

A dark blue-tinted photograph of the Nashville skyline, featuring the AT&T Building as the central focus. The image is used as a background for the conference poster.

*Tune into*  
**excellence**

# **2019 Baldrige Fall Conference**

October 24–25, 2019 | Nashville, TN



## OCTOBER 24: OPTIONAL PRE-CONFERENCE WORKSHOPS

On Thursday, October 24, there are options for three pre-conference workshops and a field trip to a local manufacturing plant.

### EXCELLENCE IS IN THE DETAILS

**8:00 AM–12:00 PM**

**Presenters:** David McClaskey and David Jones of Pal's Business Excellence Institute

### BALDRIGE 101—HOW TO BUILD MORE EXCELLENCE INTO YOUR OPERATIONS

**1:30–4:30 PM**

**Presenter:** Joanne Sternke

### USING BALDRIGE CYBER TO MAKE YOUR ORGANIZATION CYBER-RESILIENT

**1:30–4:30 PM**

**Presenter:** Steve Hunt

### FIELD TRIP

**Nissan Vehicle Assembly Plant Tour**

**11:45 AM–4:30 PM**

*First come, first serve. Maximum number of tour participants is 55. Transportation is included as part of the plant tour registration fee.*



# OCTOBER 25: A FULL DAY OF KEYNOTE PRESENTATIONS, BREAKOUTS AND BEST PRACTICE SHARING BY 2018 BALDRIGE AWARD-WINNING ORGANIZATIONS

7:00–8:00 AM	Registration / Breakfast / Networking / Exhibits Open			
8:00–8:10 AM	Opening Session   <b>National and State Performance Excellence Programs Help Create Value, High Performance and Sustainability in Challenging Times. Help us Tune in to Excellence today!</b>			
8:10–9:45 SESSION 1	Leadership Plenary   <b>Effective Leadership Drives Loyal Customer Relationships—and Delivers Results for all Key Stakeholders. Five top executives, representing each of the 2018 Baldrige winners, will share how it's done!</b>			
10:00–10:45 AM BREAKOUT SESSION 2	<b>Integrated Performance Excellence: Strategy Development, Implementation, and Analysis</b> Mike Flores, Chancellor Alamo Colleges District	<b>Improving Quality of Life in America—One Community at a Time</b> Stephanie Norling, Director Communities of Excellence	<b>Harmony in Communication + Reward/Recognition + Retention = Employee Engagement</b> Denise Kaetzel, MHHCC Ann Steffe, MHHCC	<b>Designing Work Systems to Achieve Mission Impact: How We Save Lives</b> Grace Harcek, Director Donor Alliance
10:45–11:00 AM	Break / Networking / Exhibits			
11:00–11:45 AM BREAKOUT SESSION 3	<b>The Surprising Secrets of Most Cyber-Resilient Companies</b> Steve Hunt, President Hunt BI	<b>Innovation through Strategic Planning</b> Meridith Wentz, UW Stout Glendali Rodriguez, UW Stout Andrei Ghenciu, UW Stout	<b>Value—the Golden Nugget of Innovation</b> Jane Keathley, Principal Keathley and Company	<b>Accelerate your Baldrige Journey using Project Management Best Practices</b> Dan Stark, Knowledge Management Integrated PM Co, Inc.
11:45–12:45 PM	Lunch / Networking / Exhibits   <b>Harmony is Not Just a Musical Term—it Drives Organizational Excellence</b>			
12:45–1:30 PM BREAKOUT SESSION 4	<b>Accelerating the Performance Excellence Journey in the Age of Consumerism</b> Ben Sawyer, CEO SOAR Vision Group	<b>Design + Manage + Improve = “Tuned up” Operational Effectiveness</b> Ann Steffe, MHHCC Denise Kaetzel, MHHCC	<b>The Tri County Way—Workforce</b> Dr. Tammie Strobel, Tri County Dr. Jason Godfrey, Tri County	<b>Measuring What Matters—a Scorecard System</b> JoAnn Sternke, Senior Leader & Coach Studer Education
1:30–2:00 PM	Travel / Break / Networking / Exhibits			
2:00–2:45 PM BREAKOUT SESSION 5	<b>Life after Baldrige: UW-Stout 15+ Years Later</b> Meridith Wentz, UW Stout Glendali Rodriguez, UW Stout Andrei Ghenciu, UW Stout	<b>Moving Strategy from a Key Theme Opportunity for Improvement to a Key Theme Strength</b> Jennifer Prinz, Director Donor Alliance	<b>Less is More, Stick to the Core-Strategy</b> Dr. Tammie Strobel, Tri County Tonya Foreman, Tri County	<b>Are your KPIs Indicative of Your Actual Performance? And Other Burning Issues from Category 4</b> Dan Stark, Integrated PM Co, Inc. Tim Czech, Integrated PM Co, Inc.
2:45–3:00 PM	Dessert / Travel Break			
3:00–4:00 PM	Closing Keynote   <b>The Influential Leader</b> , Stevie Ray, Stevie Ray's Improv			

# Optional Pre-Conference Workshops

October 24, 2019 | Nashville, TN

## EXCELLENCE IS IN THE DETAILS

OCTOBER 24 | 8:00 AM–12:00 PM

**David McClaskey, President and Cofounder,  
Pal's Business Excellence Institute**

**David Jones, VP, Pal's Business Excellence Institute**

*What is the difference between a sound process that produces average results and an extraordinary process that produces sustained, repeatable excellent results? During Pal's BEI's regular public classes, we show that excellence is always in the details. The details usually consist of approximately the last 15%. The 85% is required to make the transaction complete. Getting the details right sets the degree of excellence for the processes, products, and services. This workshop will include:*

- *How: a systematic approach for designing the details into service, product, and people processes that then consistently produce extraordinary results*
- *Examples: the Baldrige winning Pal's Sudden Service examples will be used to illustrate real applications for service, product, and people processes*
- *Practice: will enable you to practice doing this for your organization's processes during the workshop with guidance from the instructors*
- *Deployment: how to get the details deployed to all applicable work units within your organization*

**David McClaskey** has over 45 years of experience as an executive trainer, consultant, and coach, conference presenter, and Baldrige expert. He is one of the few individuals to have the privilege of assisting seven companies to win eight Malcolm Baldrige National Quality Awards (about 6% of the total winners) including The Ritz-Carlton Hotel Company twice. McClaskey served as a Judge for the Malcolm Baldrige National Quality Award from 2000–2002. He has also served as a Judge for the Tennessee and Georgia Quality Awards. McClaskey

developed the training and trained the very first Baldrige Board of Examiners in 1988. Since then he has taught over 5,000 leaders how to understand and use the Baldrige criteria to improve.

McClaskey is co-founder in 2000 (with Thom Crosby) and President of Pal's Business Excellence Institute which trains thousands of leaders from all over the world in performance and operations excellence.

**David Jones** is an instructor, consultant, and executive coach with over 30 years of experience in the manufacturing, education, and health care sectors. He is passionate about helping individuals and organizations reach their full potential, particularly through the use of the Baldrige Criteria.

Jones has over 25 years of hands-on experience with the Baldrige Framework at the state and national levels as an applicant, examiner, examiner training facilitator, judge, and consultant.

Concurrent with his teaching and consulting, Jones was an engineer and manager with Texas Instruments, Siemens, and EPIC Technologies. His areas of expertise span Management, Leadership, Performance Excellence, Strategic Planning, Manufacturing, Marketing and Sales, ISO 9000, and ISO 13485. David has also served as an internal Baldrige and performance excellence consultant with a large, multi-facility, regional health care system.

In 2007 he co-founded Edamar, Inc., an award-winning educational products company serving the K-12 science classroom with innovative hands-on teaching tools.

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## BALDRIGE 101—HOW TO BUILD MORE EXCELLENCE INTO YOUR OPERATIONS

OCTOBER 24 | 1:30–4:30 PM

**JoAnn Sternke, Senior Leader & Coach, Studer Education**

*What is innovation and how do you manage it? Innovation management is a key element of the National Baldrige Performance Excellence Framework. Some might call it a vital element in learning “Balrige 101”.*

*In this session you will learn what innovation is and, most importantly, what it is not. Innovation doesn’t occur in “light bulb moments” where brilliant ideas strike like lightning. Innovation is fostered by a multi-step process designed to solution finding. You will leave this session understanding principals of the Baldrige framework, and how using it will help your organization become more innovative. And don’t we all want that?*

How many people can say they have worked for TWO Baldrige recipient organizations? **Dr. JoAnn Sternke** currently serves as a Senior Leader and Coach at Studer Education, a division of Studer Group. Studer Group is a 2010 Baldrige award recipient. Simply put, JoAnn is enjoying helping organizations “get better at getting better” and loves working with organizations on a performance excellence journey. From 2001 to 2017, JoAnn served as the Superintendent of Schools in the Pewaukee School District, located near Milwaukee, Wisconsin. In 2013, the Pewaukee School District was honored to receive the Malcolm Baldrige National Quality Award. JoAnn was Wisconsin’s 2013 Superintendent of the Year. This year JoAnn was honored to receive the Harry Hertz Leadership Award by the Baldrige Foundation. JoAnn is a Master Examiner with the Baldrige National Quality Program and currently serves on the Baldrige Panel of Judges. She is also active with her state program, the Wisconsin Center for Performance Excellence. JoAnn is thrilled to be here to learn and share with you at the Baldrige Fall Conference!

## USING BALDRIGE CYBER TO MAKE YOUR ORGANIZATION CYBER-RESILIENT

OCTOBER 24 | 1:30–4:30 PM

**Steve Hunt, President, Hunt BI**

*Steve Hunt, strategic advisor on cybersecurity to over 400 organizations, shares his technique for easily and systematically making any organization more resistant to cyber attacks by using Baldrige Cyber and other performance excellence elements. In this workshop, Steve will guide attendees to create their own deployment of Baldrige Cyber for use in their own organizations. Attendees should bring their own PCs for a richer experience.*

**Steve Hunt** is a speaker, investor, advisor, and most of all, a teacher.

He has motivated and inspired leaders around the world by helping over 400 global organizations to optimize success. He guides leadership and operations toward performance excellence.

He is also passionate about mentoring the next generation of security leaders. Steve was inducted into the Cybersecurity industry Hall of Fame, founded the Communities of Excellence, and CSO Magazine presented him with the “Industry Visionary” Compass Award.

Steve has appeared as an analyst on CNBC, Fox News, CNN, and other news programs. His analysis has appeared in the Financial Times, Wall Street Journal, The New York Times, Business Week, and other global publications. Steve earned certifications CPP and CISSP, attended Elizabethtown College and was a graduate fellow at University of Chicago. Steve’s diverse background lends

# 2019 Baldrige Fall Conference Keynotes

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## LEADERSHIP PLENARY

### EFFECTIVE LEADERSHIP DRIVES LOYAL CUSTOMER RELATIONSHIPS—AND DELIVERS RESULTS FOR ALL KEY STAKEHOLDERS

*Five top executives, representing each of the 2018 Baldrige winners, will share how it's done!*

OCTOBER 25 | 8:10–9:45 AM

#### **C. Richard Panico, Founder / President / CEO, Integrated Project Management Company, Inc.**

Rich is the Founder, President, and CEO of IPM. Prior to IPM, he spent 15 years with two divisions of Johnson & Johnson in various operations and engineering management leadership roles. Rich established IPM in 1988 with a focus on creating a values-based company comprised of high-integrity top performers. Today, his focus is primarily assisting in strategy development to address complex client needs, driving IPM's own strategy, and ensuring the preservation of IPM's culture and sustainability toward its 100th anniversary vision. Rich is actively recruited by organizations to present his philosophies on business ethics, organizational culture, strategy realization, entrepreneurship, and project management excellence.

#### **E. Kyle Bennett, FACHE, CPA - President and CEO**

As President and CEO, Kyle has utilized the Baldrige framework to drive change in order to create a mission-focused culture of ownership, transparency, and open communication. His leadership style of being for others led to the adoption of servant leadership and the creation of the Servant Leadership System for all leaders - linked to MHHCC's Core Values. He was instrumental in the inclusion and definition of leadership attributes in order to evaluate this role model leadership behavior. Kyle also

pens a weekly communication newsletter, Friday Facts, to connect the healthcare mission with scripture and to keep the workforce informed.

With a BA in English, a BS in Accounting, and a MBA, along with his quiet and calm leadership style, Kyle inspires others to transform lives through faith-based, compassionate care.

In 2013, Kyle was named Executive VP and COO until 2015 when he was promoted to President and CEO. Kyle holds a CPA and is a Fellow of HFMA and ACHE. Additionally, Kyle is active in community and professional organizations and serves on the board for The Partnership for Excellence.

#### **Lindel Fields, Superintendent and CEO, Tri County**

Lindel Fields, the Superintendent and CEO of Tri County Tech, is fearless in the pursuit of excellence without being reckless. He is methodical with the direction and vision for Tri County and inspires his staff with bold intention. As soon as he stepped into the CEO role, he challenged employees to stretch themselves and Tri County. His first action was to draft Vision 2020, a bold initiative to establish Tri County as a premier education institution and one of the only schools to decline federal funding in the United States.

In fact, as a result of his inclusive and transparent leadership, Tri County Tech is the only public education institution on Fortune's Great Places to Work list, four years in a row. This past November, Tri County crossed a finish line ten years in the making when they won the prestigious award for excellence, the Malcolm Baldrige National Quality Award.

Leaders often ask him what's his secret. How does he motivate a high-performing, grace-filled culture of excellence? His usual reply is, "our secret sauce isn't about doing things, it's about touching hearts. You have to touch their hearts before you can ask for their hands."

### **Dr. Mike Flores Chancellor ACD (Alamo Colleges District)**

Dr. Flores assumed chancellorship of the ACD on October 1, 2018, after 10 years of ACD service distinction most recently as president of PAC (Palo Alto College) - 2012 to 2018. Flores utilized Baldrige criteria to help PAC gain recognition as 2015 winner of the Texas Award for Performance Excellence, 2016 nominee for the Malcolm Baldrige National Quality Award, and top 10 finalist for the 2019 Aspen Prize for Community College Excellence.

Flores has gained national recognition for his efforts to increase student success – as an Achieving the Dream Coach, as a fellow with the American Council on Education and with the Hispanic Association of Colleges & Universities, for postgraduate work at the Harvard University Institute for Educational Management, and for his work with community-based organizations in San Antonio, Houston, and Chicago.

The son of migrant farmworkers, he earned a bachelor of arts degree from the University of Texas at San Antonio, a master of science degree from Illinois State University, and a PhD in educational administration from the University of Texas at Austin.

He lives in San Antonio with his wife Martha, a talented creative director and entrepreneur, and their daughters, Mara Zoe and Mia Ximena.

### **Sue Dunn, RN, BSN, MBA, President / Chief Executive Officer, Donor Alliance**

Working for more than three decades in organ, eye and tissue donation and transplantation, Sue has served as President and CEO of Donor Alliance since 2004. Under her leadership both states have some of the nation's highest donor designation rates, directly translating to more lives saved and healed through transplantation. Currently serving as President of the Board of Directors of the U.S. Organ Procurement Transplant Network, Sue

has served in dozens of leadership positions across the field. Along with her business acumen, Sue has years of commitment to community involvement and has been decorated with a variety of awards including the City and County of Denver's 150 award and the Denver Business Journal's Outstanding Women in Business. She holds a master's in business from Regis University and a bachelor's in nursing from Creighton University.

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### **CLOSING KEYNOTE**

## **THE INFLUENTIAL LEADER**

**OCTOBER 25 | 3:00–4:00 PM**

### **Stevie Ray, Stevie Ray Improv**

It is one thing to have great ideas, but it is another to get your team aligned behind your vision. Influencing others to act in accordance with the team's mission is tricky. Stevie Ray, a corporate speaker and trainer nationwide for over thirty years, will take you through a hands-on, interactive session to give you the skills you need to influence others and gain positive traction.

**Stevie Ray** has been a nationally recognized speaker and trainer for over thirty years, helping Fortune 500 companies and small organizations alike improve communication skills, teamwork, innovative thinking, and leadership. He is the Executive Director of Stevie Ray's Improv Company in Minneapolis, a company that has provided training and entertainment since 1989. He is also a nationally syndicated columnist for the Business Journal Newspapers and is the author of ten books. He lives in Minneapolis with his wife and stepdaughter. He learned his quick-thinking skills trying to win debates with them; it has yet to work.



# 2019 Baldrige Fall Conference Sessions

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## INTEGRATED PERFORMANCE EXCELLENCE: STRATEGY DEVELOPMENT, IMPLEMENTATION, AND ANALYSIS

OCTOBER 25 | 10:00–10:45 AM

**Mike Flores, Chancellor, Alamo Colleges District**

*This session will provide participants an opportunity to learn about the key processes of the ACD integrated performance excellence framework. The framework aligns our approaches to strategic planning, performance improvement and performance review. The harmony of these approaches demonstrates how we drive organizational excellence and assure we are meeting our mission, vision, and values.*

**Dr. Mike Flores** assumed chancellorship of the ACD (Alamo Colleges District) on October 1, 2018, after 10 years of ACD service distinction most recently as president of PAC (Palo Alto College). Flores utilized Baldrige criteria to help PAC gain recognition as 2015 winner of the Texas Award for Performance Excellence, 2016 nominee for the Malcolm Baldrige National Quality Award, and top 10 finalist for the 2019 Aspen Prize for Community College Excellence.

Flores has gained national recognition for his efforts to increase student success—as an Achieving the Dream Coach, as a fellow with the American Council on Education and with the Hispanic Association of Colleges & Universities, for postgraduate work at the Harvard University Institute for Educational Management, and for his work with community-based organizations in San Antonio, Houston, and Chicago.

The son of migrant farmworkers, he earned a bachelor of arts degree from the University of Texas at San Antonio, a master of science degree from Illinois State University, and a PhD in educational administration from the University of Texas at Austin.

## IMPROVING QUALITY OF LIFE IN AMERICA— ONE COMMUNITY AT A TIME

OCTOBER 25 | 10:00–10:45 AM

**Stephanie Norling, Director, Communities of Excellence**

*In 2010, a small group of leaders developed the hypothesis that a systems framework—the Baldrige Framework—could be adapted to transform the health and wellbeing of residents in communities. In this session, Communities of Excellence 2026 staff, faculty and community leaders will discuss their journeys and share their experiences adopting the Baldrige-based Communities of Excellence framework.*

**Stephanie Norling** has been Director of Communities of Excellence 2026 since 2014. In her roles as Director, Stephanie participated in the development of the Communities of Excellence Criteria, adapted from the Baldrige Criteria for Performance Excellence and launched a National Learning Collaborative of communities to support their use of the framework. She also serves as a Learning Collaborative faculty and mentors several of the 14 communities participating. After graduating with a BA in Anthropology from Tufts University in 1999, Stephanie joined the Institute for Healthcare Improvement in Boston as a Project Coordinator. After moving to San Diego in 2001, she worked for 12 years at the San Diego Zoo and Safari Park, first in the Operations Department and later taking a lead role in the Elephant Department at the San Diego Zoo Safari Park. In 2012 Stephanie graduated from the University of San Diego with a Master's in Business Administration and a Certificate in Nonprofit Management.

Stephanie is an active member of her community, with volunteering history at Father Joe's Villages, the House of Denmark, the San Diego Zoo, and many others. Stephanie also participated as a National Baldrige Examiner for three years.



## HARMONY IN COMMUNICATION + REWARD/ RECOGNITION + RETENTION = EMPLOYEE ENGAGEMENT

OCTOBER 25 | 10:00–10:45 AM

**Denise Kaetzel, Director of Quality Services, MHHCC**

**Ann Steffe, Director of Critical Care Services, MHHCC**

*Memorial Hospital and Health Care Center's Commitment to Mission and Culture are critical. Through our Workforce Cycle of Engagement, we support our workforce in their personal and our organizational journey to excellence. Rounding, SMART Goals and Tri-annual Coaching are integral to systematic performance management. Use of the Baldrige framework provided support as we developed a succession planning process. Intentional, transparent and systematic communication is hard-wired and reward and recognition processes have been a key to moving the impossible to possible!*

Leading with compassion and respect for all, **Denise Kaetzel** encourages and expects team members to commit to quality and excellence. She is passionate about personal and professional growth through continuous learning, excellent patient and organizational outcomes, and performance improvement. Denise is committed to the mission, vision, and core values of Memorial Hospital and is grateful to serve in a faith-based organization. Denise has served in several leadership positions over the last 25 years and has been in her current role since 2007. She earned a Master of Science in Nursing Leadership in 2008 and a Masters in Health Administration in 2017.

Starting at Memorial Hospital in 1994 as a staff nurse, **Ann Steffe** has dedicated her career to Critical Care. Memorial Hospital offered her the experiences and education necessary to grow and thrive as a health care professional. She currently serves as the Director of Critical Care Services, overseeing four departments. She inspires others with her attention to detail and forward thinking—

promoting innovation in the workplace. It is her passion to create effective standardized processes and successful implementation plans for her teams. She leads by example, drawing inspiration from her faith and the hospital's mission to serve her coworkers, patients, and their families.

## DESIGNING WORK SYSTEMS TO ACHIEVE MISSION IMPACT: HOW WE SAVE LIVES

OCTOBER 25 | 10:00–10:45 AM

**Grace Harcek, Director of Performance Excellence,  
Donor Alliance**

*Donor Alliance's mission of saving lives through organ and tissue donation and transplantation is the foundation of the organization's culture. The mission keeps the organization focused on managing performance through a systems approach involving alignment and integration of plans, processes, measurements, as well as relationships with many individuals and organizations. Hear how this non-profit organization used the Baldrige framework as a roadmap for designing and improving its key work systems and work processes to save lives.*

Responsible for overseeing the organization's performance excellence program, Grace led the journey to the Rocky Mountain Performance Excellence Peak Award in 2015 and the Malcolm Baldrige National Award in 2018. Throughout this pursuit she drove staff engagement with the Baldrige Excellence Framework through an integrated planning process. With twenty-five years of experience in health care, including sixteen in quality, Grace has served as a Malcolm Baldrige Examiner and held numerous leadership positions in the field of organ and tissue donation, including Chair of the Association of Organ Procurement Organizations Quality Improvement Council. A registered nurse, Grace holds a BSN from Regis University and a BA from Randolph-Macon College.

# 2019 Baldrige Fall Conference Sessions

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## THE SURPRISING SECRETS OF MOST CYBER-RESILIENT COMPANIES

OCTOBER 25 | 11:00–11:45 AM

**Steve Hunt, President, Hunt BI**

*Steve Hunt, executive coach and strategic executive advisor to over 400 organizations, has identified the keys to creating a resilient security operation with high employee retention, resistance to cyber-attacks, and executive buy-in. It turns out that when an organization does security right, it results in top-line value and bottom line cost reduction. In this session you will hear stories of driven leaders who applied the secrets. You'll learn how to assess quickly your own "security maturity" and show quick improvement to boards of directors. Everyone will walk out inspired and confident of their own cyber resilience.*

**Steve Hunt** is a speaker, investor, advisor, and most of all, a teacher. He has motivated and inspired leaders around the world by helping over 400 global organizations to optimize success. He guides leadership and operations toward performance excellence. He is also passionate about mentoring the next generation of security leaders. Steve was inducted into the Cybersecurity industry Hall of Fame, founded the Communities of Excellence, and CSO Magazine presented him with the "Industry Visionary" Compass Award.

Steve has appeared as an analyst on CNBC, Fox News, CNN, and other news programs. His analysis has appeared in the Financial Times, Wall Street Journal, The New York Times, Business Week, and other global publications. Steve earned certifications CPP and CISSP, attended Elizabethtown College and was a graduate fellow at University of Chicago. Steve's diverse background lends a fresh perspective on business and society.

## INNOVATION THROUGH STRATEGIC PLANNING

OCTOBER 25 | 11:00–11:45 AM

**Meridith Wentz, PhD, UW Stout**

**Glendali Rodriguez PhD, UW Stout**

**Andrei Ghenciu, PhD, UW Stout**

*This presentation will give participants an opportunity to experience some of the signature events associated with UW-Stout's strategic planning process. Our process provides an opportunity for everyone to have a voice, has systematic processes for turning that feedback into action and communicating those actions to the campus, and is aligned with performance indicators. In this interactive session, we will demonstrate how this works in several annual events: 1) an engagement session where the workforce provides input into major initiatives, 2) a process used by our Strategic Planning Group to turn that feedback into actions, and 3) a You Said...We Did event where we close the loop and share actions taken and recognize the people who made them possible.*

**Meridith Wentz** is an Assistant Chancellor in the department of Planning, Assessment, Research and Quality at the University of Wisconsin-Stout. She is responsible for leading institutional research and assessment, strategic planning, quality, performance measurement, regional accreditation, and policy efforts. She is a master examiner with the Malcolm Baldrige National Quality Award, having led three national review teams, and a peer reviewer for the Higher Learning Commission. Meridith has extensive experience presenting UW-Stout's approaches to strategic planning and using data to inform decision-making at numerous venues. She led UW-Stout's efforts as a founding institution for the Aspirational Statements for institutional research.

## VALUE—THE GOLDEN NUGGET OF INNOVATION

OCTOBER 25 | 11:00–11:45 AM

**Jane Keathley, Principal, Keathley and Company**

*The critical element of successful innovation is the creation of value. Without it, there is no innovation. Just as the value of music varies with the listener and may be based on artistry, social enjoyment, or economic potential, the value of innovation varies across interested parties, such as developers, users, or business leaders. Being able to measure value is therefore important to fully understand the potential for innovation and to manage the innovation process. How does one go about measuring something as subjective as ‘value’? This session will explore value measurement and assessment concepts, models, and pitfalls.*

**Jane Keathley, MS, PMP** helps organizations at the intersection of quality and innovation management. She was a founding member of the ASQ Innovation Division and currently sits on the ASQ Board of Directors. Her career spans medical device software, clinical research, biopharma manufacturing, and diagnostic microbiology. Ms. Keathley recently authored the paper *Knowing When You’ve Added Value*, and she co-authored *The Executive Guide to Innovation-Turning Good Ideas into Great Results*. She was an Examiner for the Baldrige for Performance Excellence Program and for the Virginia SPQA program, where she also served as Director and as Training Chair. Jane holds degrees Medical Microbiology (MS) and Medical Technology (BS).

## ACCELERATE YOUR BALDRIGE JOURNEY USING PROJECT MANAGEMENT BEST PRACTICES

OCTOBER 25 | 11:00–11:45 AM

**Dan Stark, Knowledge Management, Integrated PM Co, Inc.**

*Mark Twain once said “The secret of getting ahead is getting started. The secret of getting started is breaking your complex overwhelming tasks into small manageable tasks, and starting on the first one.” Embarking on the quest for Baldrige can be a daunting proposition, but the key to realizing your vision is proper planning and execution. In this Accelerate Your Baldrige Journey presentation, you will learn how to incorporate project management best practices to navigate the occasionally turbulent waters of the Baldrige journey and help ensure its ultimate success.*

**Dan Stark** has been with IPM since 2010, imparting valuable tools, techniques, and soft skills to internal resources and clients alike. Prior to joining IPM, Dan worked as a writer in both the newspaper (Oakland Tribune) and marketing industries.

Born in Bristol, Illinois—population 500 people and 1 stoplight—Dan grew up in the greater Chicago area as a rabid sports fan, much to the chagrin of his parents. He is a proud graduate of the University of California, Berkeley and he and his wife Rachel now live in Oak Park, Illinois, with their fun-loving children Lucy and Jack.

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## ACCELERATING THE PERFORMANCE EXCELLENCE JOURNEY IN THE AGE OF CONSUMERISM

OCTOBER 25 | 12:45–1:30 PM

**Ben Sawyer, CEO, SOAR Vision Group**

*In this interactive session, you will hear how SOAR Vision Group is expanding the awareness of our “National Treasure”, the Baldrige Framework. In the internet age of consumerism, improved message visualization and operational structure are necessary to accommodate rapid cycle transformation. To that end, the Baldrige Foundation has worked to identify key channel partners whose messaging and approach effectively aligns with the Baldrige to help address these new market requirements. SOAR Vision Group is one such partner. Together the Baldrige Foundation and SOAR have created a Leader Dialogue website, leaderdialogue.com. An accompanying Leader Dialogue radio program effectively engages organizations of all types, delivering key Baldrige performance excellence principles and insights, thereby expanding the market reach and attraction of the Baldrige. The results to date are impressive, serving as a collaborative model for the future. Participants will learn:*

- Age of consumerism performance demands
- What it takes to win in this new environment
- Recalibrated maturity journey requirements

**Ben Sawyer** launched the SOAR Vision Group to help align people with purpose to achieve exceptional results. His expansive business career has included healthcare executive leadership positions, and the successful launch and commercialization of several business enterprises. A Lean black belt, Ben has significant guided strategy deployment experience, having worked with many clients to achieve dramatic, sustainable operational performance improvement outcomes. Ben is a member of the American College of Healthcare Executives (ACHE).

## DESIGN + MANAGE + IMPROVE = TUNED UP OPERATIONAL EFFECTIVENESS

OCTOBER 25 | 12:45–1:30 PM

**Denise Kaetzel, Director of Quality Services, MHHCC**  
**Ann Steffe, Director of Critical Care Services, MHHCC**

*Memorial Hospital and Health Care Center utilized a process selection matrix to identify and determine which work processes were most important (key). For process management, we adopted a systematic 90 Day Team methodology, which has allowed us to not only accomplish the work, but to infuse a culture of ownership and interdisciplinary collaboration. Standard tools and templates are utilized for all 90 Day Teams. We both design and improve processes through 90 Day Teams and we manage processes through an Operational Rhythm and Quarterly Business review. Intentional definition of a process framework, identification of key processes, the 90 Day methodology and Weekly Report-out have been key in moving the impossible to possible!*

Leading with compassion and respect for all, **Denise Kaetzel** encourages and expects team members to commit to quality and excellence. Denise has served in several leadership positions over the last 25 years and has been in her current role since 2007. She earned a Master of Science in Nursing Leadership in 2008 and a Masters in Health Administration in 2017.

Starting at Memorial Hospital in 1994 as a staff nurse, **Ann Steffe** has dedicated her career to Critical Care. She currently serves as the Director of Critical Care Services, overseeing four departments. She inspires others with her attention to detail and forward thinking—promoting innovation in the workplace. It is her passion to create effective standardized processes and successful implementation plans for her teams. She leads by example, drawing inspiration from her faith and the hospital's mission to serve her coworkers, patients, and their families.



## THE TRI COUNTY WAY—WORKFORCE

OCTOBER 25 | 12:45–1:30 PM

**Dr. Tammie Strobel, Deputy Superintendent and Chief Quality Officer, Tri County Tech**

**Dr. Jason Godfrey, Director of Tri County University, Tri County Tech**

*It's "who" we are. It's "what" we do. And "how" we do it.*

*Dr. Tammie Strobel and Dr. Jason Godfrey will engage you in the specifics of the "Tri County Way", their Organizational Alignment, and the Performance Management System they utilize to produce world class results. You will also experience their rich culture of employee engagement and how their dreams became a reality when Tri County Tech was simultaneously recognized by Fortune Magazine as a top place to work and a 2018 Malcolm Baldrige National Quality Award recipient*

**Dr. Tammie Strobel** helped position Tri County as one of the top places to work in the United States and has been the organization's quality journey leader. Being part of the Tri County family for eighteen years, she began as the marketing instructor, led to the director of instruction, then assistant superintendent. She was promoted to chief quality officer to lead Tri County's continuous improvement efforts. As a board chairman for the Oklahoma Quality Foundation, National Baldrige Senior Examiner, American Society for Quality, and Lean Six Sigma Green Belt, to say Dr. Strobel is passionate about quality and excellence is an understatement. She received her doctorate in educational administration, curriculum, and supervision from the University of Oklahoma.

**Dr. Jason Godfrey** has worked to improve the selection, collection, reporting, and analysis of Tri County Tech's data over the past three years. With Wildcats sports in the background, Dr. Godfrey leads the charge into data-driven decision-making, helping build one of our most used processes to date. Before revamping the inner works

of the organization, Dr. Godfrey was the instructor of the Pre-Engineering Program. He holds a Bachelor's Degree in Secondary Education from Kansas State University, a Master's in Educational Administration, and a Doctorate from the University of Oklahoma. Godfrey holds positions in the American Society of Quality, Association for Talent Development, and is a National Baldrige Examiner.

## MEASURING WHAT MATTERS—A SCORECARD SYSTEM

OCTOBER 25 | 12:45–1:30 PM

**JoAnn Sternke, Senior Leader & Coach, Studer Education**

*W. Edwards Deming said, "In God we trust, all others bring data." Data—it's a key driver in our organizations. In this session you will learn how to collect key data, principles of data display, and the key functions of a performance management system. You will leave this session seeing sample scorecards as well as a process you can use to monitor progress using a scorecard review process.*

How many people can say they have worked for TWO Baldrige recipient organizations? **Dr. JoAnn Sternke** currently serves as a Senior Leader and Coach at Studer Education, a division of Studer Group (a 2010 Baldrige award recipient). JoAnn enjoys helping organizations "get better at getting better" and working with organizations on a performance excellence journey. From 2001–2017, JoAnn served as the Superintendent of Schools in the Pewaukee School District, near Milwaukee, Wisconsin. In 2013, the Pewaukee School District was honored to receive the Malcolm Baldrige National Quality Award. JoAnn was Wisconsin's 2013 Superintendent of the Year. This year JoAnn was honored to receive the Harry Hertz Leadership Award by the Baldrige Foundation. JoAnn is a Master Examiner with the Baldrige National Quality Program and currently serves on the Baldrige Panel of Judges. She is also active with her state program, the Wisconsin Center for Performance Excellence.

# 2019 Baldrige Fall Conference Sessions

October 25, 2019 | Nashville, TN

## LIFE AFTER BALDRIGE: UW-STOUT 15+ YEARS LATER

OCTOBER 25 | 2:00–2:45 PM

**Meridith Wentz, PhD, UW Stout**

**Glendali Rodriguez PhD, UW Stout**

**Andrei Ghenciu, PhD, UW Stout**

*UW-Stout was a recipient of the Malcolm Baldrige National Quality award in 2001. This session will cover some of the most significant ways that we have integrated the Baldrige Framework into the institutional culture. The session will feature a national benchmarking initiative for 4-year institutions of higher education, our efforts to stay connected with the Baldrige community, our focus on valuing people, and our approaches to strategy and performance measurement.*

**Meridith Wentz** is a master examiner with the Malcolm Baldrige National Quality Award, having led three national review teams, and a peer reviewer for the Higher Learning Commission. Meridith has extensive experience presenting UW-Stout's approaches to strategic planning and using data to inform decision-making at numerous venues.

**Glendali Rodriguez** is a professor and interim Vice Chancellor for Academic Affairs for the University of Wisconsin-Stout. She joined UW-Stout in 2005 and taught courses in the area of Construction Management, Interior Design, and Technology Education, prior to becoming a full-time administrator in 2014. As associate provost, she worked closely to foster curriculum quality in coordination with faculty governance groups, and to provide professional development and training opportunities for program directors and department chairs. As a faculty member, she received teaching awards, and areas of research included service-learning, Universal Design for Learning, and Building Information Modeling. Glendali joined the Higher Learning Commission (HLC) Peer Corps program as a peer reviewer in 2016 and was trained as a Wisconsin Forward Examiner in 2018. She received a Master of Architecture degree from the

Georgia Institute of Technology and a Bachelor of Arts from Yale University.

**Andrei Ghenciu**, PhD, is an Associate Professor of Mathematics in the Department of Mathematics, Statistics and Computer Science at University of Wisconsin-Stout. Andrei received a Master of Arts in 2000 from the National School of Political and Administrative Studies, in Bucharest, Romania and his PhD from the University of North Texas in 2006. Since 2006 he has held faculty positions for University of Alaska Fairbanks, East Central University, in Ada, Oklahoma and University of Wisconsin Stout. He was a long-term Visiting Faculty for Hochschule Darmstadt University of Applied Sciences, in Darmstadt, Germany.

## MOVING STRATEGY FROM A KEY THEME OPPORTUNITY FOR IMPROVEMENT TO A KEY THEME STRENGTH

OCTOBER 25 | 2:00–2:45 PM

**Jennifer Prinz, Chief Operating Officer, Donor Alliance**

*Donor Alliance invites you on organization's journey of moving strategic development from an opportunity for improvement to a key theme strength. During this presentation, Donor Alliance will share experience, tools, and learning from their performance excellence journey.*

Since 2008 **Jennifer Prinz** has served as COO of Donor Alliance, the nonprofit that facilitates organ and tissue donation in Colorado and most of Wyoming. Jennifer has worked in the donation and transplant field for more than two decades and has been personally touched by the lifesaving possibilities of transplantation. Jennifer oversees more than 80 percent of the organization including the clinical, quality, hospital development, performance excellence and HR departments. Under her leadership, Donor Alliance has achieved outstanding clinical, operational and financial outcomes, and Colorado and Wyoming boast some of the highest donor designation rates in the country.

## LESS IS MORE, STICK TO THE CORE-STRATEGY

OCTOBER 25 | 2:00–2:45 PM

**Dr. Tammie Strobel, Deputy Superintendent and Chief Quality Officer, Tri County Tech**

**Tonya Foreman, Senior Director of Business Development, Tri County Tech**

*Thirteen years ago Tri County Tech began progress towards a bold Strategic Plan that would place them among the best education institutions in the nation. Dr. Tammie Strobel and Tonya Foreman will share with you ingredients in the secrets to their success: Strategy Development System; Long and Short Term Strategic Planning Process; Benchmarking and Innovation to our Strategic Planning; Workgroup Action Plans and Individual Action Plans.*

*We trust that this session will exponentially assist you and your organization on its performance improvement journey to experience world class results.*

**Dr. Tammie Strobel** helped position Tri County as one of the top places to work in the US and has been the organization's quality journey leader. Dr. Strobel is also a board chairman for the Oklahoma Quality Foundation, National Baldrige Senior Examiner, American Society for Quality, and Lean Six Sigma Green Belt. She received her doctorate in educational administration, curriculum, and supervision from the University of Oklahoma.

**Tonya Foreman** is known for having big hair and a bigger heart. Being the Senior Director of Business Development, she has been an instrumental part of Tri County Tech's ability to give back to the communities it serves. In her 20 years dedicated to Tri County, Foreman has been a crucial component in ensuring no student is denied an education due to a lack of funds as well as helping propel businesses to greater heights. Foreman currently leads the Nowata Business Development Facility project opening up new opportunities for one of the poorest counties in Oklahoma. Being on the board of both Boys & Girls Club and Agape Mission, her

compassion cannot be disputed. She earned her Bachelors in communications with a Masters in marketing.

## ARE YOUR KPIS INDICATIVE OF YOUR ACTUAL PERFORMANCE? AND OTHER BURNING ISSUES FROM CATEGORY 4

OCTOBER 25 | 2:00–2:45 PM

**Dan Stark, Knowledge and Process Management , Integrated PM Co, Inc.,**

**Tim Czech, CFO, Integrated PM Co, Inc.,**

*Jimmy Dean gave the gifts of country music, delicious breakfast sausage, and the profound quote "I can't change the direction of the wind, but I can adjust my sails to always reach my destination". Do you have the right metrics in place to provide guidance and direction in order to properly and quickly adjust your business sails? Join IPM to hear how our Baldrige journey provided greater insight into our measures and metrics, allowing us to adjust directions to meet and exceed our performance goals.*

**Dan Stark** has been with IPM since 2010, imparting valuable tools, techniques, and soft skills to internal resources and clients alike. Prior to joining IPM, Dan worked as a writer in both the newspaper and marketing industries.

**Tim Czech** began his tenure with IPM more than 20 years ago as an accounting intern. He has handled every possible financial situation for the company and was promoted to his current position of Chief Financial Officer in 2015. His responsibilities now include Communication & Creative Services, Human Resources, Information Technology, and Legal. Notable contributions include the development of IPM's key performance index and financial systems, IT security measures, and strategic direction for HR.

Tim is a CPA and holds a BA in accounting from the University of Illinois. Since 2014, he has represented IPM on the Board of the Better Business Bureau of Chicago and Northern Illinois.





# *Tune into* **excellence**

