

Baldrige Self-Assessment Training Agenda

3-Day workshop designed to deliver comprehensive organizational assessment and feedback report writing skills comparable to the skills of Baldrige Award Examiners

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4/6/2010

Training is conducted using the same materials used to train the Baldrige Award national Examiners. It is facilitated by the most experienced Baldrige trainer who has trained thousands more people in this course than the Baldrige Award Program which currently trains up to 600 people per year and began training in 1988.

Baldrige Self-Assessment Training (SAT) Agenda

(3-Day Workshop based on 2010 Baldrige Case Study)

(__-__ ____ 2010)

DATE & TIME	SUBJECT
Day 1	Course Overview and Introductions
9:00 AM to 5:00 PM	Excellence Criteria Status Update
	<p>Review of Excellence Criteria Core Values:</p> <ul style="list-style-type: none"> • Visionary Leadership • Customer-Driven Excellence • Organizational and Personal Learning • Valuing Workforce Members and Partners • Agility • Focus on the Future • Managing for Innovation • Management By Fact • Societal Responsibility • Focus on Results and Creating Value • Systems Perspective
	<p>PROCESS Excellence Criteria Understanding Review:</p> <ul style="list-style-type: none"> • Leadership <ul style="list-style-type: none"> ○ Senior Leadership ○ Governance and Social Responsibilities • Strategic Planning <ul style="list-style-type: none"> ○ Strategy Development ○ Strategy Deployment • Customer Focus <ul style="list-style-type: none"> ○ Customer Engagement ○ Voice of the Customer
	<p>Roles of Examiners/Assessors:</p> <ul style="list-style-type: none"> • Assessment Role • Ambassador Role of Examiners • Value of Serving as an Examiner Video
	<p>Baldrige Framework Relationships to Other Models and Methodologies:</p> <ul style="list-style-type: none"> • ISO • Six Sigma • Lean • EFQM • Accreditation
	<p>Key (Success) Factors Determination, including:</p> <ul style="list-style-type: none"> • Organizational Description <ul style="list-style-type: none"> ○ Organizational Environment ○ Organizational Relationships • Organizational Situation <ul style="list-style-type: none"> ○ Competitive Environment ○ Strategic Context ○ Performance Improvement System
	<p>How to Assess Criteria PROCESS Items:</p> <ul style="list-style-type: none"> • How to identify Key Factors • How to select and prioritize Strengths and Improvement Opportunities • How to write PROCESS Strength/ Improvement Opportunity Comments

	<ul style="list-style-type: none"> • How to use PROCESS Scoring Guidelines to Score PROCESS Items: <ul style="list-style-type: none"> ○ Approach; ○ Deployment; ○ Learning; and ○ Integration
	<p>How to Score PROCESS Criteria Scoring Dimensions (ADLI):</p> <ul style="list-style-type: none"> • Approach • Deployment • Learning • Integration
	<p>Process Criteria Assessment – Team Case Study Exercise #1</p> <ul style="list-style-type: none"> • Identify Key Factors • Write Strength and Improvement Opportunity Comments • Score: <ul style="list-style-type: none"> ○ Approach ○ Deployment ○ Learning ○ Integration • Team presentation of assessment feedback findings
	Day 1 – Lessons Learned and Announcements
	SUBJECT
Day 2	Course Progress Review and Announcements
9:00 AM to 5:00 PM	<p>PROCESS Excellence Criteria Understanding Review (Continued):</p> <ul style="list-style-type: none"> • Measurement, Analysis and Knowledge Management <ul style="list-style-type: none"> ○ Measurement, Analysis and Improvement of Organizational Performance ○ Management of Information, Knowledge and Information Technology • Workforce Focus <ul style="list-style-type: none"> ○ Workforce Engagement ○ Workforce Environment • Process Management <ul style="list-style-type: none"> ○ Work Systems ○ Work Processes
	Feedback Report Comments Writing Orientation and Exercise
	<p>CONSENSUS Process Orientation:</p> <ul style="list-style-type: none"> • Consensus Process Preparation and Planning • Consensus Execution • Consensus Report Writing • Consensus Process Simulation
	<p>PROCESS Criteria Assessment – Team Case Study Exercise #2</p> <ul style="list-style-type: none"> • Identify Key Success Factors • Write Strength and Improvement Opportunity Comments • Score: <ul style="list-style-type: none"> ○ Approach ○ Deployment ○ Learning ○ Integration • Team presentation of assessment feedback findings
	Day 2 – Lessons Learned and Announcements

	SUBJECT
Day 3	Results Assessment – Team Exercise (conclusion)
9:00 AM to 5:00 PM	<p>Results Excellence Criteria Understanding Review (Continued):</p> <ul style="list-style-type: none"> • Results Criteria: <ul style="list-style-type: none"> ○ Product Outcomes ○ Customer-Focused Outcomes ○ Financial and Market Outcomes ○ Workforce-Focused Outcomes ○ Process Effectiveness Outcomes ○ Leadership Outcomes
	<p>How to Assess Criteria RESULTS Items:</p> <ul style="list-style-type: none"> • How to identify Key Success Factors • How to select and prioritize Strengths and Improvement Opportunities • How to write RESULTS Strength and Improvement Opportunity Comments • How to use RESULTS Scoring Guidelines & Score RESULTS Items for: <ul style="list-style-type: none"> ○ Levels: ○ Trends: ○ Comparisons and Benchmarks; and ○ Integration
	RESULTS Item Scoring Simulation Exercise
	<p>RESULTS Criteria Assessment – Team Case Study Exercise #3</p> <ul style="list-style-type: none"> • Identify Key Success Factors • Write Strength and Improvement Opportunity Comments • Score: <ul style="list-style-type: none"> ○ Levels; ○ Trends; ○ Comparisons and Benchmarks; and ○ Integration
	<p>Site Validation Visit Process Orientation</p> <ul style="list-style-type: none"> • Site Validation Visit Issues Determination • Site Visit Preparation and Planning • Site Visit Execution • Site Visit Feedback Report Writing Including Key Themes (Executive Summary)
	Application Writing Software Demonstration and Free Copy
	Total Integrated Baldrige Excellence System of best practice processes - free DVD
	How to Effectively Implement the Criteria in Your Organization
	Day 3 – Lessons Learned and Course Conclusion

Bonus materials provided for all participants:

- 2010 Guide to a well-written Baldrige Application
- Approximately 1,000 metrics commonly used by winners and other high-scoring organizations
- Videos and PowerPoint presentations from award winners
- 2010 Baldrige Site Visit Preparation Guide