

# The Foundation for the Malcolm Baldrige National Quality Award



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

George W. Bush



*"I was proud as a U.S. Senator to vote in favor of the Baldrige Act..." this award has helped us re-focus on the future, on quality, on performance, and most importantly maybe, on innovation."*

Joe Biden

*"In just a few years, the National Quality Award has literally become the standard of business excellence. And the renewed spirit of excellence in business, of making quality an integral part of America's corporate strategy, has truly, I believe, made us more competitive in the international arena."*

George H.W. Bush

*"The Malcolm Baldrige National Quality Award, which highlights customer satisfaction, workforce empowerment, and increased productivity, has come to symbolize America's commitment to excellence."*

Bill Clinton

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

Ronald Reagan



America's Best Investment





**Presents:**

**Elevate Your Organizations Quality Journey  
with the Baldridge Foundation's  
Institute for Performance Excellence**

**September 26, 2024**

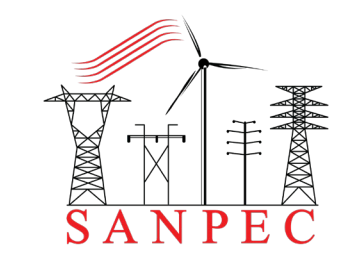




Mac Baldrige Society  
Institute Trustees



### A Special Thanks to Our Donors & Sponsors!



# Opening Remarks/Agenda

**Introduction**

**Guest Presenters**

**Josh Racette, Vice President, National Programs & Development  
Baldrige Foundation**

**Questions from the  
Audience**

**Al Faber, Moderator**

**Baldrige Enterprise Update**

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

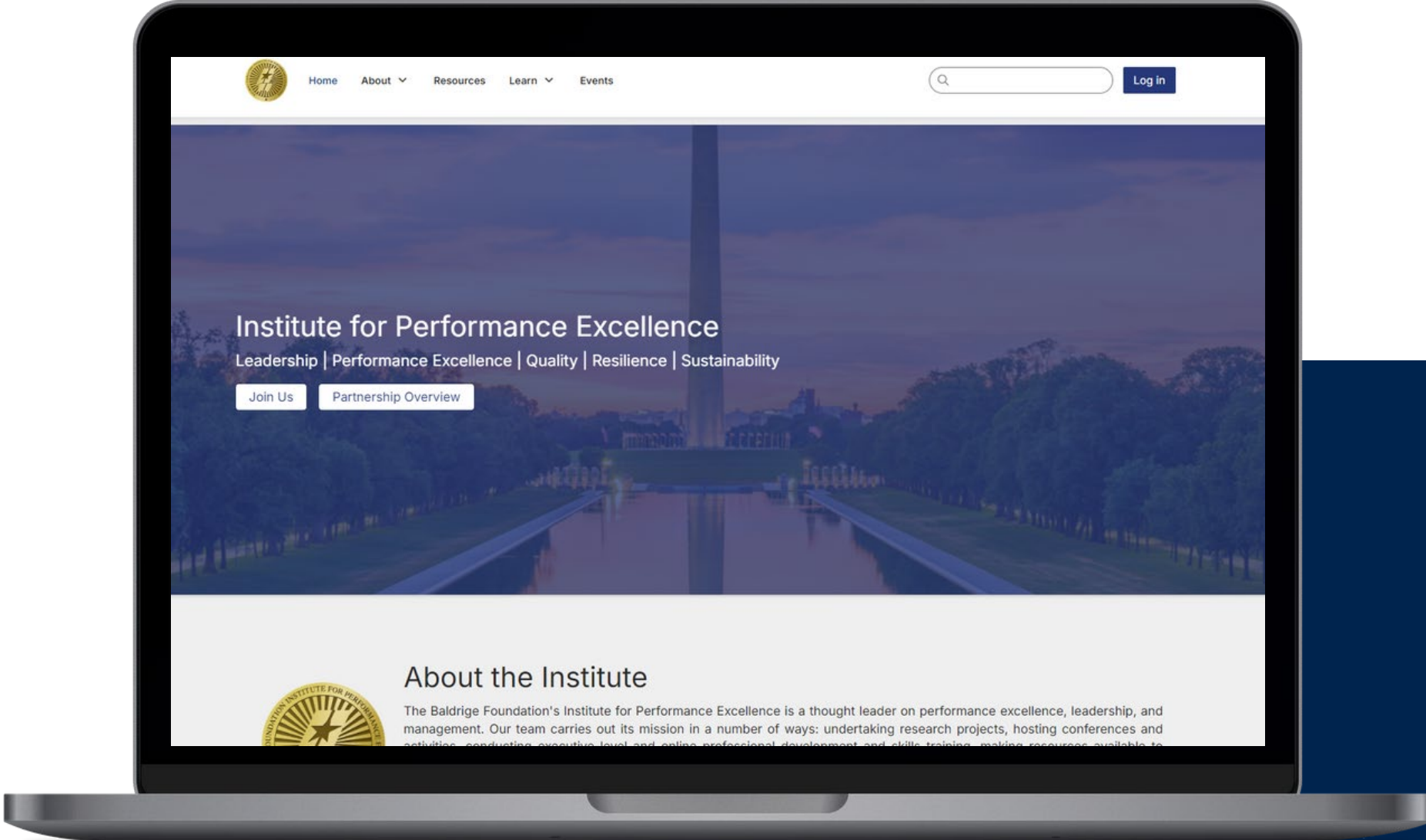
**Margot Hoffman, Vice Chair, Alliance for Performance Excellence**

**Stephanie Norling, President & CEO, Community of Excellence 2026**

**Closing Remarks**



# ELEVATE YOUR ORGANIZATION'S QUALITY JOURNEY with the Baldrige Foundation's Institute for Performance Excellence







# VISION

To be the global academic leader in the study, promotion, and practice of performance excellence, leadership, and management.

# MISSION

To improve the practice of leadership and management in pursuit of performance excellence and its impact in an ever-changing world.







# WHO WE ARE

The Baldrige Foundation's Institute for Performance Excellence is a thought leader on performance excellence, leadership, and management.







# HOW WE WORK

Our team carries out its mission in a number of ways: undertaking research projects, hosting conferences and activities, conducting executive-level and online professional development and skills training, making resources available to enhance organizational performance, and publishing and distributing a wide variety of educational materials to share best practices.







# OUR FOCUS



## Education

Partners of the Institute for Performance Excellence receive discounts on educational offerings to include online self-paced or in-person educational opportunities housed in our current Learning Management System (LMS).



## Communities

Our communities are specifically designed to provide Institute Partners with opportunities to network, idea share and converse with one another on important performance excellence, leadership and management topics.



## Knowledge Center

Partners of the Institute gain access to hundreds of resources curated to support a desire to learn, share best practices, and explore content related to performance excellence, leadership and management.



## Research

The Institute offers research publication opportunities through its Chronicle of Leadership and Management. An independent review board selects both featured and prospective articles for publication.



## Resources

Resource partners help the Institute for Performance Excellence provide various products and services that will support our partners as they navigate their performance excellence journeys.



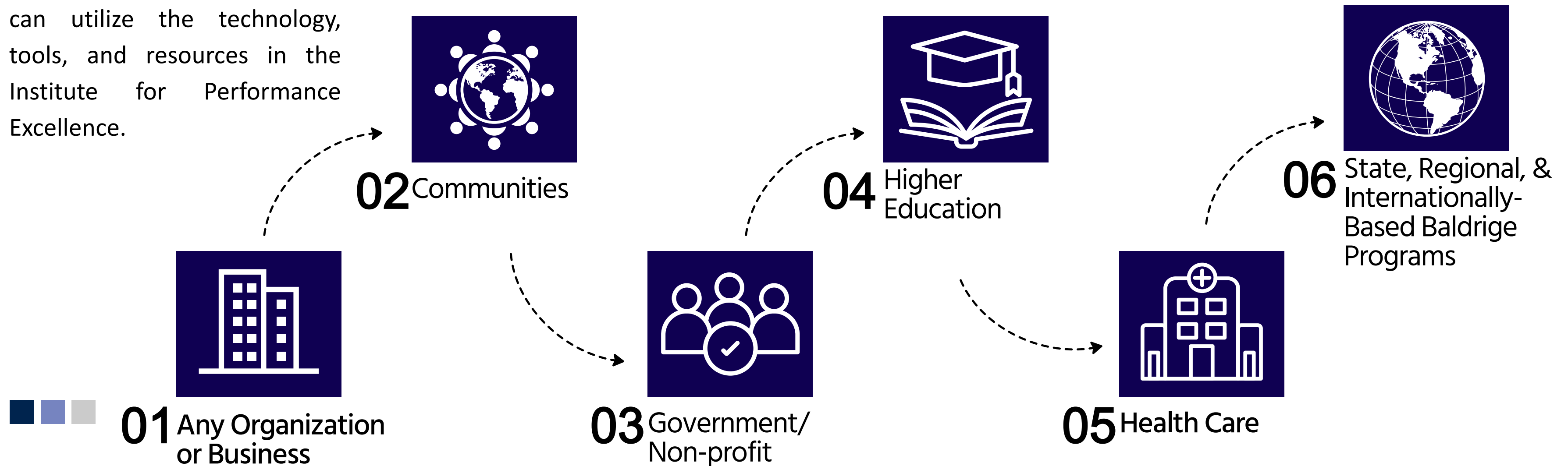




# WHO CAN USE THE INSTITUTE?

## EVERYONE!

All industries and subsectors can utilize the technology, tools, and resources in the Institute for Performance Excellence.



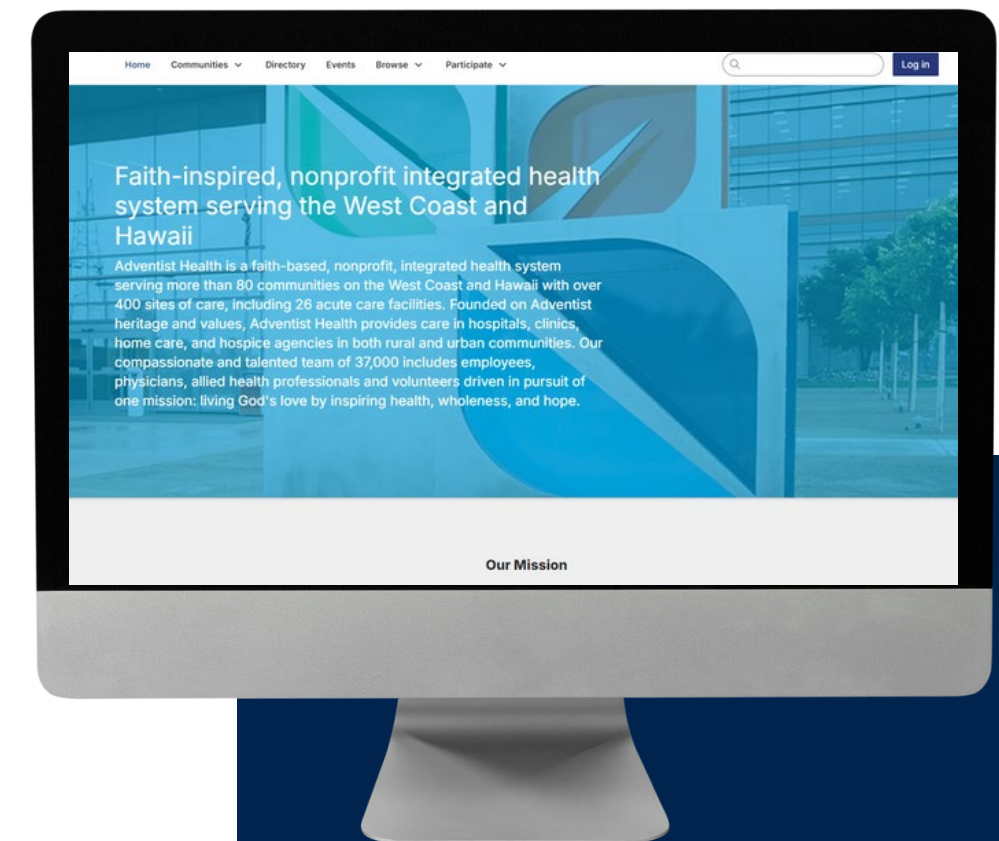




# HOW CAN YOU USE THE INSTITUTE?

The Institute has been created to provide a flexible and customizable approach so that it can be leveraged by all types of business and communities to meet their needs.

1. Provide access to the Institute for all of your employees.
2. Create a custom-branded portal just for your employees.
3. Create a custom-branded portal for your membership, alumni, citizens, or consortium of businesses.







# ONLINE COMMUNITIES



## Modern Social Media Look and Feel

The Institute provides an easy-to-navigate, LinkedIn-style look and feel.

## Directories

Use our directories to help search content and connect with leaders from across the country and the world.

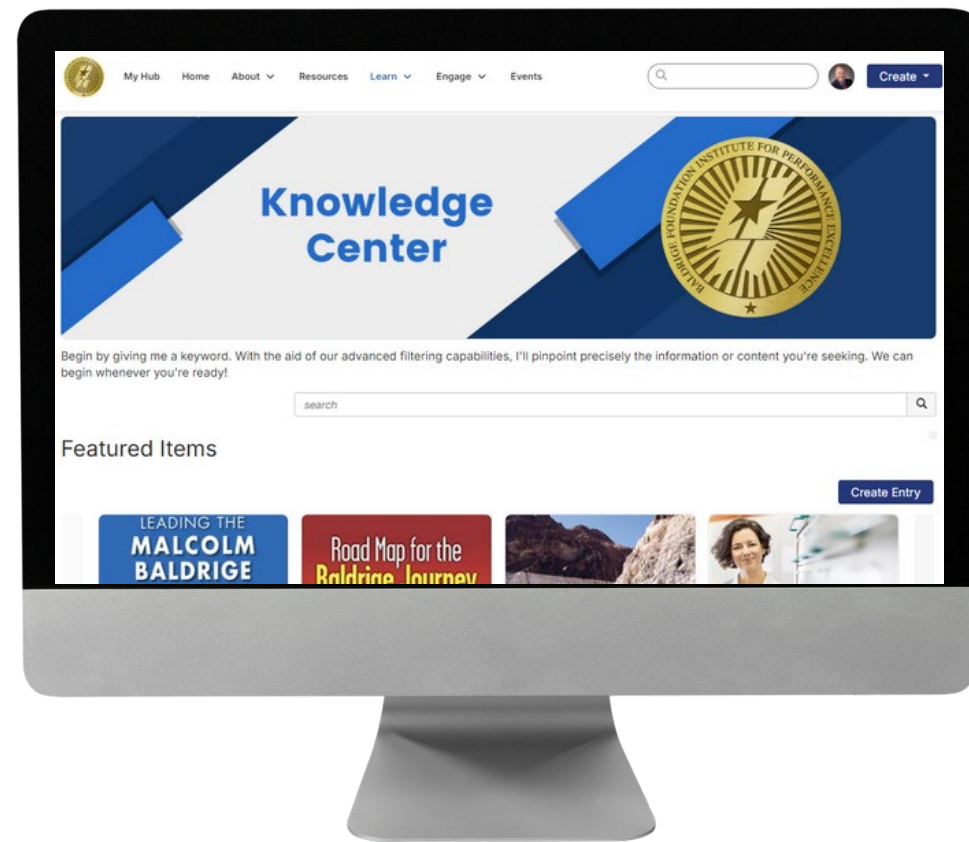
## Engagement Tools

The Institute has built-in engagement tools such as gamification and leaderboards that encourage individuals to create an active community.





# KNOWLEDGE**CENTER**



## **Access hundreds of resources**

The Institute has a growing database of knowledge specifically curated to support you as you pursue excellence.

## **Create and share your own knowledge**

Baldrige organizations and communities want to support each other. Share your content to help support everyone.

## **Wide array of content**

The Institute contributes research, past Baldrige application summaries, presentations, infographics, book reviews, videos, essays, and many more items that will allow you and your colleagues to grow your knowledge.





# RESOURCE PARTNERS



## Partners that can support

The Institute has a growing list of organizations that have worked with businesses or communities on a Baldrige journey.

## What do they offer?

They provide discounted access to their services and/or products to our Institute partners.

## How does the Institute select resource partners?

The Institute carefully selects resource partners that have previously demonstrated that their product and/or service has benefited organizations on a Baldrige journey. Typically, we see our resource partners cited in past Baldrige application summaries.



# CONNECTING YOU WITH **PAST BALDRIGE AWARD RECIPIENTS**



**Looking to gain insights from leaders in your industry?** Want to know how they did it? What was the key to their success? What was the hardest part? The biggest opportunity for improvement?

## **Be introduced to past Baldrige Award Recipients**

We help connect our Institute partners to past Baldrige Award recipients so that you can learn from what they have to offer.







# EDUCATIONAL PROGRAMS

The Baldrige Foundation Institute for Performance Excellence supports individuals and organizations globally by offering high-quality, online, and self-paced educational programs.

With access to over 400 training programs and certifications through a comprehensive learning management system, your organization can leverage the Institute's professional development opportunities to advance its goals.

- Leadership Development Courses
- Strategy Planning & Project Management
- Lean & Six Sigma
- Baldrige-Based Accelerators
- Degree Programs





# GENERAL COURSES

Recently, Congress approved "Community" as the newest sector within the Baldrige framework. In response to the increasing demand for a diverse range of courses aimed at small businesses across the United States, the Institute has strategically partnered to provide over 400 training and certification opportunities across various categories supporting communities that are small, large, and rural.

Additionally, Institute partners have the option to fully white-label our Learning Management System (LMS) and access a dedicated online portal. This portal enables them to oversee and deliver tailored educational opportunities for their organization or community members.

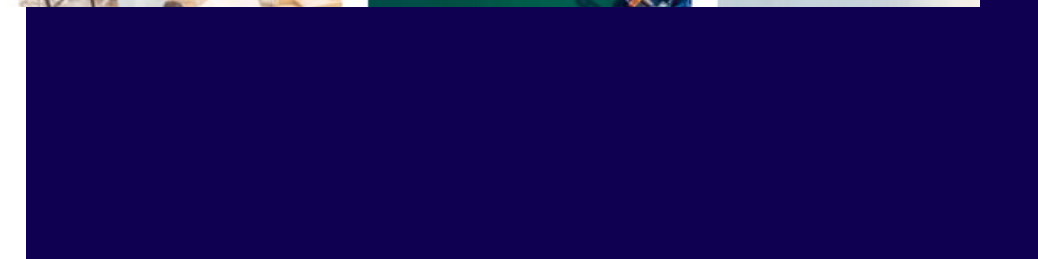


**BALDRIGE FOUNDATION**  
INSTITUTE FOR PERFORMANCE EXCELLENCE

What do you want to learn about?

**Learning Categories**

- Banking**  
4 Courses
- Business Analysis**  
1 Course
- Business Math**  
3 Courses
- Career Building**  
6 Courses
- Computer Applications**  
13 Courses
- Creativity & Innovation**  
4 Courses
- Cybersecurity & CISSP®**  
27 Courses
- Design**  
4 Courses | 2 Certificates





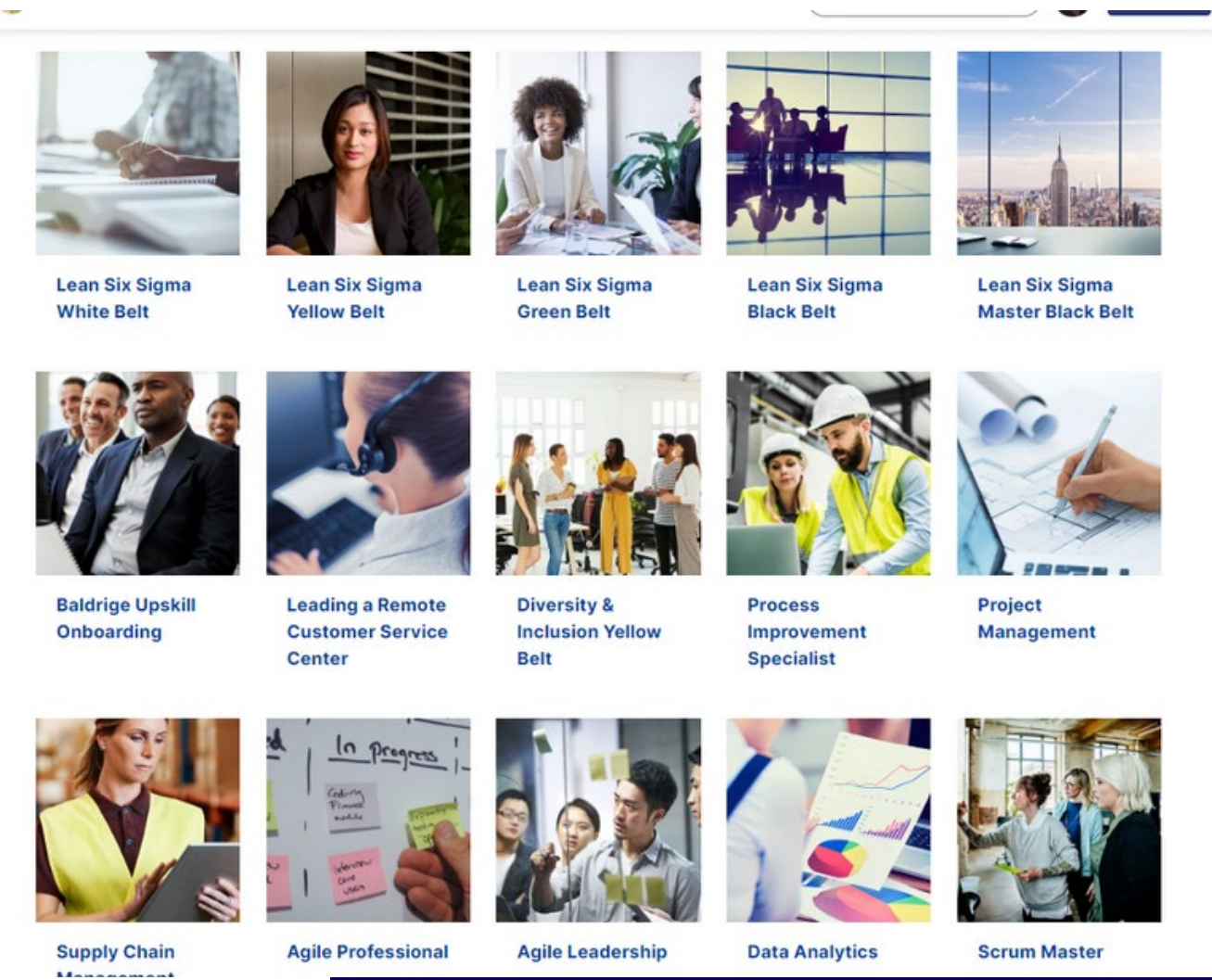


# LEANSIX SIGMA

We offer over 20 different Lean Six Sigma training and certification courses. To differentiate us in the marketplace, elements of Baldrige have been infused into our curriculum.

These training and certification programs are dedicated to helping you and your organization achieve process excellence.

- White Belt to Master Black Belt
- Baldrige Upskill Onboarding
- Process Improvement Specialist
- Project Management
- Health Care Belts
- Agile Leadership
- Supply Chain
- Data Analytics
- Scrum Master
- And more ...







# STRATEGY & MANAGEMENT TRAINING

The Institute also offers access to training programs that can help your company concentrate, make better decisions, and expand by harnessing foresight to think and act strategically.

- Baldrige Performance Excellence Champion Certification
- Mastering Strategy Certification
- Master Foresight: Scenario-Based Planning Certification
- Mastering Agile Organizational Design
- Strategic Thinking in the 21st Century (1-day Pro. Dev.)
- IASP Strategic Planning Certification Exam Prep



The Institute for Performance Excellence, in collaboration with LBL Strategies and the George Washington University Center for Public Leadership, provides training programs that can help your company concentrate, make better decisions, and expand by harnessing foresight to think and act strategically.

A Cross Walk Integrating the Baldrige Performance Excellence Criteria and the Strategic Management Performance Excellence System Frameworks.

The speakers will perform a "Cross Walk" that integrates the Baldrige Criteria for Performance Excellence and Strategic Management Performance System frameworks. The webinar serves as an introduction to the upcoming live online "Mastering Strategy in Health Care" boot camp co-sponsored by the Baldrige Foundation, George Washington University's Center for Excellence in Public Leadership, and LBL Strategies. "Mastering Strategy in Health Care" is targeted to senior leaders in health care and will be delivered via ten half-day sessions over two weeks.

[View Webinar](#)  
[View Crosswalk Overview](#)

## Testimonials

David Markovich, MS, MHA  
Business Program Analyst Strategy Management & Foresight American College of Radiology



*The LBL Strategies Mastering Strategy in Healthcare bootcamp was insightful, engaging, and thought-*



## Mastering Foresight: Scenario-Based Planning Certification Program

This program is a practical application of the most widely used foresight tool: Scenario-Based Planning. You will learn how to lead and facilitate all phases of a Scenario-Based Planning workshop, including the development of alternative future worlds, what drives them, and facilitating discussions to elicit capabilities needed to succeed.







# BALDRIGE-BASED ACCELERATORS

In partnership with a resource partner, the Institute for Performance Excellence has helped make available three unique Baldrige-Based accelerator and QuickStart programs.

## Baldrige-Based Accelerator

Designed to provide businesses and nonprofits with a comprehensive suite of tools and methods to foster excellence, streamline operations, and achieve sustainable growth on a monthly and ongoing basis.

## 4-Week Onboarding & Development QuickStart

Onboard and develop every employee to high performance using a consistent Baldrige-based mentoring system.

## 4-Week Continuous Improvement QuickStart

Create a simple and systematic Baldrige-Based continuous improvement cycle,



**Baldrige-Based Accelerator**

The Accelerator program is designed to provide businesses and nonprofits with a comprehensive suite of tools and methods to foster excellence, streamline operations, and achieve sustainable growth. It offers a structured approach to implementing the Baldrige Framework, ensuring that participants can drive innovation and improve performance across their organization.

[Register Now](#) [Learn More](#)



**4-Week Continuous Improvement QuickStart**

Create a simple and systematic Baldrige-Based continuous improvement cycle that's powered by the creativity of your entire organization. Setup and start deploying in just four simple steps, with no prior business experience required.

[Register Now](#) [Learn More](#)





# OTHER PROGRAMS & OPPORTUNITIES

The Institute for Performance Excellence helps to create programs that engage industry executives, thought leaders, and many more in the pursuit of performance excellence.

An example is our CEO Roundtable Series which has been tailored to support organizations like the American College of Healthcare Executives.







# CHRONICLE OF LEADERSHIP & MANAGEMENT

## Our Purpose

The Chronicle of Leadership and Management is a peer-reviewed publication by the Baldridge Foundation's Institute for Performance Excellence. It aims to share knowledge by providing insightful and practical perspectives for leading and managing performance excellence in various sectors including business, healthcare, education, and government.



## Call for Papers

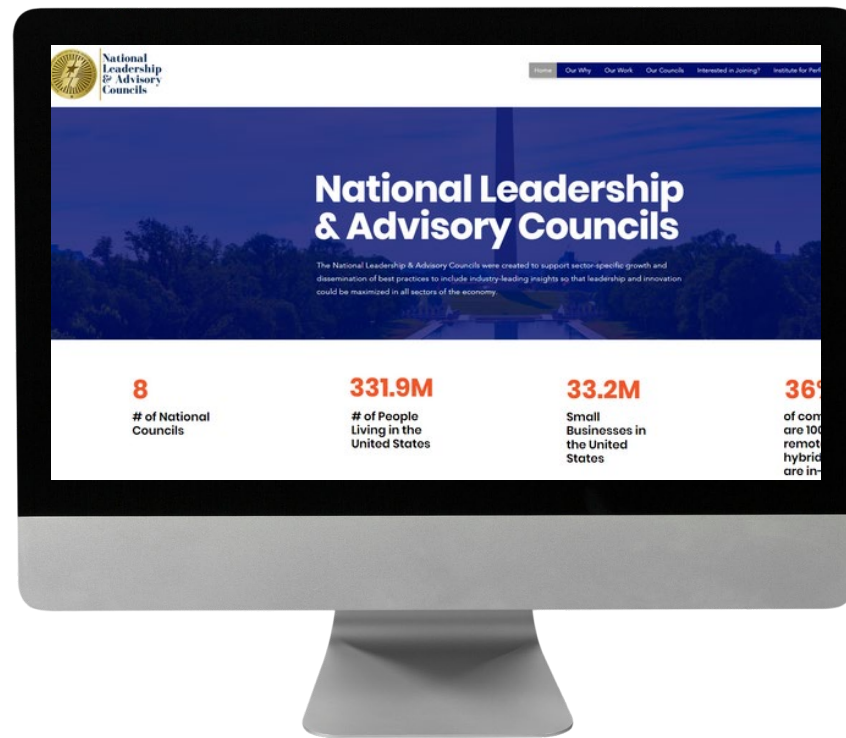
All interested parties can submit for publication, and we encourage you to do so by visiting:

<https://www.baldrigeinstitute.org/learn/research/chronicle-of-leadership-and-management>





# NATIONAL LEADERSHIP AND ADVISORY COUNCILS



## Our Purpose

The National Leadership & Advisory Councils are being created to support sector-specific growth and dissemination of best practices to include industry-leading insights so that leadership and innovation could be maximized in all sectors of the economy.

## Mission & Vision

To improve the practice of leadership and management, innovation, resilience, and strategy in pursuit of performance excellence.

To be the global academic thought leader in the identification and sharing of world-class business practices.







# NATIONAL LEADERSHIP AND ADVISORY COUNCILS

## Our Councils

To further support our thought leadership efforts, the Institute has recently established eight (8) National Leadership and Advisory Councils.

- Business
- Cybersecurity
- Education
- Energy
- Health Care
- Manufacturing
- Non-Profits
- Small Business

## Questions about Joining?

Interested in joining a council? Email Josh Racette at [jracette@baldrigefoundation.org](mailto:jracette@baldrigefoundation.org).





# INSTITUTE **PARTNER** BENEFITS

Institute partnerships are customizable and available for ALL members of an organization.

An Institute partnership annual fee is only \$5,000 for an organization.

\*call for bulk rates and customizable partnerships



- Partial Scholarships for the Institute's Executive-Level Training and Online Training
- 10% University Degree Program Discounts (Walden University)
- 10% University Degree & Certificate Program Discounts (University of Charleston)
- 10% Discount on the Strategic Performance Excellence and Knowledge System (SPEAKS) (Jordan Johnson, Inc.)
- 30% Discount on Stakeholder/Customer Engagement Survey Resources (Beyond Feedback)
- 5% Discount on Strategic Planning & Leadership Certifications in collaboration with LBL Strategies and George Washington University
- 10% Discount on Lean Six Sigma Courses (SSGI)
- Discounts on Evidence-Based Succession Planning, Executive Search and Executive Assessments. (The Synergy Organization)
- 5% Discount on Corporate Transcendence products and services (Corporate Transcendence)
- Discounts on Baldrige-Based Accelerators and QuickStart programs (ManageHub)
- Discounts on products and services with Ascend, Apex, Organizational Performance, or Professional Services (Stratex Solutions)
- Corporate Travel Discounts on Hotel, Car, Bus, and Flights
- 10% Annual Quest for Excellence Conference Registration Discount; Limited to 10 Attendees
- 20% Discount on Exhibitor Space at the Annual Quest for Excellence Conference
- 10% Sponsorship Discount for the Annual Quest for Excellence
- Individual Profile Listing(s) for all employees
- Ability to Post Press Releases on the Foundation's Web Site
- Partners Only LinkedIn Group
- Unlimited Access to Electronic Journal of Performance Excellence
- Unlimited Access to Electronic Chronicle of Leadership & Management
- Ten (10) Printed Copies of the Journal of Performance Excellence
- Ten (10) Printed Copies of the Chronicle of Leadership & Management
- Baldrige Foundation CEO Letters of Support for Campaigns and Grant Applications
- Baldrige Foundation CEO Statements of Support for Marketing, Advertising, and Quality
- 25% Discounted Rate on Additional Copies of the Journal of Performance Excellence
- Use of Baldrige Foundation Institute for Performance Excellence Partner Logo w/Year for Promotional Materials/Communications





# WANT TO LEARN MORE? INSTITUTE FOR PERFORMANCE EXCELLENCE

## Join us

The Institute offers essential tools and resources to support the employees of your business, your customers, or the citizens in your community.

Interested in joining the Institute for Performance Excellence as a partner? Scan the QR Code to schedule a meeting or email Josh Racette at [jraccette@baldrigefoundation.org](mailto:jracette@baldrigefoundation.org).



## Schedule a Meeting

Schedule a conversation with us to discuss how we can customize a program for your needs.



# Panelist Questions and Discussion



**Josh Racette**  
Vice President, National  
Programs and Development  
Baldrige Foundation



**Al Faber**  
President & CEO  
Baldrige Foundation





# Baldrige Performance Excellence Program

Robert Fangmeyer, Director BPEP



# Baldrige Program Purpose/Mission



To improve the quality, performance, and long-term success of businesses and other organizations by

- Recognizing role models
- Fostering the adoption of proven practices
- *[Fostering a nation-wide ecosystem]*





# Baldrige Program Update

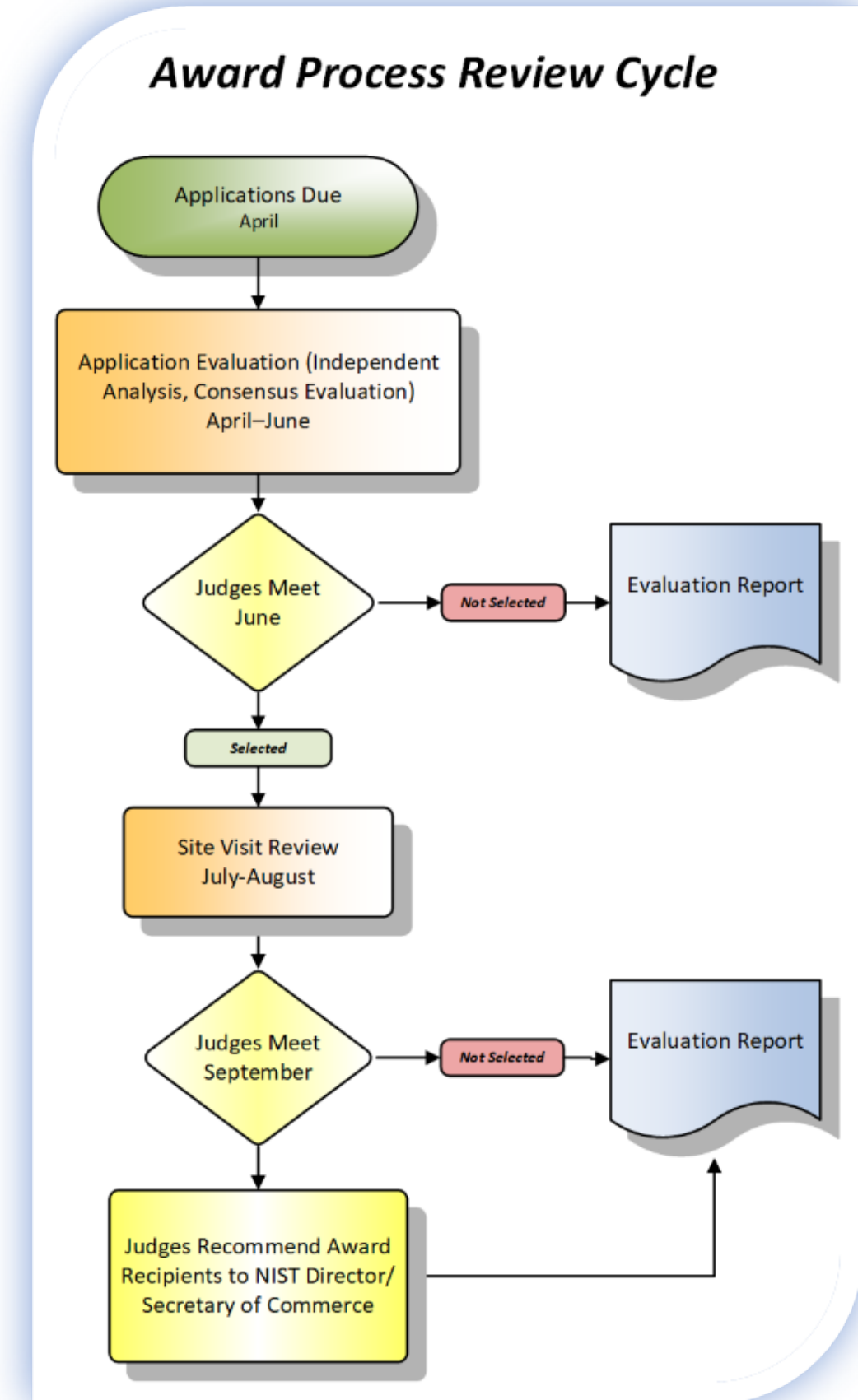
- 2024 Baldrige Award Process
- 2025 Baldrige Award Process
- Baldrige Framework Revisions



# 2024 Award Process

- 29 Eligibility submissions
- 16 Award Applicants
- 9 Finalists received site visits
- Judges met September 9 to 13
- Recommended \_\_ Award Recipients

- 
- Evaluation Reports and Surveys
  - Process OFIs being identified





# 2025 Award Process

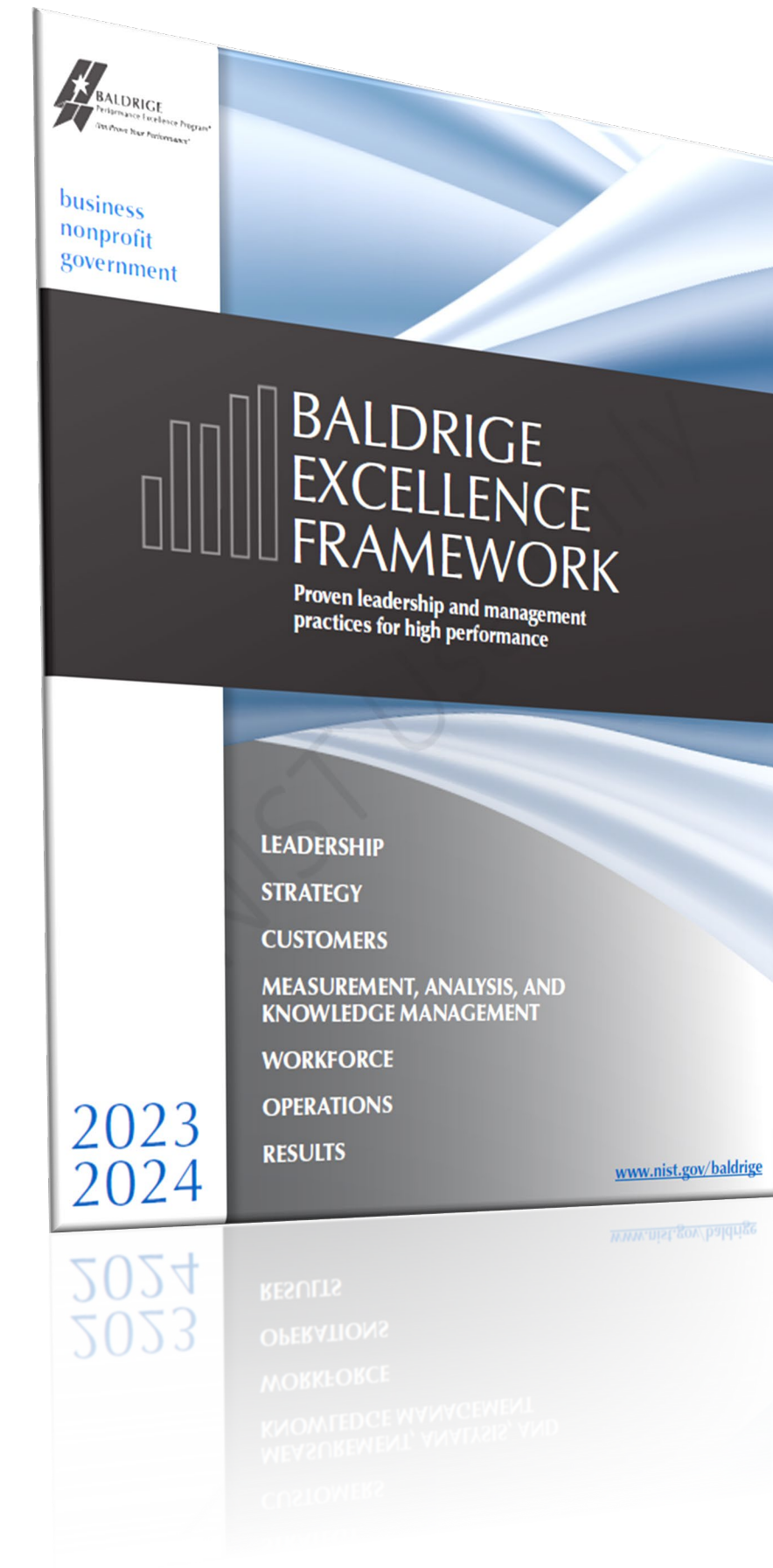
- Adjust calendar and milestones
- Tweak award criteria and evaluation rubrics
- Clarify guidance and instructions
- Develop and provide samples



# Baldrige Framework Revisions

## Objectives:

- Incorporate needed content changes based on research and input
- Enhance utility and value as a maturity model improvement guide
- Simplify and streamline for ease of understanding and use





Thank You!

# Alliance for Performance Excellence Update

The screenshot shows the website's header with the logo on the left and the tagline "The Journey to Performance Excellence Start Here" on the right. A navigation menu includes links for Home, About Us, What We Do, Members, Alliance Programs, Library, and Contact Us. Below the navigation is a dark blue banner with a map of the United States. The text on the banner reads "Find Performance IMPROVEMENT HELP NEAR YOU". The map is divided into state outlines, each labeled with its two-letter abbreviation. A legend on the right side of the map lists the state abbreviations: NH, ME, VT, CT, RI, MA, NY, NJ, PA, DE, MD, DC, VA, WV, KY, TN, MS, AL, GA, SC, NC, and HI.

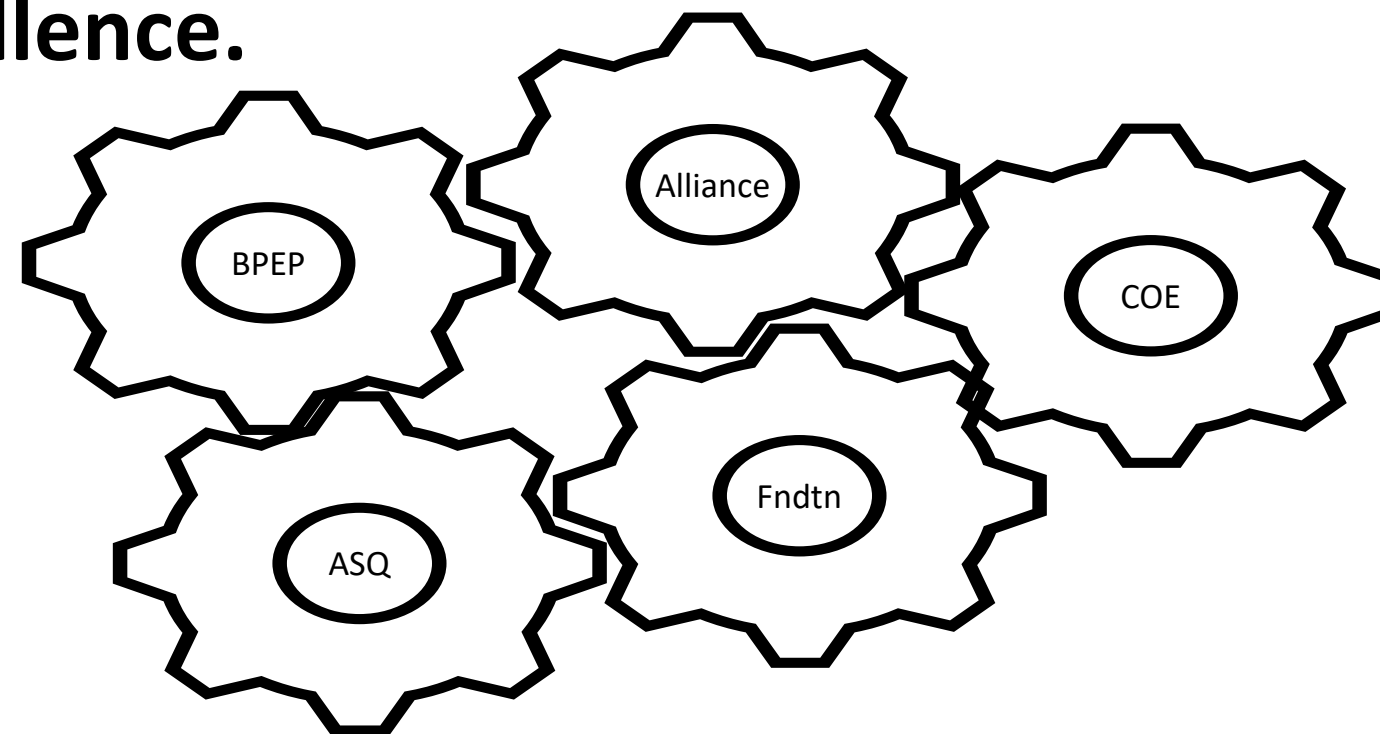


**Margot Hoffman**  
**Vice Chair**  
**Alliance for Performance Excellence**



# (re)Introducing Alliance for Performance Excellence

- Founded in 2005, the Alliance for Performance Excellence is the network of Baldrige-based programs and other members supportive of performance excellence.
- **Purpose:** To inspire individuals, organizations, and communities across the U.S. and the world to learn, implement, and achieve performance excellence.
- **Mission:** To strengthen members through training, mentoring, collaboration, and sharing of resources, best practices, and service offerings.
- **Vision (proposed):** to be the premier resource for organizations and communities desiring to achieve and sustain excellence.
- **Core Values:**
  - Act with Integrity
  - Value People
  - Collaborate
  - Focus on Excellence



*Learn. Share. Connect.*

**NEW!!**

# 2024 Plan

# EXCELLENCE



## Purpose

To inspire individuals, organizations, and communities across the US and the world to learn, implement, and achieve higher levels of performance.

## Mission

To strengthen members through training, mentoring, collaboration, and sharing of resources, best practices, and service offerings.

**Vision (proposed):** To be the premier resource for organizations and communities desiring to achieve and sustain excellence.

**Value Proposition (proposed):** Equip Alliance members to develop and sustain higher performance in organizations and communities by furthering the principles of the Baldrige Excellence Framework.

## 2024 Strategic Priorities

### 1. Changes due to implications of Baldrige Reimagine

- Reevaluate Top Tier requirements
- Develop discontinued tools (i.e. Case Study, AWMP)
- Determine future eligibility criteria
- Identify components of national process to be adopted by Alliance & pathway from Alliance programs to national

### 2. Operational effectiveness

- Contract part-time administrative position to support secretary, treasurer, committees, etc.
- Return to financial stability – breakeven or better

### 3. Host successful Baldrige Fall Conference

- Return to financial stability & increase attendance
- Contract part-time conference planning support

### 4. Alliance refresh

- Rebrand - update name/logo/colors/tag line
- Refresh website

## Core Values



**Act with Integrity:** are honest, ethical, authentic, transparent and respectful.



**Value People:** show respect, professionalism, empathy, and inclusion for all people – members, customers, volunteers, and partners.



**Collaborate:** share ideas, best practices, resources, and achieve understanding with other members; partner with other organizations, and jointly solve problems.



**Focus on Excellence:** embrace systems-based improvement and learning for organizations and communities.

Alliance Scorecard	2023 Actual	2024 Target
<b>Member Engagement</b>		
Member Satisfaction - NPS	7.4	10
Members Good Standing (Comp. Criteria)	86%	90%
Dues discount % (Discounts/Dues)	36%	36%
<b>Building Lasting Stakeholder Relationships</b>		
Conference Attendance	256	200
Conference Survey Results - NPS	62	62
Conference Sponsorships/Exhibitors	3	12
<b>Financial Performance</b>		
Net Operating Income	-\$81,000	(\$4,000)
Net Income	-\$50,568	(\$4,000)
Conference Profit Margin	-\$31,093	\$40,000
Dues Collected	\$22,500	\$20,000
Current Assets	\$249,602	\$250,000



# Learn More!...

- Attend the 2024 Baldrige Fall Conference, **October 29-30** (with Communities of Excellence 2026 conference October 28-29) in **Coral Gables, Florida!**  
*Early Bird Sept 30!!*  
**BaldrigeConference.org**
- Explore the value of getting started (or accelerating) your journey to excellence using Baldrige, contact your Alliance member program at **<http://baldrigealliance.org>**

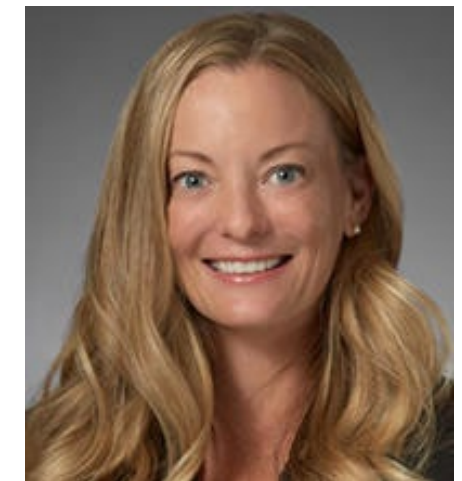


*Learn. Share. Connect.*

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



*“For America to sustain its vitality, promote opportunity, and create a more equitable society during its second 250 years of existence, we must improve the performance of communities and the people who lead and live in them.”*



**Stephanie Norling**  
**President & CEO**  
**Communities of**  
**Excellence 2026**



# 2024 FALL CONFERENCE

*The Age of Innovation & Resilience*

CORAL GABLES, FLORIDA

OCTOBER 28-29TH, 2024



**Who Owns America:  
Revelations on Institutional Investors and  
the American Dream of Homeownership**

**Dr. George "Mac" McCarthy**  
*Lincoln Institute of Land Policy*

**Other conference highlights include:**

- Keynote Session featuring Krista Stepney
- Community Excellence Journey Spotlight - Coral Gables
- Navigating the AI Landscape: A Roadmap for Community Excellence
- Engaging Breakout Sessions

<https://communitiesofexcellence2026.org/get-involved/fall-conference-2024/>





# Membership Levels At-a-Glance

BENEFITS	INDIVIDUAL		BUSINESS/ORGANIZATION			COMMUNITY	
	Supporting	Collaborating	Forming	Accelerating	Sustaining	Learning Collaborative	Alumni
	\$500/yr	\$1,500/yr	\$5,000/yr	\$15,000/yr	\$20,000/yr	\$25,000/yr	\$5,000/yr
The Communities of Excellence Framework	✓	✓	✓	✓	✓	✓**	✓**
Website Recognition	✓	✓	✓	✓	✓	✓	✓
Newsletter	✓	✓	✓	✓*	✓*	✓	✓
Special Discounts**	✓	✓	✓	✓**	✓**	✓	✓
Exclusive Trainings**	✓	✓	✓	✓**	✓**	✓	✓
Social Impact Assessment				✓	✓**	✓	✓
Social Marketing/Technology Assessment				✓	✓	✓	✓
Coaching Training Program Access					✓	✓	✓
Online Community Scorecard						✓	✓

**WHY JOIN?**  
If you want to make an impact in your community and communities across the United States but don't know where to start, our membership program provides tools, resources, and access to professionals who share your passion for community transformation.

\* Accelerating and Sustaining Members receive an online spotlight article in our quarterly newsletter. \*\* Number, hours, and value of offerings increase across membership levels.

<https://communitiesofexcellence2026.org/how-to-help/become-a-member/>





# Communities of Excellence Digital Scorecard and Toolkit

Quantitative Measures







Mac Baldrige Society  
Institute Trustees



### A Special Thanks to Our Donors & Sponsors!

