The CKMS methods also include regular department and faculty meetings, huddles, surveys, and open houses with parents.
- Teachers use instructional and assessment software and access the School Pathways Student Information System to view real-time student achievement data. Data are analyzed by teachers, Learning Leads, and the Administrator of Instructional Services to ensure that the instructional strategies used are truly successful for each student. Based on the data, teachers can immediately reconcile and adjust the student's instruction, methods of delivery, and resources.



James Olthoff, performing the non-exclusive functions and duties of the Under Secretary of Commerce for Standards and Technology and Director, National Institute of Standards and Technology, congratulates Tim Tuter, Executive Director of The Charter School of San Diego, on receiving the 2021 Malcolm Baldrige National Quality Award, April 3, 2022.

- The Charter School of San Diego's Strategic Planning Process (SPP) draws information from multiple sources, including student achievement and finance and enrollment information, as well as inputs from the curriculum, workforce qualifications, technology, safety, stakeholders, and regular environmental scans. The process includes a step for making financial resources available to support innovation. The final step provides for an evaluation of scorecard and performance data that relate to strategic initiatives and serve as inputs for the next annual planning cycle.
- Action plans that support the school's strategic goals and initiatives cascade to departments and individual employees through a scorecard system known as the Organizational Performance Measure Review (OPMR). Instructional staff scorecards include individualized targets for student achievement that are aligned to the school's action plans. Progress is reviewed as part of the OPMR and SPP. These integrated processes ensure organizational alignment with strategic aims.







# Mid-America Transplant St. Louis, Missouri

Mid-America Transplant is a private, nonprofit organ procurement organization (OPO) and an eye and tissue bank serving 84 counties in three states (Missouri, Illinois, and Arkansas), with a combined population of 4.7 million. Exemplifying its mission, “we save lives through excellence in organ and tissue donation,” Mid-America Transplant works with its partner hospitals to procure donated organs and tissues and then provide them to transplant centers and tissue processors, both in its designated service area and across the country. With an annual gross revenue of approximately \$80 million and a workforce of about 200 employees, Mid-America Transplant operates from its headquarters in St. Louis, Missouri.

This is the second Baldrige Award for Mid-America Transplant; the organization was honored in the same category in 2015.

- Mid-America Transplant led the largest industry experience in the utilization of free-standing Organ Recovery Centers with increasing research to drive outcomes.
- The organization’s Baldrige journey led to a 167 percent increase in organs transplanted and a 350 percent increase in tissue donors through 2020, saving and healing thousands of lives.
- Since its first Baldrige Award in 2015, Mid-America Transplant has continued to help advance its industry through innovations and sharing of its methods and learning. It has published several peer-reviewed articles on its novel approaches in areas where it has cultivated expertise and freely shares its advances in clinical practices to maximize organ use to impact more lives.
- Mid-America Transplant’s innovative, future-focused practices include a partnership with a local nursing college, through which nursing students are educated about Mid-America Transplant’s care of donors. In recent years, Mid-America Transplant has expanded the initiative to include seven community colleges and universities.
- Mid-America Transplant has forged a local partnership that introduces future funeral home directors to Mid-

America Transplant’s donor services while financially supporting students’ professional certifications.

- Mid-America Transplant’s results for organs and tissues donated per 1 million people are in the top 10 percent of industry comparisons. These results are especially notable given the relatively modest size of Mid-America Transplant’s federally designated service area population, which ranks 28<sup>th</sup> among 57 OPOs across the country.



Diane Brockmeier, President and CEO of Mid-America Transplant, accepting the 2021 Malcolm Baldrige National Quality Award, April 3, 2022, Gaylord National Harbor.



Diane Brockmeier (center), President and CEO of Mid-America Transplant, and Linda Martin (second from right) Vice President of Tissue and Support Services at Mid-America Transplant, are presented the 2021 Malcolm Baldrige National Quality Award, with Bob Fangmeyer (from left), Director of the Baldrige Performance Excellence Program, Kay Eggleston, Board Chair of the Foundation for the Malcolm Baldrige National Quality Award, and James Olthoff, performing the non-exclusive functions and duties of the Under Secretary of Commerce for Standards and Technology and is Director, National Institute of Standards and Technology (NIST), April 3, 2022.

- Mid-America Transplant has earned a top-level (“Tier 1”) status among the nation’s 57 nonprofit OPOs under a results-based certification rule issued in November 2020 by the Centers for Medicare and Medicaid Services.
- Demonstrating Mid-America Transplant’s values of excellence and stewardship of each donor’s lifesaving “gift,” the organization has recently achieved record-setting results for key measures such as the number of organs transplanted annually. For that topline measure, Mid-America Transplant is among the top performing OPOs nationwide, with results above 125 organs per 1 million (population) in 2020 and at or above that level since 2017.
- Results for hearts, lungs, livers, and pancreata transplanted, respectively, per 1 million people place Mid-America Transplant at or above the top 25 percent of the nation’s OPOs in 2020, and Mid-America Transplant’s results for the number of kidneys transplanted per 1 million people are in the top 10 percent of industry comparisons.
- A three-phase leadership system enables senior leaders to drive high performance throughout the organization based on Mid-America Transplant’s mission, vision, and values through a set of integrated processes. In phase 1, leaders review feedback gathered from customers and stakeholders; in phase 2, they drive the organizational strategy via a set of aligned communication, planning, development, and management processes; and in phase 3, they measure and monitor organizational performance.
- Mid-America Transplant’s Board of Directors self-assessment results for the past three years show performance at or above OPO partners’ comparisons for items such as adherence to mission, financial oversight, strategic oversight, and CEO oversight.
- Results for regulatory, accreditation, and compliance



demonstrate excellent levels sustained over time, with full accreditation achieved from all regulatory bodies identified for multiple years.

- Through Mid-America Transplant’s commitment to continuous improvement, its Strategic Thinking Process has evolved from an annual process with one- and three-year objectives to the establishment in 2019 of the organization’s North Star Vision (NSV). The NSV institutes a strategic performance map that defines milestones and five-year goals for accomplishing the vision.
- Mid-America Transplant identifies relevant data and information for its ongoing planning, which includes

environmental scans, customer and market impacts, board of directors input, stakeholder feedback, past performance data, and regulatory changes.

- Demonstrating its strategy for long-term success, Mid-America Transplant’s average organ acquisition costs (the fees charged to transplant centers, which are customers to Mid-America Transplant) have been sustained at levels that are the second or third lowest in the nation since 2017.
- Mid-America Transplant leaders emphasize collaboration in relations with key stakeholders, including donor families, hospitals, nonhospital referral sources, and customers, with favorable results sustained since 2017 for loyalty among customers—particularly for Mid-America Transplant’s tissue processor and corneal transplant center customers. With tissue processor customers, Mid-America Transplant has maintained an expanded number of contracted relationships for the past four years. Mid-America Transplant’s corneal customer base grew from around 16 in 2017 to nearly 20 three years later.
- Levels of overall satisfaction with Mid-America Transplant among its key customer groups, as well as among donor families (a stakeholder group), have met or exceeded performance comparisons from a national marketing research firm indicating the industry standard. Overall rates of satisfaction with Mid-America Transplant by its local organ transplant center and tissue processor customers have been sustained above 4.5 on a five-point scale since at least 2017.
- Mid-America Transplant’s rates of customer dissatisfaction, customer complaints, and dissatisfaction by service line have been at or near 0 percent since 2017.
- Senior leaders support high performance by employees through systematic communication and development processes, as well as benefits that are regularly reviewed to ensure that they meet employees’ diverse needs. An example of Mid-America Transplant’s uniquely supportive practices are the “Mindful Minutes” conversations that supervisors have with employees to engage them in a deep level of thought and dialogue.
- Among exemplary results, the rate of employee satisfaction with the benefits package provided by Mid-America Transplant has since 2017 exceeded a benchmark from a company that collects data from Baldrige framework-using organizations. Mid-America Transplant’s overall workforce engagement rate has consistently exceeded two external industry comparisons (a best-in-class benchmark compiled by an HR-



James Olthoff, performing the non-exclusive functions and duties of the Under Secretary of Commerce for Standards and Technology and is Director, National Institute of Standards and Technology (NIST), congratulates Diane Brockmeier, President and CEO of Mid-America Transplant, for receiving the 2021 Malcolm Baldrige National Quality Award, April 3, 2022.



Kay Eggleston (from left) Board Chair of the Foundation for the Malcolm Baldrige National Quality Award, congratulates Diane Brockmeier (center), President and CEO of Mid-America Transplant, and Linda Martin, Vice President of Tissue and Support Services at Mid-America Transplant, on receiving the 2021 Malcolm Baldrige National Quality Award, April 3, 2022.

focused company and a benchmark based on Baldrige framework-using organizations).

- Mid-America Transplant has sustained progress in achieving its mission even during times of potential or actual disruption, including when the COVID-19 pandemic caused a temporary shutdown of some parts of its facilities and necessitated telework for many employees. For 2020 and 2021 year-to-date, Mid-America Transplant broke records for 22 measures. For example, in 2020, Mid-America Transplant achieved record-high numbers of organ and tissue donors, organs transplanted, tissue donor authorizations, and bone donors released (a measure of eligible musculoskeletal donations delivered to Mid-America Transplant’s tissue processor/customer) per 1 million people.
- Supply-chain measures that sustained best-possible performance trends in recent years include supply

availability and charter flight delays. Results for both measures have been at or near 100 percent favorable levels since 2017.

- Workforce-related results demonstrate good performance despite the pandemic. Consistent staffing has enabled Mid-America Transplant to meet its needs, by maintaining a reliably steady number of donors per coordinator for organ, tissue, and eye donations—for example, about 15 organ donors per coordinator every year since 2017.
- Through the first year of the COVID-19 pandemic, results included a very low rate of missed organ referrals (sustained near zero from 2017 through 2020) and a best-possible rate of timely organ referrals (100 percent done within 90 minutes from the time of the donor’s death).









# 14 Reasons to Celebrate

by James K. Olthoff

Performing the non-exclusive functions and duties of the Under Secretary of Commerce for Standards and Technology and is Director, National Institute of Standards and Technology (NIST)

*Normally, the Malcolm Baldrige National Quality Award follows an annual cycle. The award recipients for a given year are typically announced in November of that year and they are then recognized and receive their awards at a ceremony that opens the annual Quest for Excellence® conference the following April. That cycle had been disrupted in 2019 and 2020 by the public health and safety challenges of the COVID-19 pandemic. Quest was cancelled in 2020 and in 2021 was presented remotely using virtual technologies. Quest 2022 returned to a full, in person experience. As a result, the Baldrige Award ceremony in April 2022 recognized not only the award recipients of the current, 2021, award cycle, but also the award recipients from the 2019 and 2020 cycles. Dr. Olthoff kicked off that multi-year celebration.*

W elcome everyone. It is really great to be in a room with everyone together. Just fabulous!

It is certainly an honor to be here tonight to recognize the 14 Baldrige Award recipients from the last three years. It has been just about three years since the Baldrige Award ceremony and the Quest for Excellence® has been held, and what a three years it has been.

Tonight we celebrate 14 amazing organizations that not only persevered over the past three years, but excelled, thanks to their commitment to and usage of the Baldrige Framework.

The Baldrige Award recipients come from all parts of the country and all sectors of our economy. From the health care sector we have here tonight Adventist Health White Memorial from Los Angeles, California; GBMC Healthcare, Towson, Maryland; Mary Greely Medical Center, Ames, Iowa; and Wellstar Pauling Hospital, from Hiram, Georgia, near Atlanta.

From the Small Business sector we have MESA from Tulsa, Oklahoma.

From the Service sector we have MidwayUSA from Columbia, Missouri.

From the Education sector, we have Howard Community College from Columbia, Maryland; and the Charter School of San Diego, San Diego, California.

And from the Nonprofit sector we have AARP from Washington, D.C.; the city of Germantown from Germantown, Tennessee; the Center for Organ Recovery and Education, Pittsburgh, Pennsylvania; the Elevations Credit Union, Boulder, Colorado; the Illinois Municipal Retirement Fund from Oakbrook, Illinois; and last but not least, MidAmerica Transplant from St. Louis, Missouri.

“Tonight we celebrate 14 amazing organizations that not only persevered over the past three years, but excelled, thanks to their commitment to and usage of the Baldrige Framework.”

Despite all their differences, they all share a common focus on continual improvement and pursuing excellence and world class results, and they all know that the Baldrige Framework is the secret to their success. As an example of that success, eight organizations have won the Baldrige Award twice, and two organizations have won the

Baldrige Award three times. Both three-time winners and several of the two-time winners are being honored here tonight.

For the two-time winners, from their first and second winning Baldrige Award applications, their median job growth between awards was 56 percent and their median revenue growth was 80 percent. And to top that, for the two three-time winners, MESA and MidwayUSA, their median job growth from the first to the third winning application was 188 percent and their median revenue growth was 255 percent.

All of you here tonight, the Baldrige Foundation Board members and staff, the Baldrige examiners, judges, Baldrige Overseers, the employees and stakeholders from these amazing Baldrige recipients, the Baldrige Award-winning organizations, state and regional program representatives, and other Baldrige Program stakeholders know what Baldrige can do, and has done, to transform organizations in this country and around the globe.



Dr. James K. Olthoff welcomes the 2019, 2020, and 2021 Baldrige Award recipients to their presentation ceremony, opening the 33<sup>rd</sup> Quest for Excellence Conference, April 3, 2022.



Dr. Olthoff presents the first award of the evening to Jo Ann Jenkins, CEO, representing AARP, April 3, 2022.

And it is not just these award winners that benefit, but the countless others that use Baldrige day in and day out to improve their performance. It is a model that has stood the test of time for more than 30 years, and it is more relevant today than it ever has been. The last two years have shown that a disciplined, systems-thinking model that also emphasizes agility, innovation, and resilience, is needed to navigate and succeed.

We are lucky enough to know that such a model exists, and we have to time-tested data to prove it.

Thank you very much.



“As Mr. Tata said once, ‘The true objective of setting these criteria, however, was never meant to be merely to use them as an assessment for an award but, more importantly, to utilize them for an institutionalized approach to drive performance and attain higher levels of efficiency in everything that a corporate entity does.’”

# A Partnership to Enable Long-term Value Creation

by S Padmanabhan, Chairman, Governing Council  
Tata Business Excellence Group, Tata Sons

## Early Adoption and Leadership Driven

During the early 1990s, the Indian economy experienced a significant change. India’s New Economic Policy, known as the LPG (Liberalization, Privatization, and Globalization), which aimed to give a new thrust toward a market orientation, was announced. It was intended to achieve economic stabilization and convert the economy into a market economy by increasing the participation of private players in all sectors. India as a country was now available to world players to do business with relatively fewer restrictions. This change deeply impacted the Indian industry, mainly on the quality of products and services and thus competitiveness.

The then- 125-year-old Tata Group was also in the same situation. However, the visionary Leadership of Mr. Ratan N Tata, the then-Chairman of the Tata Group, and his leadership team steered the group to address the economic challenges. The leadership also nurtured the conglomerate with more than 100 entities to be resilient and future-ready. The Tata Group introduced a common performance excellence framework, which would inspire and guide the group companies towards world-class products and services and attain the highest level of customer satisfaction. That was the time when Tata Group adopted the Malcolm Baldrige National Quality Award (MBNQA) Model and introduced the same as the Tata Business Excellence Model (TBEM) as a common improvement methodology for the Tata companies.

## Developing an Ecosystem for Excellence

Once the framework was established, it was important to develop an ecosystem to run the program consistently and effectively while managing the change happening at the marketplace. An institution was formed at the Group center to govern the program, Tata Quality Management Services – TQMS (now known as Tata Business Excellence Group or TBExG). This team of professionals was entrusted with promoting business excellence in the group companies, building assessors’ capabilities, facilitating assessments, and creating a recognition platform for the companies achieving certain milestones in their journey of excellence.

In this process, TQMS adopted governing principles, assessment methodology, and assessors’ capability-building patterned on the Baldrige Criteria. Over these twenty-nine years, thousands of Tata colleagues across the hierarchy were trained and added value by not only becoming external business excellence assessors but also championing the cause in their own company or function. Senior Tata Leaders have personally committed their time to guide assessment teams as ‘Mentors.’

At the same time, the high-performing Tata executives led the diversified assessment teams to provide insights to the assessee companies. The experience gained by the assessors in the assessment journey has often been referred to as a mini-MBA. It thus resonates with the superlative purpose of this movement in the Tata Group as it created future Leaders while establishing an

assurance process through assessments. The annual custom of the Mentors of the assessment teams providing a brief summary to the Tata Group Chairman, followed by the celebrations of assessors' contribution and company achievements at the Business Excellence Convention, drew on the best practices from the Baldrige Quest for Excellence program. As Mr. Tata said once, "The true objective of setting these criteria, however, was never meant to be merely to use them as an assessment for an award but, more importantly, to utilize them for an institutionalized approach to drive performance and attain higher levels of efficiency in everything that a corporate entity does."

The program still runs with this spirit where the companies believe the journey is more important and the award is just an outcome.

### Resilient Towards World-class Performance

The Business Excellence program in the Tata Group has evolved as a repeatable, scalable, and value-adding process. The companies look forward to the changes in the criteria developed every two years by the Baldrige Program. Some of the changes that triggered several actions in the Tata companies were on Innovation, Addressing social media, Big Data, Organizational culture, Risk Management, Cybersecurity, and Agility and Resilience, to name a few. The journey of business excellence has been highly value-adding for the Tata companies and its stakeholders in many ways. Some of the impacts are as follows:

- Superior customer experience
- Enhanced marketplace performance
- Leadership development and higher levels of employee engagement
- Stronger partnerships with vendors and collaborators
- Leadership in corporate brand image



*S Padmanabhan, Chairman, Governing Council, Tata Business Excellence Group, Tata Sons (left) with Baldrige Foundation Board Chair Dr. Kay Eggleston, at the Baldrige Quest for Excellence® Conference, National Harbor, Maryland, April 5, 2022.*

The Business Excellence program was not paused for a single year, even during the COVID-19 pandemic. With the resilient mindset supported by adaptive methods, the Business Excellence program gained momentum in the last few years. The platform is now being leveraged to drive specific and focused change momentum in the Tata companies in the areas of Safety and Sustainability, Data and Analytics, and Cybersecurity.

Tata Sons is now a Founding Member of the Mac Baldrige Society® and Trustee of the Baldrige Foundation's Institute for Performance Excellence. While this acknowledgement provides a sense of accomplishment but also brings in the responsibility to keep the program relevant in the next 25 years and beyond in the 150+-year-old conglomerate. The long-standing partnership with Baldrige has been immensely beneficial in this journey, and each of us in the Tata group cherishes this camaraderie.



# PHOTOS FROM THE 33<sup>RD</sup> ANNUAL QUEST FOR EXCELLENCE® CONFERENCE









# PHOTOS FROM THE 33<sup>RD</sup> ANNUAL QUEST FOR EXCELLENCE® CONFERENCE





# THANK YOU TO OUR 2022 QUEST SPONSORS

The 33<sup>rd</sup> Quest for Excellence® Conference, returned, in person, and better than ever, April 3-6, 2022, after disruptions the previous two years due to the impacts of the COVID-19 pandemic. Quest in 2022 was a real celebration, as old friends and colleagues came together to renew friendships and acquaintances, share best practices, and honor 14 role-model organizations that comprised three years of Baldrige Award recipients.

**On behalf of the Baldrige Foundation and the Baldrige community, thank you to our 2022 Quest Sponsor organizations!**



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The next Quest for Excellence® conference is scheduled for April 7-10, 2024, in National Harbor, Maryland. To demonstrate your support for performance excellence as a Quest sponsor, please contact Josh Racette at 614-785-0214 or jracette@baldrigefoundation.org.

# The Hybrid Workspace, Societal Well-Being, and Productivity: A Proposal for the Future of Work

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



The hybrid workspace, societal well-being, and productivity: on the surface, these three concepts are not obviously related to each other. But permit me the opportunity to explore each of them in the context of our current environment and then conclude with a proposal for organizations to consider that could improve organizational performance and personal well-being.

## The Hybrid Workspace

In many organizations, the boundary between home and work has been blurred beginning with the existence of instant-access email and text messaging, combined with the broad-scale availability of cell phones. That boundary between home and work totally disappeared in early 2020, when many employees across the globe were sent home to work due to the pandemic, and totally new work processes and patterns were established.

During this time at home, workers realized the hundreds of hours they could gain each year by not having to commute.

And, in most cases, people realized the workday could be redesigned to accommodate virtual meetings, solo worktime, family responsibilities, hobbies, and exercise. Also, people were enjoying their newfound autonomy and empowerment to make decisions.

According to Jaime Teevan, chief scientist at Microsoft, as work went home, 49 percent of Microsoft employees reported working longer hours and only nine percent reported working fewer hours (<https://hbr.org/2021/09/lets-redefine-productivity-for-the-hybrid-era>). A Bloomberg report stated that people were working three additional hours in the U.S. and, according to VPN data, logging in to work at odd hours, with a spike from midnight to 3 AM (<https://www.bloombergquint.com/coronavirus-outbreak/working-from-home-in-covid-era-means-three-more-hours-on-the-job>).

However, there is also a downside to working from home. Some Microsoft employees reported that they desire time in the office to reinstate work-life balance boundaries and

to allow focus time for work (<https://hbr.org/2021/09/lets-redefine-productivity-for-the-hybrid-era>). The office environment also provides needed time for cultural bonding, team brainstorming and other teamwork, and socialization (“water-cooler” time).

Innovation is frequently a hybrid activity by its very nature. It requires people getting together to exchange ideas, brainstorm, prototype, and refine concepts. It also requires time spent alone to reflect, to consider ideas, and to refine personal contributions.

As most organizations are coming to realize, the future will be one with a hybrid work environment, with some time at the “office” and some time at home. The balance is yet to be determined and will vary by organizational mission and individual preference.

Curt Steinhorst points out in a Forbes article that leaders must avoid several crucial mistakes in a hybrid future: (<https://www.forbes.com/sites/curtsteinhorst/2021/07/22/5-hybrid-workplace-mistakes-to-avoid/?sh=551ae581116b>)

- Top-down, arbitrary decision making: Empowerment has been successful, and a return to old patterns could lead to enhanced resignations.
- Lack of trust: The last year-plus has debunked the myth that employees must be observed to make sure they are working.
- Real-estate-based rationales: We own/rent the space and must use it productively.
- Failure to supply appropriate technology: Providing appropriate technology for home-based work enhances productivity (or otherwise frustrates employees, reducing engagement and productivity) and reduces security risks.
- Rushing into a plan: Phase in hybrid work in stages; committing to a final plan too early will not allow consideration of factors still unknown.

## Societal Well-Being

Let me share some data. According to a 2017 Deloitte study, 88 percent of millennials believe their employers should play a significant role in addressing societal issues such as income inequality, hunger, and the environment (<https://www2.deloitte.com/us/en/pages/about-deloitte/articles/millennial-survey.html>). Similarly, a 2015 Deloitte survey of 7,800 millennials from 29 countries led to the conclusion that

companies should spend more time on broadly contributing to society (<https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-wef-2015-millennial-survey-executivesummary.pdf>).

A Gartner study of more than 30,000 people worldwide reported that 87 percent of employees believe businesses should take a public position on societal issues relevant to their business (<https://www.gartner.com/smarterwithgartner/corporate-advocacy-of-social-issues-can-drive-employee-engagement>). And a second Gartner survey indicated that corporations that do take a stand have an increase in the number of employees who go above and beyond the call of duty at work. This discretionary effort also enhances employee engagement; hence, greater labor productivity (<https://www.gartner.com/smarterwithgartner/corporate-advocacy-of-social-issues-can-drive-employee-engagement>).

## Productivity

In a 2021 McKinsey pulse survey of 350 senior executives, 56 percent of respondents reported higher work-from-home workforce productivity compared with pre-COVID levels. But how do you convert survey data to true measures of productivity (<https://www.mckinsey.com/business-functions/operations/our-insights/managing-change-what-lies-behind-g-and-a-spend-transformation>)?

With 24/7 access to work and employees’ responsibility to work from home, classical definitions of productivity (measures of the efficiency of resource use — e.g., labor, machines, energy, and capital) become meaningless.

We must consider how we measure overall productivity — and labor productivity specifically — in a hybrid environment. How do we most effectively engage employees and produce organizational output? How do “extra effort” and flexible schedules factor into a metric? And, given the benefits of an organizational commitment to societal well-being, how is that turned into a meaningful metric for overall productivity, including societal productivity that leads to greater employee, customer, and community engagement?

While I don’t know that anyone has the answers yet, I believe the time is right to focus on the meaning and measurement of productivity in a hybrid, socially conscious work environment.

I welcome your thoughts!

# Mac Baldrige Society Grows Membership in 2022

“The Mac Baldrige Society,” said Foundation President and CEO Al Faber, “is our campaign to establish the Foundation’s Institute for Performance Excellence with the generous support of the first twenty major donors. The members are the Trustees of the Institute which, by their commitment, demonstrate they recognize the importance of the Baldrige Foundation’s mission: to promote organizational

performance excellence in the United States and throughout the world by supporting the Baldrige Program.”

In 2020, the Baldrige Family, Adventist Health, MidwayUSA, and Stellar Solutions stepped up to pledge their support as the first Institute Trustees and members of the Mac Baldrige Society. In 2021, the Institute for Performance Excellence welcomed two new members of the Mac Baldrige Society, ABOUT HealthCare, Inc., and Freese and Nichols. 2022 saw an outpouring of support leading to the ascension of four additional members of the Mac Baldrige Society.

The first is Tata Sons, the principal investment holding company and promoter of Tata companies. The Tata group of companies is valued at \$11.4 billion and ranked 57th among top 100 brands listed by Brand Finance, an independent company focused on the management and valuation of brands. Tata companies had a combined revenue of nearly \$103 billion in 2020-2021 and employed over 800,000 people in 100 countries worldwide.

“Organizations like Tata,” continued Faber, “have been crucial to the growth of Baldrige. Baldrige has crossed borders with some major international companies like India’s Tata Sons, which have adopted Baldrige-based assessment processes, called the Tata Business Excellence Model (TBEM), in all their companies like Tata Consultancy Services, Titan, Tata Power, Tata Chemicals, Indian Hotels Company, Tata Motors, Tata Consumer Products Limited, Jaguar, Land Rover, and Tata Steel, to name just a few.”

Commenting on the occasion, S. Padmanabhan, Chairman, Governing Council, Tata Business Excellence Group, said, “We are delighted to become a founding member of the Mac Baldrige Society® and Trustee of the Baldrige Foundation’s Institute for Performance Excellence. Tata is the first international company to be accorded this opportunity.”

“The Tata group has implemented the Baldrige excellence model for improving organization performance and quality across multiple industry clusters for almost three decades,



At the Quest for Excellence® conference, the Baldrige Foundation and its Institute for Performance Excellence hosted their first ever Mac Baldrige Society recognition dinner, affording members of the Society the opportunity to meet one another and brainstorm with Foundation staff over the direction of the Institute. National Harbor, Maryland, April 5, 2022.



Ben Sawyer, representing ABOUT Healthcare, Inc., is recognized as one of the new members of the Mac Baldrige Society from 2021, with Kay Eggleston, Board Chair of the Foundation for the Malcolm Baldrige National Quality Award, and Al Faber, President and CEO of the Baldrige Foundation, National Harbor, Maryland, April 4, 2022.

and we look forward to enhancing this relationship. In this new role, we will be able to contribute to the Society based on our experience, enrich the value of the Baldrige Framework, and help create a future for the Framework.”

Second is Mid-America Transplant, a leader in organ and tissue procurement for transplantation located in St. Louis, Missouri. Mid-America Transplant is a private, nonprofit organ procurement organization and an eye and tissue bank serving 84 counties in three states (Missouri, Illinois, and Arkansas), with a combined population of 4.7 million. Exemplifying its mission, “we save lives through excellence in organ and tissue donation,” Mid-America Transplant collaborates with its partner hospitals to procure donated organs and tissues and then provide them to transplant centers and tissue processors. Mid-America Transplant has an annual gross revenue of approximately \$80 million and a workforce of about two hundred employees.

Mid-America Transplant has been integrating the Baldrige criteria into its day-to-day operations for nearly two decades. “Mid-America Transplant began our Baldrige journey in

2003 as a way to continuously improve how we operate, so we could save more lives through organ and tissue donation,” said Diane Brockmeier, President and CEO at Mid-America Transplant. “Since then, the tenets of quality and performance improvement have become the Mid-America Transplant way, helping us set donation records year after year and giving more people a second chance at life.”

Since adopting the Baldrige Excellence Framework with the goal of saving more lives, Mid-America has continuously improved processes and outcomes to increase the number of lifesaving organs transplanted by 167 percent and increase the impact of tissue donation by 385 percent.

Mid-America Transplant has been a champion for Baldrige, including having several executives serve on the Board of Examiners for the Malcolm Baldrige National Quality Award, and Diane Brockmeier has also served on the Baldrige Foundation Board of Directors. In addition, Mid-America Transplant has helped several other organ procurement organizations adopt the Baldrige framework. And now, Ms. Brockmeier continued, “We are honored to



Kay Eggleston (left), Chair of the Board of the Baldrige Foundation, and Al Faber (right), President and CEO of the Baldrige Foundation, present Brian Coltharp, President and CEO of Freese and Nichols, one of the new members in 2021 of the Mac Baldrige Society, National Harbor, Maryland, April 4, 2022.

continue to champion the framework as a member of the Mac Baldrige Society.”

The third organization to become a member of the Mac Baldrige Society in 2022 is CORE, the Center for Organ Recovery & Education, a leader in organ and tissue procurement for transplantation headquartered in Pittsburgh, Pennsylvania.

CORE was founded for the purpose of saving and enhancing lives through organ, tissue, and cornea transplantation. CORE is one of 57 federally designated not-for-profit organ procurement organizations in the United States, and it serves a Donation Service Area assigned by the federal government that includes 150 donor hospitals and approximately 5.5 million people throughout western Pennsylvania, West Virginia, and Chemung County, New York.

“CORE’s Baldrige performance excellence journey has empowered us to focus successfully on the mantra, ‘Every Donor, Every Time.’ Today, a decade into this journey, CORE is a results-driven organization, thriving in a culture of transparency and innovation,” said Susan Stuart, President and CEO of CORE. “The result: CORE is saving and healing more lives than ever before — the most significant indicator of performance excellence and proof that the Baldrige framework affects positive change.”

2021 was CORE’s third consecutive record-breaking year Saving and Healing lives through organ, tissue, and cornea donation. The organization made possible more than 700 life-saving organ transplants, thanks to the generosity of an unprecedented number of organ donors. That is a 150 percent increase since CORE began its performance excellence journey in 2012. Incredibly, ten of the donors in 2021 were over the age of 75, a group that is often overlooked for

donation. The most notable of these donors was Cecil F. Lockhart of Welch, West Virginia, who in May 2021 became the oldest organ donor in U.S. history at 95. Also in 2021, the number of people healed because of tissue recovered by CORE was 133 percent more than in 2012.

“CORE is honored to become part of this distinguished group of Mac Baldrige Society trustees,” Stuart said. “In doing so, CORE hopes to signify that our performance excellence journey is one without a destination. We will, now and in the future, continue to follow the Baldrige Framework and the roadmap it provides us on our mission: Saving and Healing lives through donation.”

The fourth member of the Mac Baldrige Society class of 2022 is Adani Enterprises Ltd. (AEL), the flagship company of the Adani Group, India’s largest and fastest-growing portfolio of diversified businesses.

The Group has a market-leading presence in natural resources, cement, data centers, power generation, transmission and distribution, renewable energy, gas and electric utilities, agro-business (commodities, edible oil, food products, cold storage, and grain silos), public transport infrastructure, logistics (seaports, airports, shipping, and rail), real estate, consumer finance, media, and defense.

“The time has come to demonstrate and deeply institutionalize a culture of Business Excellence that covers all our businesses, as well as all our corporate functions. This is the most effective way to demonstrate benchmark performance and consolidate a strong foundation on which our enterprise can continue to achieve higher scales of performance and create high levels of stakeholder value on a sustainable basis.” said Mr. Gautam Adani. “Our pledge to join Mac Baldrige Society demonstrates the Group’s commitment to integrate the Baldrige criteria for performance excellence in each aspect of business management and deliver long-term value to all stakeholders.”

The Adani Group adopted the Baldrige criteria in 2020 and built a comprehensive business excellence ecosystem governed by its APEX council. Within a short span of two years, several thousands of its employees have been trained in continuous improvement techniques and have received national and international recognition. “The Adani Group’s Business Verticals are consistently benchmarking to be the best-in-class and are pursuing disciplined growth using the Adani Business Excellence Model (ABEM) based on the

Baldrige criteria,” said Mr. Anil Sardana, Adani Group Service Head – Business Excellence.

“Baldrige helps improve organizational performance,” concluded Faber, “and we are grateful for those who choose to promote that reality for other organizations as Trustees of the Institute for Performance Excellence and members of the Mac Baldrige Society.”

As for the future, Faber added, “half of the Trustees have been named, but there are still 10 opportunities for organizations to become Trustees of the Institute for Performance Excellence. In 2023, we will continue to bring additional organizations into the Mac Baldrige Society.”

## Baldrige Foundation Staff Coordination

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# Saving Lives Through Performance Improvement

by Diane Brockmeier  
President and CEO Emerita at Mid-America Transplant

I am honored that Mid-America Transplant was once again recognized with the Malcolm Baldrige National Quality Award. Having been involved with our Baldrige journey since day one, being named a recipient again in the final year before my retirement was a deeply moving reminder that the culture of improvement we have created will persevere long after I step away.

As my 36 years at Mid-America Transplant came to a close, I was reminiscing on how much our organization has changed in three decades. Our core mission, to save lives through excellence in organ and tissue donation, has always been why we do what we do, but how we do it has evolved significantly, and we credit the Baldrige journey for this.

“It has been exciting to see several of our peers incorporate Baldrige into their own business strategy, as well as receive Malcolm Baldrige National Quality Awards for their work, because improving how we all work saves more lives.”

We embarked on the Baldrige journey in 2003 because we recognized the need for a proven performance improvement framework that would help us go further and faster. Over these past two decades, Baldrige has become so embedded in our culture that the Baldrige Way has simply become the Mid-America Transplant Way. Every employee, regardless of their role, knows we are driven by data and are on an improvement journey. We now have a business intelligence team the sole job of which is to create dashboards and glean insights that can help us run smarter and smoother. Not a day goes by without evaluating what we did and how we can do it better, and it is because of the rigor we learned through Baldrige that we have achieved a 153 percent increase in organs transplanted and 340 percent increase in tissue donors from the beginning of our Baldrige journey to today.



*Diane Brockmeier, President and CEO of Mid-America transplant, sharing her organization's Baldrige Award-winning best practices. April 3, 2022.*

We have learned a great deal as we created a culture of continuous improvement:

1. Stay diligent. After submitting Baldrige applications for a few years, Mid-America Transplant took a year off to focus on our opportunities to improve internally. Instead, we lost momentum. We learned that the Baldrige application process helped drive our work, and that it is important to remain persistent in this journey. This persistence paid off and helped us earn our first Baldrige award recognition in 2015—but what we took even greater pride in was that the improvements we incorporated through Baldrige resulted in more than double the number of organs transplanted in 2015 compared with when we first began our journey.

Since Baldrige is a journey and not a destination, we did not rest there. Instead, we continued to push ourselves to shore up our processes and introduce clinical innovations that would drive continuous improvement and set performance records year after year. Now more than 150 more mothers and fathers, sisters and brothers, children and friends received lifesaving transplants this past year compared with 2015. Imagine if we had stopped in 2015, thinking we had done well enough.

2. Bring others along. It takes a full cultural shift for the Baldrige framework to be fully impactful. When we first introduced the framework, we were all learning and embracing it together. As newer leaders came in, they saw the ways we had improved the organization, such as creating a performance excellence department, but it was important for them to understand that Baldrige was the foundation behind these successes. Since then, these leaders have gone through Baldrige training and some have served as national, state, and regional examiners for Baldrige.

3. Recognize the entire team's contributions. Continuous improvement is not something that is done solely in the boardroom. Every single employee at Mid-America Transplant has had a hand in improving how we work, and it was important to celebrate that. For both of our national Baldrige awards, we held a drawing to bring more than a dozen employees to D.C. to attend the awards ceremony, in addition to our leaders and board members. When we won the Missouri State Quality Award, we rented two buses and drove everyone to the capitol for the award party. We also made a big deal out of unveiling the awards during all-staff meetings.

4. Step beyond the organization. Mid-America Transplant had previously measured our success compared with our previous year's performance, but Baldrige showed us that making significant improvements would require looking outside ourselves and evaluating our performance against our peers. Very little benchmarking data existed among organ procurement organizations (OPOs), which prompted us to engage other OPOs

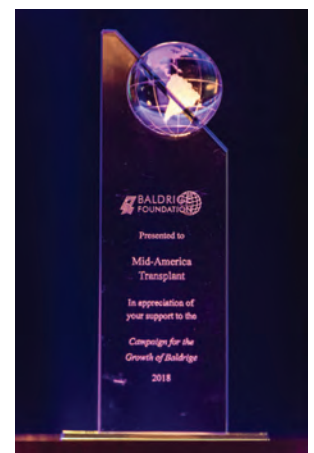
to establish better data sharing. This not only created better opportunities for benchmarking but had the added benefit of introducing other OPOs to Baldrige. It has been exciting to see several of our peers incorporate Baldrige into their own business strategy, as well as receive Malcolm Baldrige National Quality Awards for their work, because improving how we all work saves more lives.

5. Embrace the Baldrige network. Mid-America Transplant has benefited from the guidance of not just the Baldrige network but the other organizations that are on their own performance improvement journeys. As we became more confident in how to incorporate the framework, we felt compelled to return the favor. Serving on the Malcolm Baldrige Foundation Board of Directors and the Board of Examiners has been an inspiring experience that enabled us to share what we have learned, while also learning from the successes of others. I strongly urge you to tap into this network of incredibly motivated organizations

as we support each other toward excellence.

I truly believe that Mid-America Transplant would not be the organization we are today without the adoption of Baldrige principles. I am the first to admit that this is not a program for the faint of heart. It requires diligence and commitment across your entire organization to make substantial change but making that investment has transformed us into a better employer to our team, a better partner to the hospitals and transplant centers that help make donation possible, and a better steward of the lifesaving gifts donors and their families entrust to us.

An unanticipated benefit of our involvement with the Baldrige program is that it has given us a national platform to introduce the importance of donation to the rest of the Baldrige community. So I will close by once again reminding you all of the incredible impact we can make simply by saying yes to organ and tissue donation. If you have not already registered, I encourage you to do so at [SayYesGiveLife.org](http://SayYesGiveLife.org).



*Pictured Left: Diane Brockmeier, President and CEO of Mid-America Transplant, accepts the recognition from the Baldrige Foundation President and CEO Al Faber (right), and then-Board Chair George Benson, for Mid-America Transplant's support of the Foundation's Campaign for Growth, April 10, 2018. Pictured Right: Mid-America Transplant gives back. In 2018 it was recognized for its continuing support of the Baldrige enterprise exemplified by its support of the Foundation's Campaign for Growth.*



# 2022 Sees Expanding Opportunities for Partner Organizations Through the Baldrige Institute for Performance Excellence



The Baldrige Foundation established the Institute for Performance Excellence in June 2020, as a focal point for students, scholars, leaders, and practitioners of Baldrige and performance excellence. Today, more than two full years on, it is providing thought leadership on performance excellence, leadership, and management.



“In 2022,” Racette continued, “we have been working to expand those training and certification opportunities.”

The Institute announced in 2022 a partnership with MindEdge Learning, bringing hundreds of new courses and certifications to the Baldrige community, including discounted tuition rates for partners of the Institute for Performance Excellence.

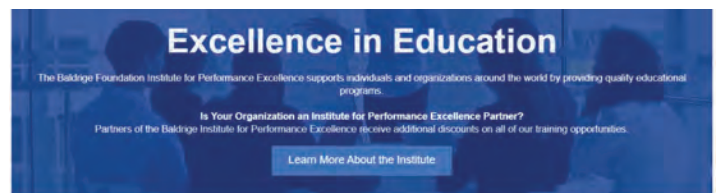
“The mission of the Institute,” as Baldrige Foundation President and CEO Al Faber said when introducing the new enterprise, “is to amplify the influence of the Baldrige Framework and to improve the practice of leadership and management in pursuit of performance excellence, broadening its impact in an ever-changing world.”

Becoming a partner of the Institute for Performance Excellence provides each organization and its people with full access to the Institute’s resources, strategy execution tools, training, professional development opportunities, conference discounts, networking, and educational opportunities.

“The educational opportunities are a significant component of the Institute’s value added,” said Josh Racette, the Foundation’s Executive Director of Corporate Development, “In 2021 we were focused on developing opportunities for degree programs, discounted through the Institute, in addition to a significant number of training and certification programs for professional development.”

MindEdge is a learning house with four different doors: higher education for credit, continuing education non-credit, professional development, and corporate solutions. The courses and certifications provided by MindEdge are high-quality, expertly designed, and learner-approved, and focus on helping adults learn the fundamentals and master the skills needed to succeed personally and professionally.

“This new partnership brings over 370 new educational offerings to the Institute,” said Josh Racette, Executive Director of Corporate Development, “many including certifications



#### Our Programs

Online Self-Paced Courses

Strategic Planning & Management Training

Degree Programs



and recognized continuing professional education credits, to meet the specific requirements of professional learning in the 21<sup>st</sup> Century.”

“Whether you are looking to expand your skill set,” Mr. Racette continued, “earn professional credits, or learn something new, our online professional development courses and certificates pair perfectly with a busy schedule. Courses are self-paced and online, accessible from anywhere, and available on mobile.”

The Baldrige Foundation has maintained a commitment to improving educational experiences and connecting more students to the larger Baldrige Enterprise. “I am excited about how this partnership will allow the Baldrige Foundation, through the Institute for Performance Excellence, to improve educational opportunities for learners at all levels while also continuing to improve the quality of life in communities across the United States,” said Mr. Faber.

In addition to the expanding educational opportunities, the Institute’s flagship publication, the *Chronicle of Leadership and Management*, continues to attract significant, positive attention. Volume two of the *Chronicle* debuted recently. “We were very excited,” said Racette, to get out of the gate early with Christel Gollnick’s serious, peer-reviewed analysis of the Communities of Excellence initiative, just as Congress and President Biden were authorizing Community as the seventh sector of eligibility for the Malcolm Baldrige National Quality Award. Gollnick makes the case that the Baldrige framework provides a unique capacity to bring communities together to address their most intractable and complex issues.

Volume two of the *Chronicle* contains these articles:

- Feature Articles
  - The Agility and Resilience of Health Systems and Response to the COVID-19 Pandemic Crisis
  - A Model for Transforming Health Care Using the Baldrige Excellence Framework
  - Key Success Factors in Communities of Excellence
- Leadership and Management Perspectives
  - From Hurt to Healing: A New Perspective to Improve Workplace Ecosystems
  - Balancing Strategic Stability and Operational Agility in a Volatile Environment

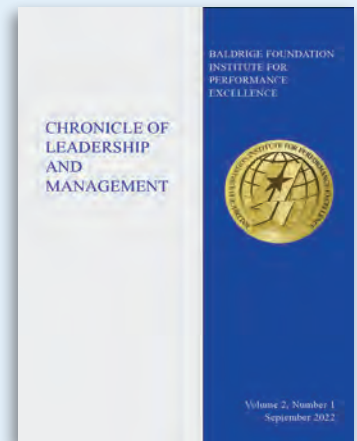
For more information about the Baldrige Institute for Performance Excellence, visit their website at <https://www.baldrigeinstitute.org/home>, or contact Josh Racette at 614-785-0214 or [jracette@baldrigefoundation.org](mailto:jracette@baldrigefoundation.org).

## CHRONICLE OF LEADERSHIP AND MANAGEMENT

### Call for Papers

#### JOIN THE CONVERSATION

The *Chronicle of Leadership and Management* is a peer-reviewed publication by the Baldrige Foundation’s Institute for Performance Excellence. The purpose of the *Chronicle* 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, communities, and cybersecurity applications.



We are now accepting submissions for Volume 3 of the *Chronicle of Leadership and Management*. Your original research can help shape the future of quality and performance excellence. Guidelines for authors and information about submitting your papers can be found at [www.baldrigefoundation.org/clm](http://www.baldrigefoundation.org/clm).

#### WHAT READERS ARE SAYING ABOUT THE CHRONICLE

“Excellent articles from renowned Baldrige gurus! Great insights, and all topics are enlightening for the diehard disciples of the Baldrige Framework.”

“I can’t wait to read the second edition of the *Chronicle*!”

“The *Chronicle* provides great leadership and management insights for any organizational leader, regardless of sector.”

“The *Chronicle* is a great resource for in-depth discussions about using Baldrige. It fills a gap in the research literature that is often superficial or tangentially touches Baldrige’s concepts and applications.”

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# Second Time Around

by Mary Searcy Bixby, Founder, President, and CEO, The Charter School of San Diego

Competing with the best requires strong commitment and the grit necessary to create an exceptional organization. After being formally acknowledged as a high-performance organization, why would a leadership team choose to compete for this prestigious award again five years later? The answer is momentum.

After The Charter School of San Diego (CSSD) was first recognized as a Baldrige recipient in 2015 our team paused to debrief. We discussed the journey, our outcomes, our long-term aspirations and most importantly what we were going to do about living in a culture that was so deeply immersed in the Baldrige framework.

Fueled by our tools, processes, and systems in place we chose to continue to advance to a place that we described as stellar. We had cracked the code to consistently achieve extraordinary outcomes and we knew it. Our Leadership Management System was remarkably strong, our workforce was vibrant and clear about expectations, and the use of data drove our decisions. Staff was hungry to consistently show us better ways to serve our students. Even if we were magically lifted to another organization and in another sector, we were confident we could apply what we had learned and together we could accomplish anything.

“Even if we were magically lifted to another organization and in another sector, we were confident we could apply what we had learned and together we could accomplish anything.”

We understood our key indicators, our knowledge management was better than ever, and Altus University, our school within a school, used the Baldrige framework as a basic approach to all our professional development. Within Altus University, we established a Fellows program that fed our leadership training. We had carefully designed strategic plans for the long term. The plan focused on our vision and commitment to stellar achievement. For us, innovation was not just a part of a marketing tag line. In fact, we had moved past incremental improvement, growth, and expansion of our promising programs and radical practice that disrupted our

sector. From there, we transitioned to innovation that held promise for public education across the country. While our team was confident about the journey we had embarked upon, we were never presumptuous or arrogant. In our view of where we wanted to be in five years, that timeline was not so far away.

“The second time around still required focus and hard work and yet was always engaging and fulfilling. CSSD was proud and joy-filled that our students, their families, staff, and community were reaping the benefits of a program geared to meeting student need and creating templates for educational improvement.”



*Mary Searcy Bixby, Founder, President, and CEO, The Charter School of San Diego*

Receiving a second Baldrige recognition was not our priority. Rather, the journey of high achievement was key because we knew from experience that this was what would keep us on track. We had followed the guidance and listened carefully to those who came before us. Learning and researching took on a new meaning. This was what was different. Valuing each incremental step became critically important. We had

learned how to scrupulously plan and execute. We evaluated, modified, improved, and accelerated as needed. The workforce understood the goals and the approach required to reach our goals. The challenges became fun, the disappointments temporary, and the outcomes celebrated for being stellar. The second time around still required focus and hard work and yet was always engaging and fulfilling.

CSSD was proud and joy-filled that our students, their families, staff, and community were reaping the benefits of a program geared to meeting student need and creating templates for educational improvement. CSSD felt the force of momentum and opened itself to the energy propelling it forward.

A crucial consideration we made involved deeply examining how the organization could maintain high momentum and energy over time. If we considered the Baldrige endeavor something apart from our day-to-day activity or work, sustaining momentum would be extremely difficult. Furthermore, applying another layer of responsibility to our dedicated team members would not resonate with them.

To avoid this, the Leadership team regularly integrates the framework into what we do every day as we go about the work of educating and improving the lives of high-risk students. Our team is busy meeting, collaborating, researching, and working to engage students and staff alike.

When Baldrige came into our lives, we had to begin with a deep dive into figuring out what our core competency was all about. We began with fifteen. Staff was all over the Board. Defining our one core competency required two years of exhaustive work. In the end we determined it was to *transform lives*. That realization was a significant moment.

“A crucial consideration we made involved deeply examining how the organization could maintain high momentum and energy over time. If we considered the Baldrige endeavor something apart from our day-to-day activity or work, sustaining momentum would be extremely difficult.”

During one meeting, a participant posited the idea. A few minutes of silence followed. Nearly in unison, the other participants said, “Boom!” The spontaneous and collective reply was followed by laughter and relief. Reaching this simple yet significant conclusion came in a flash. As in the case of many sparks of inspiration, it came as a result of countless hours of deep and intense conversations.

From that moment, transforming lives became our reference point for all we did. We understood our reason for being and we learned how to work in a Baldrige mode all the

time. Soon, the Baldrige framework became second nature. Thus, we never considered it a separate program, an add-on, or an expectation that did not directly connect to our work. Baldrige was our friend and we embraced it. After meeting with many people over the years we have come to realize this is a major obstacle for many groups. We believe that achieving this view of how Baldrige is integrated is teachable. Beginning in 2015, we became comfortable saying, “We are Baldrige.”

“We understood our reason for being and we learned how to work in a Baldrige mode all the time. Soon, the Baldrige framework became second nature. Thus, we never considered it a separate program, an add-on, or an expectation that did not directly connect to our work. Baldrige was our friend and we embraced it.”

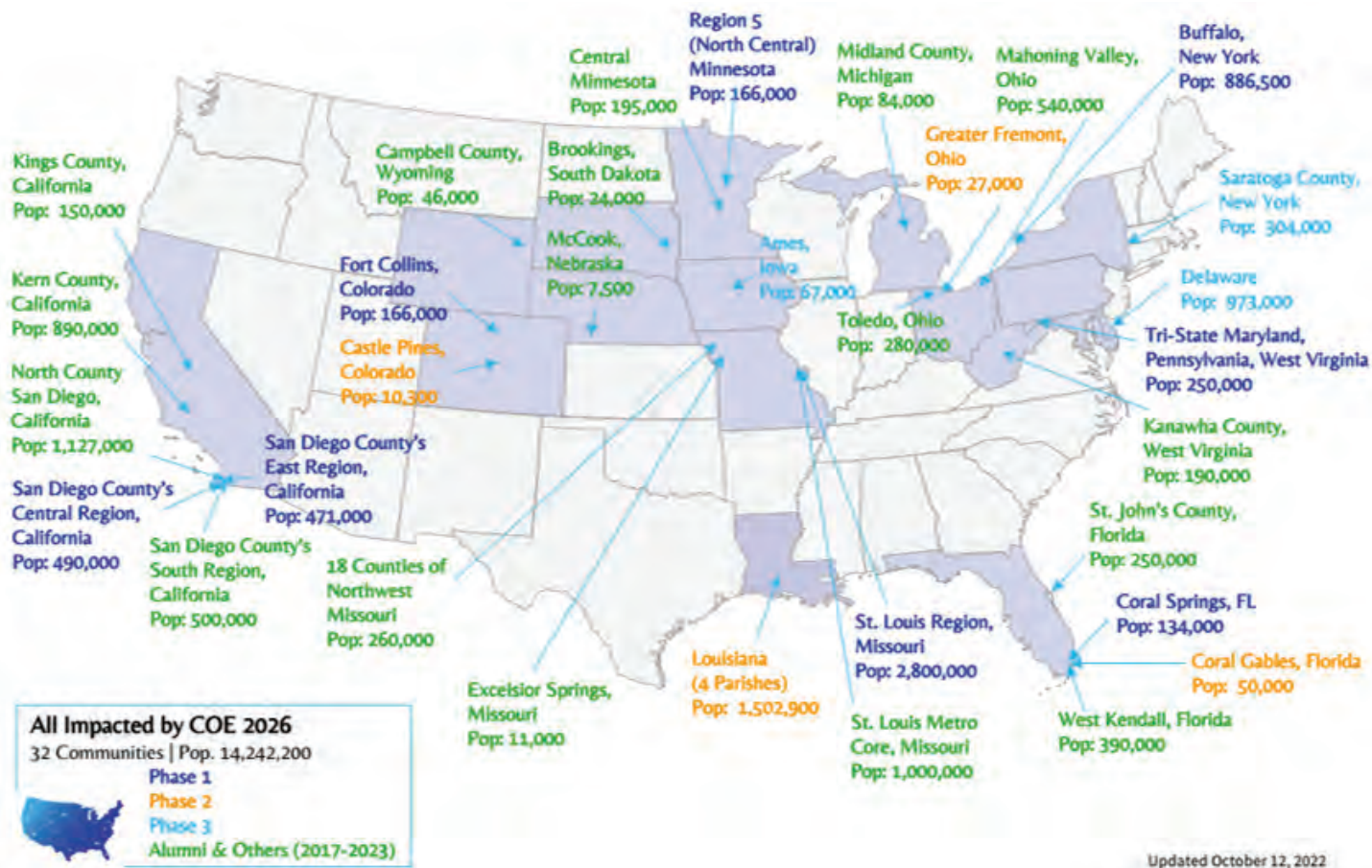
The CSSD team is moving forward. We are still riding that wave of success and our momentum is alive and well. We carefully include Baldrige into the onboarding of every new employee. The framework is regularly included in all our trainings. The terminology is widely understood and used. Baldrige is our “secret sauce.”

We look forward to continuing to be part of the Baldrige community. We enjoy traveling and presenting our story and inspiring other organization to succeed. Now more than ever business, health, education, and communities at large are addressing a rapidly changing environment. With a new workforce, consumers, and clients having new expectations, and institutions facing new financial, social, and governance requirements, the future is filled with unprecedented disruptive change. To remain competitive, organizations must embrace best practices to assure they develop, grow, and achieve positive outcomes that carry them into a productive and successful future. BOOM!

# Preparing for Our Next 250 Years

by Stephanie Norling, Executive Director, Communities of Excellence 2026

## communities of excellence 2026<sup>TM</sup>



Stephanie Norling, Executive Director, Communities of Excellence 2026

2022 provided our organization and the communities we work with a lot to celebrate. For us, the biggest news of the year happened in July when President Biden signed the CHIPS and Science Act into law which, among other things, authorized Community as the seventh category of the Malcolm Baldrige National Quality Award. With this authorization American communities can apply for and receive presidential-level recognition for efforts to systematically improve community performance across all sectors and collectively achieve better community outcomes.

In addition to enabling communities to apply for this award and receive a detailed feedback report on their strengths and opportunities, this authorization allows for the identification of role-model communities and the sharing of best practices from these communities across the United States and around the world.

Celebrating this achievement, Nick Macchione, Director & Deputy Chief Administrative Officer, Health and Human Services, San Diego County, California said, "This systems approach broadens community

partner support, is anchored in data and equity, and moves shared community concerns and efforts toward a common vision for the public good. It is an invaluable tool to improve performance and people's lives."

There is still work to be done to prepare communities for national applications, but we have, and continue to work closely with the Baldrige Program and the Alliance for Performance Excellence to develop a process that works best for communities and trains examiners and program staff to provide communities with feedback that helps them take their efforts to the highest levels of community performance excellence. While we may not see communities on the national stage for a few more years, we are seeing visible progress as they coordinate improvement efforts and build leadership and decision-making systems across sectors, develop shared community strategies and community scorecards, and engage residents in community planning and action to address their most pressing challenges and achieve more equitable outcomes.

This year also marked significant growth for our organization. For the first time we welcomed eight new communities into the National Learning Collaborative, which launches every



From left, Christel Gollnick, Stephanie Norling, Molly Baldrige, Kim Halfhill, and Manuel Castañeda, at the launch of the 2022-2023 National Learning Collaborative, San Diego, California, October 20, 2022.



At the 2022 Baldrige Fall Conference and Communities of Excellence Conference, COE board members, special guests, faculty, mentors, and conference participants gathered in San Diego, California, to kick off the 2022-2023 National Learning Collaborative, October 20, 2022.





October. Currently 25 communities are involved, either in the three phases of the Learning Collaborative or as Alumni. We kicked off the 2022-2023 National Learning Collaborative, our flagship program, with an in-person conference in San Diego, California, in October. Representatives from all 25 communities attended and we were honored to feature Molly Baldrige as our special guest speaker during the joint COE/Baldrige Fall Conference's community recognition lunch ceremony where 15 communities were recognized across the three levels of our assessment and recognition program.

Communities of Excellence 2026's reach extended internationally this year too. Also in October, three members of the Japan Productivity Center visited the United States and joined us on a site visit of six COE communities across the country to determine whether the COE Framework could be effective in Japan. The result of the visit is their intention to implement a version of COE in Japan to help address their country's "wicked problems."

We are also starting to see some exciting results in communities using the COE Framework. In their annual

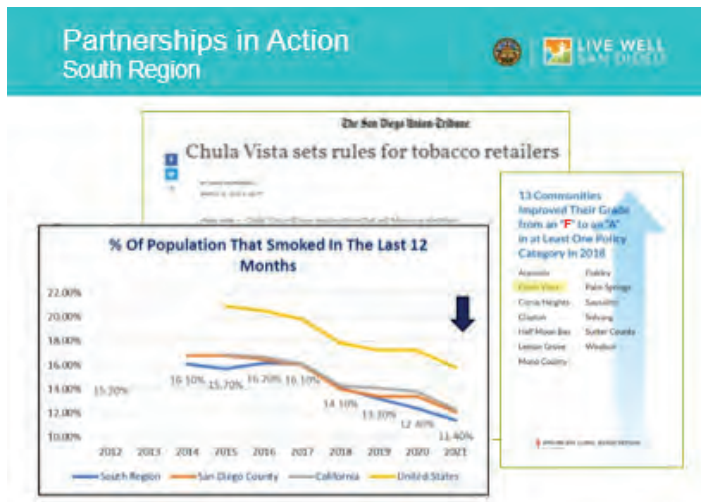
application for evaluative feedback and recognition, the McCook, Nebraska leadership team shared, "The difference today [after applying the COE Framework] is that we are talking about some of the needs and gaps that may have never been discussed in other cross agency discussions. Eliminating what may have been perceived as barriers of even coming together for discussions is a huge win for our city. Now, after several years of applying the COE Framework, we have some good initial wins for action plans with early adopters that have given us good visibility with the public, and most importantly, to other community leaders that have now taken an interest in the momentum we have created."

Cristina Brito from West Kendall, Florida said, "COE allowed us to take our programs and communication efforts to the next level. We now have over 200 business and public partners involved." Recent successes from these partnerships include the placement location of new signs and crosswalks based on foot traffic patterns crossing dangerous roadways, determining the content for their "Brain Bag" initiative educating new parents on infant brain development, enrolling as the first unincorporated community in AARP's



Members of the COE 2026 Board of Directors, from left, Brian Lassiter, Chair, the Alliance for Performance Excellence; Tommy Gonzalez, City Manager, City of El Paso, Texas; Darin Atteberry, Market President Northern Colorado, Elevations Credit Union; Lowell Kruse, Co-Founder, Communities of Excellence 2026; Stephanie Norling, Executive Director, COE 2026; Angela Brandt, President for Senior Care and Healthy Aging, ProMedica; Bob Fangmeyer, Director, Baldrige Performance Excellence Program; at the 33<sup>rd</sup> Quest for Excellence® conference, National Harbor, Maryland, April 5, 2022.

Network for Age-Friendly States and Communities, launching a swim safety campaign to decrease drowning deaths, forming an economic council to launch a buy local campaign, serving a student body of more than 5,000 with a school pantry stocked with food, apparel, hygiene and toiletry items, and several other projects.



In 2018 the *Live Well San Diego* South Region Community Leadership Team identified three priority areas based on a comprehensive strategic planning process that led to the formation of three new work groups. The Chronic Disease Work Group’s cross-sector community-wide focus on smoking and vaping cessation is showing impressive results across the region. Barbara Jiménez, Community Operations Officer for the County of San Diego Department of Homeless Solutions and Equitable Communities, said, “Being a part of Communities of Excellence 2026 has accelerated and built upon our work: where we are doing well, what is our mission and vision as a community, what are the areas that we want to focus on, what is the data telling us, do we need to shift gears, who is missing from the table? It gives us a framework to really continue ultimately to serve our community.”

In January of 2022, the COE 2026 Board approved a bold new strategic direction for our organization. The strategy begins with five big goals that we believe, if successful, will lead us towards our new envisioned future:

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

With the support of the Baldrige enterprise, the five goals are:

1. Communities of Excellence is sought out by communities and organizations as the collective center of knowledge, expertise, instruction, and wisdom related to community performance excellence with the capacity to spread to communities nationally and internationally, resulting in sustainable and significant improvement to key measures of community performance.
2. Organizations and leaders in all sectors adopt Baldrige-based tools and practices, including the Communities of Excellence Framework, and collaborate across sectors to lead high-performing organizations and communities.
3. The Baldrige enterprise is an energized, integrated, high-performing public-private partnership recognized for its leadership and standing in performance excellence, and passion for improving America.
4. The Department of Commerce and the National Institute of Standards and Technology (NIST) partner with the Baldrige enterprise to adopt Baldrige-based tools and practices, including the Communities of Excellence Framework, as the means to transform community performance.
5. The President of the United States and cabinet members endorse the Baldrige enterprise and Baldrige-based tools and practices, including the Communities of Excellence Framework, as the means to transform organizational and community performance. Propelled by this endorsement, all governmental agencies (federal, state, county, and local) are encouraged and incentivized to adopt Baldrige-based tools and practices within their agencies and assist with implementation in communities.

Our five-year strategy specifically focuses on three areas:

- Actively support an energized, high-performing Baldrige Enterprise,
- Increase capability and capacity to support communities, and
- Become the Center for Community Performance Excellence Resources and Knowledge.

Among our key priorities for this year are to develop a training and certification program that prepares current and future leaders to take an active role in the systematic improvement of their communities and engage leaders and residents in new and innovative ways. Community Coaches trained in performance excellence, facilitation skills, and the ability to seek out and include the range of diversity in a community will help communities to excel. We are currently seeking additional resources to build out and pilot this certification program, which will facilitate COE national expansion.








*“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*

We are also working with the Baldrige Program to update the current version of the Communities of Excellence Framework. We believe there is a need for a national review and feedback on the current version developed in 2020. Our goal this year is to include broader national expertise and participation through a National Equity Advisory Panel of experts in community transformation that bring will expertise in issues of equity and community engagement in the areas of health care, the economy, and education, particularly with respect to issues of diversity and inclusion. We will also seek feedback from past and current Communities of Excellence participants through virtual focus groups and solicitation of structured comments.

learning opportunities for those already involved and those looking to get involved.

As we do every year, we cannot conclude this article without recognizing all of the people that have helped us reach our goals to date. This includes our co-founders, board, faculty, mentors, volunteer examiners, the Baldrige Program staff, Alliance members, and Baldrige Foundation staff. Finally, this year I want to specifically call out the hard work and talent displayed by our small staff – Manuel Castañeda, Christel Gollnick, and Kim Halfhill, who have helped take our organization to ever higher levels of performance.

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

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

In 2022 we completed a Common Community Scorecard of high-level interdependent measures to help communities early in their journeys and for benchmarking against communities across the country. We are continuing this project by developing a series of cascading measures to help tell each community’s story and track progress over time. Our goal is to develop a web-based tool that each COE site could use to measure and communicate strategies and progress across multiple platforms and devices to make data collection and action transparent.

In addition to these key priorities, we are adding more tools and opportunities for enhanced learning and sharing across communities. We are regularly adding new programs and

Throughout its first decade of serving communities, Communities of Excellence’s leaders have learned that when it comes to making meaningful change in communities, each community’s leaders and key stakeholders must first take ownership and trust the process. They must look to each other and include as many of their residents and other customers as possible to find new and better answers to legacy and systemic problems. To be successful once they have shown up to collaborate, they need guidance, mentorship, and coaching that allows them to thoughtfully and systematically make progress through the interconnected complexity of their community. The systems leadership and integrated management approach inspired by Baldrige and translated into inclusive community language developed by COE is helping to build stronger communities of connection, courage, creativity, and character. It is an innovative approach that is helping leaders think differently about the potential of their communities and value all people and assets. Communities of Excellence 2026 is bringing the light of hope to community leaders who have dedicated themselves to improving the places they live, learn, work, and play.

Christel Gollnick, “Key Success Factors in Communities of Excellence,” *Chronicle of Leadership and Management*, Volume 2, Number 1, September 2022, p. 71.



The Foundation for the Malcolm Baldrige National Quality Award has become a thought leader in performance excellence, leadership, and management. A significant part of that effort has been the development of several series of podcasts and webinars that address critical and timely issues facing leaders at all levels and in all sectors.

The Foundation itself organizes the Quarterly Webinar Series that not only addresses critical leadership issues but includes regular updates from the Baldrige Performance Excellence Program and the Alliance for Performance Excellence, providing an opportunity for interested parties to understand and appreciate the scope of activities across the Baldrige enterprise. Interspersed with the quarterly webinars are special interest webinars organized through the Institute for Performance Excellence.

The Foundation has also partnered with Institute Trustee ABOUT Healthcare to present the Leader Dialogue podcast series. Leader Dialogue focuses on health care, and addresses some of the biggest challenges health system leaders face. This series brings together subject matter experts who dissect the challenges and opportunities to help uncover practical solutions that enable leaders to succeed.

These are the topics our Broadcasting Excellence initiative addressed in 2022. You may go back and view the Foundation and Institute webinars here: <https://baldrigefoundation.org/what-we-do/webinars/>. Recordings and transcripts of the Leader Dialogue podcasts can be found here: <https://leaderdialogue.com/podcast/>.

## FOUNDATION AND INSTITUTE WEBINARS

- Virtual Executive Roundtable with ABOUT Healthcare - Technology: Maximizing Your Systems to Accomplish Your Goals
- Leadership Engagement: Workforce – Customers – Communities
- Delivering on our Commitment to Community Performance Excellence
- Innovation with ABOUT Healthcare
- Data Disasters and Delayed Decisions: Moving from an Explanation Culture to an Execution Culture
- Creating a Culture of Excellence: Operationalize Culture by Focusing on Process
- Consumerism: The Payvider Faultline with ABOUT Healthcare
- Using the Baldrige Excellence Framework to Improve Organizational Resilience and Sustainability
- Agility in Strategic Planning
- State-Based Baldrige Programs: The Gateway to Performance Excellence
- 2022 Baldrige Enterprise Update
- Systemness with ABOUT Healthcare
- Next Steps with ABOUT Healthcare

## LEADER DIALOGUE PODCASTS

- Can Innovation Rescue Health Care? With Ben Look and Mike Morin
- A Roundtable Discussion on the Health System, Executive Management, Pandemic Challenges, and More!
- Achieving Financial Stability and Resilience with Carol Burrell
- The Essentials of Operational Transformation with Dan Mullen
- Pragmatic Approaches of Innovation in Health Care with Dr. Jennifer Strahan
- ProVInsure: Innovative Self-Insured Health Care with Ashley Bacot
- Responding to Hinge Moments with Dr. Michael Lindsay
- Navigating the New Landscape: Innovation and Change Management in Health Systems
- Optimizing Capacity and Throughput with Angie Franks, ABOUT Healthcare CEO
- Oak Street Health: Rebuilding A Value-Based Health Care with Dr. Julie Silverstein
- The Disruption in Health Care: How You Should Pivot and Adapt for the Future with Scott Nordlund
- Payvider Adoption: Dennis Butts Jr.
- Unlocking Top Performance and Creating Extraordinary Outcomes Through the Power of Full Engagement with Jim Loehr
- Leading a Health Care Organization: Leadership Towards Providing Excellent Service with Phil Young
- John Chessare | Post COVID Health Care System
- David Burik | Challenging Health Care Trends
- U.S. Health Care: Understanding Challenging Trends for Health Systems and Hospitals with David Burik
- Achieving Systemness: Competitive Challenges with Scott Nygaard MD, MBA
- Achieving Systemness: Coaching Opportunities
- Achieving Systemness: Analyzing Gaps and Opportunities in Today's Environment with Dr. Conrad Vial
- Operating as One: Employee Empowerment and Seamless Handoffs with Gay Landstrom and Kim Maguire
- Operating As One: Leadership Development with Russ Hill
- Driving Clarity and Focus: the 12-week Year, With Guests Dan Isacksen, Trinity's CFO, and Brian Moran, author of the book *The 12 Week Year*

# Do You Have an Organizational Purpose? Is It Mere Propaganda?

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



In a recent blog about CEO challenges and opportunities in 2022 (reprinted starting on page 80 of this *Journal*), the first opportunity listed was the opportunity to “make a difference.” As stated in that blog, “Employees, customers, and investors want to associate with organizations that serve a larger **purpose** (emphasis added) than may be expressed in their mission statement. They want to be associated with organizations that live their values and have a commitment to societal responsibilities, environmental stewardship, and equity and inclusivity.”

In 2019, The Business Roundtable (BRT) (<https://www.businessroundtable.org/business-roundtable-redefines-the-purpose-of-a-corporation-to-promote-an-economy-that->

serves-all-americans) issued a “Statement on the Purpose of a Corporation signed by 181 CEOs who commit to lead their companies for the benefit of all stakeholders—customers, employees, suppliers, communities and shareholders.” It thus redefined the purpose of a corporation as participating in stakeholder capitalism, putting the interests of employees, customers, suppliers, and communities on par with shareholders.

There was some subsequent criticism of the degree of follow-through on this commitment by some members of the BRT ([https://en.wikipedia.org/wiki/Business\\_Roundtable](https://en.wikipedia.org/wiki/Business_Roundtable)). In 2022, this commitment is taking on significant importance with a growing number of organizations in the BRT and beyond.

To show a commitment to a larger **purpose**, many organizations are now developing statements of purpose that accompany their mission, vision, and values. As with mission, vision, and values, purpose is meaningless unless translated into action. As with mission, vision, and values, purpose is detrimental to the engagement and loyalty of stakeholders, unless the purpose is incorporated into organizational strategy, goals, and metrics.

## Incorporating Purpose

The topic of incorporating purpose into strategy (and action) was addressed by Graham Kenny in the May/June 2022 issue of *Harvard Business Review* (<https://hbr.org/2022/07/your-corporate-purpose-changed-has-your-strategy-kept-up>). As reported in other studies, he points out that companies with a clear purpose and deployment of that purpose through actions do better than those without such a commitment. As an example, he discusses Woolworths, Australia's largest supermarket chain.

In 2017, Woolworths provided two very different statements of its corporate purpose. One spoke to "adding quality of life" for its customers and people. The other stated, "We are focused on shareholder returns through the effective deployment of capital and ensuring we deliver on our Group targets." Today, Woolworths' stated purpose no longer mentions shareholders; it is "to create better experiences together for a better tomorrow." This statement is a guide for Woolworths' strategic planning, and the business now has a broad range of related metrics across its stakeholder groups of shareholders, customers, suppliers, employees, and the community.

At the Consumer Goods Forum in Dublin in June 2022, the consumer products division chief of L'Oreal reported on its sustainability goals ([https://www.happi.com/contents/view\\_breaking-news/2022-07-08/loreal-exec-provides-update-on-research-sustainability-efforts/](https://www.happi.com/contents/view_breaking-news/2022-07-08/loreal-exec-provides-update-on-research-sustainability-efforts/)), which are set out to 2030. As of today, 70 percent of the PET plastic that the division uses worldwide is recycled and 25 of its 44 manufacturing plants are carbon neutral. By 2030, the company intends to use recycled and reused water for all its industrial processes.

## Baldrige Excellence Framework and Purpose

Societal contributions is one of the Baldrige core values (<https://www.nist.gov/baldrige/core-values-and-concepts>). The Baldrige Excellence Framework® booklet description of the core value states, "Considering societal

well-being and benefit means leading and supporting... the environmental, social, and economic systems in your organization's sphere of influence."

- Item 1.2 of the Baldrige Criteria for Performance Excellence® (<https://www.nist.gov/document/2021-2022-baldrige-framework-bnp-free-sample.pdf>) is entitled "Governance and Societal Responsibilities." It asks how societal well-being and benefit are incorporated into your strategy and daily operations.
- Item 2.1, "Strategy Development," asks how changes in your external environment are considered in your strategic planning.
- Item 5.2, "Workforce Engagement," specifically asks about workforce equity and inclusion for a diverse workforce. The Criteria also ask about how you track progress on achieving strategic plan objectives and the results for achieving those objectives.

Given the changing stakeholder demands and the greater commitment to more inclusive purposes, future revisions of the Baldrige Excellence Framework® might provide greater emphasis on societal well-being as part of remaining at the leading edge of validated leadership and performance practice.

## Is a Purpose Statement Necessary?

I believe a purpose statement can provide great focus and be a powerful engagement vehicle for an organization's stakeholders. That said, I think commitment to "making a difference" is what really matters. Instead of, or in addition to, a purpose statement an organization could include its purpose in its vision statement or make it a strategic pillar with associated strategic objectives, action plans, and metrics.

Real companies are doing real good! Each organization must craft its own path to its purpose and that purpose's deployment through strategy, goals, and metrics. The value comes in what your organization actually does. So please consider your purpose today!



# The Alliance for Performance Excellence

by Brian Lassiter, Chair, the Alliance for Performance Excellence



Brian Lassiter, Chair, the Alliance for Performance Excellence

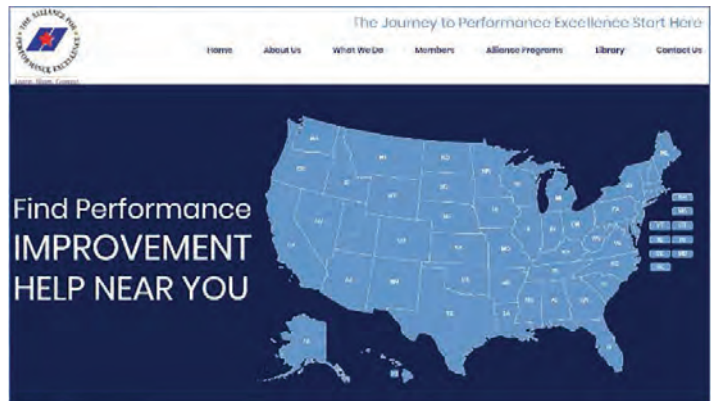
In a period of continuous—and somewhat dramatic—change these last couple of years, the members of the Alliance for Performance Excellence have shifted their strategies and offerings to better serve organizations and communities on the journey to excellence.

As we all know, the last couple of years have been unprecedented: organizations and communities are

still facing lingering challenges with the pandemic, staffing shortages, supply chain issues, shifting work environments and business models, and planning for an uncertain future. The Alliance – sometimes called the “front door” to the Baldrige Performance Excellence Program—is where most organizations and communities start (and advance) their improvement efforts. A 501(c)(3) nonprofit, the Alliance is a network of Baldrige-based programs and other members across the nation and world that share in the mission of growing performance excellence and is designed to provide resources and support to organizations and communities desiring to improve.

Today, the Alliance represents 29 Baldrige-based programs covering all 50 states and U.S. territories plus three supporting members that support performance excellence throughout the nation and world. In 2022, Alliance member programs evaluated nearly 600 award applications, trained nearly 800 examiners, hosted 10 conferences that had over 2,600 combined attendees, and convened dozens of workshops and other events that attracted thousands of attendees. The Alliance has 500 non-examiner volunteers, nearly 30 paid staff, and a combined budget of nearly \$9 million. The size and scale of the Alliance represents an impactful force within the Baldrige community.

In addition to conducting Baldrige-based assessments and recognizing performance through award programs, many Alliance members also conduct training, provide coaching,



and host a variety of learning and networking events—breakfasts, webinars, workshops, roundtables, fellows programs, conferences—to help leaders in all sizes and types of organizations explore best practices in performance excellence. In many ways, Alliance member programs are “developmental” in nature, helping organizations begin or accelerate their journeys to excellence.

## Key Highlights of 2022

The Alliance has also been active with several other mission-related initiatives, which benefit our members and organizations across the United States on the journey to excellence. Some of those highlights include:

- Under the leadership of Alliance member Communities of Excellence 2026 (COE 2026) and in partnership with the Baldrige Foundation and Baldrige Performance Excellence Program (and referenced elsewhere in this Journal), Community officially became an eligible Award category for the Malcolm Baldrige National Quality Award. In time, communities will be able to apply for and receive national recognition from Baldrige.

As of 2022, about 25 U.S. communities are actively using the Baldrige-based Communities of Excellence Framework to design and improve their community improvement efforts and many are applying for and receiving feedback and recognition through COE 2026 and state/regional Alliance members. As COE 2026

continues to grow, the Alliance is eager to deepen the partnership to accelerate the impact of Baldrige in communities across our country.

- Most Alliance program members shifted their core assessment offerings, now providing online only (or hybrid) site visit experiences. This was in response to the pandemic, but now offers more flexibility and accessibility to organizations and communities desiring a Baldrige-based evaluation.
- The 2022 Baldrige Fall Conference, presented in partnership with the Baldrige Performance Excellence Program and hosted in San Diego by the California Council for Excellence and Communities of Excellence, attracted nearly 400 leaders and professionals across the United States and world. The 2023 conference will be in late October in Milwaukee, hosted by the Wisconsin Center for Performance Excellence and Rocky Mountain Performance Excellence. More information will be shared soon at [www.baldrigeconference.org](http://www.baldrigeconference.org).
- The Alliance also continues to partner with the Baldrige Program and the Baldrige Foundation to grow and sustain the Baldrige enterprise. Deeper collaboration across all parts of the Baldrige community will increase the impact of this Framework, helping organizations and communities of all sizes and types improve outcomes and reach higher levels of performance.

All of these efforts are in pursuit of the Alliance mission: “Enhancing Our Members’ Ability to Grow Baldrige-based Performance Excellence.” To learn more about the Alliance and its members or to find a local program near you visit, [www.baldrigealliance.org](http://www.baldrigealliance.org).



Tommy Gonzalez, City Manager of the City of El Paso, Texas, explores some of his city’s best practices and results from its application of the Baldrige Framework, at the Baldrige Fall Conference, San Diego, California, October 20-21, 2022.



The Baldrige Fall Conference brought together hundreds of Baldrige practitioners and professionals to share best practices from Baldrige Award-winning organizations, San Diego, California, October 21-22, 2022.



**BALDRIGE FOUNDATION**  
**LEADERSHIP AWARDS**  
**2022 RECIPIENTS**



**APRIL 5, 2022**

# The Baldrige Foundation Leadership Awards and the Dr. Curt Reimann Baldrige Scholars for 2022

The Foundation presented the 2022 leadership awards in a ceremony on April 5, 2022, as part of the 33<sup>rd</sup> Quest for Excellence®. After the Baldrige Performance Excellence Program (BPEP) and the National Institute for Standards and Technology (NIST) were forced to postpone Quest in 2020 due to the COVID pandemic, and to host the rescheduled conference virtually in 2021, this was a return to an in-person award ceremony.

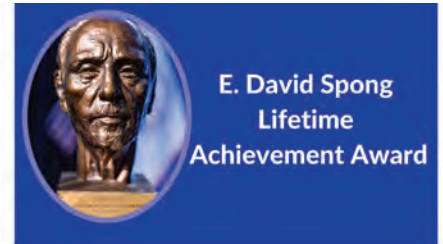
As many of these award recipients have said, the COVID pandemic has multiplied the challenges to leadership and underscored the importance of the Baldrige Criteria to overcoming those challenges. Many of these leaders have been battling on the front lines of the pandemic and have continued to lead their organizations to excellence.

For 2022, the Foundation Awards included the tenth annual presentation of the Harry S. Hertz Leadership Award, the sixth presentation of the E. David Spong Lifetime Achievement Award, the fifth cadre of winners of the Baldrige Foundation Awards for Leadership Excellence, and the fifth class of Dr. Curt Reimann Baldrige Scholars.

“Baldrige is a leadership tool set,” said Foundation Board Chair Dr. Kay Eggleston, “and these awards encourage leaders to embody and promote the Baldrige criteria and to strengthen the DNA of leadership across the United States and beyond. All the leaders being recognized today have been on the COVID front lines, and we recognize

them for their capacity to lead, to transform, to encourage their colleagues, and to keep their organizations mission-focused and viable.”

The Foundation awards are made possible through the generous support of sponsors who desire to recognize and celebrate role-model leaders. The Foundation expresses its sincere appreciation to Dr. Ken Cohen and the Synergy Organization as the Founding Sponsor of the Harry S. Hertz Leadership Award. We gratefully acknowledge George Taylor and Beyond Feedback for continuing their generous support of these awards for many years. Lori Kirkland, who helped establish and continues to work to fund the Dr. Curt Reimann Baldrige Scholarship, also deserves our sincere gratitude. Finally, each year the organizations, colleagues, and friends of our awardees make a special effort to celebrate their accomplishments by placing congratulatory notes and ads into the Foundation Awards Program. The Foundation would like to thank them all for continuing to make these awards a reality.



The Foundation Leadership Awards are presented annually during the Baldrige Quest for Excellence® conference.



## 2022 Foundation Leadership Awards Tribute Sponsors

AARP

ABOUT Healthcare

Beyond Feedback

Carnegie Mellon University

Center for Organ Recovery & Education (CORE)

Charleston Area Medical Center

Colorado School of Mines

Communities of Excellence 2026

Dallas College

El Paso Chamber

GBMC Healthcare

ISACA

Montgomery County Public Schools

Quality Texas Foundation

Tata

The Partnership for Excellence

Walden University

WellStar Health System

# The E. David Spong Lifetime Achievement Award

Tommy Gonzalez became City Manager of the City of El Paso, Texas, one of the 25 largest cities in the United States, in 2014. Prior to that he was the City Manager of Irving, Texas, for seven years, where he led the city to receive the Malcolm Baldrige National Quality Award in 2012.

“The E. David Spong Lifetime Achievement award recognizes individuals who have performed truly extraordinary service that has changed the world, and inspired others to do the same,” said Al Faber, President and CEO of the Baldrige Foundation. “Tommy has certainly done that through his lifetime of public service. He served in the Army Reserves for 22 years, retiring as a Lieutenant Colonel, and has worked in municipal government for over 30 years. He has applied the Baldrige principles to great success, bringing excellence in service and improving the lives of people in El Paso and throughout Texas.”

“The discipline within the framework guides our organization to focus on what is most important: our workforce,” said Gonzalez. “A true leader, dedicated to the Baldrige philosophy, mentors and inspires others who are on their journeys of performance excellence. Demonstrating effective leadership by sharing the Baldrige framework requires a



Al Faber (from right), President and CEO of the Foundation for the Malcolm Baldrige National Quality Award, presents El Paso City Manager Tommy Gonzalez with the 2022 E. David Spong Lifetime Achievement Award, with Dr. E. David Spong, and Dr. Kay Eggleston, Board Chair of the Baldrige Foundation, April 5, 2022.

commitment to helping others learn the ideals of continuous improvement.”

“The intense focus on our workforce strengthens our commitment to customer service by developing and investing in our people. By deploying the Baldrige framework, we have been able to achieve a vast list of accomplishments.”

“Tommy has also actively worked to promote Baldrige for other organizations,” said Faber. “He has served on the Baldrige Board of Examiners, has recently been asked to serve an unprecedented third term as chair of the Quality Texas Foundation Board of Directors, and also serves on the Communities of Excellence 2026 Board.”

According to Gonzalez, “The Baldrige framework has served as a great segue into the Communities of Excellence focus, opening up dialogue with community partners to share best practices to improve the quality of life, health care, and education of our residents.”

He continued, “The Baldrige framework has had a significant impact on the alignment of community priorities with our strategic plan. This has broken down silos by creating cross-functional teams and basing our decisions and actions on our vision, mission, and values. Baldrige gets results.”



Tommy Gonzalez, past winner in 2012 of the Malcolm Baldrige National Quality Award with the city of Irving, Texas, and current City Manager of El Paso, Texas, being introduced as the winner of the Foundation’s 2022 E. David Spong Lifetime Achievement Award, April 5, 2022.



# Remarks on Accepting the 2022 E. David Spong Lifetime Achievement Award

Tommy Gonzalez  
City Manager, El Paso, Texas

I would like to thank the Baldrige Foundation for this incredible honor. Madam Chair, Al Faber, and the Board of Directors, thank you very much. I am truly honored to receive the E. David Spong Lifetime Achievement Award. Dr. Spong is an incredible person and he is a hero of mine, and he is also what Baldrige means to all of us. I also want to recognize Ms. Spong. It was a pleasure speaking with you and my wife and I truly enjoyed getting to know you.

I want to recognize my team that made the trip: Tracey Jerome, Deputy City Manager; I also want to recognize Laura Cruz-Acosta, Communications Director. Tracey Jerome is one of the lead Baldrige examiners—we have a lot of people in our organization who are examiners—so is Laura Cruz-Acosta. I also want to recognize Rick Isaias, Communications Manager in our department; as well as Mario Rodrigues, also with our Communications department.

I want to thank also someone very special to me—the most special to me—and I want to save the best, obviously, for last. I want to thank my beautiful wife Sandy for accompanying me in life for the last 34 years and most recently in the Irving, Texas, and El Paso Baldrige Journey. Thank you.

Baldrige Framework has been incredibly helpful in Irving and now El Paso. The business operating system has made us truly resilient. By utilizing this system we have been able to show how it can truly prepare you for challenges before they happen. We were able to do that in Irving before the housing market crashed, saving millions and ensuring we continued to pay our employees pay increases during the down time in our economy. This was a huge motivator for our staff.

At the same time we reduced our personnel costs by 10 percent and we were also able to raise the customer service

requirements and satisfaction rates by double digits in all departments, culminating in the national Malcolm Baldrige Award.

After being awarded the Malcolm Baldrige Award several organizations approached me to learn more about how we were able to earn such an award. We happily assisted everyone who sought out information. We were happy to hear that one of those cities won their state and then the national award. That was Fort Collins, Colorado.

The other city that won was Farr, Texas, in the state of Texas, they won the state award, and they continue the Baldrige journey for the national award.

We are currently working with Henderson, Nevada, along with three other cities. They are all truly exceptional organizations. We find that by helping others we are able to staff fresh with ideas and stay motivated on our own journey. But we also find that we learn a great deal from those that we share information with as they share their best practices. That makes us better.

Aside from helping other organizations across the state of Texas and beyond, in 2018 we started taking Baldrige to other agency partners in our own community. This resulted in working with approximately 20 agencies. We did this by inviting all agency heads to a meeting where we had three initiatives.

The first one was Baldrige training. We had Mac McGuire teach the Baldrige application process. We called it a Champion Level training.

Secondly, we also committed to a community project to demonstrate our collective resolve to working with one another. We committed to working with all the school districts, the junior colleges, the University of Texas El Paso,

which is a Tier One university, and teach approximately 500 kids the city of El Paso's budget. The city of El Paso has a billion dollars in operational budget and another billion dollars in capital improvements.

We did it to show the council how the youth could learn about the budget, but we also wanted to show the administrators in all the school districts how they could apply the STEM program to actual applications of learning how to lead and manage a one billion dollar budget and another billion dollars in capital improvements. That proved extremely successful. The city council was inspired by that process. They then made that committee a youth advisory committee. They chose nine kids to become a youth advisory committee to the council and they completed a strategic plan for the community. All this work was just one of the initiatives we planned to do as 20 organizations.

The third initiative was to commit to share a day of best practices with these organizations, to have a conference to share best practices, our best practices and then what their best practices are so we can learn from each other. We have not had that yet, but that is the third initiative that we have planned to work through.

This process led to training other agencies in Lean Six Sigma, training other agencies in the Malcolm Baldrige process, and learning, training, and working together. Again, this all happened in 2018.

All this work truly made us resilient and prepared us for what we did not know was going to come. We had three different events happen back to back to back. We had the immigration crisis. We then had the August 3 atrocity that occurred in our community in which a young man came from north Texas to kill 23 of our own people in our own back yard. And then we had the pandemic that we have all lived through. We have all gone through the pandemic, and we all had to prepare for it and work through it, but you do not really prepare for the other crises that challenged us.

So for example, the work we did in the immigration crisis, we streamlined the process with local, state, and federal agencies as we dealt with immigration matters. We did not have the types of challenges that other border cities have had because we were working with each other prior to that occurring. So we process each person, we house them,



El Paso, Texas, City Manager Tommy Gonzalez accepting the Baldrige Foundation's 2022 E. David Spong Lifetime Achievement Award, April 5, 2022.

we make sure that we feed them and we transport them to where they need to go. We have had visits from other border cities to see how we were doing it.

During the August 3 hate crime, the young man came and he shot the people I mentioned earlier. That was a time that was really sad for our community. We really did not want that particular issue to define us as a community. Instead, we wanted to show everyone how a safe and compassionate community responds to that type of adversity. Our community truly demonstrated our true character during that time. While others, as you have seen throughout the country, were throwing water on police officers, our community was bringing water to our officers. During this time we also demonstrated community leadership. When a north Texas city attempted to cancel a football game with one of their high schools and one of our El Paso high school football teams,



we sprang into action as a community. Following that horrible crime, cancelling a football game between what represented the two geographic areas that collided on that fateful August 3, 2019, would have simply exacerbated an already difficult situation. Sports are supposed to unite us, not divide us. Having played sports when I was young and playing college sports, it was something that was near and dear to me. It became a special moment because we rallied as a community as we worked with the Dallas Cowboys and several other entities to put the game back on at the Star in Frisco, Texas. Instead of worsening memories for our youth, we created a beautiful memory and continued the healing process.

This would not have been possible without the groundwork we did in 2018. That was the foundation of this deep and broad relationship that we have been able to forge with all of our community partners.

Finally, we then faced the pandemic as the rest of the world has. We were at one point the most infected city in the world. We could have toppled from all that pressure and just listened to a lot of the rhetoric at the state and national level. Instead, what we did was we followed that data. That is what Baldrige teaches us. Follow the data. We really worked on communication infrastructure, our infrastructure as a whole, how we used technology to do things differently from how other folks were doing it. Some were just first-come, first-served, and we were getting heavy pressure to succumb to that approach. Instead we just stuck to our processes, stuck to our systems, again, what Baldrige teaches us. And since we had worked together as a community since way back in 2018, it really got us ready for the immigration crisis, the August 3, 2019, event that none of us would have thought would happen, and then of course the pandemic that we have all gone through.

So we went from the most infected city on the planet, literally, no joke, and of course we did not want that designation, to leading the state and the federal government in shots in arms. We were recognized by the CDC and Rockefeller for the best vaccine roll out in the states.

That work that I talked about made us better. We did Lean Six Sigma initiatives and projects together with UMC, our county hospital, and we took the three hour long waits to 15 minutes and in some cases five minutes in our megasites. And again, no different from what other communities did,

you heard of all of this, but we were able to take a huge problem and take it down to the results that I mentioned. But what we were most proud of is that we worked together as a community, using the same framework, the same methodology, and threw in some Lean Six Sigma, and were able to get those kinds of results.

Baldrige really works. Not only for an organization, but it proved vital for dealing with the challenges that could have toppled our community. It can work for communities if you share the Baldrige framework with others and create true Communities of Excellence. When you train together, you can learn together. It helps you all get on the same sheet of music and speak the same language. In the end, you develop meaningful relationships that lead to mutual results.

*“Baldrige really works. Not only for an organization, but it proved vital for dealing with the challenges that could have toppled our community. It can work for communities if you share the Baldrige framework with others and create true Communities of Excellence.”*

When you have mutual challenges, you need to overcome those challenges as a community, not silos. That is what Baldrige means to me. By utilizing Baldrige we, as a community, were not only able to overcome these very real challenges, but we were able to transform our organization, as well as our community. We transformed physically by the renaissance in our downtown, nearing 900 capital projects since we put the strategic plan in place throughout our community, not just in one part of the city. We are reaching pre-pandemic numbers of flights at our airport—before the pandemic we had 21 direct flights that we have been able to secure so getting back to pre-pandemic levels is a big deal for us. We were named an All-American City three out of the last four years. We were awarded the state of Texas Performance Excellence Award two years in a row, and we were a finalist in the Malcolm Baldrige Award process this year, but we did not win.

It is a difficult process, and I respect the process. It does make you better.

I want to thank the Baldrige Foundation, NIST, and Bob Fangmeyer and his whole team. They do an incredible job for the United States of America.

Most importantly, though, we transformed a community, and I believe we transformed our community by connecting with our community intellectually, by having a strong strategic plan and being able to intellectually talk and be on the same page, and to have goals and objectives and work together to accomplish them. We were able to connect with people emotionally by seeking and discovering what their passion is. And then we were able to connect by them touching the result.

I can go on about the type of results that we were able to achieve by having these programs in place, but what Baldrige means to me is that it can truly transform individuals, it can truly transform organizations, and then it can help you work with agency partners to transform communities.

I want to thank you again for honoring me with this amazing award. On behalf of our community, I humbly accept it. God bless you, and may God bless all of us, whether it is in good times or bad. Thank you.



El Paso, Texas, City Manager Tommy Gonzalez, winner of the 2022 E. David Spong Lifetime Achievement Award, with the award, a bust of David Spong.



# The Harry S. Hertz Leadership Award

John B. Chessare, MD, MPH, FACHE, became President and CEO of GBMC HealthCare in 2010. Prior to coming to GBMC, Dr. Chessare served as president of Caritas Christi Health Care System's Caritas Norwood Hospital outside of Boston where he also served as the senior vice president for quality and patient safety of the entire Caritas system and was the system's interim president from 2006 until 2008. Dr. Chessare held several other executive level health care leadership roles, including at Boston Medical Center/Boston University School of Medicine from 1998 to 2005; at Albany Medical Center/Albany Medical College from 1994 to 1998; and at the Medical College of Ohio from 1983 to 1994.

"The GBMC Board of Directors set a new vision for our organization in 2010," said Dr. Chessare, "and we realized that we had a lot of work to do to move from a focus on individual health care services, to the creation of a system that could be held accountable for managing the health of a population and delivering on our four aims. It was this realization that moved us to begin implementing the Baldrige criteria."

"The Hertz Leadership Award recognizes role-model leaders that challenge, encourage, and empower others to achieve performance excellence," said Al Faber, President and CEO of the Baldrige Foundation. "Dr. Chessare embraced the



Harry S. Hertz (center), former Director of the Baldrige Performance Excellence Program, and Al Faber (right), President and CEO of the Foundation for the Malcolm Baldrige National Quality Award, welcome to the stage John B. Chessare, President and CEO of GBMC Healthcare, to present him with the 2022 Harry S. Hertz Leadership Award, April 5, 2022.

Baldrige framework as the way to achieve those leadership goals."

"We needed a management structure that would drive us faster towards our vision," continued Dr. Chessare. "Since we had been relying on hard work and good intentions alone, very little of our work was systematic and highly reliable. Implementation of the Baldrige criteria has helped us create systems that could be deployed, studied, continually improved, and integrated with other systems to achieve our aims."

As the COVID-19 pandemic stressed health care organizations to their limits and beyond, Dr. Chessare and his team continued to operate under the guidance of the Baldrige criteria, receiving the 2020 Malcolm Baldrige National Quality Award in the health care sector.

"John is a role-model leader deeply committed to the Baldrige framework and embodies the Baldrige leadership principles," said Faber. "His unwavering servant leadership has been instrumental in the success of GBMC HealthCare in navigating the unprecedented challenges during the COVID-19 pandemic while providing high quality patient care."



Al Faber, President and CEO of the Baldrige Foundation, Harry S. Hertz, former Director of the Baldrige Performance Excellence Program and inspiration for the Hertz Award, and Kay Eggleston, Board Chair of the Baldrige Foundation, present John B. Chessare, President and CEO of GBMC Healthcare, with the 2022 Harry S. Hertz Leadership Award, April 5, 2022.

# Remarks on Accepting the 2022 Harry S. Hertz Leadership Award

John B. Chessare, MD, MPH, FACHE  
President and CEO of GBMC HealthCare, Baltimore, Maryland

Good afternoon. Please let me thank the Baldrige Foundation for honoring me as the recipient of the Harry Hertz award. It is fabulous to have Harry up here.

On the Hertz award web page, you will find the statement that no one person in an organization can be credited with the achievement of excellence, and I am accepting the award for all of my colleagues in the GBMC Healthcare System, many of whom are here with us today.

From the Board of Directors—and I would like to ask Bonnie Stein and Dr. John Saunders to please stand up very quickly—we have fabulous community support with our organization. I like to use the word “fabulous,” and it has been pointed out that I use it too often, but my fabulous senior team, please stand up and all the directors that are with us today, thank you so much, and all of our outstanding clinicians and support staff.

We are all united by our vision phrase, “To every patient, every time, we will provide the care that we would want for our own loved ones.” I will take credit for helping to create that vision phrase, and I will also take credit for being its number one cheerleader.

It is a tall order to follow in Harry Hertz’s footsteps and to live the Baldrige Core Values and Leadership Behaviors, and I cannot claim that I always personify them. But I would highlight that at GBMC we take our societal responsibility very seriously as we work to make Baltimore a better place by creating better health care value for its citizens, including those who have been historically marginalized and underserved.

Leaders benefit from reflecting often on what really matters. I have learned this from my children, Mike, Matt, Pat, and Caroline. And leaders also must be resilient and have the strength to persevere in difficult times. My exemplar for resiliency and the strongest person I know is the love of my



John B. Chessare, President and CEO of GBMC HealthCare, accepts the 2022 Harry S. Hertz Leadership Award, April 5, 2022.

life, my wife Tracy, without whom I would have had no hope of achieving this award. She is a dermatologist who role models the Baldrige core values of personal learning—as a matter of fact, she is the best life-long learner I know—agility and societal and familial responsibility. As a matter of fact, I am sorry, I think you picked the wrong Chessare. I think Tracy deserves this more. Thank you, honey, I love you very much.

I just want to end again by thanking the Foundation. I want to thank all of you, I want to thank the people in the Baldrige Program who keep the Baldrige Criteria alive and moving forward. We have learned so much at GBMC from the Criteria and we will continue to use them.

Please let me thank all of you and the Foundation for this wonderful recognition. I am truly humbled. Thank you very much.

# Baldrige Foundation Awards for Leadership Excellence



The Foundation presents recipients of the Foundation Award for Leadership Excellence with a sector-specific medal that is suspended on a color silk moiré ribbon, matched to the color representing the sector. The award includes a lapel pin and framed certificate.

The Foundation Awards for Leadership Excellence recognize individuals who actively support the Baldrige Foundation and its mission to promote, grow, and fund the Baldrige Program in supporting organizational performance excellence throughout the world. Awards are presented to individuals working in health care, nonprofits, government, business, education, and cybersecurity.

“There are so many people doing such important work promoting the Baldrige Framework,” said Al Faber, President and CEO of the Baldrige Foundation. “Through their efforts to grow the Baldrige community, they help thousands

of organizations across the country to improve their performance.

The 2022 recipients of the Baldrige Foundation Awards for Leadership Excellence, represent key sectors of the U.S. economy. Honorees demonstrate the finest Baldrige leadership qualities, and work to ensure the continued viability of the Baldrige Program and the Baldrige Excellence Framework.

# In Their Own Words

*The 2022 awardees provide their thoughts on Baldrige and how it impacts their organizations and sectors*



**BRET ARSENAULT • CYBERSECURITY**  
Corporate Vice President and Chief Information Security Officer, Microsoft

“There are many ways to be a successful leader. In my experience, I have found that it’s critical to enable a productive and inclusive work environment and always keep a beginner’s mindset. Lean into uncertainty and take calculated risks. Ask good questions: Be curious about the perspective of others and seek creative solutions to tough problems. The truth is it takes all kinds of leadership behaviors to make an organization successful. Leadership is not about a single person, or about personality—it’s not a contest to be the most charismatic or the most energetic. Leadership is about bringing out the best in people, creating an environment where everyone feels they can do their best work and find purpose in what they do. That’s why I’m especially honored and thankful to be recognized by the Baldrige Foundation for Leadership Excellence, because it is a testament to my team and the incredible work they deliver every day.”



**ROBERT BARNETT • BUSINESS**  
Executive Vice President (retired), Motorola

“Thank you, Baldrige Foundation, for this Business Leadership recognition, in truth a significant tribute to so many people over the past 23 years. These would include the 14,000 Motorola CGISS Sector associates who successfully pursued Excellence, the National Institute of Standards and Technology (NIST) team that evaluated our performance, the state organization(s) whose volunteers (including me as a 17-year Board member and examiner) make the state programs possible, and the Baldrige Fellows staff and cohorts.

My Motorola career, the state organization, and the Baldrige Fellows Program have provided me the opportunity to work with people committed to ‘getting better at getting better.’ For all of this, I am honored and truly thankful.”



**HONORABLE WALTER G. COPAN • GOVERNMENT**  
Former Under Secretary of Commerce for Standards and Technology, and NIST Director; Currently Vice President for Research and Technology Transfer, Colorado School of Mines

“Throughout life I have been privileged to meet and to work with talented, caring people — and with organizations that are dedicated to making America better for us all. The Baldrige Foundation and the Baldrige Program and its framework set the standard for excellence, with people of integrity and commitment helping to empower the best within the nation’s companies, organizations, and communities. Generously sharing their wisdom and collective experience, the people of Baldrige provide mentorship and counsel to help others achieve great outcomes, in an ongoing quest for performance excellence. I am honored and blessed to receive the Baldrige Foundation Award for Leadership Excellence.”



**BARBARA JENKINS, ED.D. • EDUCATION**  
**Superintendent of Orange County Public Schools**

"I am extremely honored to receive the Baldrige Foundation Award for Leadership Excellence in Education. Our school district has long been inspired by the Baldrige framework, as it stands for excellence in education and across sectors. I share this award with my phenomenal leadership team, principals, teachers, and staff whom I have had the pleasure to lead for a decade. I also share it with an outstanding School Board, the members of which are committed to our dynamic strategic plan. Together, with our families and community, we provide diverse pathways to lead our 206,000 students to success."



**JOHN KUEVEN, FACHE, MSHA, MBA, RN • HEALTH CARE**  
**Senior Vice President and Hospital President at Wellstar Paulding and Wellstar Cobb Hospital**

"I am both excited and honored to receive the Baldrige Foundation Award for Leadership Excellence in Health Care. Since being introduced to the Baldrige Criteria 15 years ago, I have been able to see firsthand the positive impact it has on an organization's culture. Most recently, as hospital President, I helped lead our organization by utilizing the Baldrige framework as the operating model for Wellstar Paulding hospital. The criteria enabled nationally recognized performance in quality and safety, team member engagement, and patient experience. Most recently, the framework has supported our work through the pandemic and allowed us to be nimble during an ever-changing crisis. I want to thank my family and Wellstar Team that has supported me through this journey."



**DAVID L. RAMSEY • HEALTH CARE**  
**President and CEO, Charleston Area Medical Center Health System**

"Even before COVID-19, CAMC operated in a challenging environment where the needs of our community are significant, and the resources sometimes limited. We have long been an organization committed to continual improvement, but once we began learning and operating within the Baldrige framework our rate of innovation and change accelerated and our improvements became more measurable. I have no doubt that becoming a Baldrige organization has improved our ability to be the best place to receive patient-centered care, the best place to work, and the best place to teach and learn. I am humbled by this recognition, and I accept in honor of our CAMC team who continue to give their all in the care for our patients – even after two years on the front lines of this pandemic. Their commitment to quality and continual improvement inspires me every day."



**GRANT SCHNEIDER •  
CYBERSECURITY**

**Senior Director of Cybersecurity  
Services, Venable LLP**

"I am honored to receive the Baldrige Foundation Award for Leadership Excellence in Cybersecurity. The threats and exploitations by malicious cyber actors continue to increase at an alarming rate. This is compounded by the fact so much of our personal and professional lives have moved on-line due to the pandemic. During these times organizations need leaders who are resolutely focused on achieving objectives, nimble enough to adjust to changes, and caring enough to recognize the human needs of their team. The Baldrige Excellence Framework helps to create leaders with such skills who can excel in today's challenging environment."



**SUSAN STUART •  
NONPROFIT**

**President and CEO of the Center  
for Organ Recovery & Education  
(CORE)**

"I am so honored to receive the 2022 Baldrige Foundation Award for Leadership Excellence. This award is especially meaningful because I believe so strongly in the power of the Baldrige framework to affect positive change.

Today, CORE is a results-driven organization, thriving in a culture of transparency and innovation. Because every department is responsible for its own step in the CORE Business/Work System, our operations as a whole can focus successfully on the mantra, 'Every Donor, Every Time,' our core competency. Also, CORE's business continuity plan, which has allowed us to be agile and resilient even during the challenges of the last two years, now ensures the organization's future.

I credit CORE's Baldrige journey for empowering us with the ability to save and heal more lives than ever before—the most significant indicator of performance excellence."



**GREGORY J. TOUHILL •  
CYBERSECURITY**

**Director, the CERT Division,  
Software Engineering Institute,  
Carnegie Mellon University**

"For decades, the Baldrige Excellence Framework has served as the world's leader for the best practices, culture of innovation, and performance excellence standards that fuel our national prosperity and improve our way of life. Throughout my professional career I have leveraged the Baldrige values and principles that improve quality, build great teams, and deliver unparalleled success. I am honored and thankful to be recognized by the Baldrige Foundation as the recipient of the Award for Leadership Excellence in cybersecurity and am grateful to my powerhouse teams that continually deliver cyber solutions that are more effective, efficient, and secure."



**JERRY D. WEAST, ED.D. • EDUCATION**  
**Founder and CEO, Partnership for Deliberate Excellence, LLC; Former Superintendent, Montgomery County (Maryland) Public Schools**

"After decades of leading educational organizations both small and large, one thing stands clear. To be successful, a leader must put people first. Success depends on having a team that feels respected and valued and a community that believes you have an understanding of their needs and a vision to meet them. To operationalize the collaborative plan and accelerate outcomes, alignment from beginning to end is essential. Honesty, transparency, and ethics are accelerants to a well-executed plan."



**CAROL C. WILSON, M.ED. • EDUCATION**  
**Co-Founder and Executive Director of Alaska EXCEL**

"On behalf of Alaska EXCEL, I am truly honored and humbled to be a recipient of the 2022 Baldridge Foundation Award for Leadership Excellence in Education. Both Billijo Mills, Co-Founder and Deputy Director of Alaska EXCEL, and I learned and lived the Baldridge Excellence Framework in 2000 while working as part of the team for the Chugach School District. Chugach was the first organization to win the Baldridge Award in the Education sector in 2001. The process inspired Billijo and me to build Alaska EXCEL to what it is today. However, we would not be where we are today without the amazing team of people surrounding our organization from the incredible staff (who many began working with us the day we opened our doors in 2014), to the amazing board of directors who have supported us along the way, to the extraordinary business and industry partners who believe in our students and our mission, to the 10 school districts across Alaska who have entrusted us with over 600 students each year. Thank you all!"

# The Dr. Curt Reimann Baldrige Scholarship



“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.”

## THE 2022 DR. CURT REIMANN BALDRIGE SCHOLARS



**LAUREN BROWNING**  
Director of Training and Administration  
The Partnership for Excellence

“As Director of Training and Administration for The Partnership for Excellence (TPE), I develop content and materials for examiner training, review and edit feedback reports, and co-facilitate workshops to assist organizations in understanding the Baldrige criteria and writing applications. I have a passion for supporting examiners and applicants throughout the assessment process. This training will better equip me to create learning modules, provide guidance to examiners throughout the examining cycle, and assist organizations on their journey to excellence. It will also develop me into a more knowledgeable examiner for TPE’s Advising and Partnering program and Communities of Excellence.”



**JUAN A. DELDUARTE**  
DBA – Global Supply Chain Management

“My professional opinion and experience is that organizational leaders can use the Baldrige Excellence Program as a framework to facilitate the achievement of continuous organizational improvement. The Baldrige program is a tool that I continue to use in my role as a Capabilities Developer to identify gaps and develop, and deliver solution recommendations to achieve current and future organizational objectives. I also applied the 2019-2020 Baldrige Performance Excellence Framework in my role as a student-scholar working with a nonprofit organization. The Baldrige framework enabled me to help leaders identify strengths and opportunities to improve their organizational performance and maintain a customer-centric focus.”



# Building Trust as a CEO in 2022: Are You Thinking about Focus and Constant Reinvention?

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

It has once again been a little more than two years since I last summarized the topics that are keeping CEOs up at night (<https://www.nist.gov/blogs/blogrige/it-2020-your-ceo-thinking-about-perpetual-reinvention>). And what a ride we have had over the last two years! In my new study, I have found a great overlap with the themes I articulated two years ago. However, I also found significant focus that offers much greater specificity, complexity, and integration of interwoven priorities.

As in the past, I have combined what I heard from senior executives across sectors, what I read in blogs and publications, and what I learned from numerous studies. I have once again identified six areas that are important to CEOs as we enter the future normal.

I will briefly describe the 17 articles that had the greatest influence on the current study, share the six themes for consideration in 2022 and briefly relate how the 2021-2022 Baldrige Excellence Framework® addresses these topics, comment on the relationship to the themes from two years ago (<https://www.nist.gov/blogs/blogrige/it-2020-your-ceo-thinking-about-perpetual-reinvention>), and provide some food for thought as the Baldrige framework is being revised this year to remain at the leading edge of validated leadership and performance practice.

## The 17 Articles

Six articles/studies were the most informative for me.

- The first, “Find Your Essential: How to Thrive in a Post-Pandemic Reality (PDF)” was produced by the IBM Institute for Business Value, in cooperation with Oxford Economics (IBM). It is based on interviews of 3,000 CEOs from nearly 50 countries and 26 industries. (<https://www.ibm.com/downloads/cas/WVPWGPYE>)
- The second article, “Building on Hope: Forging Ahead (PDF),” is the product of the 2021 Fortune/Deloitte CEO survey conducted in September 2021 and involving 117 CEOs from more than 15 industries (Fortune) (<https://www2.deloitte.com/content/dam/Deloitte/us/Documents/about-deloitte/us-ceo-survey-overview-fall-2021.pdf>).
- The third article, “7 Deepwater Business Challenges We’ll Be Facing in 2022,” by Angela Yurchenko is based on interviews of over 100 entrepreneurs (Medium). (<https://angela-yurchenko.medium.com/100-entrepreneurs-on-challenges-theyre-preparing-for-in-2022-a6d49d7eaa78>)
- The fourth article, based on a Business Roundtable survey (BRT), was authored by Eric Rosenbaum, published by CNBC, and summarized as “more volatility, no end to Covid.” (<https://www.cnbc.com/2021/12/02/ceos-across-economy-agree-on-one-big-2022-prediction-more-volatility.html>)
- The fifth article, “The CEO: Architect of the New Operations Agenda,” from McKinsey & Company (McKinsey1), was co-authored by Andreas Behrendt, Axel Karlsson, and Daniel Swan. (<https://www.mckinsey.com/business-functions/operations/our-insights/the-ceo-architect-of-the-new-operations-agenda#:~:text=To%20thrive%20in%20a%20volatile,very%20top%20of%20the%20organization.>)
- The sixth article, “The Next Normal Arrives: Trends that Will Define 2021 — and Beyond,” also from McKinsey (McKinsey2), was co-authored by Kevin Sneader and Shubham Singhal. (<https://www.mckinsey.com/featured-insights/leadership/the-next-normal-arrives-trends-that-will-define-2021-and-beyond>)

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*“Employees, customers, and investors want to associate with organizations that serve a larger purpose than may be expressed in their mission statement. They want to be associated with organizations that live their values and have a commitment to societal responsibilities, environmental stewardship, and equity and inclusivity.”*

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The remaining articles are as follows:

- “Our Leap of Faith,” by Gary Burnison, Korn Ferry (KF). (<https://www.kornferry.com/insights/special-edition/our-leap-of-faith>)
- “The Paradox of Leadership after COVID-19,” by Deborah Stadler, SHRM (SHRM). (<https://www.shrm.org/resourcesandtools/hr-topics/behavioral-competencies/leadership-and-navigation/pages/the-paradox-of-leadership-after-covid-19.aspx#:~:text=This%20paradox%20of%20leadership%20is,this%20pandemic%20will%20have%20overall>)
- “Leadership after Covid-19: Learning to Navigate the Unknown Unknowns,” by Koldo Echebarria, Forbes (Forbes). (<https://www.forbes.com/sites/esade/2021/03/30/leadership-after-covid-19-learning-to-navigate-the-unknown-unknowns/?sh=59ec818114d2>)
- “Sustainable Business Went Mainstream in 2021,” by Andrew Winston, Harvard Business Review (HBR). (<https://hbr.org/2021/12/sustainable-business-went-mainstream-in-2021>)
- “2022: The Year Ahead,” Korn Ferry Insights (KFI). (<https://www.kornferry.com/insights/briefings-magazine/issue-52/2022-the-year-ahead>)
- “The Old Style of Leadership Is Dead. Life After COVID-19 Will Require New Kinds of Leaders,” by Robert E. Hall, Dallas Morning News (DMN). (<https://www.dallasnews.com/opinion/commentary/2021/03/28/the-old-style-of-leadership-is-dead-life-after-covid-19-will-require-new-kinds-of-leaders/>)
- “Leading for ‘the Human Moment,’” by Amy Bradley, 13th Global Peter Drucker Forum (PDF). (<https://www.corporatelearningnetwork.com/leadership/articles/leading-for-the-human-moment>)
- “What Matters Most? Five Priorities for CEOs in the Next Normal,” by Homayoun Halami and Liz Hilton Segel, McKinsey & Company (McKinsey3). (<https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/what-matters-most-five-priorities-for-ceos-in-the-next-normal>)
- “The CEO Moment: Leadership for a New Era,” by Carolyn Dewar, Scott Keller, Kevin Sneader, and Kurt Strovink, McKinsey Quarterly (MQ). (<https://www.mckinsey.com/featured-insights/leadership/the-ceo-moment-leadership-for-a-new-era>)
- “The Future of Work Is through Workforce Ecosystems,” by Elizabeth J. Altman, David Kiron, Jeff Schwartz, and Robin Jones, MIT Sloan Management Review (MIT). (<https://sloanreview.mit.edu/article/the-future-of-work-is-through-workforce-ecosystems/#:~:text=Our%20emerging%20research%20suggests%20that,of%20work%20in%20the%20enterprise.>)
- “Majority of Workers Who Quit a Job in 2021 Cite Low Pay, No Opportunities for Advancement, Feeling Disrespected,” by Kim Parker and Juliana Menasce Horowitz, Pew Research Center (Pew). (<https://www.pewresearch.org/fact-tank/2022/03/09/majority-of-workers-who-quit-a-job-in-2021-cite-low-pay-no-opportunities-for-advancement-feeling-disrespected/>)

## The Six Areas for 2022

At first, the title of this blog might appear contradictory. How do you both provide organizational focus and reinvent the organization at the same time? That is part of the opportunity

and challenge senior leaders face: to focus on the vital few areas that will create impact, while keeping an eye on constant reinvention to continue to achieve positive impact.



Below, I have divided this year's six themes into two categories, listing three as opportunities and three as challenges. While this decision is somewhat arbitrary, I see three areas as providing great opportunity and three more as challenges (that could create opportunities).

## The Opportunities

- Make a Difference
- Use Technology and E-Wisdom
- Focus on the Vital Few

## The Challenges

- Develop the Right People Ecosystem
- Build Your Supply Ecosystem for Resilience
- Lead for Constant Reinvention

## Make a Difference

To introduce each 2022 theme, I will start with some data. According to the DMN, in the year from April 2020 to March 2021, people "absorbed at least five years' worth of chaos, crisis, technological disruption and change," and they now demand a greater voice in creating a better and fairer future. Some data from McKinsey (MQ) indicate that 87 percent of customers will buy from companies that support what they care about; 94 percent of millennials want skills to benefit a cause; and sustainable investing has grown 18-fold since 1995. From its study, Fortune reported that 68 percent of CEOs have increased their emphasis on corporate purpose and 90 percent said climate change needed to be urgently addressed. More than 70 percent of the CEOs agreed that their investors support a proactive climate agenda; 85 percent agreed that executing on their climate agenda would impact their ability to attract, retain, and engage workforce members; and 70 percent said their organizations would reach net-zero carbon emissions by 2050 (as have the governments of 137 countries). According to the entrepreneur survey conducted by Medium, a growing number of the entrepreneurs' customers base their loyalty on sustainability and inclusivity efforts.

Ira Bedzow, UNESCO chair in bioethics at the New York Medical College, provided this advice to senior leaders: "Take some time every day to think broadly of the social implications of the new normal and not simply the immediate financial ones."

By building social capital, organizations build trust. And trust results in long-term stakeholder and shareholder loyalty. As a first sign of the interconnectedness of my six themes, the competition for talent is going to grow, and engaged workers are looking for organizations to commit to a larger purpose.

This is especially true of younger workers, who make up 50 percent or more of today's workforce. They have the power, and they are going to use it.

The Baldrige Criteria for Performance Excellence® (<https://www.nist.gov/document/2021-2022-baldrige-framework-bnp-free-sample.pdf>) currently address societal contributions as part of the leadership category and equity and inclusion as part of workforce engagement. Related results are addressed in the results category. The Baldrige core values of valuing people and societal contributions point to the foundational nature of these topics (<https://www.nist.gov/baldrige/core-values-and-concepts>).

## Use Technology and E-Wisdom

The 3,000 CEOs surveyed in the IBM study identified technological factors as the most important external force that will impact their organizations over the next several years. According to the same study, during the height of COVID-19, more tech-savvy organizations outperformed their less-savvy peers on revenue growth by an average of six percentage points across 12 industries. Six hundred and five (605) of the executives surveyed indicated that they are accelerating their organizations' digital transformation. According to McKinsey<sup>1</sup>, companies with "digitization success" have seen 30 percent reductions in inventory and cost of goods sold, 50 percent reductions in cost of quality, and 30 percent improvements in cash and productivity. Furthermore, 64 percent of the companies in one study said digitization has helped them meet sustainability goals.

Technology, e-wisdom, and digitization are frequently associated with the business sector's fourth industrial revolution. Technologies generally cited include automation, advanced analytics and big data, machine learning, artificial intelligence (AI), the internet of things (IoT), and the related area of cybersecurity. These technologies enable organizational agility and are considered central to innovation, enhancing operational efficiencies, customer and stakeholder engagement, and smooth operation of a hybrid workforce.

In the IBM study, 72 percent of the identified customer-focused "outperforming organizations" identified cybersecurity as a top-three priority, accompanied by agility and empowering a remote workforce.

The use of technology and e-wisdom is another example of the interconnectedness of this year's six theme areas. The description above clearly relates this focus area to people ecosystems and constant reinvention.

The Baldrige framework has numerous touchpoints with technology, e-wisdom, and cybersecurity. Several of the core values relate to use of technology and e-wisdom. The Baldrige Criteria for Performance Excellence® address technological change as one of the strategy considerations and have items that address performance analysis, data and information, managing opportunities for innovation, and cybersecurity.

### **Focus on the Vital Few**

As stated above, focusing on the vital few and leading for constant reinvention (discussed later) might appear to be contradictory. However, I believe they highlight the opportunity and challenge that organizations face.

Organizations must be agile, yet focus on priorities to remain competitive and relevant. BRT senior executives phrased this opportunity for focus as simplifying and doing better with less.

Focusing on the vital few begins with reexamining vision and strategy, following the upheavals of the last couple of years. With strategy comes identification of a focused set of action plans (priorities); action plans must include a process for action plan modification if necessitated. Rapid execution of new plans can be due to emergencies, breaking technological change, and other external forces.

Topics that senior executives included in regard to the need for focusing on the vital few dealt with more effective execution, addressing pandemic-driven customer behavior changes, virtual work changes, and massive ongoing innovation of all types. MIT summarized the workforce-driven need for focus as flipping a perennial workforce ecosystem strategic challenge from “What workforce do I need for my strategy?” to “What strategy is possible with my workforce?”

The Baldrige framework’s core value of focusing on success and innovation addresses all aspects of balancing short-term and longer-term needs, resource allocation, and the ability to deal with uncertainty. The Baldrige Criteria devote a complete category to strategy, including an organization’s ability to execute, resource allocation, action plans, and action plan modification. Strategy results are addressed in the results category.

### **Develop the Right People Ecosystem**

I am using the MIT definition of people ecosystem, that is, “a structure that consists of interdependent actors, from within the organization and beyond, working to pursue individual and collective goals.” According to the same study, more than 75 percent of managers in a global survey of 5,118 managers view their workforce as both employees and non-employees,

and non-employees are responsible for performing more than 25 percent of the organization’s work. Organizations report that they “inconsistently manage or have no process to manage alternative workers.” Managing this blended workforce in alignment with the organization’s strategic objectives, culture, and values is a critical business imperative. Given this business imperative, PDF reports that 90 percent of organizations state they put people at the heart of their long-term strategies for value creation, but only two-thirds of employees agree.

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*“In order to gain loyalty and retention, leaders must provide a values-based environment with less hierarchy; a hybrid, blended, partially remote and partially non-employee workforce; and engagement that respects workforce members’ differing needs.”*

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Some additional people-related data worth noting come from numerous recent studies. Pew reports that about 20 percent of non-retired adults in the U.S. say they quit their jobs during 2021. Low pay, lack of opportunity for advancement, and feeling disrespected at work were the top reasons for quitting their jobs. Those who quit and are then employed elsewhere generally say their new job has better pay, more opportunities for advancement, and more work-life balance and flexibility. According to IBM, 80 percent of executives in its study agreed or strongly agreed that they were supporting the physical and emotional health of employees. When employees were asked the same question, only 46 percent agreed or strongly agreed. When asked about receiving adequate training on new ways of work prompted by the pandemic, 74 percent of executives agreed, but only 38 percent of employees agreed. When IBM asked the executives about the most important attributes for engaging employees, diversity and inclusion ranked near the bottom of a 13-choice list. Yet the same leaders ranked diversity and inclusion as central criteria for leadership.

The McKinsey studies (1&2) estimate that more than 20 percent of the global workforce will spend the majority of their work time away from the “office.” Furthermore, across the world’s eight largest economies, more than 100 million people (one in every 16 workers) will need to transform to new roles by 2030.

Yet many organizations consider themselves “stuck” in old paradigms, according to KF. Becoming unstuck requires a decision and a discipline to elevate the horizon and focus on a future that encompasses workforce diversity and inclusivity, development, reskilling, coaching, creativity, well-being, compassion, flexibility, and empowerment.

Finally, it is important to emphasize that none of the other five opportunities and challenges facing senior leaders in 2022 can be addressed without the right people in their ecosystem.

The Baldrige core values of valuing people, ethics and transparency, and visionary leadership all address the underpinnings of a good people ecosystem. The Baldrige Criteria devote a complete category and a results item to workforce. The workforce is addressed in the Organizational Profile (the prefatory section of the Criteria) and is an important component of the leadership and strategy categories.

## Build Your Supply Ecosystem for Resilience

Our reliance on organizations’ suppliers and partners has affected and dazzled every business and every consumer in the last two years. In a McKinsey (McKinsey1) survey of supply-chain leaders, 93 percent of the respondents said COVID-19 had exposed problems with their global manufacturing and supply footprints. Nevertheless, by the middle of 2021, only 15 percent had made changes such as nearshoring of production and diversification of their supplier base. According to one smaller product company (Medium article), in 2020, 8 percent of all canceled orders were the result of stock issues; in 2021 that rate was 43 percent. IBM’s outperforming organizations prioritized spare capacity seven times higher than just-in-time inventory.

In addition to availability of supplies, according to McKinsey1, 80-90 percent of greenhouse gas emissions arise from companies’ value chains. As a result, there is a need and interest in making those supply chains more sustainable. According to HBR, companies are requiring more information, setting higher standards, and placing higher demands related to climate and human rights on their suppliers.

More and more, organizations need to focus on just-in-case rather than just-in-time. They must rebalance their priorities to better manage risk. Risk management strategies are becoming increasingly complex due to supply ecosystem challenges (as well as workforce uncertainties, disruptive technologies/innovation, and societal demands). On the flip side, supply ecosystems also offer expanded opportunities for partnering and collaboration in problem solving and invention.

The Baldrige core value of delivering value and results addresses the need to balance value for all stakeholders — including your suppliers, partners, and collaborators. The Baldrige Criteria ask about key suppliers, partners, and collaborators in the Organizational Profile and address the supply network as strategic and operational components of an organization’s work systems.

## Lead for Constant Reinvention

We have already experienced the fact that the most significant change over recent times is the accelerating rate of change. The ability to be perpetually “unstuck” has become a strategic and operational imperative and a competitive differentiator. Resilience, bouncing forward in the face of disruptive challenges, will distinguish the outperformers. According to the IBM study, 56 percent of CEOs emphasize the need to “aggressively pursue” operational agility and flexibility over the next several years. Key questions on every leader’s (indeed, every person’s) mind are: What has changed forever? What will return to a prior state? What will continue evolving? What will the next big (disruptive) change be? How will it all affect my organization (and me)?

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*“We are in an environment where the ability to constantly reinvent must be part of an organization’s strategic and operational DNA.”*

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According to Forbes, leaders and managers must move from a role of containing uncertainty to one of encouraging it, while making it tolerable as a norm in partnership with their people and supply (partner/collaborator) ecosystems. Processes that were characterized by deciding and acting need to be supplemented with processes for asking, doubting, and testing.

MQ challenges leaders to “aspire 10x higher.” I believe the challenges of constant reinvention are to aspire ten times higher and act ten times faster, recognizing that the need for intelligent risk taking will be riskier and therefore must be accompanied by the ten times faster ability to ask, doubt, and do rapid testing or prototyping.

The Baldrige core values of agility and resilience and focus on success and innovation form a foundation for reinvention. The Baldrige Criteria item on strategy development asks about strategy considerations, including disruptive forces, technological change, and blind spots, The strategy execution

item asks about your ability to rapidly execute new plans. The operations category poses questions about your pursuit of intelligent risks and your organizational resilience in the face of disruptions.

## Comparison with 2020 CEO Issues

The 2022 CEO issues show a striking overlap with many of those identified in 2020. However, while there is overlap in “title,” the interpretation, complexity, and specificity in 2022 have been reframed and clarify the opportunities and challenges. The six areas identified in 2020 are as follows:

1. Emerging Technologies and the Digital Economy
2. The Right People for the Organization
3. Evolving and Uncertain Global Markets
4. Responding to Society’s Call
5. Big Data and Business Platforms
6. Customer Experience

While customer experience is no longer a separate area in 2022, it is certainly an important factor in why we need to reinvent and use technology. Many customers are also favoring organizations that make a difference. The issue of global markets focused on sales, but also was related to uncertainty in supply chains. However, the causes of the uncertainty were not anticipated in the 2020 study. And now that supply ecosystem is a major focus for organizations broadly. Product availability, resilience, and responsibility for the societal impact of that supply system are keeping CEOs up at night.

The remaining four areas from the 2020 study are still subjects of the 2022 opportunities and challenges. The right people is now the right people ecosystem, with workforce and workforce structure drawing equal attention. In 2022, technology and e-wisdom are at the center of opportunities for those who can and choose to capitalize on them. Responding to society’s call is now an imperative from employees, customers, and investors.

New this year is the need to focus on the vital few. Prioritization, with agility, may be the biggest source of competitive advantage for successful organizations. The opportunity is to achieve this focus while using the other five focus areas as lenses to help guide your organization’s vital few.

## Implications for Future Baldrige Framework Revisions

While the next set of Baldrige framework revisions are being contemplated now, some of the 2022 CEO focus areas will probably be played out over more than the next few years. The 2021-2022 Baldrige framework already deal with them, but they might result in a clarity and added emphasis in areas related to prioritization (vital few), workforce, resilience, and innovation. Because of the inter-related nature of this year’s focus areas, they emphasize and elicit numerous examples of the need for a systems perspective. Other Baldrige core values take on added meaning, as already described in the sections above.

The Baldrige framework definition and interpretation of innovation take on added meaning when thinking about the 2022 focus areas of making a difference and constant reinvention.

Workforce considerations should now include the recent changes in where we work, how we work, and the empowerment and flexibilities that workforce members have come to expect over the past two years. We also must pay more attention to a blended workforce with on-site, at-home, remote, and non-employee members all contributing to the work of the organization.

The last two years have made clearer to us the needed components of agility and resilience. While already embedded in the Baldrige framework, these concepts suddenly have much more gravitas.

Forefront organizations are now doing a lot more with their strategic supply ecosystem partners, while also building redundancy and proximity in relation to their direct suppliers.

Finally, the appreciation of all that digital technologies can offer in competitive advantage is expanding on an exponential basis.

## Some Summary Thoughts

Let me start with a comment on the title for this blog. I emphasized **building trust** because the great dependence on people across an organization’s sphere of interactions will only succeed if there is a great sense of trust and a building of truly trusting relationships. Now, more than ever before, a systems perspective deals not only with processes, but with people, organizations, and processes.

As in the past, I look forward to observing ongoing changes in performance excellence over the next few years. And I look forward to another look at CEO opportunities and challenges a few years down the road, with ever-evolving insights on the road to performance excellence!



# 2022—On the Path to Review, Reimagining, and Revitalization

by Bob Fangmeyer

Director, Baldrige Performance Excellence Program



“In perhaps the most exciting development for the Program in the past 15 years, as a part of the CHIPS and Science Act, Congress authorized the addition of Community to the list of Baldrige Award categories.”

As we began 2022, I greeted people with the wish that “2022 be everything you hoped 2021 would be.” Well, for the Baldrige Performance Excellence Program (BPEP), 2022 was the start of new beginnings that few could have anticipated.

In perhaps the most exciting development for the Program in the past 15 years, as a part of the CHIPS and Science Act, Congress authorized the addition of Community to the list of Baldrige Award categories. This development demonstrates their support for the Communities of Excellence 2026 (COE2026) vision of using a Baldrige-based framework and assessment process to address the systemic challenges faced by communities across the nation to improve our quality of life. It also represents an incredible accomplishment for all those involved in the initiative—including the COE2026 Board and leadership, participating communities, and many volunteers—as well as the advocacy efforts of the Baldrige Foundation. Congratulations!

In addition, we have optimistically embraced a unique and exciting opportunity—supported and funded by our parent organizations, the National Institute of Standards and Technology (NIST) and the U.S. Department of Commerce (DOC)—to explore and leverage wide-ranging possibilities for future changes in the Baldrige Award program and other offerings. These changes will enable us to expand our reach, benefitting more individuals, organizations, communities, our economy, and quality of life for decades to come. To this end, a sweeping review

of BPEP was launched in late 2022, after a highly qualified contractor, the small business Rios Partners, was competitively selected to lead it. Information and updates on this program review are posted on BPEP’s home page (<https://www.nist.gov/baldrige/baldrige-program-external-review#about/>).

### Other key initiatives and outcomes from 2022

#### 33<sup>rd</sup> Quest for Excellence Conference and Award Ceremony

The 33<sup>rd</sup> Quest for Excellence® Conference and award ceremony, held April 3–6, 2022, at the Gaylord National Harbor Resort and Convention Center, in National Harbor, Maryland, brought the Baldrige community back together again to celebrate performance excellence. Fourteen Baldrige Award recipients from 2019, 2020, and 2021 were honored and celebrated at the ceremony, including three 2021 Baldrige Award recipients—The Charter School of San Diego, Mid-America Transplant, and MidwayUSA—which were all repeat winners.

Seventeen former Baldrige Award recipients also shared their success stories in conference sessions: AARP, Adventist Health White Memorial, Center for Organ Recovery & Education, City of Germantown (Tennessee), Charleston Area Medical Center Health System, City of Fort Collins (Colorado), Elevations Credit Union, GBMC HealthCare, Hill Country Memorial, Howard Community College, Integrated Project Management Company, Mary Greeley Medical Center, MESA, The Ritz-



Carlton Hotel Company, Southcentral Foundation, University of Wisconsin-Stout, and Wellstar Paulding Hospital.

A special session featured community leaders who are participating in the Communities of Excellence 2026 initiative. In addition, a session featured Adventist HealthCare, based in Gaithersburg, Maryland, which was recognized in 2021 by the Baldrige Award Judges Panel for best practices in the Leadership category of the Baldrige Excellence Framework.



*Kai Kight's appearance arranged through Gotham Artists. Photo courtesy of Kai Kight and Gotham Artists.*

The keynote presentation by Kai Kight, "Composing Your World," featured him playing his violin live. Using music as a metaphor, he made clear that his aim was to inspire leaders to make a powerful mindset shift in order to nurture transformative leadership that can turn unique ideas into reality and empower teams across all industries to reach their creative potential.

Doc- this is a one-time use only photo. Please do not use anywhere else, and please include this caption under the picture: "Kai Kight's appearance arranged through Gotham Artists. Photo courtesy of Kai Kight and Gotham Artists"

## Job Quality Toolkit

BPEP led the effort to develop the Job Quality Toolkit (JQT) as part of our strategy to increase awareness and impact by introducing Baldrige to new audiences through simple, targeted offerings. An outgrowth of a partnership with

the U.S. Department of Commerce (<https://www.nist.gov/news-events/news/2021/10/department-commerce-kicks-new-job-quality-initiative-help-ensure-economic>) and the Department of Labor over the last three years to support various workforce excellence initiatives, this resource is intended to be an easy-to-use tool for organizations of all kinds, especially for those that are small and medium-sized. The Baldrige Excellence Framework served as a foundation for the toolkit, which is a menu of vetted strategies and actions from which any organization's leaders and workforce members can collaboratively choose in order to increase the quality of jobs offered. BPEP's deep dive into the job quality space included a thorough literature search and extensive engagement with more than 60 national experts, nonprofits, businesses, academics, and leaders in government. The toolkit was formally launched by the secretaries of commerce and labor at a kickoff event on August 4, 2022 (<https://www.cnn.com/2022/01/21/politics/good-jobs-initiative-marty-walsh/index.html>). NIST's Manufacturing Extension Program (MEP) has adopted and is distributing the JQT as well as hosting the already-successful online Job Quality Employer Assessment (<https://www.jobquality.org/>), modeled after the Are We Making Progress







## BALDRIGE PERFORMANCE EXCELLENCE PROGRAM

Surveys found on the Baldrige website. Another partner in the implementation of this resource is Public Private Strategies Institute, which received a Gates Foundation grant associated with its job quality initiative. References to the JQT are also incorporated into the “Notice of Funding Opportunity” for key Department initiatives, including the National Technical Information Agency’s Broadband Equity, Access, and Deployment (BEAD) Program and the CHIPS Act.

### **Examiner Training and the Baldrige Award Process**

Based on the success of 2021 virtual training, the 2022 Examiner Preparation Course was again conducted online. Running from March through May 2022, the entirely virtual program consisted of training modules delivered to Baldrige examiners at their convenience via the Rise learning management system, along with interactive, small-group discussions facilitated by master examiners using MS Teams software. In addition, master examiners were

paired with new examiners for individual coaching and feedback.

Although the decision was made to put the Baldrige Award process on hold pending the completion of the external review, ten of the eligible organizations that had intended to participate in the 2022 Baldrige Award process signed up to receive examiner-led evaluations not tied to an award.

The feedback-only assessments of the ten organizations enabled BPEP to roll out several long-planned revisions that streamlined aspects of the award evaluation process. The process changes were designed to simplify how examiner teams craft feedback and allow enhanced engagement between examiners and applicant organizations, in order to improve the overall quality of the process and feedback provided.

After the evaluation process, which extended from mid-summer into the fall, the organizations received



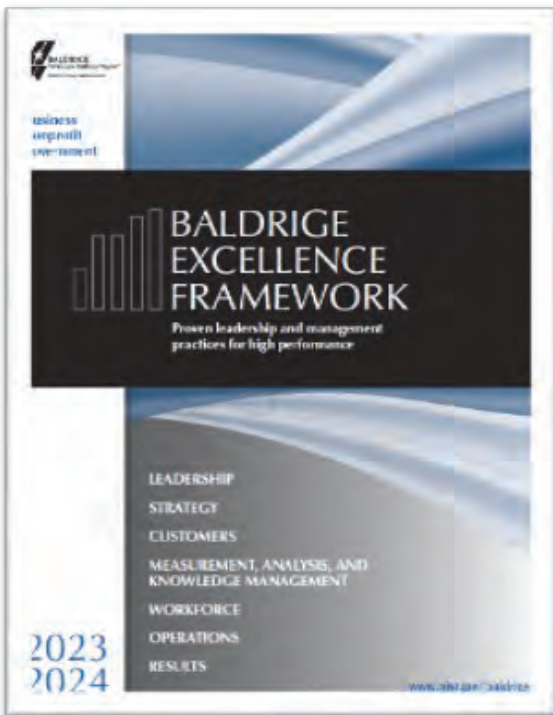
*Baldrige Performance Excellence Program Director Bob Fangmeyer (front, center) with members of the BPEP staff at the 33<sup>rd</sup> annual Quest for Excellence® and Baldrige Award presentation, National Harbor, Maryland, April 3, 2022.*

# BALDRIGE PERFORMANCE EXCELLENCE PROGRAM



Baldrige feedback reports beginning in November. Those reports were produced using a new format that provides more information on examiners' analyses, including for the first time each team's scoring rationales.

The 2022 non-award-based assessments also provided the opportunity for BPEP to use its new online scorebook system called Bridge. Developed, managed, and serviced in-house by BPEP—enabling significant cost savings and efficient system support—Bridge both replicates and improves functions of the contractor-supported BOSS system that it replaced.



## 2023-2024 Baldrige Excellence Framework Booklets

Prior to BPEP's release of digital copies of the 2023-2024 Baldrige Excellence Framework (Business/Nonprofit version) (<https://www.nist.gov/baldrige/publications/baldrige-excellence-framework/businessnonprofit>) in December (followed by the distribution of both digital and print copies of sector-specific booklets a few weeks later), BPEP leadership and select staff members carried out intensive development and production processes throughout 2022. In addition to an

ongoing review of insights from various publications and leading thinkers, we gathered input via a wide range of sources both inside and outside the Baldrige community, leveraging the opportunity to glean insights from individuals engaged with our other offerings and experts associated with our workforce, manufacturing, and job quality initiatives. We also collected input from the Baldrige community and the public through an email account set up just for that purpose. In May and June, BPEP held a series of webinars, hosted by highly experienced Baldrige volunteers.

In the well-attended webinars, Baldrige practitioners with varied sector expertise discussed inputs and recommendations organized around various themes and refined proposed revisions. BPEP staff members also conducted interviews with experts in their fields to gather input. For example, Baldrige staff members met with Frank Voehl, administrator of the U.S. technical advisory group for Innovation ISO 56000, and Rick Fernandez, vice chair of the U.S. technical advisory group for Innovation Management, to discuss how innovation is handled in the Criteria. They also met with Don Berwick, president emeritus and senior fellow at the Institute for Healthcare Improvement and former administrator of the Centers for Medicare & Medicaid Services, for a discussion focused on population health and the results asked for in the Health Care Criteria. BPEP is grateful to all who participated, freely providing ideas, expertise, and time to develop our most important resource for excellence!

## Baldrige Executive Fellows

Fourteen senior leaders were selected for the 2022 cohort of the Baldrige Executive Fellows Program (<http://www.nist.gov/baldrige/fellows/index.cfm>), with their first meeting held in April 2022 in conjunction with the Quest for Excellence conference. They heard from and networked with Baldrige Award recipient senior leaders and explored the development of capstone projects—something of strategic significance to innovate or improve at their own organizations.

In June 2022, the Fellows met in St. Louis, Missouri, with host Mid-America Transplant and guest



## BALDRIGE PERFORMANCE EXCELLENCE PROGRAM

recipient Honeywell Federal Manufacturing and Technologies, to discuss the best practices and challenges of leadership and strategy, categories 1 and 2 of the Criteria; this meeting was titled Visionary Leadership that Works. In October, they were hosted by Memorial Hermann Sugarland Hospital in Houston, Texas, with guest recipient Freese & Nichols, in a meeting entitled Operational Intelligence that explored categories 4 and 6 of the Criteria or measurement, analysis, knowledge management, and operations. They also met with a professor from the University of Houston's Graduate Program in Foresight to discuss planning in an uncertain future. In January 2023, they were hosted by The Ritz-Carlton LLC, with guest recipient AARP, in a meeting entitled Leading for Engagement, which focused on categories 3 and 5 of the Criteria, with the discussion and best practices focused on customers and workforce.

The cohort will present their capstone projects and graduate in April 2023. Capstone projects include aligning campus/infrastructure plans with strategic and capital plans, developing tech-based solutions to track standardized processes, implementing a virtual intensive care unit for community hospitals, implementing processes to address health equity, implementing a standardized scheduling platform based on artificial intelligence, creating a patient quality and safety scorecard, understanding and improving the customer experience, and creating strategy for a diversity-equity-inclusion council.

The following are the 2022 Baldrige Executive Fellows:

- Callie Andrews, Senior Vice President, Chief Operating Officer, Wellstar Kennestone & Windy Hill Hospitals
- Brian Copello, Executive Officer, Communications Technology Laboratory, National Institute of Standards and Technology
- John Deledda, Chief Medical Officer, Henry Ford Hospital
- John Gannon, Physician System Director, Surgical and Procedural Services, Urologist, Bozeman Health
- Jennifer Giusti, Vice President, Clinical Outcomes, WellStar Health System

- John Kueven, President, Northeast Georgia Medical Center
- Lance Millburg, System Administrator, Quality and Performance Improvement, Memorial Health
- Pravina Raghavan, Director, Manufacturing Extension Partnership, National Institute of Standards and Technology
- Trey Roeder, Chief of Staff, Sport Clips
- Deirdre Salanger, Vice President, Operations, Henry Ford Hospital
- John Six, Vice President of Medical Affairs and Chief Medical Officer, Washington Health System
- Shane Sommers, Vice President of Professional Services, Hendricks Regional Health
- Glenn Strausser, Director, Infrastructure and Facilities, Honeywell Federal Manufacturing & Technologies (FM&T), Inc.
- Doris Tetz Carpenter, Human Performance Executive, Talent Strategy, Adventist Health

### **Advanced Manufacturing/Industry 4.0 Assessment**

BPEP participated in the development of an assessment process and tools to evaluate and provide feedback to manufacturers on their readiness for, performance on, and adoption of elements of Industry 4.0. Under a September 2020 grant from the NIST Manufacturing Extension Partnership (MEP), this project was a partnership with FloridaMakes (a MEP program), the (Baldrige-based) Florida Sterling Award program, and the Illinois Manufacturing Extension Center (IMEC; which houses the Baldrige-based Illinois Performance Excellence program).

The project team developed an assessment and other tools that used the Baldrige framework as the foundation to help U.S. manufacturers integrate the concepts of Industry 4.0—that is, the integration of new technologies (including the Internet of Things, cloud computing and analytics, and artificial intelligence and machine learning) into manufacturing production facilities and operations. Because of manufacturers' diversity in size, culture, industry, organizational level of maturity, and other factors, the project team used a two-phase approach to the assessment.



In stage 1, manufacturers completed a Baldrige Organizational Profile to give the MEP center and the manufacturer a clearer understanding of its environment/competitive situation (i.e., structural readiness). This assessment asked about some of the more basic processes/practices that every business should have in place to survive and be minimally successful. There was little if any focus on advanced technologies in stage 1 because it does not make sense to automate poor processes or build on a weak foundation. The results of that assessment were used to determine priority needs for the organization and if moving on to stage 2 made sense.

In stage 2, the focus shifted to assessing company leadership and employee mindset to accepting adoption of advanced manufacturing technologies for success. This stage was more of a facilitated assessment/consultative engagement, in which MEP practitioners met with the organization's key leaders to work through what might be best for them, determine how to get started, and ensure that the workforce is prepared.

During a 15-month period and using team-based idea generation, the project team developed and conducted assessments of 92 manufacturers in Florida and Illinois. Practitioners from IMEC and FloridaMakes conducted team-based feedback sessions (in most cases, virtually or in a hybrid fashion) in individual or group sessions. The assessments led to projects such as recommendations to improve strategic planning processes and include consideration of technologies and to standardize and make consistent other business processes, as well as leading to potential adoptions of Industry 4.0 technologies.

Next steps of the assessment include the distribution of tools, including a Baldrige-based "Foundations of a Successful Business;" sharing best practices with other MEP centers and other organizations interested in implementing advanced technology; and using the assessment as the basis for a manufacturing award process to interest more organizations to participate in Baldrige-based award programs.

## In Appreciation

In closing, I would be remiss if I did not emphasize the value of the tremendous support of Baldrige volunteers, partner organizations, and others who are part of the extensive Baldrige community throughout the nation. Their contributions made possible BPEP's success in surmounting challenges while managing the programs and events and producing the resources described above. These greatly appreciated contributors in 2022 included 103 examiners, 12 judges, 12 overseers, dozens of award recipients, leadership and staff at ASQ, leaders and member programs of the Alliance for Performance Excellence, Communities of Excellence 2026, the Baldrige Foundation, NIST, and the Department of Commerce. What an amazing and unique public-private partnership the Baldrige enterprise is! Thank you each and all.

# Baldrige Economic Impact: #BaldrigeForGrowth

The Malcolm Baldrige National Quality Award was born of the quality crisis in American manufacturing in the 1970s and the 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 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.

"We have 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

While the prize may motivate some organizations to begin their Baldrige journey, it has become apparent over more than 30 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.

Assessing the economic impact of the Baldrige Performance Excellence Program over 35 years means that assessing the improvements in profits, reductions in costs, enhancement of customer and employee satisfaction, higher levels of

"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." – Wilbur Ross, U.S. Secretary of Commerce

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 Enterprise 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 Bureaus of Economic Analysis and Labor Statistics report that organizations that have twice won the Baldrige Award demonstrate a stunning 92.6 percent increase in median revenue growth in the period between winning their awards; job growth at 2.5 percent, nearly 20 times greater than matched industries; and growth in the number of business sites of 84 percent.

As an example, 2021 Baldrige Award winner MidwayUSA, only the second organization to be a three-time winner, has demonstrated consistent, sector-leading economic performance over the 15 or more years since it adopted the Baldrige management and leadership principles. "We (MidwayUSA) have been one of the fastest growing companies in our industry over the past 12 years at 17 percent average annual growth, growing at almost double the average industry growth rate of 9 percent. 2009 to 2020 represents a 225 percent increase in customers, 268 percent increase in sales, 510 percent increase in net income with only a 101 percent increase in employees."

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, then-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.”

“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 have learned from Baldrige we are 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

“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.”

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 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—that is, each dollar invested spent to keep BPEP operational results in \$820 of economic benefit.

“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.

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 their Baldrige assessment, and attained a leading market share and sustained growth in the four years leading to their 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.

“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.)

# Baldrige Small Business Impact: #BaldrigeGrowsSmallBusiness



When Congress established the Malcolm Baldrige National Quality Award as Public Law 100-107 in 1987, the Award was available for three sectors of the economy: Manufacturing, Service, and Small Business.

“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.” – C. Richard Panico, Founder, President, and CEO of Integrated Project Management Company

The first award recipients in 1988 and 1989 were American giants with names like Motorola, Westinghouse, and Xerox. One of the five recipients in those first two years was a small business 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 was a quintessential American small business.

“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.

Through the application of the principles of quality and performance excellence, Globe experienced growth in sales, profits, customer satisfaction, and employee engagement. In quality audits by General Motors, Ford, Internet, John Deere, and other customers, the firm’s scores have set records, resulting in certified supplier status for Globe. Foreign buyers also recognize Globe’s commitment to quality. When many European traders place an order for magnesium ferrosilicon alloy they specify that the material must be “Globe quality,” a standard that other suppliers must match.

Through the 2020 award cycle, 30 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.

The Malcolm Baldrige National Quality Award lost one of its premier representatives of the small business sector in 2021. MidwayUSA, which had won the award twice before in the small business category in 2009 and 2015, became in 2021 only the second three-time Baldrige Award recipient, the first being Mesa, also in the small business sector. MidwayUSA, however, has experienced such growth as a result of its application of the Baldrige Criteria to its operations, that it had become too large to apply in the small business sector. Instead, the on-line retailer won the Award in 2021 in the service sector.

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.

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

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. And remember. Much of that growth is generated by small businesses on the Baldrige journey. The evidence also shows how small businesses improve

“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.

as they pursue excellence through Baldrige. Some of the specific company-level improvements driven by Baldrige include the following:

- Three-time award recipient MESA Products has experienced improvement in cumulative growth of 40 Percent over five years, better than the performance of five separate competitors.
- Integrated Project Management’s total annual revenue increased by 62 percent over the four years preceding its 2018 Baldrige Award, while the ratio of annual revenue per consultant outperformed a national comparison by 50 percent.

“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.

- As of 2017, Bristol Tennessee Essential Services offered the fastest Internet available in the United States at 10 Gigabits per second, while outperforming regional, industry, and best-in-class comparisons for service reliability as measured by outage minutes per customer.
- 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.





“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

- 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, which also won a Baldrige Award in 2006, 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.

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

## Recipients of the Malcolm Baldrige National Quality Award in the Small Business sector

- 1988 – Globe Metallurgical, Inc. (now Globe Specialty Metals, Inc.)
- 1990 – Wallace Co., Inc.
- 1991 – Marlow Industries, Inc.
- 1992 – Granite Rock Company (now Graniterock Company)
- 1993 – Ames Rubber Corporation
- 1994 – Wainwright Industries, Inc.
- 1996 – Custom Research, Inc. (now GFK Custom Research North America, Inc.)
- 1996 – Trident Precision Manufacturing, Inc.
- 1998 – Texas Nameplate Company, Inc.
- 1999 – Sunny Fresh Foods, Inc. (now Cargill Kitchen Solutions)
- 2000 – Los Alamos National Bank
- 2001 – Pal’s Sudden Service
- 2002 – Branch-Smith Printing Division
- 2003 – Stoner, Inc.
- 2004 – Texas Nameplate Company, Inc.
- 2005 – Park Place Lexus
- 2006 – MESA Products, Inc.
- 2007 – PRO-TEC Coating Company
- 2009 – MidwayUSA
- 2010 – Freese and Nichols Inc.
- 2010 – K&N Management
- 2010 – Studer Group
- 2012 – MESA
- 2015 – MidwayUSA
- 2016 – Don Chalmers Ford (now Chalmers Ford)
- 2016 – Momentum Group
- 2017 – Bristol Tennessee Essential Services
- 2017 – Stellar Solutions
- 2018 – Integrated Project Management Company, Inc.
- 2020 – MESA

# Success Strategies for Building Organizational Resilience through the Baldrige Framework

by Michelle Peña, Baldrige Performance Excellence Program  
National Institute of Standards and Technology



Photo Courtesy of Elevations Credit Union

The Baldrige Program's 33<sup>rd</sup> Quest for Excellence<sup>®</sup> Conference (<https://www.nist.gov/baldrige/qe>) brings together the leaders of U.S. organizations to celebrate and learn role-model best practices from current and former Baldrige Award recipients.

Attendees take home practical lessons in critical areas such as leadership, strategy, customer and employee engagement, and operations. The speakers also provide attendees with proven solutions to help their organization achieve breakthrough performance and results.

At the 33<sup>rd</sup> Quest for Excellence<sup>®</sup> Conference this week, where award recipients from the past three years are being honored, Genevieve Cavallo, vice president of enterprise

transformation at Elevations Credit Union (<https://www.elevationscu.com/>), is presenting the session titled "Building Organizational Resilience through the Baldrige Framework."

As Elevations is a 2014 (<https://www.nist.gov/baldrige/elevations-credit-union>) and 2020 Baldrige Award recipient (<https://www.nist.gov/baldrige/elevations-credit-union-2020>), I had an opportunity to interview president and chief executive officer Gerry Agnes. Agnes reflected on how the Baldrige Excellence Framework (<https://www.nist.gov/baldrige/publications/baldrige-excellence-framework>) inspired Elevations' journey to excellence and how other organizations might also leverage the framework to improve their organization's performance. Following is my recent interview with Agnes.

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*“The Baldrige framework has positioned Elevations Credit Union to perform exceptionally well for its members, employees, and community, regardless of remarkably challenging conditions, including the Great Recession and a global pandemic.”*

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**Would you share an example from your work in regard to using the Baldrige framework?**

What I learned, along with the entire Elevations Credit Union team, are three key themes:

- It may seem that there is no perfect time to begin implementing the Baldrige framework (<https://www.nist.gov/baldrige/how-baldrige-works>). Actually, the perfect time is now!
- Seeking the truth within an organization is essential to expertly deploy the Baldrige framework. Therefore, it's vital that leaders create a safe environment where everyone can have honest conversations about salient matters that impact the organization's customers, employees, and key stakeholders (<https://www.nist.gov/baldrige/core-values-and-concepts>).
- Never underestimate the capabilities of a stellar team. Assemble and lead the best team, and you will achieve greatness with the Baldrige framework.
- The Baldrige framework has positioned Elevations Credit Union to perform exceptionally well for its members, employees, and community, regardless of remarkably challenging conditions, including the Great Recession and a global pandemic.

**What are your top tips for an organization's first self-assessment using the Organizational Profile (<https://www.nist.gov/baldrige/baldrige-organizational-profile>)?**

My top tips, in addition to those noted in my previous answer, stem from the objective of gaining organizational commitment to the Baldrige framework:

1. Ensure that your strategic plan clearly states your commitment to the Baldrige framework. When we began our pursuit of excellence, we incorporated the Baldrige framework into our strategic foundational elements, which

are critical to a strategic plan. We adopted the strategic framework that Jim Collins outlined in his book, *Built to Last*, which by design is Core Ideology and Envisioned Future.

The core ideology consists of the core purpose (why we exist) and core values (how we behave). The envisioned future consists of the vision statement (what we want to be known for) and the BHAG (Big Hairy Audacious Goal, which accelerates the fulfillment of our vision).

Our first BHAG was, “We will win the Malcolm Baldrige National Quality Award!” Thus, it was at the highest level of strategy (foundational element in our strategic plan) and had direct oversight by our Board of Directors. After receiving our first Malcolm Baldrige National Quality Award, we changed our BHAG to “Audacious Excellence! P.S. We will win the Baldrige again.” And we did!

2. Engage an expert Baldrige coach for the organization. At the inception of our Baldrige journey, we engaged Jan Johnson, who provided tremendous counsel and guidance that helped shape how we approached the deployment of the framework. Jan remains actively engaged with Elevations Credit Union today in our pursuit of audacious excellence and is one of my lifetime coaches.

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*“The Baldrige framework enabled us to create robust leadership and strategic planning systems that contributed mightily to our ability to predict or respond very early to changing conditions. By doing so, we have been able to realize above-market returns on equity.”*

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**What do you view as primary ways that organizations today can benefit from using the Baldrige framework?**

The Baldrige framework, if deployed properly, builds organizational resiliency (<https://www.nist.gov/baldrige/core-values-and-concepts#agility>). We began our Baldrige journey in the summer of 2008 during the Great Recession and received our first award in 2014.

We received our second award during a global pandemic that created a global economic recession. During that period, our return on equity averaged 11 percent, which was 38 percent greater than that of our peer group.

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*“The key for leaders who embrace this framework is to create a safe environment so all employees can have honest conversations about salient matters that impact its customers, employees, and key stakeholders. Because if you create that environment while deploying the Baldrige framework, you will be wildly successful.”*

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**When did you first hear about the Baldrige framework? What were your initial thoughts or “aha” moments as you began learning about it?**

I learned about the Baldrige framework when I was newly hired as an executive at a former employer. The framework enabled me, as a new leader, to quickly learn about the organization and areas we could successfully and swiftly improve that would benefit the organization and its key stakeholders.

**What is your “elevator pitch” about the Baldrige framework and/or assessment approach? In other words, what would you say to a group of senior leaders in your sector who are unfamiliar with the Baldrige framework if you had 1-2 minutes to tell them something about it?**

The beauty of the Baldrige framework is that it’s not prescriptive. Rather, it’s designed for organizations that are deeply curious and committed to audacious excellence. It contains around 255 questions asking “How” or asking about your processes in key segments: Leadership; Strategy; Customers; Measurement, Analysis, and Knowledge Management; Workforce; Operations; and Results.

Also, do not fall into the trap that the Baldrige framework requires additional work or resources, or that it’s accomplished in a single department. Rather, it’s how everyone does their work.

Lastly, the best time to deploy the Baldrige framework is now. Do not wait for the perfect moment as it will not come. Deploy it now. You’ll be glad that you did!

**Similarly, what would you say to a group of college students (particularly those pursuing studies for a profession related to your sector) about the Baldrige framework?**

The Baldrige framework is not widely adopted, yet those who’ve embraced it have created sustainable, successful organizations. Research the organizations that have received the Baldrige Award, and you will confirm my statement about sustainability and success.

Then study how they deployed the framework and determine what their key ingredients were to success. If you summarize what you learned and use that as a platform in your career, you will experience a joyful and productive career.

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*“The Baldrige framework [has inspired me to] pursue excellence, not perfection.”*

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**Has your perception of the Baldrige community (e.g., award recipients, examiners, judges and overseers board members and alumni, other framework users) changed since your organization became a Baldrige Award recipient? If so, how?**

As this is the second time we’ve achieved the award, our perceptions have remained steady through the years. Our commitment to the Baldrige framework and its community remains strong. We’re honored to be a part of it, and we’re totally engaged.

# 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 2002.

Through the 2020 award cycle the National Quality Award has been presented to organizations in the health care sector a total of 29 times. Hundreds of additional health care organizations 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. By one estimate over 65 percent of hospitals and health care systems employ some form of Baldrige-based performance excellence management system.

“Going through the Baldrige process during the COVID crisis helped maximize efficiency when we needed to perform at unprecedented levels. In a time when we were presented with new information and challenges on an hour-by-hour basis, the systemic processes and problem solving we had incorporated into our culture through the Baldrige framework allowed us to be nimble and achieve change quickly..” – John Kueven, Senior Vice President, Wellstar Health Systems, and President, Wellstar Cobb Hospital

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

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.



Baldrige health care organizations also benefit from systemic alignment and an agility in leadership and decision making that have been critical to adapting to the challenges of the COVID-19 pandemic. Many of the leaders of Baldrige health care organizations have testified that Baldrige made a significant difference in their ability to continue to provide high-quality medical care through the pandemic.

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

We now have over 20 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 and support staff and patient and family

satisfaction. Some of the life-saving improvements in clinical outcomes include:

- GBMC HealthCare, Inc. demonstrated industry-leading performance with 100 percent of stroke patients receiving antithrombotic therapy at discharge, 100 percent of high-risk mothers receiving antenatal steroids, and 100 percent of patients receiving combination chemotherapy for breast cancer.
- Memorial Hospital and Health Care Center earned 5-star ratings for overall quality of inpatient care from the Centers for Medicare and Medicaid Services (CMS) every year since the ratings were released, and its performance in CMS's Value-Based payment system ranked in the top 10 percent of health care organizations nationwide since 2017.

“The Baldrige framework helped us hardwire systematic communication that has increased transparency and built trust with our workforce.” – Kyle Bennett, President and CEO, Memorial Hospital and Health Care Center

- Memorial Hospital and Health Care Center's excellent health care outcomes include zero early elective deliveries before 39 weeks since 2015, zero pressure ulcers in its skilled caring center since 2016, zero central-line-associated blood stream infections since 2016, and zero hospital methicillin-resistant staphylococcus aureus (MRSA) infections since 2015.
- Setting national benchmarks for patient safety, Memorial Hospital and Health Care Center earned the Leapfrog Hospital Safety Grade of “A” since 2016. These patient safety results include a two-year reduction in total harm issues, from 6.2 to 1.1 per 1,000 patient days from 2016 to 2018; a bedside medication verification rate of more than 97 percent, exceeding the Leapfrog benchmarks from 2013 to 2018; and a performance level in the top 10 percentile of CMS comparison data for PSI-90 patient safety composite results since 2017.
- 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 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

“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

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.

- 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.

“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

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 6 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



“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

- 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, 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 proves that #BaldrigeSavesLives.

“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 health care to every patient every day.’” – Dr. Glenn Crotty, Jr., Executive Vice President and Chief Operating Officer, Charleston Area Medical Center

## Recipients of the Malcolm Baldrige National Quality Award in the Health Care sector

- 2002 – SSM Health Care
- 2003 – Saint Luke’s Health System
- 2003 – Baptist Hospital, Inc.
- 2004 – Robert Wood Johnson University Hospital Hamilton
- 2005 – Bronson Methodist Hospital
- 2006 – North Mississippi Medical Center
- 2007 – Sharp HealthCare
- 2007 – Mercy Health System  
*(now known as MercyRockford Health System)*
- 2008 – Poudre Valley Health System  
*(now part of University of Colorado Health)*
- 2009 – Heartland Health *(now Mosaic)*
- 2010 – Advocate Good Samaritan Hospital
- 2011 – Southcentral Foundation
- 2011 – Schneck Medical Center
- 2011 – Henry Ford Health System
- 2012 – North Mississippi Health Services
- 2013 – Sutter Davis Hospital
- 2014 – Hill Country Memorial
- 2014 – St. David’s HealthCare
- 2015 – Charleston Area Medical Center
- 2016 – Memorial Hermann Sugar Land Hospital
- 2016 – Kindred Nursing and Rehabilitation –  
*Mountain Valley (now known as Mountain Valley of Cascadia)*
- 2017 – Adventist Health Castle
- 2017 – Southcentral Foundation
- 2018 – Memorial Hospital and Health Care Center
- 2019 – Mary Greeley Medical Center
- 2019 – Adventist Health White Memorial
- 2020 – GBMC HealthCare
- 2020 – Wellstar Paulding Hospital

# Public-Sector Best Practices Inspire State and Local Governments Overseas

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



Can the Baldrige Excellence Framework (<https://www.nist.gov/baldrige/about-baldrige-excellence-framework>) and the best practices of U.S. role-model cities and communities (<https://www.nist.gov/baldrige/award-recipients>)—as honored by the Baldrige Award (<https://www.nist.gov/baldrige/baldrige-award>) and Communities of Excellence 2026 (COE2026) (<https://communitiesofexcellence2026.org/>)—be implemented in cities and communities around the world? Feedback from a recent conference in Japan proved that the answer is a resounding yes.

## The “Wicked Problems” of Local Governments

In early February, an international conference called “Challenge of Local Governments on Management—Beyond COVID-19” featured three Baldrige Award-winning cities and COE2026 sharing their key success factors in improving the “quality of management” and solving

governments’ “wicked problems” (defined as problems difficult for government to solve without collaborations such as those with companies and citizens). The COE2026 keynote focused on the effort to take local governments’ role one step further to include multiple community players in order to address large issues.

The Japan Productivity Center (JPC) (<https://www.devex.com/organizations/japan-productivity-center-122342>), a nonprofit committed to “promoting productivity in Japan’s industrial society and in improving the quality of people’s lives,” invited sharing from Baldrige Award-recipient cities in the United States, namely, Coral Springs, Florida (<https://www.coral springs.org/Home>); Fort Collins, Colorado (<https://www.fcgov.com/>); and Germantown, Tennessee (<https://www.germantown-tn.gov/0>).

Craig Anderson, strategic advisor to the JPC, said, “It was an honor to be part of such a stimulating and promising



international event, one that hopefully can be replicated in other countries. The goal of the conference was to share best practices for public-sector performance management using case studies from COE2026 and . . . Baldrige-winning U.S. cities.”

Anderson added, “The bottom line is that the Baldrige framework works in state and local government organizations, and COE2026 complements the Baldrige principles by extending their applicability to a broader set of community stakeholders. The JPC has indicated they received a lot of positive feedback and inquiries from attendees, so I hope that we can build on this first engagement.”

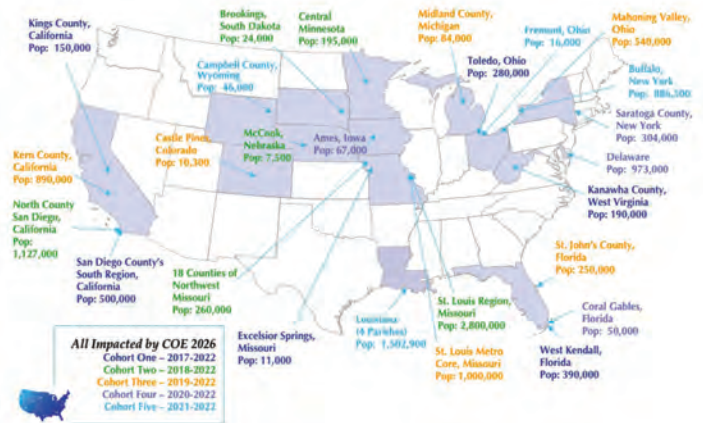
Conference materials offered the COVID-19 pandemic as an example of a “wicked problem” faced by governments, explaining “that governments with excellent management have been able to deal with COVID-19 by planning, implementing, evaluating, and improving. . . . It is believed that the higher ‘quality of management’ in [such] governments, the more effective [and evidence-based] decision making can be. . . . It is clear that this is not limited to COVID-19, but [rather, is] the same for any problems.” The conference materials defined “high-quality management” as the Baldrige framework.

COE2026 kicked off the conference with the keynote presentation, and then the three cities presented and participated in a question-and-answer panel.

***The cities of Coral Springs, Florida; Fort Collins, Colorado; and Germantown, Tennessee “built their leadership, planning/evaluation systems, organizational culture, etc., at a high level, and as a result, their performance such as [results for] citizen satisfaction, staff satisfaction, and bond ratings [have been sustained] at high levels,” according to the JPC materials.***

**Communities of Excellence 2026**

With a mission “to improve the quality of life for the nation’s residents by assisting communities in implementing the Baldrige-based Communities of Excellence Framework,” COE2026 has adapted the Baldrige framework for communities to focus on solving problems. Problems include education disparities, deteriorating public health, and inequalities in economic opportunity (especially for people living in poverty). COE2026 shared that its customized Baldrige-based framework and efforts aim to provide a solid, proactive framework for cross-sector collaboration and performance excellence among key players and stakeholders. This enables ongoing nationwide challenges to be tackled with systematic thinking and action, collaboration and cooperation, and a commitment to performance excellence at the community level. Twenty-two communities throughout the United States have participated in COE2026 since 2016, and more communities are expressing interest and engagement each year.



**City of Coral Springs, Florida**

The City of Coral Springs, which in 2007 became the first city to receive the Baldrige Award, has continued to sustain high levels of performance, including for measures of citizen and employee satisfaction (95 percent surveyed would recommend working there) and bond rating. Coral Springs—whose mission is to be the premier community in which to live, work, and raise a family—shared how it sustains its results through management of the city, even though external environments and some top management and staff positions have changed. City Manager Frank Babinec and Assistant City Managers Catherine Givens and Dale Pazdra presented the city’s business model, inputs/data for listening and learning from residents and businesses, surveys, the strategic plan, the annual budget, and educational efforts and partnerships.

Babinec, Givens, and Pazdra offered this testimonial for the conference: "It was an honor and privilege to participate in the conference to share our story and continuous quality journey as we continue to evolve with the changing environment."

### City of Fort Collins, Colorado

The City of Fort Collins is trying to solve its problems in collaboration with residents, private companies, and the government through a "co-creation model." The city offers various collaborative opportunities, including mobile apps based on generations, lifestyles, and preferences. As a result, many indicators such as living environment, culture and quality of leisure, and working environment are ranked in the top 10% of all U.S. cities, and the bond rating is at the highest level. Fort Collins shared how it realized effective collaboration and achieved results.

Fort Collins Performance Excellence Program Manager Terri Runyan said, "The City of Fort Collins was humbled to participate in this international conference with such high-performing organizations as Coral Springs and the City of Germantown, along with the Communities of Excellence. The JPC provided an extremely well-done venue and shows much enthusiasm for leading the international community in inspiring the Baldrige process and framework."

### City of Germantown, Tennessee

The City of Germantown created its vision and values in collaboration with its citizens, and it deploys these to government officials, private companies, citizens, and other stakeholders in a variety of ways. As a result, the unemployment rate has improved, citizens' engagement level has become one of the highest in the world, and the bond rating has remained at the highest level. During the virtual presentation, Germantown shared how it raised citizen awareness and achieved results.

In addition, according to Stacey Crockett, Germantown's senior communications strategist, the Strategic Plan was completely generated by residents, with the process guided by City staff members. The Strategic Plan is deployed through departmental business plans and throughout the workforce, with each employee's Individual Employee Development Plan connecting their daily work back to the City's strategies.



### Baldrige Across Asia

Attendees at the virtual conference included national productivity organizations (NPOs), local governments, local councils, academics/experts, private organizations, and the media. Seven countries participated: Japan, Malaysia, Iran, Philippines, Thailand, Fiji, and Australia. The JPC is currently evaluating attendee feedback and developing a two-pronged approach for moving forward. First, the JPC will provide specific assistance to several of the local Japanese government organizations that have expressed interest in using the Baldrige framework. Second, the JPC will coordinate with the Asian Productivity Organization (APO) to provide similar workshops for other APO member countries.

"I can state first-hand that there is a tremendous appetite for Baldrige performance excellence across Asia," said Anderson. "Hopefully, we can nurture and build on that interest in the future."

Municipalities qualified for the Baldrige Award under the 2005 expansion of the sectors in which Congress added the nonprofit sector, which also includes government organizations. The first city received the Baldrige Award in 2007, and through the 2021 cycle, a total of four cities have won the Award:

- 2007 – City of Coral Springs, Florida
- 2012 – City of Irving, Texas
- 2017 – City of Fort Collins, Colorado
- 2019 – City of Germantown, Tennessee

# 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 National Quality 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. In 2021, the Charter School of

“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

San Diego became the first two-time winner of the Baldrige Award in education, demonstrating continual performance improvement over an extended period of time and proving once again the ability of the Baldrige Criteria to build and sustain high quality organizations.

The adaptability of the Baldrige Framework is evident in the education sector as a wide variety of organizations have used Baldrige to achieve success. Through the 2020 award cycle, a total of 14 education organizations have received the National Quality Award. Of those, eight are K-12 schools or school systems and six 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.

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.”

“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.” – Mike Flores, Chancellor, Alamo Colleges District

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 integrate many of those seeming conflicting factors.

With its focus on the student, teachers, staff, and families as the customers, Baldrige also helps school systems recognize where frustration may arise and satisfaction diminish. 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.

“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

- 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.
- Graduation rate for high-risk students and student groups reached 77% in the 2019-2020 school year, outperforming competitors and county and state high-risk designated schools.
- 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.

“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 Net Promoter Score 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.” – Lindel Fields, Superintendent and CEO, Tri County Tech

- 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, 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.



In higher education:

- Howard Community College outperformed its peer community colleges with a more than 100 percent growth rate for associate degrees awarded for over 10 years.
- The persistence rate, defined as the number of students who graduated, transferred, earned at least 30 credits with a cumulative grade point average of 2.0 or above, or were still enrolled at Howard Community College four years after entry, has increased significantly over three fiscal years, from just over 75 percent in FY2016 to over 80 percent in FY2018, surpassing the Maryland community colleges and best state rates.
- Alamo Colleges District increased its four-year student graduation rate by 150 percent in recent years to become the best in the state of Texas. In four years, it also doubled the number of degrees and certificates it awarded, to 12,750, which is three times the state norm.
- For student completion/retention and job placement after graduation, Tri County Tech maintained rates in the top 25 percent nationally for eight fiscal years. The organization also achieved the top completion/retention rate in its state of Oklahoma for full-time students for five of seven years preceding its Baldrige Award.

“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



“When the global pandemic struck in March 2019, the college converted its mainly face-to-face instruction and services to primarily remote classes within two and a half weeks. Because we had been operating for well over a decade using the Baldrige framework, the shift was successfully completed.” – Kathleen Hetherington, President, Howard Community College

- 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.
- Students 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.

## Recipients of the Malcolm Baldrige National Quality Award in the Education sector

- 2001 – University of Wisconsin, Stout
- 2001 – Pearl River School District
- 2001 – Chugach School District
- 2003 – Community Consolidated School District 15
- 2004 – Kenneth W. Monfort College of Business
- 2005 – Richland College
- 2005 – Jenks Public Schools
- 2008 – Iredell-Statesville Schools
- 2010 – Montgomery County Public Schools
- 2013 – Pewaukee School District
- 2015 – The Charter School of San Diego
- 2018 – Alamo Colleges District
- 2018 – Tri County Tech
- 2019 – Howard Community College
- 2021 – The Charter School of San Diego

# The Customer is Always Right. Right?

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



This is nothing new. The customer is always right. Customers come first. We have heard these adages for a long time. And we have questioned these adages for equally long (almost). And I love to tell customer stories from my personal experience. Those of you who know me, know I have been doing that for a long time!

Two recent experiences brought this topic back to top of mind. Furthermore, my wife thought it was time for a break from my more academic blog postings.

## Story #1

I recently made a routine trip to our local supermarket. As I prepared to check out, I started unloading my purchases on the cashier's checkout conveyor belt. While I was unloading, another customer (customer #2) came behind me and "dumped" a bunch of items on the belt, saying she hoped I didn't mind, but she did not have a cart and the items were bulky. I said, "Sure. Place them on the belt," and I continued unloading my items. As the conveyor belt moved forward, I assumed the other customer would hold her purchases back,



so I could continue unloading. However, I found that I had to keep moving the items back myself. When I turned around to politely ask that she hold her items back, I discovered that nobody was there. When I was finished unloading, there was no stop bar to put at the end of my merchandise, so I told the cashier that my purchases ended with the bag of peppers.

After I paid, the cashier started ringing up the next customer's items. As I was walking away, that customer (customer #3) said to me, "Don't you want to have the cashier ring up the rest of your items?" When I responded that I was done, I quickly realized that the next customer was not customer #2. Just about then, customer #2 came running up with a few more items and pushed ahead of customer #3. Without any apology to #3, customer #2 proceeded to tell the cashier that the first (big) item is actually a return and she had lost the receipt. (I had to listen; this was getting interesting.) The cashier explained that the item was currently still for sale; he would need a manager's approval to key in the return since customer #2 had come through the store where the item was on the shelves. Now, customer #3 was getting "impatient," and customer #2 started cursing the cashier. I left. But, as I was pulling away with my car, customer #2 exited the store vigorously gesticulating. I don't know what had happened after I left. However, I was left to ponder, Did customer #2 have a right to curse and gesticulate? What about the way she treated customer #3? And what about the cashier? How was he treated by his manager when customer #2 was cursing him?

## Story #2

I recently returned from a meeting at a Ritz-Carlton hotel with the Baldrige Executive Fellows (<https://www.nist.gov/baldrige/products-services/baldrige-executive-fellows-program>). A hallmark of the Ritz-Carlton Hotel Company (<https://www.nist.gov/baldrige/ritz-carlton-hotel-company-llc>) is their motto, "We are Ladies and Gentlemen serving Ladies and Gentlemen." Their employees treat each other with the same respect and service that they provide guests. And management values employees and customers equally, as well. So much so, that management will "fire" a guest who does not treat an employee with respect. Managers will provide that guest accommodations at another hotel and provide transportation to that hotel. Are they saying that the customer is not always right? Are they showing employees how important and valued they are?



## The Big Question

So, who is more important, the customer or the employee? Sir Richard Branson is known for saying, "Clients do not come first; employees come first. If you take care of your employees, they will take care of the clients." This is also a sentiment frequently expressed by Baldrige Award recipients.

I think an organization's core values and culture are important indicators of how customers will be treated. Organizational environment determines how employees feel and the attitude they display when they interact with

customers. The quality of the employee's work is directly related to the quality of their treatment at work. I have experienced the pure joy of the exhilarating environment when I walk into a Baldrige Award recipient's organization. You can feel the enthusiasm. I, as most or all of you, have also experienced the oppressive environment when I walk into an organization where employees are ignored, frequently overridden, or disrespected by management.

### **An Example**

Customer-focus and employee engagement go hand-in-glove. They start with the treatment and respect senior leaders show their employees. This "truism" came back to me when I recently came across a 2017 article in Forbes. It related a case study from Continental Airlines. In 1994, Continental had a toxic culture. The company had gone through ten CEOs in the past ten years. Employee attitudes had resulted in the airline being ranked consistently low and being on the verge of its third bankruptcy. Gordon Bethune became the airline's president (and subsequently its CEO and board chairman) in October 1994. He started by changing the organizational culture. A previously closed environment with key card access to the executive floor was changed to an "open door" environment, with executive-level access for all employees. He fired 39 executives who

couldn't adapt to the new, employees-first environment. The airline went from dead last in every customer service ranking to winning more J.D. Powers awards for customer service than any other airline globally. And, coincidentally, the stock price rose from \$2 a share to \$50 a share.

### **Some Questions to Ponder**

The Baldrige Excellence Builder® (<https://www.nist.gov/baldrige/products-services/baldrige-excellence-builder>), an introductory set of questions for your organization to ponder, helps you understand how well you are accomplishing what is important to your organization.

Category 5 is all about your workforce. Here are some basic questions to consider:

- How do you build an effective and supportive workforce environment?
- How do you engage your workforce for retention and high performance?

And a few more detailed questions to consider:

- How do you support your workforce via services, benefits, and policies?
- How do you determine key drivers of workforce engagement?

And since it all starts with leadership, here are a couple of questions from category 1 on leadership:

- How do senior leaders communicate with and engage the entire workforce?
- How do senior leaders create an environment for success now and in the future?

So, who gets priority consideration in your organization? Does it start with your workforce?







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- 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

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