



*Learn. Share. Connect.*

**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](http://www.baldrigepe.org/alliance)



### A Message from the Chairman

Brian Lassiter, Chair

Alliance for Performance Excellence &  
President of the Performance Excellence Network (MN, ND & SD)

#### Strengthening and Improving Your Audience

[www.baldrigealliance.org](http://www.baldrigealliance.org)

Hello fellow Alliance members! I hope you're all having a terrific summer (where is it going?!).

As you'll read in this issue of our newsletter, there is a lot going on within the Alliance and the broader Baldrige Enterprise. A few highlights:

- The Alliance has a new website! If you haven't visited [http://baldrigealliance.org/](http://baldrigealliance.org) yet, check it out and bookmark it – it's the new “front door” to Alliance member programs.
- We've had several changes in Alliance Executive Directors the last 60-90 days, most notably the retirements of Katie Rawls (TNCPE) and Gary Nesteby (IQC). Thank you for your years of incredible contribution to your programs, the Alliance, and the overall Baldrige Enterprise! And welcome to Tamara Parsons and Scott Burgmeyer, who have taken the helm of TNCPE and IQC, respectively.
- Congratulations to PEN-W, which the board approved to officially serve Alaska!
- Mark your calendars for the Baldrige Fall Conference: October 24 in Denver (pre-conferences October 23, including an option to do a “field trip” to Ft. Collins to learn from two Baldrige recipients, the City of Ft. Collins and Elevations Credit Union). As you all know, this is the second year that the Alliance is managing the conference on behalf of (and in cooperation with) the Baldrige Program. This year, the conference is being facilitated and hosted by RMPEX and WCPE and the theme is “Elevate Excellence.” More information is coming and registration is open (<https://www.baldrigeconference.org/>). Please help us market this event, and plan on attending yourself (the Alliance will have a member meeting concurrent with the conference Oct 24 afternoon).
- To make you all aware, the Alliance now offers Supporting Memberships to any organization (or individual) that wants to support our mission and excellence throughout the US. Look for more information from the Membership Committee later in this newsletter.
- The Baldrige Enterprise Leadership Team recently selected two strategic areas on which to collectively focus: a marketing strategy (to identify a target market(s) that we all can systematically focus on to grow an underserved segment) and a strategy to promote consistency in examiner training. Katie Rawls and Julia Galbadon (two of our rock start retired EDs!) are representing the Alliance on the marketing task force, and Geri Markley and Anne Warner are representing us on the examiner training task force. More information on their progress will be reported by the Fall Conference.
- Similarly, your Alliance board recently selected two focus areas for the Alliance itself: one task force will focus on setting standards for lower tier awards and one will inventory revenue-generating services so that we can share across the Alliance (helping to create a bucket of products that any/all of us can use to grow revenue and impact within our programs). We are currently building both teams, so if you're interested in participating, please let me know. And thanks to the task force that led us there (Mike Belter, Ben Krupowicz, Gary Nesteby, and sponsor Geri Markley) – a team that sifted through dozens of potential strategies from which the board prioritized and selected these two.

And you can see many other great things going on within the Alliance and our member programs throughout the rest of the newsletter. Thanks for all you're doing to advance performance excellence across your state/regions and the nation, and we'll see you this October in Denver! Enjoy the rest of summer...

Brian Lassiter, Chair (PEN/MN)

# The Alliance for Performance Excellence has a **new website!!**



The Journey to Performance Excellence Start Here

[Home](#) [About Us](#) [Membership](#) [Alliance Programs](#) [Library](#) [Contact Us](#)



It includes the interactive state map and listing of Alliance Programs and Services. Please visit the new website at: <https://www.baldrigealliance.org>

Thanks to Geri Markley, Alliance Treasurer for taking the lead on this!

**Make sure to change the web address in your personal favorites / settings AND program/organization website links.**

Update the link from <http://www.baldrigepe.org/alliance/> to <https://www.baldrigealliance.org>

## **Dues Reminder, Discount & Alliance Participation**

Submitted by: Geri Markley, Alliance Treasurer

As a reminder, the Board approved in increase in member dues last year, which will take effect with Jan 2019 dues. Member programs with revenues over \$500,000 will be charged \$2,000 per year while member programs with revenues under \$500,000 will be charged \$1,000.

There is an opportunity to earn a 50% reduction in dues when a representative from your program actively works to advance the mission of the Alliance. We're almost midway through the year, so if you are interested in earning this credit, now is the time for you or another representative to support the Alliance.

**Currently we have a need for volunteers** to join the Governance Committee, the Membership Committee, and to coordinate the member Calling Tree. If you are interested in joining the Governance Committee, please contact Brian Lassiter ([brian.lassiter@performanceexcellencenetwork.org](mailto:brian.lassiter@performanceexcellencenetwork.org)). If you are interested in joining the Membership Committee or coordinating the member Calling Tree, please contact Dean Bondhus ([dabmnky@gmail.com](mailto:dabmnky@gmail.com)). It's time to act!



## Baldrige Fall Conference

Hilton Denver City Center

OCTOBER 23 - 24, 2018

[www.baldrigeconference.org](http://www.baldrigeconference.org)

Save \$45! Early bird pricing through 9.7.18.  
Group discounts available

The need to elevate your organization's performance has perhaps never been greater: customers and other stakeholders expect more, competent workers are growing scarce, and competition is intensifying. But – with the complexity of organizations – where does one start? How do you know on which processes to focus? And how to do you achieve – and sustain – high performance over time?

Attend the 2018 Baldrige Fall Conference, October 24 in beautiful Denver, Colorado! Learn proven best practices that advance continuous improvement and performance excellence, as 17+ speakers share insights to improving areas such as leadership, customer service and satisfaction, workforce engagement, operational and process performance, financial and marketplace results.

- Hear from all [five 2017 Baldrige recipient organizations](#)
- Choose a mix of other presentations from an array of valuable **breakouts** and **“intensive” sessions**
- Attend [pre-conference activities](#) on **October 23:**
  - Half day workshop options including *Introduction to Excellence: Baldrige 101* and *Moving from Interest to Action*;
  - *Experience “excellence in action” via a full-day learning tour of award-winning Fort Collins, home to Baldrige recipients, City of Fort Collins and Elevations Credit Union;*
  - *a fun western-themed evening reception with hearty appetizers, cash bar and some special treats*
- **Network** with hundreds of other leaders and professionals interested in continuous improvement and performance excellence.
- Enjoy the energy and elevation of the [Hilton Denver City Center](#) and all the **Mile High City** offers. Come early, stay late – learn, relax, refresh!

For more information, visit [www.baldrigeconference.org](http://www.baldrigeconference.org).

**The conference is presented by the Baldrige Alliance for Performance Excellence in partnership with the Baldrige Performance Excellence Program, and is hosted by Rocky Mountain Performance Excellence and the Wisconsin Center for Performance Excellence.**

Don't miss this extraordinary learning and networking opportunity! We'll see you there!



Learn. Share. Connect.



### **Walden University partners with the Baldrige Foundation and the Alliance to serve members of the Baldrige community and the organizations and individuals they serve**

*Recommend organizations in your state/region to take advantage of free consulting from one of Walden University's knowledgeable doctoral students.*

Walden University is an accredited online institution that has been providing graduate-level higher education to working professionals for nearly 50 years. As one of the largest conferrers of research doctoral degrees in the country Walden has a broad access mission providing educational opportunities to those who might not otherwise have the chance to achieve their educational dreams. Walden's Doctor of Business Administration (DBA), Doctor of Education (EdD), Doctor of Healthcare Administration (DHA), and Doctor of Psychology in Behavior Health Leadership (PsyD) include a [Consulting Capstone](#) that connects doctoral scholars to non-profits, small businesses, and mental and physical healthcare organizations to serve as consultants using the Baldrige Excellence Framework and Criteria.

Over the course of give-or-take a year, a doctoral student will work with an assigned client organization one-on-one in a virtual environment to complete a Baldrige assessment and a consulting project on a business challenge that the student and leaders of the client organization identify as a key opportunity. Examples of the types of projects could be strategic planning, or building customer relationships, leadership and workforce development, or succession planning. The student delivers a Baldrige-based holistic assessment of the organization, including key themes, recommendations for next steps, and an executive summary. There is no cost to the organization for participating.

Already, several dozen organizations are benefiting from this arrangement, including the Minneapolis non-profit Youth Performance Company, whose leaders worked with [Dr. Tammy Jameson](#), an emergency preparedness officer for the government and a mother of two children. Walden doctoral capstone students like Tammy are typically working professionals with career experience, who have completed a master's degree and most of a rigorous doctoral program.

The Baldrige Foundation and Walden University are [partners in a joint initiative](#) that advances and accelerates higher education opportunities for members of the Baldrige community. This collaboration provides access to higher education opportunities for judges, examiners, and other trained volunteers for Baldrige programs at the state and national level to earn academic credit for their Baldrige experience. In addition, tuition discounts may be available. Employees of a Baldrige national or Alliance award-winning organization may also be eligible for reduced tuition.

To recommend an organization to receive the support of a Walden scholar-consultant, and to get more details, contact [joshua.saunders@waldenu.edu](mailto:joshua.saunders@waldenu.edu)





### Advocacy Update: Continuing Success for FY2019; More Work to Do

After securing \$2.2 million for BPEP in the final omnibus appropriations bill for Fiscal Year 2018, the Foundation went right to work on the FY 2019 budget, currently working its way through Congress, and the full Senate has approved another \$2.2 million in the Commerce, Justice, and Science appropriation for FY 2019.

“Congress is trying to get the budget process back to what they call ‘regular order,’ in which each of the 13 appropriations bills are considered and adopted separately,” said Foundation President and CEO Al Faber, who has been working the Hill. “It is unclear how successful they will be in that effort, but securing funds in the full Senate-passed version of the Commerce appropriation is a critical step, regardless of how the Congress executes the appropriations process.”

Whether Congress gets to regular order or ends up with an omnibus (or several minibus) bill combining several of the appropriations into a single legislative vehicle, the Foundation will continue to work to preserve funding in the FY 2019 Commerce bill, and has already begun working on getting funding included in the President’s budget request for FY 2020.

Please continue to call and write your Senators and Representatives and ask them to support funding for Baldrige. For help in how to do that, click here: <http://baldrigefoundation.org/get-involved/write-to-congress.html>

### Foundation Launches Quarterly Webinar Series

In March the Foundation launched its quarterly webinar series to bring together the leadership of the Foundation, the Baldrige Performance Excellence Program, and the Alliance for Performance Excellence to discuss topics of interest to the Baldrige community and take questions.

If you have been able to attend the previous webinars, we thank you, and we hope you will mark your calendars for September 27, 2018, the date of the next in the webinar series. If you were not able to attend, or if you want to go back and review all or part of the webinars or access the slides, you can find the videos and slide decks here: [Access the Webinars](#)

If you have questions or suggestions about the webinars, please feel free to drop us line here: [Webinar Feedback](#)

### Foundation’s *Journal of Performance Excellence* Available for Purchase

The *Journal of Performance Excellence*, which Foundation unveiled at Quest in April, has been very well received. It has become one of our primary tools for introducing Baldrige to Members of Congress and C-Suite leaders.

If you would like copies for your marketing and educational efforts, or if you just want to relive the past year in Baldrige, you may purchase professionally-printed and bound copies here: [Purchase the Journal of Performance Excellence](#)

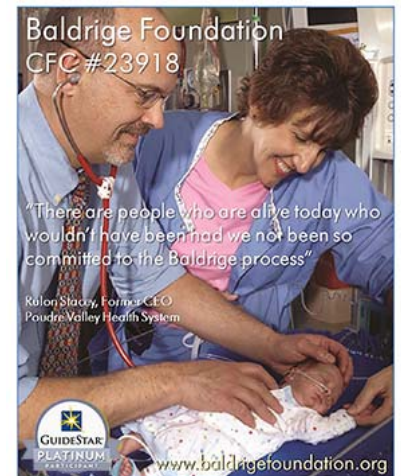




### **Foundation Announces Combined Federal Campaign (CFC) Revenue-Sharing Opportunity with State Programs**

September 1 marks the beginning of the enrollment period for the CFC, allowing federal employees to use payroll deductions to support their favorite charities. The Foundation has once again been validated for inclusion in the CFC program.

If a state program director or board member makes a presentation at a federal facility in their area, the Foundation will transfer **100 percent** of the donations that we receive from that area to the state program. For more information, see [Promote Baldrige CFC](#)



## Baldrige News Updates

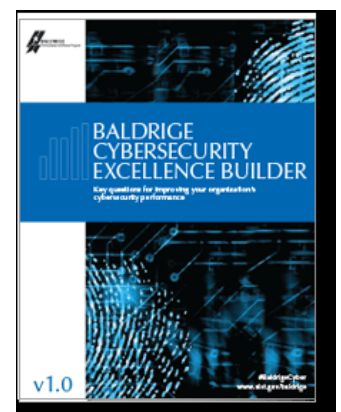
### **NIST Webcast Series | Cybersecurity Framework: Next Up!**

#### **Lessons Learned in Using the Baldrige Cybersecurity Excellence Builder with the Cybersecurity Framework with the University of Kansas Medical**

<https://www.youtube.com/watch?v=zRmLqmZpidA>

The “Builder” can be downloaded free from:

<https://www.nist.gov/baldrige/products-services/baldrige-cybersecurity-initiative>



The progress over the last year has been truly remarkable. Our first ever [National Learning Collaborative](#) of communities began last October and is in its final months. All of our communities completed their Baldrige-based Community Profiles and are in various stages of initiating or executing their cross-sector Community Strategic Plans. Five of these Profiles can be viewed on our [website](#). The hard work and commitment by our community leaders has been exciting and encouraging. Most of these communities will be continuing with us for a second year, and we are starting a new year one cohort in October. The application deadline is July 31<sup>st</sup>, so we will keep you updated on this new cohort. Our thanks to you all for your support in identifying new communities to join us!



We are also just now beginning the second year of our assessment and recognition program. This year we have applications for two levels of recognition: The first level—*Commitment to Community Excellence* consists of responses to the Community Profile section of the COE Framework. The second level – *Journey to Community Excellence* includes their Community Profile, responses to Categories 1 and 2 and select Results items. In total, 30 people volunteered to serve as Examiners for the program; including many of you! The program kicked off last week with four communities submitting their Intent to Apply forms for the Journey level recognition.

Thanks to the feedback of many volunteers and community leaders, we are nearly finished with our first update to the COE Framework. The revised framework will feature an updated Community Profile. We plan to roll out this new version in September. Throughout the next year we will be collecting feedback on the seven categories of the framework for revision with a specific focus on Categories 1 and 2.

As part of our commitment to collaborate as much as possible with the Alliance we will again hold our COE 2026 Learning Collaborative Kick-Off Conference alongside the Baldrige Fall Conference. Our participants will all attend the Baldrige Fall Conference sessions on October 24<sup>th</sup> and then take part in a COE-only day of sessions on October 25<sup>th</sup>. Last year's conference was a huge success and enabling our attendees to join the Baldrige Conference was a great addition to their experience.

We truly appreciate the many opportunities we've had to present at your state and regional conferences and



# BLOGRIGE

the official Baldrige blog



## Leadership Practices of the City of Fort Collins

By Christine Schaeffer

According to Fort Collins City Manager Darin Atteberry, his city is the fourth largest in the state of Colorado, with a current population of about 170,000 and expected growth to 250,000 in the years ahead. . . . Atteberry stressed that Fort Collins is not only in a “great location” but, also, that it has a legacy of great relationships. “We’ve inherited

[...Read more](#)



## Leadership Practices of Bristol Tennessee Essential Services

By Christine Schaeffer

Established as an electric utility in 1945, BTES purchases its electricity from the Tennessee Valley Authority. For more than 60 years, BTES had been solely a provider of electricity, but the company changed its business model as technology and its customers’ needs changed. An event that first prompted the small business to consider key changes . . . .[Read more](#)



## Leadership Practices of Adventist Health Castle

By Christine Schaeffer



As a faith-based organization, Adventist Health Castle embraces its spiritually based mission of “Living God's love by inspiring health, wholeness, and hope” (in Hawaiian language: E ola mau ke Aloha o ke Akua i ke olakino, i ka pono iho, a me ka mana'olana), according to the president and CEO Kathy Raethel. . . .

Raethel stressed that AHC’s mission, vision (“We will transform the health experience of our community by improving health, enhancing interactions and making care more accessible”), and values (integrity, compassion, respect, and excellence) drive her organization’s leadership system. This system incorporates concepts from the Baldrige Excellence Framework, she said, noting,....[Read more](#)

# BLOGRIGE

the official Baldrige blog



## [What Provides Clarity](#)

By Harry Hertz, "the Baldrige Cheermudgen"

I am reminded of the old Abbott and Costello routine, "Who's on First." In the routine, *who's on first* is a declarative statement, not a question: *Who* is the name of the first baseman. In the same vein, in my title for this blog *what provides clarity* is a declarative statement, not a question. Let me explain. I recently read a book review by Mike Richman of the book, *Clarity First*, by Karen Martin. The thesis of the book is that...[Read more](#)



## ["In God We Trust—and to Improve Our Impact, We Use the Baldrige Framework"](#)

By Christine Schaeffer

The Baldrige Performance Excellence Program stresses that the Baldrige Criteria for Performance Excellence can be used by organizations in any sector and of any size to promote continuous improvement and success. As we've shared stories of business, education, health care, and various nonprofit organizations that have found the framework beneficial, we've also received several requests for information on using the Baldrige Excellence Framework in faith-based organizations in particular. So I was pleased to hear about an example this year from a Baldrige examiner who was willing to share the details widely...[Read more](#)



## [A Beloved Leader's Legacy of Leadership, Sustainability, People First](#)

By Dawn Bailey

In Rio Rancho, NM, one of the largest American flags in the state waves over Don Chalmers Ford, a 2016 Baldrige Award recipient. One of these large flags was even loaned to the state of New Mexico after 9/11 because of the patriotism of the dealership's owner. That owner, Don Chalmers, wanted to design his Ford dealership to feel different from other automotive dealerships, with a focus on the customer experience and...[Read more](#)



## Summit Focuses on Managing Chaos through Focus and Action

In June, the GSQC/NNEAE held its fifth Leadership Summit. This year's event featured tools and techniques to mitigate the increasing challenges that we all face when managing multiple priorities and tasks. Over 60 new, aspiring, and experienced leaders attended the Summit for a "tasting menu" of topics including *The Power of Mindfulness*, *Agile Project Management*, *Leading in a Large and Hectic Environment*, and the emerging use of *Analytics*.



A recurring theme of the day was the value of mindfulness. Dr. Annabel Beerel, co-author of *Mindfulness: A Better Me; a Better You; A Better World* started the Summit by helping participants understand mindfulness and the importance of a mindfulness practice for both individuals and in a workplace culture. Others in attendance who have developed a mindfulness practice, including GSQC/NNEAE Chair and Annabel's co-author Tom Raffio, shared the significant impact this has made on both their professional and personal life.

The Summit also featured a demonstration of using a Kanban Board to "shift from chaos to flow" at either a personal or organizational level; examples of leading through chaos at a large company by setting the stage, finding "true north" and staying committed to that path, and building/keeping stakeholder trust; and using analytics to support decision making. Our Analytics speaker, Dr. Liran Edelist, presented his remarks remotely from Germany after he was unable to return to the U.S. as scheduled, staying an extra day to participate. As a result, we are calling this our first "International" Summit!

This event also celebrated PeoplesChoice Credit Union's (PCU) *Silver Achievement Recognition* for their Demonstration of Excellence. This is the second consecutive year that this Maine Credit Union has been recognized, last year applying and being recognized as a *Profile Recognition* recipient.



Kim Cadorette, Operations Director at BAE Systems (top left), shares her insights about Leading Through Chaos, and Beverly Parent, Manager of Software Quality Assurance (bottom) demonstrates the use of a Kanban Board at the 2018 Leadership Summit.

The Leadership Summit was created to explore the nuances that help leaders become *excellent* leaders. The design of the Summit implicitly draws on the Baldrige Category of Leadership and core value of Visionary Leadership with the goal that all participants leave with renewed energy, at least one idea that they can implement immediately, and other practices that they can work on for the long term. Contact [anne@gsgc.com](mailto:anne@gsgc.com) for more information on the design or benefits of a Leadership Summit.



PeoplesChoice Credit Union earns the NNEAE Silver Recognition a year after receiving the Profile Recognition (L to R –Shannon Kashinsky PCU VP of Human Resources, and Tom Raffio, GSQC/NNEAE Chair)





The Oklahoma Quality Foundation 2018 Performance Excellence Program cycle is under way with applications already submitted and examiner training completed. The Board of Examiners have finished Independent review and are currently working on Stage 2 of the process, which is Consensus Review. We provided an additional resource for the Board of Examiners in the form of a weekly Tuesday “study hall” session from noon to 1:00 pm, throughout Independent Review. Although we couldn’t talk about applicant specific information on these calls, they provided great opportunities to get answers for challenges Examiners may have with the process, the criteria or Scorebook Navigator. Examiners were encouraged to hop on, get their question answered, and hop off if they didn’t want to stay for the entire session. They could stay on the entire call if they wanted to hear what others’ questions were and the answers. Examiners will have until August 11 to complete their Consensus Review so they are ready for the Consensus meetings held on August 14, 15 and 16. They will also work on Site Visit issues during this time .

A promotional graphic for a leadership workshop. It features two headshots of men, a circular logo with "THE 360 LEADER" and "Develop Your Influence from All Angles in the Organization", and the text "Are you an effective leader?". Below the main text are small bullet points: "Join us to learn how to grow your leadership skills in your organization and community.", "August 23, 2018, Metro Technology Centers Business Conference Center, (1900 Springlake Drive, Oklahoma City, OK 73111)", and "\$275 - includes book, participant workbook, continental breakfast, catered lunch, and 4 follow up group coaching sessions".

**When and Where:** August 23<sup>rd</sup>, 2018

Metro Technology Centers Business Conference Center, 1900 Springlake Drive, OKC 73111

**Cost:**

\$275 – includes book, participant workbook, continental breakfast, catered lunch, and 4 follow up group coaching sessions

### The 360-Degree Leader

99% of all leadership in an organization comes from someone other than the top leader. Usually, an organization has only one person who is *the* leader (and let’s face it, even that person probably has to answer to someone else). A 360-Degree Leader is one who leads in all directions – up, down and across the organization. The skills you develop as a 360-Degree leader are invaluable whether you are just starting out in a leadership role, trying to expand your influence from somewhere in “the middle”, or even as one of top leaders in the organization building a cohesive, strong leadership team.

#### Workshop Highlights

- The Myths of leading from the middle of an organization
- The Challenges 360-Degree Leaders face
- The Value of 360-Degree Leaders
- The Principles of effective 360-Degree Leaders

Learning doesn’t happen in just a day, so to reinforce the skills being developed as 360-Degree Leaders, participants also receive **4 follow up group coaching sessions**. Click here to register: <https://www.eventbrite.com/e/oqf-leadership-series-360-degree-leadership-tickets-47971273370>

*Space is limited to the first 25 participants, so register early!*

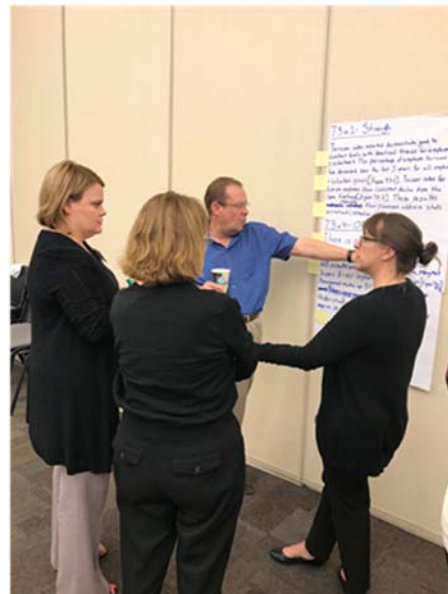
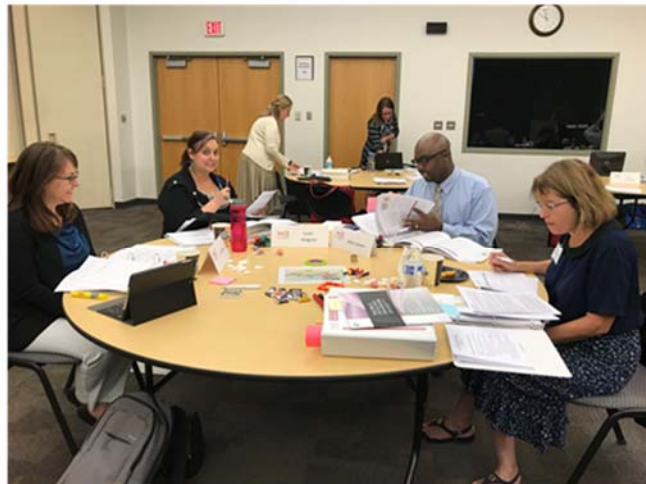
**SOUTHWEST ALLIANCE for EXCELLENCE** **PERFORMANCE EXCELLENCE PROGRAM**

*2018 Board of Examiners Training in Phoenix*

Our 2018 Performance Excellence Program cycle is under way with applications already submitted and examiner training complete. Training was held on June 19, 20 and 21 in Phoenix with several examiners participating via webinar from Henderson, Nevada. Training went very well with 19 attendees representing all industries and all three states: Arizona, Nevada and Utah. The Board of Examiners are currently working on Stage 1 of the process which is Independent Review.



We would like to thank our talented and dedicated volunteer trainers Stacy Harley, Wayne Haggstrom and Heather Mock. A special thank you to Jayne Mazurkiewicz for facilitating the examiners in Henderson, Nevada. We appreciate all of our trainers for their invaluable service to the program. We would like to thank Deer Valley Unified School District for generously donating training space.





## Tennessee Center for Performance Excellence

Submitted by Tamera Fields Parsons, President & CEO

The Tennessee Center for Performance Excellence is pleased to announce that Tamera Fields Parsons has been named President and CEO.

Parsons succeeds Katie Rawls, who is retiring, effective June 1, after 14 years heading the non-profit group, which is widely recognized as the best state-wide quality performance organization in the United States.

Parsons comes to TNCPE from Ballad Health (formerly Mountain States Health Alliance) where she was most recently Vice President for Quality and Performance Improvement.

“I’m delighted to announce that Tamera Fields Parsons will become TNCPE’s third president and CEO in 25 years,” said Rodney Woods, chairman of the TNCPE board of directors and Vice President and Chief Clinical Engineer at BlueCross BlueShield of Tennessee. “Ms. Parsons has a wealth of leadership experience and is committed to maintaining the legacy of distinction prized by our organization. I look forward to her fresh insight and the vision she will bring to the TNCPE.”

Parsons will be overseeing TNCPE’s daily operations, continuing its mission to help organizations reach peak performance, making their communities better places to live and work.

Prior to serving as President and CEO, Parsons has held volunteer roles with both TNCPE and the national Baldrige Performance Excellence Program through her tenures on the Baldrige National Quality Award Board of Examiners, the TNCPE Board of Examiners, and the TNCPE Panel of Judges. In 2009, she received the first TNCPE Champion of Excellence Award for her dedication to helping drive performance excellence.



### TNCPE Hosts Deliberate Innovation Workshops in August

Nashville, Tenn. - The Tennessee Center for Performance Excellence (TNCPE) and the University of Tennessee Center for Industrial Services are partnering with Systematic Inventive Thinking Ltd. of Tel Aviv, Israel to deliver two SPARK TN Workshops in August. The workshops are an effort of the three organizations to help customers and members explore a successful, demonstrated, deliberate process to incorporate innovation into their business practices.

[Systematic Inventive Thinking Ltd.](#) (SIT) has worked with over 1,000 companies in 70 countries since 1995, including presenting at the TNCPE Excellence in Tennessee Conference in February 2018. SIT is a consulting group with offices and affiliates on five continents that help organizations of all sizes and industries develop the culture and practices that incubate innovation.

The workshops will consist of two separate sessions. The first is a [two-hour Deliberate Innovation workshop](#) on August 6 that will focus on overcoming cognitive fixedness and brief exercises with the SIT method. The second will invite a select few organizations to send teams of 3-4 people to participate in the [1.5-day SPARK TN workshop](#) on August 9-10. Limited enrollment will allow each team to thoroughly explore the SIT Innovation Map and how to apply its principles in a work setting to innovate new solutions. Specific course objectives include: identifying standard paradigms, becoming an innovation accelerator or resource, and developing innovation-supporting processes that lead to innovative outcomes.

## Tennessee Center for Performance Excellence (continued)

*Submitted by Tamera Fields Parsons, President & CEO*

### **TNCPE Celebrates 25 Years with Annual Excellence in Tennessee Conference & Banquet**

Nashville, Tenn. – The Tennessee Center for Performance Excellence celebrated its 25<sup>th</sup> anniversary at the annual Excellence in Tennessee Conference & Banquet in Nashville in February. The Center has led companies and organizations to drive organizational excellence through affordable, in-depth assessments since its conception in 1993.

The 25<sup>th</sup> Anniversary Excellence in Tennessee Conference & Banquet included over 20 speakers and presenters from local and foreign organizations of all industries, punctuated by a Keynote address from Sean Henry, President & CEO of the Nashville Predators hockey team. Henry spoke to conference attendees on his drive to improve the performance of both his team and support staff on the ice, in the office, and out in the Nashville community.

Conference attendees enjoyed presentations from leaders of organization across the country and from as far away as Tel Aviv, Israel, as well as networking breaks, nostalgic snack bars, and a fun, Baldrige-themed photo op. The two-day event ended with the Excellence in Tennessee Awards Banquet to honor TNCPE applicants on all levels, including the 2017 Excellence winner, City of Germantown.

To learn more, visit our [website](#) and enjoy photos of the Conference & Banquet in the [gallery](#).

*Tom Tull, Katie Rawls, Commissioner John Dreyzehner, and emcee Michelle Mowery-Johnson at the 2018 Excellence in Tennessee Banquet.*



## Bristol Tennessee Essential Services

*Submitted by Leslie Blevins*

### **Bristol Tennessee Essential Services is having a Best Practice Sharing Day!**

**Date: November 8, 2018**

**Time: 8:30-4:30**

**Where: 2470 Volunteer Parkway, Bristol, TN 37620**

**Cost: \$25.00**

BTES presents a day of sharing and learning, covering organizational strengths and best practices included in our 2017 Malcolm Baldrige National Quality Award application.

The day will include presentations on our journey, Category 3—Customers, and Category 5—Workforce. Participants will also tour BTES and choose two afternoon breakout sessions to attend that will go in depth on the chosen topic.

**[Register at www.btes.net/baldrige](http://www.btes.net/baldrige)**

### 2018 TPE Award Recipients Announced

TPE recently completed their annual award cycle with over 75 volunteer examiners, judges, team leaders and trainers supporting the process. Applicants from various industry segments participated in the cycle and six organizations will be recognized with awards at TPE's Quest for Success conference in September. The awards represent Ohio, Indiana & West Virginia's highest honor for performance excellence through innovation, results and visionary leadership using the Baldrige Excellence Framework. The 2018 Award Recipients who will be honored in September are:

- **Managed Healthcare Services (a division of Lilly USA, LLC)**, Indianapolis, Indiana (Platinum, Governor's Award for Excellence)
- **ProMedica Memorial Hospital**, Fremont, Ohio (Platinum, Governor's Award for Excellence)
- **ProMedica Health System**, Toledo, Ohio (Gold, Achievement of Excellence)
- **WVU Medicine Camden Clark Medical Center**, Parkersburg, West Virginia (Gold, Achievement of Excellence)
- **Braun Industries, Inc.**, Van Wert, Ohio (Silver, Commitment to Excellence)
- **Lima Memorial Health System**, Lima, Ohio (Silver, Commitment to Excellence)

ProMedica Health System will also be recognized with a Category Leadership Award for Category 1 and several organizations will be awarded with Spirit awards for completing an organizational profile and Pioneer awards for completing a 25-page application to the overall requirements.

### TPE Quest for Success Conference – September 10 & 11, 2018



TPE's Quest for Success conference will take place September 10 – 11, 2018 at the Ohio State University in Columbus, Ohio. Malcolm Baldrige National Quality Award winners, TPE Award winners, and performance excellence professionals will deliver leading-edge presentations. Participants will engage in best practice sharing, key note presentations and breakout sessions, networking and learning sessions. 2017 MBNQA Recipients presenting at the conference include: Bristol Tennessee Essential Services, the City of Fort Collins and Stellar Solutions. Also, former MBQNA Recipients St. David's Health Care and CAMC Health System, and Communities of Excel-

lence 2026 will conduct presentations. Participants can register for the conference at [http://thepartnershipforexcellence.org/events\\_quest\\_for\\_success.html](http://thepartnershipforexcellence.org/events_quest_for_success.html)

### 2018 Third Thursday Webinars!

TPE continues to offer complimentary webinars on the third Thursday of each month at 11:00 AM Eastern time. *These educational webinars provide information to assist organizations on their performance excellence journey. In August, Travis Lozier, VP of Performance Excellence for Community Health Network will share a best practice for aligning mission, vision, values and purpose, and in September, Kristy Fidler, Director of*

## Site Visits and the Dreaded Document Requests

*By Kay Kendall*

At BaldrigeCoach, we support clients across a variety of Alliance programs. That means we get to see some really great best practices and also some troubling trends. Of the latter, the one that has us most concerned recently is the ever-growing document request lists sent to applicants prior to their site visits.

Why is this a concern? For several reasons. The first is that documents should only be requested from applicants if they are key to resolving a site visit issue, not to merely prove their existence. We believe the Baldrige Program has set the gold standard for how document request lists are created. They are developed after the site visit issue worksheets are created, and the documents are essential evidence to resolving an issue. When I've led site visits, I've tested every document requested and every interview scheduled to ensure that they were necessary and not merely the result of curiosity by an over-zealous examiner with an audit mentality.

The second is that site visits should be focused on key areas of verification and clarification. They are not intended to be an exhaustive discovery of documents that were casually referenced by the applicant. We have seen lists that are so non-sensical that we expected to see a request for a paper napkin because the applicant mentioned they had transitioned to those to be more ecologically friendly!

The third reason is that the glossary in the Baldrige Excellence Framework does not include "documented" in the definition of "systematic." For many small and very small organizations, their processes may be systematic but may not be documented. Requesting documented agendas and minutes for "well-ordered, repeatable (meetings) that exhibit the use of data and information so that learning is possible" is imposing an examiner's paradigm of how an organization should be run effectively.

Finally, the last reason why these over-reaching document request lists is a concern is the burden that it places on the applicant to retrieve documents (or be tempted to create them just for the site visit!) that are not key to helping examiners understand them and provide them with actionable feedback. And isn't that the real purpose of a site visit?