

2007 CRITERIA FOR PERFORMANCE EXCELLENCE

Importance of Beginning With Your Organizational Profile

Your Organizational Profile is critically important because:

- it is the most appropriate starting point for self-assessment and for writing an application;
- it helps you identify potential gaps in **KEY** information and focus on **KEY PERFORMANCE** requirements and **RESULTS**;
- it is used by the Examiners and Judges in application review, including the site visit, to understand your organization and what you consider important (you will be assessed using the Criteria requirements in relation to your organization's environment, relationships, influences, and **CHALLENGES**, as presented in your Organizational Profile); and
- it also may be used by itself for an initial self-assessment. If you identify topics for which conflicting, little, or no information is available, it is possible that the Organizational Profile can serve as your complete assessment, and you can use these topics for action planning.

P Preface: Organizational Profile

The **Organizational Profile** is a snapshot of your organization, the **KEY** influences on **HOW** you operate, and the **KEY CHALLENGES** you face.

Item P.1 Organizational Description

What are your key organizational characteristics?

Describe your organization's operating environment and your **KEY** relationships with **CUSTOMERS**, **suppliers**, **PARTNERS**, and **STAKEHOLDERS**.

Within your response, include answers to the following questions:

P.1a. Organizational Environment

- (1) What are your organization's main products and services?
What are the delivery mechanisms used to provide your products and services to your **CUSTOMERS**?
- (2) What is your organizational culture?
What are your stated **PURPOSE**, **VISION**, **MISSION**, and **VALUES**?
- (3) What is your **WORKFORCE** profile?
What are your **WORKFORCE** or **EMPLOYEE** groups and **SEGMENTS**?
What are their KEY requirements and expectations?
What are their educational **LEVELS**?
What are your organization's **WORKFORCE** and job **DIVERSITY**, organized bargaining units, **KEY benefits**, and special health and safety requirements?
- (4) What are your major facilities, technologies, and equipment?
- (5) What is the regulatory environment under which your organization operates?
What are the applicable occupational health and safety regulations; accreditation, certification, or registration requirements; relevant industry standards; and environmental, financial, and product regulations?

P.1b. Organizational Relationships

- (1) What are your organizational structure and **GOVERNANCE SYSTEM**?
What are the reporting relationships among your **GOVERNANCE** board, **SENIOR LEADERS**, and parent organization, as appropriate?

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- (2) What are your **KEY CUSTOMER** and **STAKEHOLDER** groups and market **SEGMENTS**, as appropriate? What are their **KEY** requirements and expectations for your products, services, and operations? What are the differences in these requirements and expectations among **CUSTOMER** and **STAKEHOLDER** groups and market **SEGMENTS**?
- (3) What are your most important types of suppliers, **PARTNERS**, **COLLABORATORS**, and distributors? What role do these suppliers, **PARTNERS**, **COLLABORATORS**, and distributors play in your **WORK SYSTEMS** and the production and delivery of your **KEY** products and services? What role, if any, do they play in your organizational **INNOVATION PROCESSES**? What are your most important supply chain requirements?
- (4) What are your **KEY** supplier and **CUSTOMER PARTNERING** relationship and communication mechanisms?

Notes:

N1. Mechanisms for product and service delivery to your **end-use CUSTOMERS (P.1a[1])** might be direct or through dealers, distributors, **COLLABORATORS**, or channel **PARTNERS**.

N2. **WORKFORCE** or **EMPLOYEE** groups and **SEGMENTS** (including organized bargaining units) (P.1a[3]) might be based on the type of employment or contract reporting relationship, location, tour of duty, work environment, family-friendly policies, or other factors.

N3. Market **SEGMENTS (P.1b[2])** might be based on product or service lines or features, distribution channels, business volume, geography, or other factors that are important to your organization to define related market characteristics.

N4. **CUSTOMER** and **STAKEHOLDER** group and market **SEGMENT** requirements (**P.1b[2]**) might include on-time delivery, low defect **LEVELS**, **safety**, ongoing price reductions, electronic communication, rapid response, after-sales service, socially responsible behavior, and community service. *For some nonprofit organizations, requirements also might include administrative cost reductions, at-home services, rapid response to emergencies, and multilingual services.*

N5. Communication mechanisms (**P.1b[4]**) should be two-way and might be in person, via e-mail, Web-based, or by telephone. For many organizations, these mechanisms may change as marketplace, **CUSTOMER**, or **STAKEHOLDER** requirements change.

N6. *While some nonprofit organizations offer products and services (P.1a[1]), many might appropriately interpret this phrase as programs or projects and services.*

N7. **CUSTOMERS (P.1a[1])** are the users and potential users of your products, programs, and services. In some nonprofit organizations, **CUSTOMERS** might include members, taxpayers, citizens, recipients, clients, and beneficiaries. Market **SEGMENTS** might be referred to as constituencies.

N8. Many nonprofit organizations rely heavily on volunteers to **accomplish their work**. These organizations should **include** volunteers **in the discussion of their WORKFORCE (P.1a[3])**.

N9. For nonprofit organizations, relevant industry standards (**P.1a[5]**) might include industry-wide codes of conduct and policy guidance. *The term "industry" is used throughout the Criteria to refer to the sector in which you operate. For nonprofit organizations, this sector might be charitable organizations, professional associations and societies, religious organizations, or government entities—or a sub-sector of one of these.*

N10. For some nonprofit organizations, **GOVERNANCE** and reporting relationships (**P.1b[1]**) might include relationships with major agency, foundation, or other funding sources.

Information for Understanding All Criteria Items

For definitions of **Key Terms** presented throughout the Criteria and **Scoring Guidelines**, see the **Glossary of Key Terms**.

Frequently, several questions are grouped under one number (e.g., **P.1a[3]**). These questions are related and do not require separate responses. These multiple questions serve as a guide in understanding the full meaning of the information being requested.

Item notes serve three purposes: (1) to clarify terms or requirements presented in an **Item**, (2) to give instructions on responding to the **Item Requirements**, and (3) to indicate **KEY** linkages to other **Items**. In all cases, the intent is to help you respond to the **Item Requirements**.

A number of Items have notes that provide additional guidance specifically for nonprofit organizations. These nonprofit-specific notes appear at the end of the Item in italics.

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For additional description of this Item, see [P.1 Organizational Description](#).

2007 Criteria Item Links: [1.1](#) - [1.2](#) - [2.1](#) - [2.2](#) - [3.1](#) - [3.2](#) - [4.1](#) - [4.2](#) - [5.1](#) - [5.2](#) - [6.1](#) - [6.2](#) - [7.1](#) - [7.2](#) - [7.3](#) - [7.4](#) - [7.5](#) - [7.6](#) - [P.1](#) - [P.2](#)

Blue Words above are hyperlinks. Yellow highlight identifies words that are newly added to the 2007 Business and Nonprofit Criteria.

Baldrige Best Practice Processes and Application Information Capture Templates will be added here soon. Hyperlinks are also being updated. Check back.

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