NC STATE UNIVERSITY

Collaborative Assessment: Day 1

DESIRED OUTCOME (S): Through interactive instruction during a 4-5 hour *Collaborative* training session, participants will be able to:

1. Understand the performance excellence journey by adopting the use of the Baldrige criteria as a framework for excellence;
2. Demonstrate an understanding of the Baldrige criteria through examination, interpretation, and application to their organization; and
3. Analyze the strengths and opportunities for improvement in the their organization for leadership, strategic planning, customer focus, measurement, analysis, and knowledge management, workforce focus, operations, focus, and results.

WHAT	HOW	Time
Understand the North Carolina Awards for Excellence (Level 1): Collaborative Assessment Day 1	Welcome Introductions: 2 truths & a lie. Present snapshot of collaborative process. Q&A	20'
Understand the systematic components of an integrated management system.	Present the Baldrige burger. Discuss the meaning of systematic, what, & how.	10'
Understand and apply the basic item requirements for 1.1 Leadership: How senior leaders lead? 1.2 Governance & Societal Responsibility: How do you govern and fulfill societal responsibilities?	Break into 5/6 partners. 1. Review the assigned area to address. 2. Capture the essence of the criteria and 1 organizational example. 3. Write it down. 4. Report out. Present examples. 5. *Individually complete the self-analysis worksheet for category 1.*	30'
Understand and apply the basic item requirements for 2.1 Strategy Development: How do you develop your strategy? 2.2 Strategy Implementation: How do you implement your strategy?	Break into 4/7 teams. Repeat process. *Individually complete the self-analysis worksheet for category 2*	30'
Understand and apply the basic item requirements for 3.1 Voice of the Customer: How do you obtain information from your customers?	Break into 5/6 teams. Repeat Process *Individually complete the self-analysis worksheet for category 3*	30'

3.2 Customer Engagement: How do you engage customers to serve their needs and build relationships?		
Understand and apply the basic item requirements for 4.1 Measurement, Analysis, and Improvement of Organizational Performance: How do you measure, analyze, and then improve organizational performance? 4.2 Measurement of Information, Knowledge, and Information Technology: How do you manage your information, organizational knowledge, and information technology?	Break into 8/5 teams. Repeat Process *Individually complete the self-analysis worksheet for category 4*	30'
Understand and apply the basic item requirements for 5.1 Workforce Environment: How do you build an effective and supportive workforce environment? 5.2 Workforce Engagement: How do you engage your workforce to achieve organizational and personal success?	Break into 6/8 teams. Repeat Process *Individually complete the self-analysis worksheet for category 5*	30'
Understand and apply the basic item requirements for 6.1 Work Systems: How do you design, manage, and improve your work systems? 6.2 Work Processes: How do you design, manage, and improve your key work processes?	Break into 5/5 teams. Repeat Process *Individually complete the self-analysis worksheet for category 6*	30'
Understand and apply the basic item requirements for 7.1 Product and Process Outcomes 7.2 Customer-focused Outcomes 7.3 Workforce-focused Outcomes 7.4 Leadership and Governance Outcomes 7.5 Financial and Market Outcomes	Break into 5 teams. Repeat Process *Individually complete the self-analysis worksheet for category 7*	30'
Assign Homework	Read Core Values & Narrative Section	60'
Meeting Evaluation	Plus/Delta	5'

Collaborative Assessment: Day 2

DESIRED OUTCOME (S):
1. Prioritized list of opportunities for improvement
2. Step 1 in performance improvement methodology

WHAT	HOW	Time
Welcome	Introductions Logistics Parking Lot Q&A	15'
Complete Round 1: Categories 1,2,3 Complete Round 2: Categories 4,5,6	1. Break into 3 teams. 2. High level review of 3 categories. Record on chart paper. 3. Discuss Strengths and Opportunities for Improvement (OFIs). Remove duplicates. Consensus. Record on chart paper. 4. Report out. 5. Group discusses, asks for clarification, discusses, consensus. 6. Rank OFIs using light voting tool.	180'
Complete Round 3: Results Categories	1. High level review of results. . Record on chart paper. 2. Discuss Strengths and Opportunities for Improvement (OFIs).). Remove duplicates. Consensus. Record on chart paper. 3. Map results to categories. 4. Group discusses, asks for clarification, discusses, consensus. 5. List all results needed on final report.	90'
Understand areas for improvement in leadership, strategic planning, customer focus, measurement, analysis, and knowledge management, workforce focus, operations focus, and results.	1. Using the self-analysis worksheet, for each Category record the top 3 Opportunities for Improvements (OFIs) 2. Designate a champion for each item. 3. Follow this process for each category.	30'
Understand initial steps in continuous improvement.	1. Discuss models.	60'
Meeting Evaluation	Plus/Delta	10'