**Minutes**

**Meeting of the Judges Panel of the**

**Malcolm Baldrige National Quality Award**

**National Institute of Standards and Technology**

**Tuesday, May 7, 2024 ● 10:00 AM–2:30 PM**

## Attendees

Judges: Cary Hill, Keith Everett, Lynda Johnson, Sophia McIntyre, Brian Miller, Jennifer Niswonger, Rebecca Ruhl, Peter Scheuer, Allyson Young

NIST: Jamie Ambrosi, Dawn Bailey, Rebecca Bayless, Robyn Decker, Jacqueline DesChamps, Robert Fangmeyer, Barbara Fischer, Harry Hertz, Elif Karakas, Darren Lowe, Christine Schaefer, Kelly Welsh

Meeting start: 10:11

### **WELCOME AND MEETING OVERVIEW** (Robert Fangmeyer, Cary Hill)

Cary and Bob welcomed the judges who introduced themselves, along with staff members present.

# REVIEW OF BALDRIGE REMAGINED (Robert Fangmeyer)

Bob reviewed the Baldrige Performance Excellence Program (BPEP) purpose and mission to improve the performance and long-term success of businesses and other organizations by

* Recognizing role models with the Baldrige Award, and
* Fostering the adoption of proven practices

This is done through the Quest for Excellence® conference, the Baldrige Award itself, other products and services, and the BPEP approach to working with partners across the Baldrige Enterprise.

“Baldrige Reimagined” began with an external review in 2022 following the 2021 award process. (At the end of 2021, the Baldrige judges and overseers had also formed a working group to look at barriers to participation in the Baldrige Award.) A small consultancy, hired through a government process, took six months to do a deep dive into BPEP. The consultancy offered 26 recommendations across four big buckets: return to relevancy, transform the award, simplify and enhance accessibility, and strengthen partnerships.

## Transform the Baldrige Award

In implementing feedbacking from the consultancy, Bob said it became clear that the Baldrige Award needed a greater focus on helping organizations be resilient for the long term—not just responding to disruptions but to be ready and able to thrive. The Baldrige Award was refocused on resilience and long-term success as an emphasis, a layer on top of excellence. The award process was focused on those elements that allowed the program to recognize role models, which has allowed BPEP to lower some barriers.

THE 2024 BALDRIGE AWARD PROCESS **(Robert Fangmeyer)**

## Key Milestones

The Baldrige examiners have now begun evaluating award applicants. A brand new process for Independent Analysis and Consensus Review will take six weeks, with examiners’ work complete by June 4. Judges will meet on June 20, where they will utilize blinded, summary data from the examiners’ review. Judges will not know who the organizations are until they decide which organizations will move to site visit. Judges will also not see supporting evidence at the June meeting, as it might give away the identity of the organization.

(Examiners) Application Evaluation (April 23 to June 4)

* Independent Analysis
* Team Consensus
* (Judges) Site Visit Determination (Judges – June 20)
  + Blinded summary data from Consensus Review

(Examiners) Site Visit Review (June 21 to Aug 9)

* Applicant data call (due 7/10)
* Planning and preparation (until 7/21)
* Virtual and in-person engagement (7/22 – 8/1)
* Post site visit activities (until 8/9)
* (Judges) Award Recommendations (Judges – Sept 9 to 13)
  + Review all available data and information in advance.

## New Award Criteria

A tailored set, the [2024 Baldrige Award Criteria](https://www.nist.gov/baldrige/baldrige-award/award-criteria) are being used to determine role models of resilience and long-term success. Everything in the criteria can be found in the Baldrige Excellence Framework. BPEP also did significant research into organizational resilience, noting a lot of alignment with the Baldrige framework. The Organizational Profile asks context-setting information and is not evaluated. All other sections include questions about key processes (for context setting) and results achieved.

## Application Evaluation

* Simplified rubric is used to evaluate results. The rubric has been compressed from the prior scoring approach to tease out role-model status. BPEP is not expecting that an organization will score high on every rating; no Baldrige Award recipient has ever been perfect: “lower barriers, not lower the bar.”
* Examiners will do their own Individual Analysis using standard worksheets on information provided by the applicant.
* Examiners will then conduct consensus on ratings, evidence, and rationale.

Application evaluation samples were shared.

In summary, the role of the judges is not to be examiners but to look at the examiners’ work and make decisions (1) which organizations to receive a site visit and (2) which organizations to recommend for an award.

\*JUNE JUDGES MEETING\* **(Robert Fangmeyer)**

## Purpose

1. Determine which applicants are worthy of receiving a site visit.
2. Determine actual or perceived conflicts with those that advance.
3. Begin preparation for September meeting.

## What Will Judges Use at the June Meeting?

Judges will have the following information available for site visit determination. They will need to understand what criteria questions asked and what the rankings on the rubric mean.

* Award Criteria questions
* Ratings for each criteria section
* Ratings for each criteria question
* Ratings for each evaluation factor for each question (only as needed)
* Limited contextual information about the applicant (must prevent disclosure of identity of applicants). BPEP will provide a list of questions that Judges may ask (e.g., is the organization small or large, for-profit or nonprofit).

## How Decisions Will Be Made

1. Judges individually review rating information for each applicant, noting which applicants they think should advance.
2. Chair facilitates discussion and voting for which applicants advance.

After judges determine which organizations should receive a site visit, BPEP will go through a process to identify real or perceived judges’ conflicts with the organizations.

The judges worked through a mock evaluation process using data for a fictitious applicant.

Break: 12:35 pm

Return: 1:15 pm

SITE VISIT PROCESS/SEPTEMBER JUDGES MEETING **(Robert Fangmeyer)**

## Site Visit Objectives

At a site visit, examiners will try to verify key results, assess processes/systems (leaning into concept that results are indicators of the maturity of processes), and explore role-model characteristics.

Examiners will

* Request and review additional data and information prior to, and as needed, during the site visit around those key processes.
* Engage in dialogue with applicant leadership and others as appropriate.
* Explore potential podium issues that come up in background check/Conduct Highest-Ranking Official (HRO) interview.
* Ensure adequate information for Judges.

What’s different from the prior process?

* Hybrid approach: The site visit will be largely virtual other than a few examiners going to site for a few days.
* Less emphasis on examining and verifying role-model process maturity
* Simplified evaluation rubric
* Standardized question set categorized as “deep-dive” (some key processes for applicant to respond to in advance) and “validation” questions (other processes that examiners need to know are happening but may not need to understand deeply)
* Need to explore and document potential special recognition (examiners will look and explore potential areas for special recognition)

## Rubric

Similar to results rubric, the process evaluation rubric allows for low, medium, and high ratings. The rubric is similar to the approach-deployment-learning-integration scoring dimension used in the older Baldrige process, but has been broken down more. Glossary terms may be important in ensuring applicants understand words in the rubric.

## Content of the September Meeting

* Conflicted judges will not receive any information about applicants for which they have a conflict.
* Judges independently review worksheets from examiners.
* Judges will be assigned as leads and backups for each applicant.
* The Lead judge will have a phone call with the team leader to prepare him/her for the judging meeting.
* Non-conflicted judges provide insights to lead judge for each applicant.
* Lead judge prepares summary and recommendations to present.
* Traditionally, during the meeting, the judges will develop questions to ask the site visit team leader to clarify insights.
* Judges will then discuss and vote on whether the applicant should be recommended for the award.

## Remaining 2024 Meeting Dates

* June 20 (to decide organizations to receive a site visit), Virtual
* September 9-13 (to decide organizations to recommend to the NIST Director, Secretary of Commerce), Virtual

Adjourn: 2:30 pm