# Minutes

# Judges Panel of the Malcolm Baldrige National Quality Award

**Baldrige Performance Excellence Program ● National Institute of Standards and Technology**

**Wednesday, June 16, 2021, via videoconference**

## Attendees

*Judges*: Patricia Skriba, Keith Everett, Cary Hill, Kevin Johnson, Lynda Johnson, Amy Katschman, Christopher Laxton, Brigitta Mueller, Amy Pugh, Bruce Requa, Meridith Wentz, Gary Wilson

*NIST*: Jamie Ambrosi, Rebecca Bayless, Robert Fangmeyer, Robert Hunt, Elif Karakas, Darren Lowe, Christine Schaefer, Robyn Verner, Kelly Welsh

## The meeting was called to order at 11:10 a.m.

### WELCOME AND MEETING OVERVIEW

Pattie Skriba and Bob Fangmeyer welcomed the judges, noting that this is the 33rd year of the Baldrige Award process. The judges introduced themselves.

The minutes of the November 2019 Judges Panel meeting were approved as written.

**JUDGES’ ROLE AND PROCESS**

Skriba reviewed the Judges Panel’s key roles and responsibilities: work as a team, select applicants to advance to Site Visit Review, recommend award recipients, work with examiner team leaders on the Site Visit Process and feedback report, recommend process changes to the Board of Overseers, provide input into the development of the Criteria, and serve as ambassadors. Skriba reviewed mentoring assignments for new judges. Bob Hunt reviewed the award process and the judges’ role in it, as well as the assignment of lead and backup judges.

The importance of judging—not examining—was emphasized. Several judges (Skriba, Amy Katschman, Bruce Requa, Meridith Wentz, Gary Wilson, Brigitta Mueller, Christopher Laxton) offered to write a proposal on how to be effective**. Skriba will set up a meeting in next few weeks to work on this for presentation at the August meeting.**

**August Meeting Process**

1. Identify applicants to advance to Site Visit Review.
2. Identify judges’ conflicts of interest for these applicants.
3. Review judging process and schedule for November.

**Conflicts of Interest**

Examples include, but are not limited to, current or past employer (or principal client); major customer, supplier, or competitor of the judge’s employer or principal client; financial interest in the applicant or applicant’s major competitor; involvement in applicant’s Baldrige Award application; considerable knowledge of or perceived bias toward an applicant; and judge’s feeling that a conflict exists for any reason.

**November Meeting Process**

1. Lead Judge presents the applicant.
2. Lead Judge calls the team leader (twice).
3. Judges deliberate.
4. Judges vote. To a question about voting, Hunt said majority vote is 12+1; 7+1=8 are needed to recommend for award.
5. Judges decide on category best practice recognition.

To a question about hard copies of materials, Hunt said judges do not need them, but he could provide them on request. Judges had additional comments: hard copies allow notetaking (but could drive a judge down the path of being an examiner), electronic notetaking may be more efficient, note-taking may be needed but just on judging documents. Skriba noted that applications will be all electronic and reiterated that the real focus is NOT the application; the guiding document is the post-site scorebook. **All agreed to** **proposal that ASQ send hard copies to Lead Judges and back-ups.**

**JUDGES’ SURVEY OF 2020 APPLICANTS**

In 2020, BPEP’s Net Promoter Score (NPS) = 90 promoter, 0 detractor. NPS comes from the survey question on how likely an organization is to recommend use of Baldrige Excellence Framework. Due to COVID and travel restrictions, site visits were virtual this year, so a question was added to the survey seeking feedback on this. The survey had a 50% response rate; due to staff resources, not as much follow-up was done in 2020 with the nonresponders.

**First-Ever Virtual Site Visits in 2020**

What worked well:

* Microsoft Teams
* Communication
* Electronic submission of applications, documents
* Inclusion of people around world virtually

Opportunities:

* Inability to share moderate risk documents via MS Teams
* Unable to point out results in documents in person to ensure examiner understanding
* More difficult for examiners to understand organizations, culture without being face to face

Of eight responding applicants, four said in 2021 they would prefer hybrid site visits and four said they would prefer an in-person site visit. None said they would prefer all virtual.

**Key Findings**

All applicants were highly satisfied with the Baldrige Framework, but some had concerns with feedback reports. Two dissatisfied applicants with virtual SVs felt the examiner team didn’t adequately understand their results, leading to inaccurate comments, and felt team scored its small business too low.

**2021 Actions to Address Opportunities**

* New Results Call During Independent Review: 60-minutes with team leader, applicant, and NIST monitor to discuss and clarify key results in application (Even if the team doesn’t have any questions, the applicant can take all 60 minutes, Hunt said. However, missing results cannot be requested at this stage; for consistency, missing results can only be requested at the Site Visit stage.)
* Small group online training for seniors and returning examiners; one-on-one training for new examiners with master examiner coaches
* Continued training emphasis on key factors and Criteria relevance, scoring process, and not using any element of scoring guidelines as a gate
* Award process redesign (2022):
  + Focus on what examiners know and need to know about the applicant
  + Virtual interviews prior to consensus
  + Feedback and scoring only after the virtual interviews
  + Simplified feedback format with greater transparency/accountability

Regarding negative feedback, judges commented that applicants may need to go through state programs to prepare for national, and that “quality is complex and there are no shortcuts.” Fangmeyer reminded the Judges that feedback to applicants is reviewed several times before it goes out the door.

Fangmeyer said judges’ survey has open-ended questions, but BPEP might look at how it can do a deeper dive into dissatisfaction for root causes and continue to reach out to nonresponders. Organizations are asked if they would like a call from the BPEP Director to discuss their feedback. Unless they indicate YES or provide their names, their feedback is intended to be anonymous.

Dissatisfaction resulted from applicant (1) felt team didn’t adequately understand its results, leading to inaccurate comments, and (2) felt team scored small business too low. This type of feedback is not unique to 2020. It is part of the reason a Results call was added as part of Independent Review. There is typically a noticeable difference in satisfaction between those who receive a site visit and those who don’t.

**2021 AWARD PROCESS: APPLICATIONS, EXAMINERS**

**2021 Award Process Changes**

Online examiner training consisted of master examiners as coaches, a case study and webinar, team leader training for new seniors, small group discussions, a refresher module with a quiz; one-on-one feedback from master examiner coaches for new examiners, 13 online modules, and special team leader training.

**Selection Considerations**

Returning Examiners:performance, availability, years of service, board balance, multiple applicants from same organization. Senior/Master Examiners:performance, availability, Independent/Consensus Review and Site Visit Review experience, leadership and mentoring ability, Criteria and process knowledge

Hunt said most drops occurred between selection/notification and training. Other master examiners will serve as tech editors.

### DISCUSSION OF NOVEMBER MEETING:

Fangmeyer noted that BPEP is exploring options for whether the November meeting will be virtual or in person (NIST will have no conference rooms until mid-2023). BPEP is exploring reserving a meeting room at a hotel or another location.

It was noted that the 2020 virtual process went well, but there is a bonus to meet in-person. If virtual, two applicants a day was best; doing more than two per day would be too difficult.

The closure of the lecture rooms at NIST will also impact in-person examiner training. One idea (from BPEP) is to have an examiner training component as part of the Quest conference, but not all examiners have the financial ability to attend Quest and examiners would lose the flexibility of choosing which week to attend training.

**BPEP will look into the option of meeting in-person for August meeting; virtual for November. If necessary, the November meeting will be spread over five days (entire week) so only two applicants reviewed per day.**

**Darren will share the master examiner training webinar through RISE so the judges can hear exactly what was conveyed.**

### PREPARATION FOR THE BOARD OF OVERSEERS MEETING:

All agreed that the feedback reports (from 2020) were excellent; no decline in product or teamwork among the judges. The judges feel confident in survey results and actions to be taken to ensure satisfaction (e.g., addition of Results call).

### DISCUSSION AND MEETING EVALUATION

After a discussion of meeting strengths and opportunities for improvement, the meeting was adjourned at 2:40 p.m.

I hereby certify that, to the best of my knowledge, the foregoing minutes are accurate and complete.

Patricia Skriba

Chair

Judges Panel

X/X/2021