



Update

October 2008

13 Applicants Selected for Site Visits

A total of 85 organizations have applied for the 2008 Malcolm Baldrige National Quality Award (MBNQA), including 3 in manufacturing, 5 in service, 7 in small business, 43 in health care, 11 in education, and 16 in the nonprofit sector. These numbers are comparable to those in 2007.

Examiners have now completed Independent Review and Consensus Review for all of these applicants. On September 11, 2008, the MBNQA Panel of Judges reviewed data on all 85 Award applicants and selected 13 applicants to move on to Site Visit Review. This group includes 1 manufacturing organization, 2 small businesses, 6 health care organizations, 2 education organizations, and 2 nonprofit organizations. No service organizations were selected for site visits. Health care and manufacturing site visits are scheduled for October 12–18, and education, small business, and nonprofit site visits are scheduled for October 19–25.

The Judges will meet November 17–21 to determine which of these organizations will be recommended to U.S. Secretary of Commerce Carlos M. Gutierrez as Award recipients. Recipients will be announced shortly thereafter.

The Baldrige Program sincerely thanks the hundreds of volunteer Examiners, Senior Examiners, Alumni Examiners, and coaches/mentors who served as Item leads, Item backups, and Team Leaders, among other roles, during Independent Review and Consensus Review, as well as those who continue to serve during Site Visit Review.

New Judge Appointed

U.S. Secretary of Commerce Gutierrez recently appointed John Dew to the 2008 Panel of Judges. John is Associate Vice Chancellor for Institutional Research, Planning, and Effectiveness at Troy University, in Troy, Alabama, and serves as Adjunct Professor at the University of Alabama's College of Commerce and Business. John's extensive background includes root-cause analysis, error prevention, and corrective action analysis in the manufacturing, health care, and service industries.

The Panel of Judges functions as an advisory body to the Secretary of Commerce and ensures the integrity of the Award selection process. As described above, panel members select applicants for site visits based on a review of the results of Examiners' scoring of written applications. The panel also reviews results from site visits and recommends Award recipients.

NIST to Host 2008 GEM Meeting

The Global Excellence Model (GEM) network, which comprises quality award organizers from programs around the world, will meet October 15–17 at the National Institute of Standards and Technology (NIST). In addition to the Baldrige Program, the GEM network includes organizations in Australia; Europe; Ibero-America (Brazil, Mexico, and Spain); India; Japan; and Singapore.

In May, the Baldrige Program convened a planning call with GEM members to set the agenda, which will include sharing data on various elements of GEM programs, such as Examiner statistics, Web-based self-assessment questionnaires, program metrics, and significant Criteria changes. One morning during the meeting, GEM members will meet with several Baldrige Award recipients to discuss their respective organizations and their use of the Baldrige Criteria.

Baldrige Scoring Data to Be Released for Research

NIST has provided funding to implement the first phase of a research program to blind applicants' scoring data and release them for researchers' use. The data will permit correlation studies, inter- and intra-applicant Item comparisons, studies of organizational maturation, and analysis of Award recipient scores.

Currently, a NIST statistician is completing work on the data, with release of the data planned for early 2009. The blinded data analysis will be made available to all interested researchers.

Baldrige Endorsed by Author Jim Collins

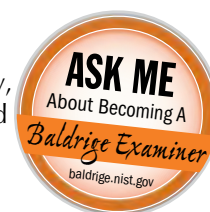
Jim Collins (author of *Good to Great: Why Some Companies Make the Leap ... and Others Don't*) recently endorsed Baldrige as follows: "I see the Baldrige process as a powerful set of mechanisms for disciplined people engaged in disciplined thought and taking disciplined action to create great organizations that produce exceptional results."

Site Visit Tools and Training Materials Posted

Examiners involved in site visits for 2008 can learn about the process and their roles online in the Examiner Learning Resource Center (www.baldrige.nist.gov/Examiner_Resources.htm). Materials include the Site Visit Manual, Site Visit Quick Start, and associated tools and training materials.

Examiner Application Opens November 5

The application for appointment to the 2009 MBNQA Board of Examiners opens Wednesday, November 5, 2008, and closes Monday, January 6, 2009, both at 2:00 p.m. EST. All Examiners and Alumni Examiners must reapply each year for appointment to the board.



Returning Examiners, Alumni Examiners, and previous applicants to the board will need a PIN and password to access the online application. In mid-October, you will receive instructions via e-mail on how to update your account profile in the ApplyYourself online application system. Please take the time to update your profile to ensure that you receive your PIN and password by e-mail when the application opens.

This year, recommendations for new and previous applicants to the board must be submitted electronically via the online application system. Returning Examiners do not need to supply recommendations. Also, this year for the first time, you will have an opportunity to complete a short survey on your experience with the application system. Please give us your feedback!

Examiner Training News

Plans are underway for the 2009 Examiner Preparation Course. The Baldrige Program's Examiner and Staff Development Team thanks the Examiners who provided feedback following the 2008 Examiner Preparation Course. Respondents (totaling an impressive 75 percent of participants) appreciated the "back-to-basics" approach to training, including the emphasis on comment writing. An overwhelming majority (97 percent) of you said that the course met or exceeded your expectations. You also told us that, overall, you would like to see more online course content and less paper. As the plans for 2009 training move forward, we will work to identify opportunities to design courses and materials that address this feedback.

In 2008, the Baldrige Program reinstated the Mentor Program for new Examiners to help them get ready for training. Of the new Examiners, 74 percent noted that "time with my mentor was well spent," and 84 percent said they would recommend the Mentor Program to a new Examiner. The Baldrige Program thanks the Senior and Alumni Examiners who served as mentors.

Employer Contributions and Examiner Subsidy Policy

Like many organizations across the country and throughout most sectors of the economy, the Baldrige Program has experienced financial challenges this year. As part of efforts to continue to provide the most support to the broadest cross-section of our Board of Examiners and address these challenges, the Baldrige Program has instituted some improvements in its approach to subsidizing Examiners' expenses for training.

New for 2009, your employer has a unique opportunity to be recognized, to make a contribution to the competitiveness of U.S. organizations, and to support this significant leadership development experience for you, a Baldrige Examiner, by supporting your time and travel/lodging expenses. Employers who sponsor an Examiner will be recognized in the Presidential Award Ceremony Program for the year in which the Examiner serves on the board.

Update

On request, the Baldrige Program will send a letter to the employers of selected Examiners to solicit their support and subsequently to acknowledge the support.

If your employer is unable to make this commitment, the Baldrige Foundation has limited funds available to subsidize the costs of travel and lodging to attend training. The funds will be made available as follows for **Examiners and Senior Examiners**:

- Airfare or costs of other modes of transportation to the Washington area will be reimbursed up to \$500. If the cost of a coach-only airline ticket or other mode of transportation exceeds this amount, costs will be reimbursed up to the \$500 limit.
- Lodging at the designated hotel will be reimbursed at the Baldrige room rate.
- All other expenses will be the responsibility of the Examiner. Please note that the Baldrige Program provides breakfast and lunch each day of training and dinner on Wednesday evening.

This year, in addition, **Alumni Examiners** may request reimbursement of up to \$500 total for the cost of transportation to the Washington area and lodging, if other sources of support for training are not available. The Baldrige Program continues to provide training at no cost and, as noted, provides breakfast and lunch each day of training and dinner on Wednesday evening for **all Examiners**.

We hope that these improvements will better serve the needs of the entire board, and we thank all of our Examiners for their continued support.

Help Us Recruit Future Examiners

Many of our most successful Examiners come to the Program through referrals from current and past Examiners and other friends of the Program. Do you belong to an association or other professional network that might be a good source of potential Examiners? If so, and if you have access to an e-mail discussion list or other mechanism that allows the posting of opportunities such as this, please contact Zara Brunner at (301) 975-2001 or zara.brunner@nist.gov, and we will provide you with text that you can customize with your own experiences. We would like to track these efforts, so if you post this opportunity to a discussion list or elsewhere, please let Zara know.

Improvement Day Includes On-Site and Virtual Sessions



Approximately 40 participants shared their ideas and suggestions for the improvement of the Baldrige Program during three Improvement Day sessions: an on-site session at NIST (July 30) and two virtual sessions (August 7 and 14).

The on-site session focused on the Criteria for Performance Excellence, with a special emphasis on Category 3, which will receive a major revision for 2009–2010. Participants also proposed changes to other Baldrige Program processes. The two virtual sessions, purposefully limited to a small number of participants and only one discussion topic (Category 3), provided valuable information to the Program and served as a pilot for a virtual venue for Improvement Day. In addition to these two sources of input, suggestions were gathered in advance through a call for comments via the Program's Web site and were supplied to participants to inform their conversations.

On-site participants, a small but eager group, recommended that the Program continue the face-to-face Improvement Day session. Participants in the virtual sessions acknowledged the limitations of virtual conversations but saw the value of saving resources and engaging a wider audience. In planning Improvement Day(s) for 2009, the Program will take both of these evaluations into consideration.

The Baldrige Program thanks Nicheole Amundsen, Steve Hoisington, John Vinyard, and Chris Wehrenberg for facilitating the on-site Improvement Day sessions. We also thank the participants—on-site and virtual—as well as those of you who offered suggestions through the call for comments. The Program is reviewing the recommended suggestions and using them to help drive program improvements during the coming year.

Revised *Are We Making Progress?* Now Available

Revised versions of the questionnaires *Are We Making Progress?* (in Spanish and English) and *Are We Making Progress as Leaders?* are now available on the Baldrige Web site (www.baldrige.nist.gov/Progress.htm). Based on the current Baldrige Criteria for Performance Excellence, the questionnaires are intended to help organizations focus their improvement and communication efforts on the areas needing the most attention from the perspective of the workforce (*Are We Making Progress?*) and the leadership (*Are We Making Progress as Leaders?*).



Novel Connect Case Study Packet Available Online



The 2008 case study packet, now available at www.baldrige.nist.gov/Novel_Connect.htm, features the fictitious Novel Connect, a midsized manufacturer of cell phones and cell phone accessories. As well as producing standard cell phones, Novel Connect designs and manufactures other communication devices that integrate audio, video, text, and other features.

The case study demonstrates the form and content of a manufacturing organization's MBNQA application. Because the main purpose of the case study is to familiarize Examiners with the Criteria for Performance Excellence and "real" applications, the case does not fully address all Criteria requirements. Gaps reflect opportunities for improvement that Examiners may encounter in evaluating an actual Award application. Also posted as part of the packet are the Novel Connect Executive Summary, the Novel Connect Scorebook, and the Novel Connect Feedback Report.

The Baldrige Program thanks the following volunteers for the tremendous effort involved in creating these materials. The Novel Connect Case Study was written by Brian Lassiter (Team Leader), Richard Allen (Backup Team Leader), Ann Burns, David Jones, Geri Markley, Kevin McManus, and Rick Press. Robert Barnett, Dennis Davenport, Eric Hemming, Liz Menzer, George Sloan, and Beth Worthington served as expert reviewers, and Kay Kendall served as alignment editor. The consensus team, which evaluated and scored the Novel Connect application to serve as a baseline for Examiner training, included Robert Stuewe (Team Leader), Dwayne Eiford, Amy Kosifas, Ruth Miller, Steve Power, and Roger Triplett.

State and Local Workshop Focuses on Running Nonprofit Organizations

On July 28–29, 2008, roughly 30 attendees from programs across the country participated in the annual State and Local Quality Awards Workshop, hosted by the Baldrige Program and the Alliance for Performance Excellence. The workshop centered on the skills needed to run a small, nonprofit organization.

The Workshop Planning Team (Mike Belter of the American Electric Power Company, Kay Kendall of MassExcellence, Mike Langridge of the Iowa Recognition for Performance Excellence Program, and Liz Menzer of the Wisconsin Forward Award) put together an outstanding agenda. Concurrent sessions delivered by ten speakers covered the topics of board effectiveness and responsibilities, marketing and public relations techniques, and managing people and time. Paul Borawski of the American Society for Quality delivered an engaging keynote on the organization's 2008 *Futures Study*. Topics of other presentations included updates on the Trifecta and Baldrige Collaborative Project, an Examiner software update, and the state and local program business model.

At the workshop, E. David Spong (California Council for Excellence) and Elaine Edgar (Ohio Partnership for Excellence) received recognition awards for their encouragement and support of two 2007 Baldrige Award recipients from their respective states (Sharp HealthCare and PRO-TEC Coating Company). The Florida Sterling Council and the Wisconsin Forward Award were recognized earlier this year at their state events for their support of Award recipients City of Coral Springs and Mercy Health System, respectively.

Additional highlights from the workshop were the networking opportunities and the Appreciation Awards given during the Monday evening reception. In a follow-up survey sent to participants, the workshop received an impressive

Update



100 percent satisfaction rating. (At left, Joshua Woods receives a certificate of appreciation from Baldrige Program Director Harry Hertz for his leadership in the State and Local Program Business Model Survey.)

For more information on the workshop, please contact Zara Brunner at (301) 975-2001 or zara.brunner@nist.gov, or Jackie Calhoun at (301) 975-2555 or jacqueline.calhoun@nist.gov.

Regional Conferences Feature Current and Past Award Recipients

More than 400 attendees from all sectors learned about the best practices of current and past Baldrige Award recipients at the 2008 Baldrige Regional Conferences in Denver (September 16) and New Orleans (October 3). The conferences were cosponsored by the Louisiana Quality Foundation, Colorado Performance Excellence, and the Alliance for Performance Excellence.

The conferences featured plenary sessions by senior leaders of the 2007 MBNQA recipients—PRO-TEC Coating Company; Mercy Health System; Sharp HealthCare; City of Coral Springs; and the U.S. Army Armament Research, Development and Engineering Center (ARDEC)—as well as concurrent and town hall sessions featuring current and past Award recipients.



Past Award recipients participating in the conferences included Baptist Hospital, Inc.; Bronson Methodist Hospital; DynMcDermott Petroleum Operations Company; Jenks Public Schools; North Mississippi Medical Center; Premier Inc.; Richland College; The Ritz-Carlton Hotel Company, L.L.C.; Robert Wood Johnson University Hospital Hamilton; and the University of Wisconsin-Stout.

Tom Mauro, Chief Executive Officer of Colorado Performance Excellence, opened the Denver conference, and Jeff Lucas, Deputy Director of the Baldrige Program, moderated the opening session. Sharon Clinebell, Adam Cohen, and Priscilla Nuwash served as moderators in Denver. In New Orleans, David Stoltz, President of the Louisiana Quality Foundation, opened the conference, and Harry Hertz, Director of the Baldrige Program, moderated the opening session. Steve Burgess, Sandra Byrne, and Eric Franks served as moderators in New Orleans.

The 2009 Baldrige Regional Conferences, featuring the 2008 Award recipients, will be held in Massachusetts and Wisconsin. For those conferences, the Baldrige Program will partner with MassExcellence, the Wisconsin Forward Award, and the Alliance for Performance Excellence.

Baldrige Office on the Road

The Baldrige Program plans to exhibit at the following conferences in the remaining months of 2008: the Association for Manufacturing Excellence Annual Conference, October 20–24, in Toronto, Canada; the National Quality Education Conference, November 16–18, in Reno, Nevada; and the Institute for Healthcare Improvement National Forum on Quality Improvement in Health Care, December 8–11, in Nashville, Tennessee. If you attend any of these events, stop by and see us!

Examiners as Ambassadors

Many thanks to Luis M. R. Calingo, Bill Denney, Ray Eldridge, Denise Haynes, Tony Ingelido, Barry Johnson, Tom Mauro, Ralph Conley Salyer, Doug Serrano, Frank Toda, and John Vinyard, who used the Baldrige Program's portable exhibit and outreach material or gave presentations in spring and summer 2008.

Have you conducted outreach efforts on behalf of the Baldrige Program? Please report your activities to the Baldrige Program's Outreach and Communications Team (e-mail: nqp@nist.gov, fax: [301] 948-3716) so we can recognize you in an upcoming issue of *Update*.

NIST/ASQ NEWS

New Team Leaders and Rotations Announced

Each year, the Baldrige Program provides opportunities for staff members to serve one- or two-year terms as leaders of the Program's teams. Team leaders for the upcoming year are Nancy Jokovich, (301) 975-8212, nancy.jokovich@nist.gov, for the Award Process Team (APT); Renée Norris, (301) 975-6323, norrisr@nist.gov, for the Examiner and Staff Development Team (ESDT); Jamie Ambrosi, (301) 975-2715, jamie.ambrosi@nist.gov, for the Outreach and Communications Team (OCT); and Ellen Garshick, (301) 975-8950, ellen.garshick@nist.gov, for the Publications Management Team (PMT).

In addition, the Program annually offers staff opportunities to rotate between teams to share knowledge and develop skills. All rotations, which must be approved by management, are made with the best interests of the Program in mind. In May, Nancy Jokovich ([301] 975-8212, nancy.jokovich@nist.gov) moved from ESDT, where she had served since 2006, to APT. In October, Sandra Byrne ([301] 975-4812, sandra.byrne@nist.gov) moved from the Management Team, where she had served since 2005, to APT, and Bob Fangmeyer ([301] 975-4781, robert.fangmeyer@nist.gov) moved from APT, where he had served since 2003, to the Management Team.

Comings and Goings

JoAnne Surette, whose service to the Baldrige Program's Publications Management Team began in 1999, has retired. Before coming to the Program, she worked in NIST's Electronics and Electrical Engineering Laboratory, where in 1993 she was the first editor hired directly by a NIST laboratory. As highlights of her time at the Program, JoAnne notes serving as a monitor during the Consensus Review stage of the Award process and writing an article for the internal NIST newsletter on how the Program staff supports the local community.

During her tenure, JoAnne's expertise as a writer/editor and her unfailing good humor served the Program well. She will be greatly missed by her colleagues in the Baldrige office here at NIST and by the Baldrige community. During her retirement, JoAnne plans to spend many hours enjoying herself with her adored grandchildren. We wish her much happiness in her retirement.

Has Your Contact Information Changed?

If any of your contact information (e-mail or postal address as well as telephone or fax numbers) has changed recently, we'd like to know. Please send changes to Suzana Weaver ([301] 975-4219, suzana.weaver@nist.gov).

Update The official newsletter for the Board of Examiners of the Malcolm Baldrige National Quality Award

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This newsletter is published on an as-needed basis.

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