



Contents

ii About the Baldrige Excellence Framework

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 Education Criteria include the Organizational Profile and seven interconnected categories.

3 Education Criteria for Performance Excellence Items and Point Values

4 Education Criteria for Performance Excellence

4 Organizational Profile

7 1 Leadership

10 2 Strategy

13 3 Customers

16 4 Measurement, Analysis, and Knowledge Management

19 5 Workforce

22 6 Operations

25 7 Results

29 Scoring System

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

32 Process Scoring Guidelines

33 Results Scoring Guidelines

35 How to Respond to the Education Criteria

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

38 Core Values and Concepts

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

44 Changes from the 2019–2020 Baldrige Excellence Framework

46 Glossary of Key Terms

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

55 Index of Key Terms

58 List of Contributors

On the Web

Education Criteria Commentary (<https://www.nist.gov/baldrige/baldrige-criteria-commentary-education>)

This commentary provides the “why” behind the Criteria, as well as additional examples and guidance.

3.2 Customer Engagement: How do you build relationships with students and other customers and determine satisfaction and engagement? (45 pts.)

a. Student and Other CUSTOMER Experience

- (1) **Relationship Management** **HOW do you build and manage student and other CUSTOMER relationships?** HOW do you
 - acquire students and other CUSTOMERS and build market share;
 - manage and enhance your image;
 - retain students and other CUSTOMERS, meet their requirements, and exceed their expectations in each stage of their relationship with you?
- (2) **Student and Other CUSTOMER Access and Support** **HOW do you enable students and other CUSTOMERS to seek information and support?** HOW do you enable them to access your programs and services? What are your KEY means of student and other CUSTOMER support and communication? HOW do they vary for different student and other CUSTOMER groups or market SEGMENTS, as appropriate? 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) **Complaint Management** **HOW do you manage student and other CUSTOMER complaints?** HOW do you resolve complaints promptly and effectively? HOW does your management of complaints enable you to recover your students' and other CUSTOMERS' confidence, enhance their satisfaction and ENGAGEMENT, and avoid similar complaints in the future?
- (4) **Fair Treatment** **HOW do your student and other CUSTOMER experience PROCESSES ensure fair treatment for different students, student groups, other CUSTOMER groups, and market SEGMENTS?**

b. Determination of Student and Other CUSTOMER Satisfaction and ENGAGEMENT

- (1) **Satisfaction, Dissatisfaction, and ENGAGEMENT** **HOW do you determine student and other CUSTOMER satisfaction, dissatisfaction, and ENGAGEMENT?** HOW do your determination methods differ among your student and other CUSTOMER groups and market SEGMENTS, as appropriate? HOW do your measurements capture actionable information?
- (2) **Satisfaction Relative to Other Organizations** **HOW do you obtain information on students' and other CUSTOMERS' satisfaction with your organization relative to other organizations?** HOW do you obtain information on your students' and other CUSTOMERS' satisfaction
 - relative to their satisfaction with your competitors; and
 - relative to the satisfaction of students and other CUSTOMERS of other organizations that provide similar programs and services, or to education sector BENCHMARKS, as appropriate?

c. Use of VOICE-OF-THE-CUSTOMER and Market Data

HOW do you use VOICE-OF-THE-CUSTOMER and market data and information? HOW do you use VOICE-OF-THE-CUSTOMER and market data and information to build a more student-focused culture and support operational decision making?

Terms in SMALL CAPS are defined in the Glossary of Key Terms (pages 46–54).

Notes

3.2. Results for student and other customer perceptions and actions (outcomes) should be reported in item 7.2.

3.2a(4). You should ensure that your approaches for managing student and other customer relationships, enabling students and other customers to seek information and support, and managing complaints promote equity and inclusion, and that they do not inadvertently discriminate

unfairly or inappropriately against specific customers or customer groups.

3.2b(1). Determining student and other customer dissatisfaction should be seen as more than reviewing low satisfaction scores. It should be independently determined to identify root causes and enable a systematic remedy to avoid future dissatisfaction.

3.2b(2). Information on relative 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 sector or other organizations. Such information may also include information on why students and other customers choose your competitors over you.

3.2c. Student and other customer data and information should be used to support the overall performance reviews addressed in 4.1b. Voice-of-the-customer and market data and information to use might include aggregated data on complaints and, as appropriate, data and information from social media and other web-based or digital sources.

For additional guidance on this item, see the Education Criteria Commentary (<https://www.nist.gov/baldrige/baldrige-criteria-commentary-education>).