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The Baldrige framework empowers your organization to reach its goals, improve results, and become more competitive. The framework consists of the Criteria, the core values and concepts, and the scoring guidelines.

## **v How to Use the Baldrige Excellence Framework**

You can use this booklet as a reference, for self-assessment, or as the basis of an external assessment.

## **1 Education Criteria for Performance Excellence Overview and Structure**

The Criteria include the Organizational Profile and seven integrated, interconnected categories. The categories are subdivided into items and areas to address.

## **3 Education Criteria for Performance Excellence Items and Point Values**

## **4 Education Criteria for Performance Excellence**

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7 1 Leadership

10 2 Strategy

13 3 Customers

16 4 Measurement, Analysis, and Knowledge Management

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## **30 Scoring System**

Performance against Criteria items is scored on two evaluation dimensions: process and results.

34 Process Scoring Guidelines

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## **36 How to Respond to the Education Criteria**

This section explains how to respond most effectively to the Education Criteria item requirements.

## **39 Core Values and Concepts**

These embedded beliefs and behaviors form the foundation of the Criteria.

## **44 Changes from the 2013–2014 Criteria**

## **47 Glossary of Key Terms**

The glossary includes definitions of terms presented in SMALL CAPS in the Criteria and scoring guidelines.

## **55 Index of Key Terms**

## **58 List of Contributors**

## **On the Web**

### **Category and Item Commentary** ([http://www.nist.gov/baldrige/publications/education\\_criteria.cfm](http://www.nist.gov/baldrige/publications/education_criteria.cfm))

This commentary on the Criteria provides additional examples and guidance.

**3.1b.** You might use any or all of the following to determine student and other customer satisfaction and dissatisfaction: surveys, formal and informal feedback, dropout and absenteeism rates, student conflict data, complaints, and student referral rates. You might gather information on the web, through personal contact or a third party, or by mail. Determining student and other customer dissatisfaction should be seen as more than reviewing low customer satisfaction scores. Dissatisfaction should be independently determined to identify root causes and enable a systematic remedy to avoid future dissatisfaction.

**3.1b(2).** Information you obtain on relative student and other customer satisfaction may include comparisons

with competitors, comparisons with other organizations that deliver similar educational programs or services in a noncompetitive market, or comparisons obtained through education industry or other organizations. Information obtained on relative student and other customer satisfaction may also include information on why students and other customers choose your competitors over you.

For additional guidance on this item, see the Category and Item Commentary ([http://www.nist.gov/baldrige/publications/education\\_criteria.cfm](http://www.nist.gov/baldrige/publications/education_criteria.cfm)).

## 3.2 Customer Engagement: How do you engage students and other customers by serving their needs and building relationships? (45 pts.)

In your response, include answers to the following questions:

### a. Program and Service Offerings and Student and Other CUSTOMER Support

**(1) Program and Service Offerings** HOW do you determine EDUCATIONAL PROGRAM AND SERVICE offerings?

HOW do you

- determine student, other CUSTOMER, and market needs and requirements for EDUCATIONAL PROGRAM AND SERVICE offerings;
- identify and adapt program and service offerings to meet the requirements and exceed the expectations of your student and other CUSTOMER groups and market SEGMENTS; and
- identify and adapt program and service offerings to enter new markets, to attract new students and other CUSTOMERS, and to create opportunities to expand relationships with current students and other CUSTOMERS, as appropriate?

**(2) Student and Other CUSTOMER Support** HOW do you enable students and other CUSTOMERS to seek information and support? HOW do you enable them to obtain EDUCATIONAL PROGRAMS AND SERVICES from you? What are your KEY means of student and other CUSTOMER support, including your KEY communication mechanisms? HOW do they vary for different student and other CUSTOMER groups or market SEGMENTS? HOW do you

- determine your students' and other CUSTOMERS' KEY support requirements and
- DEPLOY these requirements to all people and PROCESSES involved in student and other CUSTOMER support?

**(3) Student and Other CUSTOMER Segmentation** HOW do you determine your CUSTOMER groups and market SEGMENTS? HOW do you

- use information on students, other CUSTOMERS, markets, and EDUCATIONAL PROGRAM AND SERVICE offerings to identify current and anticipate future student and other CUSTOMER groups and market SEGMENTS;
- consider competitors' students and other CUSTOMERS as well as other potential students, other CUSTOMERS, and markets in this segmentation; and
- determine which student and other CUSTOMER groups and market SEGMENTS to emphasize and pursue for growth?

*(Continued on the next page)*

## b. Student and Other CUSTOMER Relationships

### (1) Relationship Management HOW do you build and manage relationships with students and other CUSTOMERS?

HOW do you market, build, and manage relationships with students and other CUSTOMERS to

- acquire students and other CUSTOMERS and build market share;
- manage and enhance your image or brand;
- retain students and other CUSTOMERS, meet their requirements, and exceed their expectations in each stage of their relationship with you; and
- increase their ENGAGEMENT with you?

HOW do you leverage social media to manage and enhance your image or brand and to enhance student and other CUSTOMER ENGAGEMENT and students' and other CUSTOMERS' relationships with your organization, as appropriate?

### (2) Complaint Management HOW do you manage students' and other CUSTOMERS' complaints? HOW do you resolve complaints promptly and EFFECTIVELY? HOW does your management of these complaints enable you to recover your students' and other CUSTOMERS' confidence, enhance their satisfaction and ENGAGEMENT, and avoid similar complaints in the future?

*Terms in SMALL CAPS are defined in the Glossary of Key Terms (pages 47–54).*

## Notes

**3.2.** Customer engagement refers to your students' and other customers' investment in or commitment to your organization and your educational program and service offerings. Characteristics of engaged students and other customers include retention, loyalty to your organization or brand, willingness to make an effort to obtain educational programs and services from you, and willingness to actively advocate for and recommend your organization and your program and service offerings.

**3.2a.** Educational program and service offerings are the activities you offer in the market to engage students in learning or contribute to scientific or scholarly investigation. In identifying educational program and service offerings, you should consider all their important characteristics and their performance in each stage of students' and other customers' relationship with you. The focus should be on features that affect students' and other customers' preference for and loyalty to you and your organization—for example, features that differentiate your programs and services from those of competing or other organizations. Those features might include curricular focus, student placement following completion of the educational goal or training objective, workforce composition, extracurricular activities, or tuition and associated costs. Key program and service features might also take into account how transactions occur and

factors such as the privacy and security of student and other customer data. Your results on performance relative to key educational program and service features should be reported in item 7.1, and those for students' and other customers' perceptions and actions (outcomes) should be reported in item 7.2.

**3.2a(2).** The goal of student and other customer support is to make your organization easy to receive educational programs and services from and responsive to your students' and other customers' expectations.

**3.2b.** Building relationships with students and other customers might include developing partnerships or alliances with them.

**3.2b(1).** Image or brand management is generally associated with marketing to improve the perceived value of your educational programs and services or brand. Successful image or brand management builds loyalty and positive associations on the part of students and other customers, and it protects your image or brand and intellectual property.

For additional guidance on this item, see the Category and Item Commentary ([http://www.nist.gov/baldrige/publications/education\\_criteria.cfm](http://www.nist.gov/baldrige/publications/education_criteria.cfm)).