Alignment, Accountability, and Results: Where Baldrige and Strategic Planning Meet

Paul Grizzell
Lynne Cunningham
Core Values Partners

Kent Holloway
Lifeline of Ohio
Webinar agenda

- Introduction
- Baldrige and Category 2 - Strategic Planning - Overview (Paul Grizzell)
- Strategic Planning Best Practices (Lynne Cunningham)
- Strategic Planning Case Study (Kent Holloway)
- Questions and Answers
Focusing Energy & Resources

Vision

Alignment

Mission

Mission

Partnership for Excellence Assessment
What is Baldrige?

Baldrige is an outcome-focused, evidence-based management model based on the characteristics of high-performing organizations.
“Opportunities for Improvement” versus “Weaknesses”

Opportunities for Improvement

Organizational maturity

...the organization does not have a strategic planning process...

Progress on performance excellence journey

...the organization does not have a method to gather supplier input to be used in the strategic planning process
The Baldrige Award Framework

Drivers
- Leadership
- Customer Focus
- Strategic Planning

Core Work
- Workforce Focus
- Operations Focus

Results

Organizational Profile
- Environment, Relationships, and Challenges

Visionary Leadership
- Focus on the Future

Patient-Focused Excellence
- Managing for Innovation

Organizational & Personal Learning
- Management by Fact

Valuing Staff & Partners
- Agility

Social Responsibility and Community Health
- Focus on Results and Creating Value
- Systems Perspective

Measurement, Analysis, and Knowledge Management

©2014 Core Values Partners, Inc.
Baldrige Strategy Alignment

**Organization Profile**

*What’s important?*

- P.1a(2) Core Competencies
- P.2a(2) Competitiveness Changes
- p.2b Strategic Context

**Process**

*What do we do and how do we do it?*

- 2.1 Strategy Development
- 2.2 Strategy Implementation

**Results**

*Were we successful?*

- 7.4b Strategy Implementation Results
- 7.0 Overall results

**Baldrige Core Values**

*linkage and alignment across your organization*

©2014 Core Values Partners, Inc.
Three Characteristics of Effective Strategy Implementation

- **Alignment** – align strategic plan and objectives to action plans [2.1b(1) to 2.2a]
- **Accountability** – 2.2a(2) action plan implementation – deployment of action plans to workforce to ensure actions achieve strategic objectives
- **Results** – strategy implementation results [7.4b] AND specific strategic objective results [all of Category 7]
Alignment

- With budgeting process
- With organizational responsibilities
- With strategic timelines
Accountability

- Executive responsibility for key strategies/goals
- Cascaded accountability and communications
- Annual goals
- Quarterly action plans
- Monthly dashboards discussed with your one-up
- CEO dashboard shared with Board
Results

- Steady progress over multiple years (*Trends*)
- Tiered goals consistent with current performance and ultimate goal (*Performance Projections*)
- Goals based on high performance (*Comparative data*)
- Celebrate successes!
The Planning Process is Like an Hourglass
Strategic Planning Touchpoints – Lynne

- Input – internal and external stakeholders, environmental assessment, SWOT by Pillar or KRA
- Board sets strategic direction
- Leaders recommend 3-year goals and financial implications based on strategic decision and one and two year incremental goals based on current performance
- Board finalizes 3-year strategic plan

- Leaders recommend budget to achieve goals – budget approved by Board
- Leaders develop tactical implementation plans, communicate to staff to connect the dots
- Share quarterly action plans and monthly dashboards with staff. Celebrate successes. Share best practices to achieve desired results.
Strategic Planning

Should Be

- Based on reality – current trends, best practices and environment assessment
- Aligned with budget process and accountability system
- An ongoing process – annual update and recalibration, discussion of results, new trends and opportunities
- Fun and provide a team-building opportunities
- Result in a document that is executed/implemented

Should NOT

- Establish unrealistic goals that set leaders up for immediate failure
- Take forever
- Result in a document that is put on the shelf or used as a door stop
"...the most effective leaders out there are the ones who can, beyond a shadow of a doubt, draw a direct line-of-sight between what a person does, and how that person and his or her work contributes to the mission and vision of the team and the organization, and even how that person and that person’s work matters to society."
Accountability Cards

Every employee has a “We Are Self” card that is kept in their badge holder.

This becomes a key subject for supervisor-employee meetings – leading to a culture of accountability for goals aligned to strategy.
Our Mission: Lifeline of Ohio empowers our community to save and heal lives through organ, eye & tissue donation

- Each day in the U.S. 18 people die waiting for an organ transplant
- More 121,000 Americans are currently on the organ waiting list
- Our job is to facilitate the donation process and inspire people to register as organ, eye and tissue donors.
- One person can save 8 lives, give sight to 2 people and help heal 50 more.
- Our vision: A Community where every individual embraces donation.

If you are not a registered donor – sign up today!
www.donatelifeline.net
What are we working toward?

“Perfection is not attainable, but if we chase perfection, we can catch Excellence.”

Vince Lombardi
Thank you for your commitment to performance excellence!

Paul Grizzell
Lynne Cunningham
Office: 651.735.7716
Cell: 651.792.5149
Email: paul.grizzell@corevaluespartners.com
Website: www.corevaluespartners.com

Kent Holloway
Office: 800.525.5667
Website: www.lifelineofohio.org
Register: www.donatelifeline.net