



# Education Criteria for Performance Excellence

## Begin with the Organizational Profile

The Organizational Profile is the most appropriate starting point for self-assessment and for writing an application. It is critically important for the following reasons:

- You can use it as an initial self-assessment. If you identify topics for which conflicting, little, or no information is available, use these topics for action planning.
- It sets the context for understanding your organization and how it operates, and allows you to address unique aspects of your organization in your responses to the Education Criteria questions in categories 1–7. Your responses to all other questions in the Criteria should relate to the organizational context you describe in this profile.
- It helps you identify gaps in key information about your organization and focus on key performance requirements and results.
- The Organizational Profile is an invaluable tool for new and seasoned employees to fully understand your organization.

## **P** Organizational Profile

The **Organizational Profile** is a snapshot of your organization and its strategic environment.

### P.1 Organizational Description: What are your key organizational characteristics?

#### a. Organizational Environment

- (1) **EDUCATIONAL PROGRAM AND SERVICE Offerings** What are your main **EDUCATIONAL PROGRAM AND SERVICE** offerings? What is the relative importance (including percentage of revenue/budget) of each to your success? What modalities do you use to deliver your **EDUCATIONAL PROGRAMS AND SERVICES**?
- (2) **MISSION, VISION, VALUES, and CULTURE** What are your **MISSION, VISION, and VALUES**? What are the defining characteristics of your organizational **CULTURE**? What are your organization's **CORE COMPETENCIES**, and what is their relationship to your **MISSION** and **VISION**?
- (3) **WORKFORCE Profile** What is your **WORKFORCE** profile? What are your **WORKFORCE** or faculty and staff groups and **SEGMENTS** and the **KEY ENGAGEMENT** drivers for each? What **KEY** changes are you experiencing in your **WORKFORCE CAPABILITY, CAPACITY, and composition**?
- (4) **Assets** What are your major assets, such as facilities, equipment, technologies, and intellectual property?
- (5) **Regulatory Environment** What are your **KEY** applicable standards and regulations, and accreditation, certification, or registration requirements?

#### b. Organizational Relationships

- (1) **Organizational Structure** What are your organizational leadership and **GOVERNANCE** structures? What are the **KEY** components of your organization's **LEADERSHIP SYSTEM**? What are the reporting relationships among your **GOVERNANCE SYSTEM, SENIOR LEADERS, and parent organization, as appropriate**?
- (2) **Students, Other CUSTOMERS, and STAKEHOLDERS** What are your **KEY** market **SEGMENTS**, student and other **CUSTOMER** groups, and **STAKEHOLDER** groups, as appropriate? What are their **KEY** requirements and expectations for your **EDUCATIONAL PROGRAMS AND SERVICES, student and other CUSTOMER support services, and operations, including any differences among the groups**?
- (3) **Suppliers, PARTNERS, and COLLABORATORS** What are your **KEY** types of suppliers, **PARTNERS, and COLLABORATORS**? What role do they play in producing and delivering your **KEY EDUCATIONAL PROGRAMS AND SERVICES** and your student and other **CUSTOMER support services**? What role do they play in contributing and implementing **INNOVATIONS** in your organization? What are your **KEY supply-network requirements**?

*Terms in SMALL CAPS are defined in the Glossary of Key Terms (pages 48–56).*

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## Notes

**P.1a(1).** Modalities for delivering programs and services to your students might be direct or indirect, or through partners and collaborators.

**P.1a(2).** Your values are part of your organization's culture. Other characteristics of your culture include shared beliefs, norms, and values that contribute to the uniqueness of the environment within your organization.

**P.1a(2).** If your organization has a stated purpose as well as a mission, you should include it in your response here and as appropriate in the process categories. Some organizations define a mission and a purpose, and some use the terms interchangeably. Purpose refers to the fundamental reason that the organization exists.

**P.1a(3).** As applicable, your workforce profile should include the location of your workforce, your organized bargaining units (i.e., union representation), and the special health and safety requirements of the workforce. Your workforce profile should specify any workforce groups the organization has identified for segmenting data. Organizations that also rely on volunteers and/or temporary staff members to accomplish core work (producing output that is necessary and/or student-facing) should include these groups as part of their workforce. Workforce or faculty/staff groups and segments might be based on type of employment or contract-reporting relationship, location (including remote work), work shift, work environment, use of flexible work policies, teaching vs. nonteaching role, student worker, or other factors. Current and anticipated changes impacting your workforce members might relate to scheduling, location, and their requirements and expectations.

**P.1a(5).** Regulations and requirements include any applicable occupational health and safety regulations; education standards; and environmental, financial, and product regulations. Education standards might include local, state, federal, or international statutory requirements, regulations, and/or sector-wide codes of conduct and policy guidance, including compliance with research ethics. Depending on the regions in which you operate, environmental

regulations might cover greenhouse gas emissions, carbon regulations and trading, and energy efficiency.

**P.1b(1).** The Organizational Profile asks for the *what* of your leadership system. Questions in categories 1 and 5 ask *how* the system functions.

**P.1b(2).** Student and other customer groups might be based on common requirements and expectations, behaviors, preferences, or profiles. Within a group, there may be segments based on differences, commonalities, or both. You might subdivide your market segments or customer groups based on educational programs, services, or features; delivery modalities; geography; or other defining factors.

**P.1b(2).** Student, other customer, stakeholder, and operational requirements and expectations will drive your organization's sensitivity to the risk of program, service, support, and supply-network interruptions, including those due to natural disasters and other emergencies.

**P.1b(3).** Suppliers and partners may include, as appropriate, key feeder schools, organizations that supply curriculum or technology, transfer partner institutions that prepare students for your organization, and/or other businesses/industries that might be working with you to develop an education program specifically for their employees.

**P.1b(3).** Your supply network consists of the external entities involved in producing and delivering your programs and services to your students and offering follow-up, as appropriate. For some organizations, these entities form a chain, in which one entity directly supplies another. Increasingly, however, these entities are interlinked and exist in interdependent rather than linear relationships. The Education Criteria use the term *supply network* to emphasize the interdependencies among organizations and their suppliers. The term *supply network* represents an evolution and maturity in supply-chain management.

*For additional guidance on this item, see the [Education Criteria Commentary](#).*

## P.2 Organizational Situation: What is your organization's strategic situation?

### a. Competitive Environment

- (1) **Competitive Position** What are your size, share, and growth in your education sector or the markets you serve? How many and what types of competitors do you have? What differentiates you from them?
- (2) **Competitiveness Changes** What KEY changes, if any, are affecting your competitive situation, including changes that create opportunities for collaboration and INNOVATION, as appropriate?
- (3) **Comparative Data** What KEY sources of comparative and competitive data are available from within the education sector? What KEY sources of comparative data are available from outside the education sector? What limitations, if any, affect your ability to obtain or use these data?

### b. Strategic Context

What are your KEY STRATEGIC CHALLENGES, threats, ADVANTAGES, and OPPORTUNITIES?

### c. PERFORMANCE Improvement SYSTEM

What is your overall SYSTEM for PERFORMANCE improvement? What KEY tools and methods are used as part of this SYSTEM?

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## Notes

**P.2a.** Education organizations are frequently in highly competitive environments. Aside from direct competition for students, they must often compete to secure financial, volunteer, and human resources (e.g., education organizations may compete with noneducation organizations where pay might be higher to recruit and retain faculty and staff). This competition may involve other education organizations, such as for appropriations, grant funding or suppliers, or the opportunity to provide supplemental services. For public education organizations, competition may involve other public agencies or departments, as in the competition for scarce budget resources.

**P.2b.** Strategic challenges, threats, advantages, and opportunities might be in the areas of educational programs and services, operations, societal contributions, and workforce. They might relate to finances, including funding mechanisms; organizational structure and culture; political influences; emerging technology; digital integration; security and cybersecurity; emerging competitors; organizational resilience and risk management; changing stakeholder requirements and expectations; faculty and staff capability

or capacity; brand recognition and reputation; diversity, equity, and inclusion; and the upgrade and maintenance of facilities.

**P.2c.** Excellence is not possible without robust evaluation and improvement of key processes, systems, and organizational results. The Baldrige Scoring System (pages 30–36) uses performance improvement through learning and integration as a factor in assessing the maturity of organizational approaches and their deployment. This question is intended to set an overall context for your approach to performance improvement. The system you use should be related to your organization's needs and compatible with your organization's capabilities, capacity, and culture. Specific tools and methods that might be utilized as part of the system include, for example, PDCA or PDSA methodology; completion of accreditation and certification requirements; nationally validated systems to improve teaching performance; and independent institutional, departmental, or program assessments.

*For additional guidance on this item, see the [Education Criteria Commentary](#).*