The Partnership for Excellence
Helping organizations see improved results
Ohio * Indiana * West Virginia

Beginning your Baldrige Journey with TPE: *Advising, Partnering, and Success (5-25-50)*

Special Thanks to Our Featured Presenter!

Dr. Rusty Clifford, Ph.D.
Superintendent
West Carrollton City Schools
rclifford@wcsd.k12.oh.us

WEBINAR AGENDA

Beginning your Baldrige Journey with TPE:
Advising, Partnering, and Success (5-25-50)

Dr. Rusty Clifford, Ph.D.

TPE Calendar 2013

Al Faber

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Dr. Rusty Clifford, is a senior TPE examiner, trainer, coach, and former Chair of the TPE Board of Trustees. Dr. Clifford is currently the Chair of TPE's Education Committee and a national examiner.

As the Superintendent of West Carrollton City Schools, Dr. Clifford has spent 41 years in education. In 2004, he led his school system to achieve the Gold-level of organizational performance with TPE, and in 2009 West Carrollton City Schools was a National Malcolm Baldrige Award applicant.

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Advising, Partnering, and Success (5-25-50)

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The Baldrige Criteria empower your organization to reach your goals, improve results, and become more competitive by aligning your plans, processes, decisions, people, actions, and results.

Baldrige Criteria – Seven management categories aligned to help organizations document, achieve, and sustain high performance.

Baldrige is non-prescriptive. It doesn't tell an organization how to do something, it tells what it should be doing, then leaves it to the organization to determine the processes that best fit the organization, its culture, and goals.

Why Baldrige ? - Why Now!

From

1. Working
2. That's as good as it gets
3. Just Do It
4. Get 'er Done
5. Looks good to us
6. Trial and Error
7. Don't ask, Don't tell

To

1. Working on the Work
2. Focus on Continuous Improvement
3. HOW do you do it
4. WHAT are outcomes and results
5. Comparisons and Benchmarking
6. Cycles of Learning
7. Generous Listening and Asking Great How and What Questions

If there is a better way than the Baldrige Criteria to accomplish a comprehensive assessment of your organization's key systems and processes, use it. But don't waste too much time trying to find it.

Advising Process

1 – initial meeting (1/2 day) with Advising Team;
2 – applicant writes 5-page Organizational Profile;
3 – applicant submits Org Profile to TPE President/CEO;
4 – TPE forwards Org Profile to the Advising Team to prepare feedback report [strengths, opportunities for improvement, and key factors];
5 – Advising Team completes feedback report in approx. one month and sends to TPE;
6 – TPE sends feedback report to applicant;
7 – Advising Team schedules follow-up meeting to review feedback report with applicant in conjunction with Partnering Workshop.

Partnering Process

1 – initial meeting (1/2 day) with Partnering Team
2 – applicant writes 25-page application addressing the overall level of the criteria;
3 – applicant submits 25 page application to TPE President/CEO;
4 – TPE forwards 25 page application to the Partnering Team to prepare feedback report [strengths, opportunities for improvement];
5 – Partnering Team completes feedback report in approx. one month and sends to TPE;
6 – TPE sends feedback report to applicant;

First Set of Questions – the OP

Who are you?

What is it that you do?

- Organizational Profile – Characteristics and Strategic Situation
  - Describe organizational environment
  - Describe relationships
  - Describe competitive environment
  - Describe strategic context – key strategic challenges and advantages
  - Describe performance improvement system

Followed by …Process Questions

How do you do it?

How do you keep improving?

- Six "process" categories:
  1. Leadership
  2. Strategic Planning
  3. Customer Focus
  4. Measurement, Analysis, and Knowledge Management
  5. Workforce Focus
  6. Operations Focus

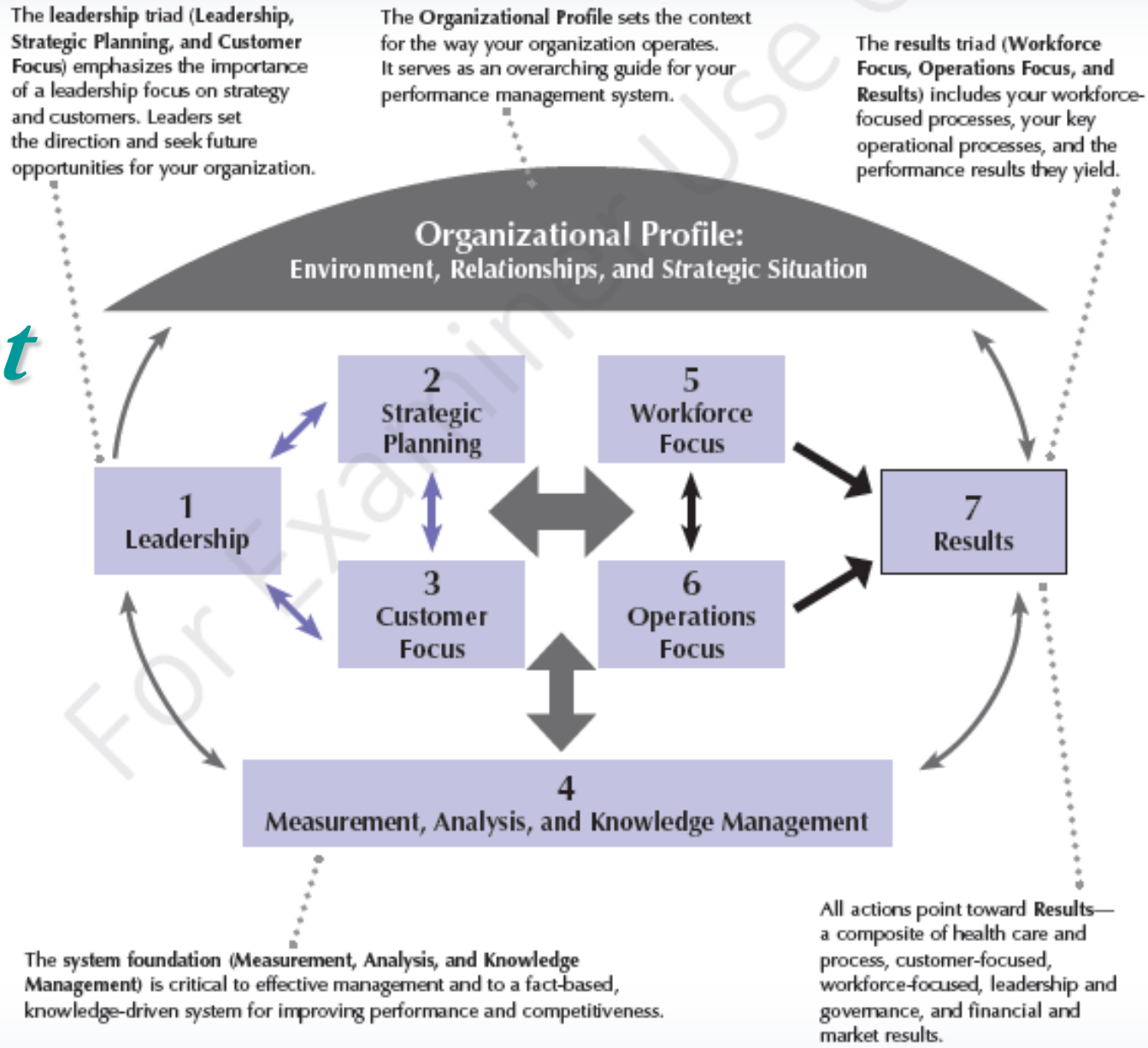
Finally … Results Questions

How do key processes work?

What are key findings, plans, objectives, goals, or measures?

- Five results items
  - Some process categories have an associated results item, although process categories and results items are not in the same order
  - Results are expected to be summarized and segmented as appropriate for all key areas and key processes, including comparative data
  - Measure the things that are important to your success

Integrated Management System



For Examiner Use

The Organizational Profile

The Organizational Profile is a snapshot of your organization, the key influences on how it operates, and the key challenges it faces.

The Org Profile sets the context for the way your organization operates. It serves as an overarching guide for your performance management system.

The greatest value of the Org Profile may lie in its ability to move the entire organization to a common understanding of its culture, its customers, its strategic challenges and opportunities.

Organizational Profile:

1 – five-page narrative of who you really are;

2 – key organizational characteristics (vision, mission, core competencies, workforce);

3 – strategic situation (competitive position, comparative data)

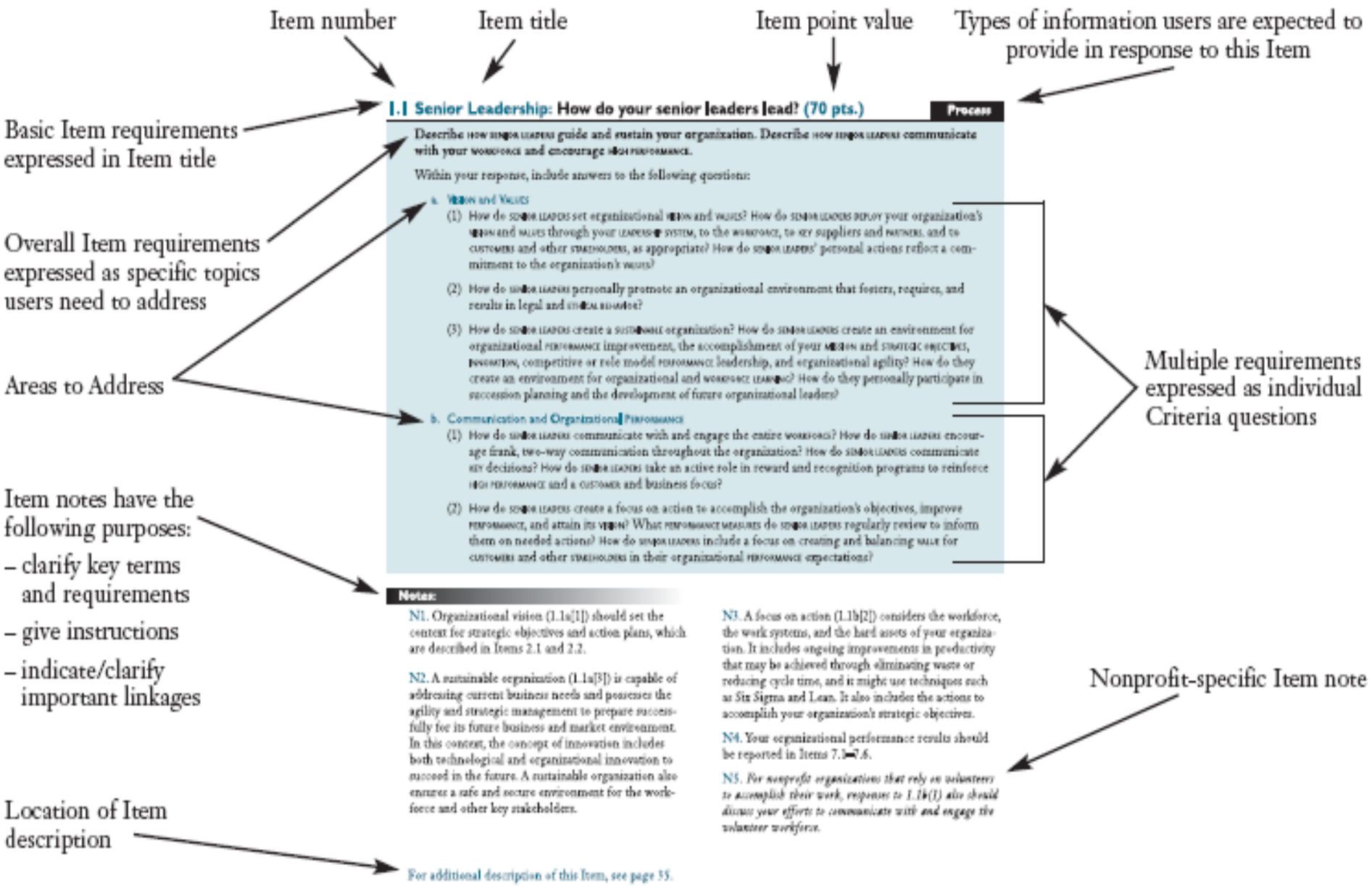
After the Organizational Profile: Understanding the Criteria

Basic Item Requirements
Overall Item Requirements
Multiple Item Requirements

Presented as questions.
You do not need to answer each question separately.
Multiple questions express the full meaning of the information being requested.

"Anatomy" of the Criteria

Item Format



Criteria book – pg 29

For each process item – Categories 1 - 6

- **Approach** – Designing and selecting effective processes, methods, and measures
- **Deployment** – Executing on your approach with consistency
- **Learning** – Assessing your progress and capturing new knowledge, including seeking opportunities for innovation
- **Integration** – Revising your plans based on assessment findings and organizational performance, harmonizing processes and work-unit operations, and selecting better process and results measures

A Process is . . .

- A repeatable series and/or sequence of activities that produces value for one or more stakeholders
- Definable – Repeatable – Predictable
- *PROCESSES* are the foundation of all aspects of the work we do

Principles of Process Management

- All work is process work.
- Any process is better than no process
- A good process is better than a bad process
- One process version is better than many
- Even a good process must be correctly executed
- Even a good process can be made better
- Every good process – not monitored and improved – eventually becomes a bad process

Processes and Outcomes

- Outcomes are dictated by what happens during processes to inputs.
- ***If you want to improve outcomes, you must change the processes that produce those outcomes.***

For Results Items – Category 7

- **Levels** - Current performance on a meaningful measurement scale
- **Trends** – Rate of performance improvement or continuation of good performance and the breadth of your performance results
- **Comparisons** - Performance relative to other, appropriate organizations and performance relative to benchmarks or industry leaders
- **Integration** – results measures (often through segmentation) address important performance requirements and are harmonized across processes and work units to support organization-wide goals

It's not about Baldrige, TPE, awards or applications. It's about disciplined and sustained alignment, continuous improvement, and results!

TPE Quarterly Webinar Series

March 15, 2013

www.thepartnershipforexcellence.org

Advising & Partnering Program Process Map

Average 1-3 Months
No Time Limit!

Average 3-4 Months
No Time Limit!

Advising Workshop
4 Hours

2 TPE Examiners discuss how to develop the 5-page Organizational Profile.

The Profile serves as the foundation for your application and is an initial self-assessment

Your Organization writes the 5-Page Organizational Profile

TPE Examiners provide written & verbal feedback

Completion of the Organization Profile results in the "Spirit Award" at TPE's Quest for Success Conference!

Partnering Workshop
4 Hours

2 TPE Examiners discuss how to write the 25-page application to the 17 main points of the criteria

The 25-page Application focuses on Processes, Systems, and associated Results

Your Organization writes the 25-page application

TPE Examiners provide written feedback

Completion of the 25-Page Application results in the "Pioneer Award" at TPE's Quest for Success Conference!

Supporting Activities:

- ❑ **Train Examiners (Recommend 2 or more)**
- ❑ **Educate the Workforce**
- ❑ **Attend the "How to Write an Application" Workshop in June**
- ❑ **Attend TPE's *Quest for Success* Conference in September**
- ❑ **Join TPE as an Individual & Organizational Member**
- ❑ **Participate in Quarterly Webinars**

Upon completion of the Advising & Partnering Program you are well-positioned to submit a Full 50-Page Application!

The Partnership for Excellence
The Nation's Most Respected State Based Baldrige Program…

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Examining Level *(Full Application)*

Traditional "Baldrige-based" 50 page Application

- Independent review by trained examiners
- Consensus review by trained examiners
- ★ *Site Visit (3 days) by examiner team*
- Award recommendation by Panel of Judges
- Review/decision on award by Board of Trustees

Eaton North American
Financial Services Center
Brook Park, Ohio
2011

Awards Presented

- Platinum – Governor's Award

  (Presented by the Governor of each state)
- Gold – Achievement of Excellence
- Silver – Commitment to Excellence
- Bronze – Pledge to Excellence

Citizens Energy Group
Indianapolis, Indiana
2012

ProMedica Flower Hospital
Sylvania, Ohio
2012

The Journey…

The Journey begins with Advising & Partnering

LEVELS OF ORGANIZATIONAL PERFORMANCE

Traditional 50 page Application
(Mirrors National Baldrige Program)

PLATINUM

GOLD

SILVER

BRONZE

PIONEER

SPIRIT

Advising- 5-page Organizational Profile

Partnering- 25-page Abbreviated Application (17 Main Points of the Criteria)

The approach is in the early stages of deployment in achieving the basic requirements of the Item. The approach is aligned with other areas or work units largely through joint problem solving.

The approach is well deployed, although deployment may vary in some areas or work units. A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place. The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items.

An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. The approach is well deployed, with no significant gaps. Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. The approach is integrated with organizational needs identified in Items. Many to most trends and current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of leadership and very good relative performance.

TPE Calendar

www.thepartnershipforexcellence.o

TPE's Annual Training Strategy

- ❑ New Examiner Training
- ❑ Returning Examiner Training
- ❑ Team Leader Training

QUARTERLY WEBINAR

QUARTERLY WEBINAR

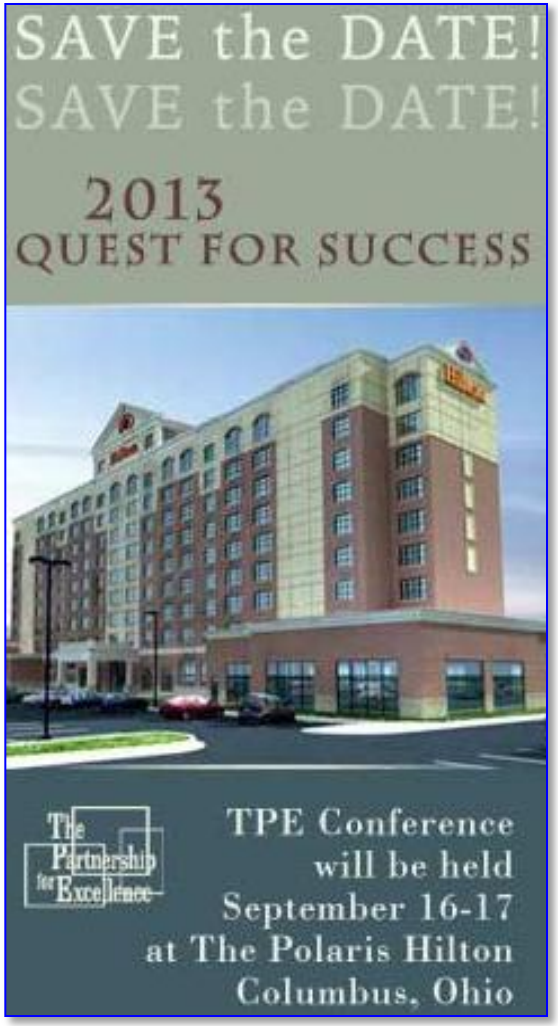
- ❑ 14th Annual *Quest for Success* Conference

QUARTERLY WEBINAR

QUARTERLY WEBINAR

- ❑ How to Write and Strengthen your Application Workshop*

*Will be offered in Indiana & West Virginia in 2013



14th Annual Quest for Success Conference!

September 16-17, 2013
Polaris Hilton, Columbus, Ohio
Golf Outing/Silent Auction – September 15, 2012

Questions?

A Special Thanks to Our 2013 Organizational Members!

SCHNECK MEDICAL CENTER
Better healthcare begins here.
SEYMOUR, INDIANA

PROTEC COATING COMPANY

WESTFIELD WASHINGTON SCHOOLS

The Ohio Manufacturers' ASSOCIATION

WEST CARROLLTON SCHOOL DISTRICT
QUALITY SCHOOLS QUALITY COMMUNITY
MIAMI TOWNSHIP • MORAINE • WEST CARROLLTON

SIX DISCIPLINES®
Total Performance Excellence™