# The Alliance for Performance Excellence Newsletter

## The Premier Resource for a Thriving Baldrige Community

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“Enhancing Our Members’ Ability to Grow Baldrige-based Performance Excellence”

www.baldrigepe.org/alliance
Greetings:

As I write this, we are anticipating the names of the 2017 Baldrige award recipients. If this year is typical, most—if not all—of the recipients will have worked with an Alliance member program as part of their journey toward excellence.

While at times our work seems unheralded, I always like to think that Alliance members have one of the best jobs in the world. We get to work with some of the best workplaces in our state or region, and with leaders that want the best for their customers, their employees, and our society. We train and support volunteers from all types of jobs, from all levels of experience to assess applicants against world class criteria embraced in the Baldrige framework. I have made friendships and professional connections that have enriched my life and advanced my career—and suspect most of you have as well.

I want to extend special gratitude to the Alliance executive team - Brian Lassiter (MN), Geri Markley (MI), and Anne Warner (NH). They log many hours on behalf of our organization, and are so invested in our collective success. Thanks also to the Alliance Leadership Team – in addition to Brian, Geri, and Anne, Katie Rawls (TN), Dean Bondhus (KY) and Karen Shepard (SWAE) keep us connected to members, organized and on track.

A quick recap of a few of the MANY ways your Alliance is working for you:

- The Alliance hosted an amazing 2017 Fall conference coordinated by Arizona and Minnesota. By all accounts the Fall conference was big success. We’ll be reporting on the results shortly, and looking for organizers for conferences through 2020. Karen, Brian and the conference team set a high bar, and we appreciate their work. The Baldrige Fall conference elevated the stature of the Alliance. We also enjoyed time to connect with each other, Communities of Excellence 2020 participants, and Baldrige enthusiasts from across the country.

- The Alliance continues to work with Accreditation Council for Business Schools and Programs (ACBSP) to develop a next level beyond accreditation for US business schools. The team is in place, and looks to leverage the processes already within state/regional programs, bringing additional volume to each of our member programs. Thanks to Doug Gilbert for his leadership on this initiative.

- Alliance Baldrige Express is available for resell to our customers nationwide. Are you using this revenue generating service? Visit the Box for specifics and sample marketing materials.

- We also continue to make terrific progress on ManageHub, a product that serves small business and could serve as a feeder to our Award/assessment products. You recently received an email about an upcoming webinar to learn more about ManageHub and the ways it can help your program and your customers.

- We have strengthened our collaboration with BPEP and with the Baldrige Foundation, partnering on their efforts to re-store federal funding to BPEP (and to state/local programs). Thank you in advance for your prompt response to requests for information about our programs, our applicants and our impact.

Helping organizations improve is a great service, and our communities and states are better because of the work you do in your own program, as part of the Alliance, and in conjunction with the national Baldrige program. We appreciate you!
Message from the Chair of the Board (continued)

Brian Lassiter will take over as Alliance chair in the coming weeks. It has been an honor to serve the Alliance as chair the past few years.

Sincerely,

Liz Menzer
Wisconsin

Alliance News
Updates from the Alliance Board of Directors

Alliance for Performance Excellence
Governance Report
Nominating Committee / Elections
(Submitted by Karen Shepard, Governance Committee Chair)

The Elections for the 2018 Board of Directors and Officers took place this fall. The Nominating Committee included: Karen Shepard (SWAE), Chair, Sherry Marshall (MEI) and Jeff Weinrach (QNM).

The following people were elected to the Board for a 3 year term beginning January 1, 2018:

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<th>Organization</th>
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<td>Illinois Performance Excellence</td>
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<td>McGuire, Mac</td>
<td>Quality Texas Foundation</td>
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<td>Marshall, Sherry</td>
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<td>Menzer, Liz</td>
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<td>Nesteby, Gary</td>
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<td>Weinrach, Jeff</td>
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They will join:

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<tr>
<th>Name</th>
<th>Organization</th>
<th>Region</th>
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<td>Belter, Mike</td>
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<td>Bondhus, Dean</td>
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<td>Kentucky</td>
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<td>Fisher, Donn</td>
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<td>Performance Excellence Network</td>
<td>Minnesota / N Dakota / S Dakota</td>
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<tr>
<td>Markley, Geri</td>
<td>Michigan Performance Excellence</td>
<td>Michigan</td>
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<tr>
<td>Shepard, Karen</td>
<td>Southwest Alliance for Excellence</td>
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<tr>
<td>Warner, Anne</td>
<td>Granite State Quality Council</td>
<td>New Hampshire / Maine / VT</td>
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The newly elected Officers will serve a 2 year term beginning January 1, 2018. They are:

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<th>Name</th>
<th>Position</th>
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<tr>
<td>Lassiter, Brian</td>
<td>Chair</td>
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<tr>
<td>Menzer, Liz</td>
<td>Vice-Chair</td>
</tr>
<tr>
<td>Warner, Anne</td>
<td>Secretary</td>
</tr>
<tr>
<td>Markley, Geri</td>
<td>Treasurer</td>
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Baldrige Fall Conference: Mission Accomplished!
Brian Lassiter (PEN), & Karen Shepard (SWAE)

Mission accomplished! Last month, the Alliance took a bold step and successfully collaborated with the Baldrige Program and the Baldrige Foundation to host the very first Baldrige Fall Conference (notice the rebranding from Baldrige Regional Conference?!?) – it was the first time BPEP subcontracted a major product to the Alliance, and by all accounts, the event was a great success! The conference was hosted and executed by the Southwest Alliance for Excellence in partnership with the Performance Excellence Network.

For those of you who attended (thank you!), you no doubt experienced what the planning committee absolutely hoped to capture: an energy that inspired learning, relationship building, and motivation to adopt, continue, or accelerate a journey to excellence. Mission accomplished. The speakers were all extraordinary (Really!); the networking reception and the main event were well-received; and the resort location was nearly perfect. The planning committee – and our partners in BPEP and the Foundation – are very happy with how things turned out. So were the attendees.

- amazing 98.5% were satisfied with the conference (that never happens at conferences – people always complain about something!)
- An equally amazing 62% were very satisfied – top box!
- And the Net Promoter Score (an indicator of engagement) was 57. For those of you not fully familiar, NPS is on a scale of -100 to +100, and anything 60+ is considered truly world class.
- More than 250 attended, which is the second highest attendance in six years and the highest in about three.

Not that we didn’t have our OFIs: the conference committee met last week to debrief and find ways to improve for 2018 and beyond, and the Alliance Leadership Committee is starting the process of selecting Alliance members to plan/execute next year’s event. BPEP and the Foundation would like to continue partnering with the Alliance on this product, which indicates a milestone for the Alliance and our ability to meaningfully execute services on behalf of the larger Enterprise. Kudos to the team!

The Conference Committee included: Karen Shepard (SWAE), Brian Lassiter (PEN), Jennifer Burmeister (PEN), Denise Shields (CAPE), Megan O’Keefe (CAPE), and Scott Kurtz (BPEP). Also volunteering during the event were Sandy Kube (SWAE) and Sue Alexander (TNCPE). An additional thank you goes to Geri Markley (MQC) for supporting the payment and financial processes of the conference. Finally, we would like to thank Communities of Excellence 2026 for hosting their first in-person collaborative learning session parallel to the conference (which attracted 40+ attendees!), as well as our partners in BPEP and the Foundation and all Alliance members who attended, introduced speakers and/or helped market and encourage their stakeholders to attend. Mission accomplished!
Proposal for Examiner Training Standards

Over the past few years, the Alliance has developed and approved standards to support consistency for our top-level award applicants across the country. These include Standards for Top Level Awards, Judging Standards, and Governance and Operating Standards. The next critical component to achieve this consistency is to provide our Examiners with the knowledge and training to identify value-added feedback and accurate scores for the applicants. This will also support Alliance Program Members’ ability to easily share Examiners providing us with a more diverse examiner pool.

The Alliance Leadership Committee is now considering the Examiner Training consistency standards that are outlined in this article. Feedback and questions are welcome. We are also planning a webinar for Program Members in the next couple of months to further discuss and provide examples.

The proposed standards relate to the content of the training (what is taught) and do not address the training process (how individual programs train examiners). They are closely aligned with BPEP’s curriculum which most Programs already follow, with some added insights from Examiner Training curriculum pilots that have been conducted over the past two years. They enable individual Programs to go beyond these standard topics to support their own program needs and ideally encourage all Programs to share best practices that support examiner development. The proposed standards are to:

- Provide new and inexperienced examiners with the following (either a part of the examiner training or in a different forum).
  - an overview of the contents of a top-level application and the contents and use of the Baldrige Framework.
  - an overview of the Criteria for Performance Excellence and how it is used to evaluate a top-level application.
- Identify and describe any changes in the Baldrige Framework – especially the Criteria and Scoring Guidelines (especially for experienced and returning examiners)
- Teach (demonstrate) and have examiners practice the following
  - The importance, development, and use of Key Factors
  - Use of the BPEP Six-Step Item Evaluation Process including:
    - Identify and document the four Evaluation Factors and Maturity levels as part of Identifying Strengths and OFIs and Writing Feedback Ready Comments (Steps 4 and 5 of the process) to support a complete evaluation and consistent/accurate scoring for each item.
      - For Process Items: Identify Approach at the Basic, Overall, and Multiple requirements level, Deployment, Learning, and Integration (A[BOM] DLI).
      - For Results Items: Identify Levels at the Basic, Overall, and Multiple requirements level, Trends, Comparisons, and Integration (Le[BOM] TCI).
Use of the Baldrige Comment Guidelines to develop feedback ready comments that meet applicants’ requirements for actionable, aligned, accurate, and appropriate (the “4 A’s”).

Support accurate, consistent Scoring by

- Using the Process Item Evaluation Factors and Maturity levels of A[BO]M DLI identified in each Item to identify a score and document the rationale for that score.
- Using the Results Item Evaluation Factors and Maturity levels of Le[BOM] TCI identified in each Item to identify a score and document the rationale for that score.

To support these standards the Alliance will collect and make available examples to Alliance Program Members that demonstrate these standards.

Each Program will self-certify that they are meeting the standards in the annual survey as they do with the other standards.

Alliance Membership Committee Webinar December 8th

Have any of your 'clients' told you that the application writing process is 'onerous' and time consuming? Have you ever wanted an easy to use tool that helps organizations document their responses to the Baldrige framework?

Well there is now a viable alternative to asking organizations to read the criteria, form teams and just start writing or hire a consultant.

The Alliance Membership Committee will hold a webinar on Friday, December 8th on the topic of a new approach to facilitate applicants and organizations interested in self assessment dialogue and focused action. Look for more details to come on the time the webinar will be held.

We will introduce and dialogue on this new approach that has been evaluated by a task team of members for high potential use by all programs.

Learn how you and your clients can use this method to:

- Attract and retain more participants in your programs
- Engage more of your participant’s in an employee-friendly Baldrige process
- Shorten the process from start to strategic actions and recognition/awards
- Replace (or complement) onsite meetings and offsite training with “always-on” online feedback and support
- Achieve a Baldrige ROI easier, faster and better

This approach works from a fully digitized version of the Baldrige Excellence Framework that organizations can use to document their processes based on the Baldrige Categories. It can be used by Alliance Members to support organizations at every level of their Baldrige Journey. It also has the potential to support the writing of an application and even to take the place of an application which could reduce time and resources for both the applicant and Examiners.

Hope you make time to participate to learn directly and get your questions asked immediately!
**New Membership Dues Structure**

Alliance Board of Directors promotes new members – and approves new dues structure!

In order to advance the mission of the Alliance the new dues structure encourages growing our membership to include ‘supporting’ members. Members that do not provide state or regional award programs – but do use the performance excellence framework. Members that will help find new and better ways of marketing and providing services to organizations across the USA.

The new structure will also encourage all award Program Members to actively support the Alliance mission. For all actively engaged programs serving the Alliance – there will be no change to their dues. For those that rely on other programs to provide Alliance services, there will be an increase in dues that effectively helps ‘pay’ for those efforts.

Beginning next year, a new category of members – Individuals – will pay just $500/year.

All organizations with <$500k gross revenues will pay $1000, if>$500k dues = $2k/year.

All program member organizations that have actively participated on Alliance committee work, task forces or otherwise contributed to achieving its strategic goals may request a 50% dues discount by submitting a brief description to the treasurer by December 31, 2018 for reduced dues in 2019.

Direct questions to the Membership Committee Chair – Dean Bondhus dabmnrky@gmail.com

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**“Best of the Best” Win U.S. National Excellence Honor**

U.S. Commerce Secretary Wilbur Ross today named two small businesses, one city government, and two health care organizations as the 2017 recipients of the Malcolm Baldrige National Quality Award. Celebrating its 30th anniversary this year, the Baldrige Award is a Presidential-level honor, recognizing exemplary practices among American organizations and businesses including an unceasing drive for radical innovation, thoughtful leadership, and administrative improvement. This year’s awardees are proven success stories, providing a rubric for other businesses across the country to follow.

[Continue reading . . .](#)
Register today for the 30th Anniversary Quest for Excellence® conference!

The conference, which will showcase the best practices of the five newly announced 2017 Baldrige Award recipients and past awardees, is being held April 8-11, 2018 at the Marriott Baltimore Waterfront in Baltimore, MD.

Celebrate our 30th Anniversary with current and past Baldrige recipients and members of the Baldrige community! Learn role model best practices, and take home solutions to help your organization achieve breakthrough performance and results.

Baldrige Criteria Pre-Conference Workshops are available the afternoon of April 8 for beginner and intermediate users of the Baldrige Criteria.

The Baldrige Cybersecurity Pre-Conference Workshop will be held on Sunday, April 8. This will be a practical, interactive workshop on how to conduct a self-assessment of an organization’s cybersecurity program, utilizing the Baldrige Cybersecurity Excellence Builder. This session is designed for those in an organization who are concerned with and responsible for mission-driven, cybersecurity-related policy and operations.

The Baldrige Award Ceremony, which will honor the 2017 Award recipients, will take place on Sunday, April 8.

Enjoy the convenience of the conference hotel with its many amenities, including free in-room wifi, convenience to the Inner Harbor and points of interest, and easily network with your fellow conference attendees at any time. Staying at the Quest conference hotel is also a way to support the Baldrige Program. Book your stay today at the Marriott Baltimore Waterfront at the special attendee rate.

Sponsorships are also available. These are great ways for your organization to be a part of the conference and contribute to the learning experience for Quest attendees.

The 2017 Baldrige Award recipients being featured are:

Bristol Tennessee Essential Services, Bristol, TN, small business sector
Stellar Solutions, Palo Alto, CA, small business sector
City of Fort Collins, Fort Collins, CO, nonprofit sector
Castle Medical Center, Kailua, HI, health care sector
Southcentral Foundation, Anchorage, AK, health care sector

Past Award recipients presenting include Charleston Area Medical Center Health System, Charter School of San Diego, Elevations Credit Union, Hill Country Memorial, K&N Management, Memorial Hermann Sugar Land Hospital, Studer Group, and the University of Wisconsin-Stout.

Join us for an awesome Quest experience! We look forward to seeing you there.

For more information about the Quest for Excellence Conference, visit the conference webpage. For questions, contact the Baldrige Performance Excellence Program at (301) 975-2036 or baldrige@nist.gov.
Baldridge Program Seeks Examiners for 2018 Board

November 27, 2017
Contact: Examiner Help Center

The Baldrige Performance Excellence Program (BPEP) is seeking applicants for the Malcolm Baldrige National Quality Award Board of Examiners for the 2018 award cycle.

The Examiner Application is now available online and will be open until January 8, 2018.

Baldrige examiners are part of an elite group of more than 400 professionals who commit their knowledge, skills, and time to help evaluate applicants for the Malcolm Baldrige National Quality Award—the only Presidential award for organizational performance excellence. The board is composed of senior leaders and experienced management professionals from across all sectors of the U.S. economy, including manufacturing, service, small business, health care, education, government, and nonprofit. Continue reading...

Get Ready to Apply for the 2018 Baldrige Award

Is your organization already using the Baldrige Excellence Framework (including the Criteria for Performance Excellence) to guide improvement efforts and support high performance? If so, consider submitting an application for the 2018 Malcolm Baldrige National Quality Award.

Whether you are eager to earn the nation’s highest honor for organizational excellence or are more focused on receiving the cost-effective, comprehensive feedback to sustain your organization’s success, you cannot truly lose by becoming a Baldrige Award applicant. Continue reading . . .

Foundation Ramps Up Drive for Quest Sponsors

In preparation for the 30th Quest for Excellence® conference to be held in April 2018, Foundation staff has been pushing hard to book sponsors for various parts of the conference.

“Bag inserts, lanyards, coffee mugs and other high-visibility items are getting a lot of attention, especially as they commemorate the 30th anniversary event,” according to Terri Owens, the Foundation’s Associate Director of Development. “We are also grateful that some of our supporters step up for some of the large-ticket items including the Gold and Platinum sponsorships that provide a collection of benefits.”
Ford Motor Company, Lilly USA, Navigant, AARP, and Advocate Good Samaritan Hospital are just a few of the organizations that have signed up for sponsorships for 2018.

If you own, work for, or know of a company that would like to align its brand to the premier global brand in quality and performance excellence, have them check out the link here:

[Quest 2018 Sponsorship Opportunities](#)

**Communities of Excellence 2026 Shines at Fall Conference**

During the Baldrige Fall Conference in Tempe, Arizona, Al Faber, President and CEO of the Baldrige Foundation recognized the first five communities to receive their Commitment to Community Excellence Recognition in the Communities of Excellence 2026 (COE2026) initiative.

COE2026 was created by Lowell Kruse, its current chair, and Rick Norling. Both are former CEO’s of Baldrige award recipient organizations. During his remarks, Faber said “both Lowell and Rick are truly great Americans, having underwritten this community-based improvement initiative founded on the Baldrige criteria. COE2026 has the potential to transform communities in a collaborative way never seen before.”

In September, these five communities submitted their Baldrige-based Community Profile, an example of an improvement they've made as a result of their Process Improvement System, and the key results they intend to track on their Communities of Excellence journey. A volunteer team of reviewers then provided an assessment of the Profiles, including highlights and considerations to help the communities better serve their residents and continue their community performance excellence journeys.

The five communities are: Brookfield/Marceline, Missouri; Kanawha County, West Virginia; Maryville, Missouri; San Diego County's South Region, California and West Kendall, Florida.

**New NIST Director Confirmed by Senate**

Dr. Walter G. Copan, a widely respected scientist and administrator, is the new Under Secretary of Commerce for Standards and Technology and Director of the National Institute of Standards and Technology. He was confirmed by the full Senate on October 5, 2017.

“I was excited to be in the room for Dr. Copan’s confirmation hearing,” said Foundation President and CEO Al Faber who attended the hearing as an invited guest of Dr. Copan. “His background both as a chemist and as an entrepreneur and business CEO make him an excellent choice to lead NIST and the Baldrige Performance Excellence Program.”

“We were grateful that Dr. Copan was able to meet the Foundation Board of Directors as we held our November Board meeting in the Washington, D.C. area,” said Faber.
11 Examples of How the Baldrige Excellence Framework Strengthens K-12 Schools
09/21/2017 By Christine Schaefer

The first two U.S. public school districts to earn Baldrige Awards—the nation’s highest honor for U.S. organizations that achieve excellence—showed that role-model performance can be achieved in elementary and secondary education schools and systems of wide-ranging sizes, … Continue reading →

The Challenge of Information Analytics
9/26/17 By Harry Hertz “The Baldrige Cheermudgeon”

The catch words in many research papers and business briefs today are big data, data analytics, and digital integration. Whatever it is called and no matter how large or small an enterprise, analysis of data is becoming more important for "business" success, customer engagement, and long-term. Read more

Oh, the Places You Go (with the Baldrige Framework)!
11/02/2017 By Christine Schaefer

Some Baldrige community members may remember the travel photos from Baldrige examiners we shared years ago via newsletter with the caption, “Where in the World Are the Criteria?”

A serious purpose behind those lively photos of the globe-trotting Baldrige Excellence Framework booklets (which include the Criteria for Performance Excellence) was to illustrate that the Baldrige framework is relevant and beneficial to organizations anywhere. Of course, the photo captions also gave the the Baldrige Program an opportunity to... Read more

Learning From the Best of the Best
11/27/2017 By Dr. Walter Copan

This article originally appeared on the NIST Taking Measure blog. For the last 30 years, NIST and the Department of Commerce, together with the President of the United States, have been recognizing the nation’s most outstanding organizations with the Malcolm Baldrige National Quality Award. It... Read more
Update from Communities of Excellence 2026

The past few months held some major milestones for us. First was the expansion of our National Learning Collaborative to ten communities. In addition to the five we’ve been working with since May, we added five new communities in October. Over the next year all of these communities will develop a Baldrige-based Community Profile, identify desired community outcomes and develop a Community Strategic Plan focused on these outcomes, and establish a diverse, values-driven leadership team. Our goal is for each of these communities to continue with us into a second year. We also plan to start a new cohort of first year communities in the fall of 2018. We will start marketing for this in late spring/early summer.

To kick off their year together we held our first in-person meeting in coordination with the Baldrige Fall Conference in Tempe. 43 attendees met for two days of learning, networking and inspiring discussion. The first day focused on the COE Framework and all attended the Baldrige Reception in the evening. On the second day our attendees attended Baldrige sessions and one additional COE session that included comments from Molly Baldrige.

COE 2026 also developed its assessment and recognition program. In partnership with Baldrige and with the help many Alliance members we developed three levels of recognition for communities. The first level—Commitment to Community Excellence was announced last spring. At this level, communities respond to the Community Profile section of the COE Framework, describing their mission, vision, and the key factors that lead to success. They also give an example of an improvement to a key initiative and describe the key results they will track related to the health, educational attainment, and economic vitality of the community. All five of our 1st cohort communities applied and all received both formal recognition at the Baldrige Fall Conference and a feedback report from volunteer examiners (many from the Alliance) that included highlights and considerations to help accelerate their communities of excellence journeys. We are starting to develop the 2nd level assessment: Journey to Community Excellence and are looking for volunteers willing to help. Please email me if you are interested.

Finally, I’d like to say a huge thanks to Karen Shepard and everyone at the Alliance that helped make our conference and our recognition program a success!
Mid-America Transplant Receives 2017 Missouri Quality Award!

Mid-America Transplant of St. Louis, MO has been named a recipient of the prestigious 2017 Missouri Quality Award (MQA) for the third time. They are also a 2015 National Baldrige Award Recipient!

Since 1974, Mid-America Transplant has facilitated the organ and tissue donation process for a service area of 4.7 million people in eastern Missouri, southern Illinois, and northeast Arkansas. Mid-America Transplant compassionately provides care for donors, transplant recipients and their families. To drive the organization’s mission, they have built strong partnerships with 122 hospitals, four transplant centers, seven tissue specialists, and multiple community organizations.

Committed to an innovative approach, Mid-America Transplant is the first Organ Procurement Organization in the nation to utilize an in-house operating room model for organ recovery, and the first to operate license offices to increase community support through donor registry enrollment. Located in St. Louis, MO, Mid-America Transplant is a not-for-profit organization and is one of 58 federally designated organizations of its kind in the United States.

Modeled after the Malcolm Baldrige National Quality Award Program©, the Missouri-Kansas Quality Award Programs use the same framework criteria, at the state-level. Since 1992, examiners have evaluated 287 applications, and 52 organizations have been named award recipients. Mid-America Transplant is one of only five organizations to receive the MQA three or more times!

In 2015, Mid-America Transplant became one of 10 Missouri-based recipients of the Malcolm Baldrige National Quality Award©, joining the ranks of MidwayUSA, Concordia Publishing House, Nestle-Purina Pet-Care, Honeywell FM&T, Mosaic (formerly Heartland Health), Boeing Support Systems, Saint Luke's Hospital of Kansas City, SSM Health Care, and Wainwright Industries. Missouri is 2nd only to Texas in the number of national award recipients!

Congratulations to Mid-America Transplant on this prestigious three-time recognition!
Awesome Conference held by Partners in Performance Excellence

PiPEx held a very successful conference at Bryant University in Smithfield, RI on Sept. 28, 2017. Eight National Baldrige Winners presented the stories of their continuous improvement journeys and a powerful panel discussion included four winning organizations speaking about how the Baldrige leadership principles drove the success of their organizations.

Two outstanding organizations were recognized with Performance Excellence Awards:
- VA Boston Healthcare Association. PiPEx Platinum Award
- Memorial Sloan Kettering Cancer Center. PiPEx Process Excellence Recognition.

RMPEx Names New ED and Hosts ACBSP Conference

Rocky Mountain Professional Excellence (RMPEx) has announced the appointment of Paul Brothe as Executive Director. He will succeed Dr. Jim Walker, current Managing Director, long time instructor and examiner for RMPEx.

A Colorado native and Denver resident, Paul has served in a variety of senior leadership roles in companies both in the United States and abroad. He holds a Bachelor of Science in Finance from Metropolitan State University of Denver, a Master of Science in Finance and a Master of Science in International Business from the University of Colorado, Denver.

“Paul has a broad business background which is well suited to helping us further our mission of helping organizations improve performance and achieve results. We are excited about the future of RMPEx and look forward to introducing Paul to our many supporting organizations,” said Dr. Doug Gilbert, RMPEx board chair. Full press release here.
October 25, 2017 was a perfect fall day in Denver when the Accreditation Council for Business Schools and Programs – Region 7 (ACBSP) and Rocky Mountain Performance Excellence (RMPEx) met for the three day ACBSP regional conference. The site of the meeting, CableLand – the official residence of Denver’s mayor, afforded conference goers a view of the cloudless sky through a wall of floor to ceiling windows.

The pre-conference workshop began with a warm Colorado welcome from Dr. Doug Gilbert, Board Chairman of RMPEx. RMPEx collaborated with ACBSP to host the conference. Dr. Gilbert’s introduction was followed by presentations: Getting High Marks with Student –Centered Processes - Mary Searcy Bixby, Founder and CEO of Charter School of San Diego, Going Beyond Assessment: Using Baldrige Performance-based Assessment Results to Assess College Performance - Dr. Bao Huynh, Director of Institutional Research, Richland College, Dallas, TX and Lessons from Somewhat Seasoned Traveler: The Baldrige Journey of District 49 -Peter Hilts, Chief Education Officer, District 49, Falcon, Colorado. A panel discussion with questions from the audience ended the first day.

The second day of the conference began with an introduction from Lori Becker, Region 7 Chair. This was followed by Best of Regions Presentations by Dr. Charla Brown – University of Alaska Southeast, Don Conant – Saint Martin’s University, and Josh Jensen – Northwest Nazarene University, highlighting the extensive work each of their institutions has done to improve quality and meet the needs of their students and faculty. Jeff Lineman presented on scholarship in Region 7. The day ended with Dr. Deb Adair CEO of Quality Matters giving a keynote speech on the importance of quality processes.

Conference attendees on the final day were given a Home Office Update from Steve Parscale, ACBSP Director of Accreditation and participated in the Region 7 business meeting.

Sponsors of the conference, Peregrine Academic Services and YouSeeU, hosted information tables at the conference and made brief presentations. This was the first collaboration between ACBSP and RMPEx,
On November 28, 2017, Southwest Alliance for Excellence (SWAE) announced the three award recipients of the 2017 Performance Excellence Program.

The Performance Excellence Program recognizes organizations for excellence in quality and performance. The program – modeled after the Malcolm Baldrige Award criteria – provides not only an opportunity for recognition, but also valuable feedback on where an organization is positioned on the quality continuum.

**Congratulations to our 2017 Performance Excellence Award Recipients:**

**Level 3) Achievement Award**

**Yuma Regional Medical Center, AZ**

**Level 4) Category Award—Category 1 “Leadership” and Category 5 Workforce**

**City of Henderson, NV**

**Level 4) Category Award—Category 5 “Workforce”**

**Nathan Adelson Hospice, NV**

“SWAE is proud to continue empowering organizations to pursue performance excellence, improve outcomes and contribute to the economic strength of their community and state. We are proud to continue over two decades of the Performance Excellence Award Program, one of the best methodologies available to develop a higher level of organizational performance.”  

-- Karen Shepard, Executive Director of the Southwest Alliance for Excellence
On September 11th & 12th more than 150 participants gathered at The Ohio State University for TPE’s annual Quest for Success conference. Five past Baldrige recipients shared stories of their performance excellence journey and their best practices in keynote addresses, a Q&A panel, and breakout sessions. The new Tailgating with Technology event included poster presentations of cutting edge technologies, tours of an ambulance and CNG bus, a tailgate buffet, a visit from Brutus Buckeye, and lots of networking. The evening concluded with a keynote address from Battelle on their strategic approach to supporting key communities. Attendees participated in best practice sessions led by TPE Award winners and performance excellence professionals, and received an update from Communities of Excellence 2026. A highlight of the conference was recognition of members of TPE’s 2016 – 2017 Board of Examiners, who were honored at a recognition breakfast. The conference culminated with an awards ceremony recognizing TPE applicants and volunteers. University Hospitals Geauga Medical Center was recognized with TPE’s highest award, the Platinum level Governor’s Award for Excellence.

We hope you can join us at our 2018 conference on September 10 – 11, 2018 in Columbus, Ohio.
AHCA PERSPECTIVE

David Gifford, MD, MPH

Baldrige Criteria Illuminate the Steps to Achieve Quality Care

As a medical director, I have worked with many dedicated clinical staff. However, passion does not always translate to quality care due to the historical systems that have been put in place across an organization. To see results, leadership must work with staff to evaluate these systems, with the medical director playing a significant role, and they must identify the opportunities for performance improvement. But this process isn’t always easy.

In today’s market, with its onslaught of regulatory and payment changes, care facilities must have a comprehensive understanding of performance systems to realize meaningful improvement. With that being said, how can medical directors work with their centers and staff to build a strong foundation for performance excellence?

The nationally recognized Baldrige Performance Excellence Criteria are a powerful tool for improving quality in post-acute and long-term care settings. This framework for performance excellence focuses on systems in all areas of the organization. The value of applying this method in the health care setting is well documented, and its effectiveness has been cited in many studies throughout the years (including Castle et al., 2016, Schulingkamp and Latham, Qual Manag J 2015;22[3]:6–22; Truven Health Analytics, 2014, https://goo.gl/CDdpRf; Foster and Chenoweth, 2011, https://goo.gl/GVJRWy). Baldrige recipients in long-term care outperform their peers in a number of key metrics: they are 5% lower than the national average for hospital readmissions rates, are 15% lower for off-label antipsychotic engagement normally are not discussed, continue to be extremely satisfied by an outmore about the AHCA Quality Initiative Recognition Program, visit www.http://baldrigefoundation.org/. To find the providers.

CDdpRf; Foster and Chenoweth, 2011, success factors in our Quality Assurance solving that results in allowing the staff through nursing to transmit information through the years (including Castle et al., 2016, Schulingkamp and Latham, Qual Manag J 2015;22[3]:6–22; Truven Health Analytics, 2014, https://goo.gl/CDdpRf; Foster and Chenoweth, 2011, https://goo.gl/GVJRWy). Baldrige recipients in long-term care outperform their peers in a number of key metrics: they are 5% lower than the national average for hospital readmissions rates, are 15% lower for off-label antipsychotic use rates, and have higher occupancy and positive operating margins.

There are several recognized programs affiliated with, and based on, the Baldrige criteria, which include the American Health Care Association/National Center for Assisted Living (AHCA/NCAL) National Quality Award Program.

To better understand the role of the medical director in pursuing the Baldrige framework, AHCA interviewed the administrator and medical director at two recent AHCA/ NCAL Quality Award recipient organizations: Altercare Post-Acute Rehabilitation Center (APRC), in Kent, OH, which received its Gold award in 2016; and Kindred Nursing and Rehabilitation Center – Mountain Valley (MV), in Kellogg, ID, which received its Gold award in 2011 and was the first skilled nursing center to be recognized with the Malcolm Baldrige National Quality Award from the Department of Commerce in 2016.

What prompted your facility to begin the AHCA/NCAL National Quality Award journey?

Frederick Haller, MD, medical director, MV: The workforce at MV always strives to be better and to do better. But the Baldrige framework offered staff additional tools to help them improve quality outcomes. Not just clinical, but customer satisfaction, workforce engagement, and community involvement. All were clear areas that could be impacted by beginning the quality journey.

As the medical director, what made you interested in being part of this process?

Dr. Haller: Quality care is my priority — my responsibility as attending physician and medical director is to ensure that I am doing everything to drive the best clinical outcomes for my patients/residents. Being part of this process meant that we as an organization would be engaged daily on a journey of quality.

Hugh O’Neill, MD, medical director, APRC: As a physician, being part of an organization that focuses on systems and encompasses quality in all aspects of providing care is extremely rewarding.

How has the Baldrige journey changed or improved the relationship between the facility and medical director?

Mary Ruth Butler, MBA, administrator, MV: I think the biggest change has been our ability to include other key success factors in our Quality Assurance and Performance Improvement (QAPI) process with Dr. Haller. For example, talking about strategic objectives relating to customer satisfaction (residents/patients) and key drivers of workforce engagement normally are not discussed with the medical director. We involve him in our strategic planning process, particularly in areas of development for new health care services.

Dr. Haller: I would agree with Mary Ruth’s comments here — through this process I have expanded my involvement to include other areas outside of clinical areas that are equally important key drivers to the outcomes of our residents.

Dr. O’Neill: The Baldrige criteria facilitate an integrated approach where the medical director, facility administrator, director of nursing, nursing staff and therapists can communicate openly and freely. This approach to communication is critical to achieving high quality care.

Please share one or two things that occurred during the Quality Award journey. What was the impact?

Dr. Haller: Because we had developed a systematic succession plan, when our director of nursing services of 25 years retired, her successor was able to easily transition into that position. I have experienced many successions plans in my career and most are not well done. However, this one was the most systematic, organized, and successful transition that I have experienced. In fact, the new director of nursing services was so prepared that 2 months after her promotion, MV received a deficiency-free survey.

Dr. O’Neill: From willer, administrator, APRC: The staff realized how the processes and systems of the organization impact every department and, as a result, how each department impacts the overall quality of care a patient receives. To establish a high performing culture, organizations must achieve a high level of customer service and employee satisfaction.

How have the changes at your facility prompted by the Quality Award journey impacted your practice as medical director?

Dr. Haller: In today’s post-acute care environment we get them sicker and quicker. MV’s systematic approach to workforce development and quality outcomes gives me the confidence to refer my patients to the center as well as to promote them to our community medical clinic, acute care hospital, and area physicians.

Dr. O’Neill: My practice has improved by the systematic approach to problem solving that results in allowing the staff to confidently assess and report conditions to physicians and then act on that information to prevent hospitalizations and improve how patients function. I was extremely satisfied before and continue to be extremely satisfied by an organization that strives to improve quality and that believes in the approach that doing good is never good enough.

How have the changes at your facility affected the practice of staff you work with?

Dr. Haller: The reduction in turnover and increase in staff retention, particularly among the nursing staff, affected me the most. As part of our workforce capability and capacity system, all nurses are trained using the same competencies relating to resident care and assessments. Their systematic process of developing workforce with competencies to match residents and then managing to meet the daily clinical needs for each patient ensures higher quality.

How have the changes impacted your practice as medical director?

Dr. Haller: My greatest satisfaction comes from seeing the delivery of the highest quality medical care. MV’s innovative and outside-the-box approach to making sure services that otherwise wouldn’t be available to my patients/residents are available, such as telemedicine, really does drive high satisfaction for me.

What specific clinical outcomes were affected by the Quality Award journey?

Dr. Haller: There really are too many to identify, but what stands out is the improvement in quality indicators over the past 5 years — all are now under state and national benchmarks.

Dr. O’Neill: Reduction in rehospitalizations for patients admitted 30 days or less. We put in a comprehensive systematic approach including care paths, stop and watch forms, and weekly meetings to review patients sent to the hospital to see what could have been identified earlier to avoid the hospital return.

What closing words of wisdom would you share with fellow medical directors?

Dr. Haller: Medical directors need to be involved in their facility’s performance improvement program to help identify the root cause of negative outcomes and begin the process of improvement. This ensures our clinical knowledge to assist in building processes that are systematic and support high clinical outcomes.

Dr. O’Neill: Open the lines of communication with staff. Create a system and culture that allow all members of the care team to come directly to the physician. Avoid the pitfalls of a hierarchy in which therapists and aides must go through nursing to transmit information to the providers.

For more information about the Baldrige Foundation and the Baldrige Performance Excellence Criteria, visit http://baldrigefoundation.org. To find out more about the AHCA Quality Initiative Recognition Program, visit www.ahcanal.org/quality_improvement/qualityinitiative/Pages/RecognitionProgram.aspx.

Dr. Gifford is the senior vice president of quality, research and regulatory affairs at the American Health Care Association, the largest association in the country representing long-term and post-acute care centers. A board-certified geriatrician, Dr. Gifford also serves on the board of the Advancing Excellence in America’s Nursing Homes campaign and the Baldrige Foundation Board. He is a clinical associate professor of medicine at Brown University and a former director of the Rhode Island State Department of Health. Special thanks to Courtney Bishnoi, AHCA senior director of quality, for her contribution to this article.