DISPLAYING & PROMOTING BEST PRACTICES:
THE SCIENCE FAIR APPROACH FOR AWARD SITE VISITS & CORPORATE QUALITY CONFERENCES

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Receiving a site visit from a team of Quality Award Examiners does not simply mean a stressful or nervous time for the company concerned, nor is it simply that the interviews, tours, information materials and countless details that need to be arranged and implemented entails a lot of coordination. No, the real issue for the company involved, just as with writing the application is, how do we tell them everything they need to know about us within these constraints?

Until you have tried, the 50-page Malcolm Baldrige National Quality Award application seems too huge to fill. Managing to get all the information about a company into a 50-page application is actually difficult! The same problem exists with a site visit. How do you ensure that the examiners get a good feel for your company's culture? How do you ensure that they get all of their questions answered? With all the great things your company does how can you be sure they see it all? Well the answer to each of these questions and many similar ones is that you cannot be sure of ensuring that you can cover everything but obviously the better the planning and execution the closer you can get to your goals.

There are a range of things that can be done to make the visit as well organized, efficient and courteous as possible one suggestion is to consider 'displaying your best practices' in 'science fair' or 'poster' format.

The opening and closing meetings of site visits are normally held between the full team of examiners and senior managers from the company concerned. This meeting is a chance for the groups to be introduced and for the examiners and company to outline the agenda for the visit, logistics, ask questions and clarify anything they think appropriate. The company can provide an overview or introduction and point out key issues that they want the examiners to be aware of. One method of conducting these meetings is to do so with tables arranged in a horseshoe format to create an effective and open discussion setting with a screen placed at the open end of the horseshoe so that a projector can display directly from a laptop or PC. (See Figure 1 for table layout for the meeting room) This enables the agenda, list of key managers attending and many other documents to be displayed clearly to the entire team and a laser pointer to be used so all members attending can follow exactly what is going on. This now common technology also allows other advantages for example, video, sound and pictures to be displayed or documents to be viewed from various computer drives. More and more ISO based audits are being conducted in this manner to allow fast access to online documents, flowcharts, records and other auditing materials. This of course also allows documents to be updated in an agreed manner real time and printed hard copy to be ready immediately, for example if the agenda needs to be adapted quickly.

In a large room this setting also allows for the space to be used for display purposes. As described earlier using time effectively to present best practices information is a key issue. By using a ‘science fair’ format, tables with back drops and front aprons can be used to display best practices through for example materials, products, flowcharts and procedure documents by department and by project. This could include placing a laptop on the table open to a department intranet page so an examiner could surf through or having a PowerPoint or sets of photographs of a team or for example manufacturing process scroll through as a slideshow.

By using this format a company could have best practices on display from every department. It would not be necessary to have them manned but simply allow examiners to walk around and view but certainly before and after the opening meeting, during a break or during lunch to have someone walk examiners through the fair or be available for questions. This hands on approach is active and engaging. This creates a fast overview of the company, a mini-tour. Each of the tables could be laid out in order of the processes of the company, walking the examiners through each stage in the process while focusing them on the key projects and on best practices.

The Science Fair also creates the opportunity for creating an energetic atmosphere. When the logistics are established in regard to the number of tables, size, and amount of materials each department and project team can be responsible for creating their display. This can create a sense of fun and teamwork, but the real benefit is the sharing that occurs. During the planning, set up and after completion team members get a chance to see in a hands on, active way all the great things happening in other departments.

If everything can be set up a comfortable time before the first day of site visit, the Best Practice Science Fair can be opened up to the whole company to tour. This provides the benefits of engagement, cross department conversations and sharing of information and ideas. All of which is exactly what will happen with the examiners.

This can become the start of an internal information sharing session each year, perhaps becoming part of a larger quality conference that could be internal or better it could be shared with key business partners as an annual learning event. The conference could have a theme and the format could consist of keynote speakers such as the company CEO, with guest speakers from within and outside the industry. Break out sessions could be presented on best practices that have been developed, the lessons learnt in their implementation, new ideas could be presented and potential changes that are planned for launch over the next year could be presented to partners. The opportunity could also be taken to provide mini-courses or introductions to tools and techniques. Partners that have shown best practices could be invited to present each year increasing the partnering association. Breakout sessions could include structured brainstorming sessions to gain feedback on areas for improvement for the company suggested by the partners. This could end with a conference dinner, which could be used as a celebration and appreciation of employees and partners.

The whole event creates many opportunities such as inviting a local ASQ Section to provide brochures and other materials on membership and certification through a ‘booth’ as a means of promoting these resources to partners and employees. The networking and relationship building of such an event and the opportunities it provides are powerful.

Having implemented these concepts, the learning, networking and energy it creates makes this an annual event that becomes a launching point for key issues and a high profile way of promoting and celebrating quality.

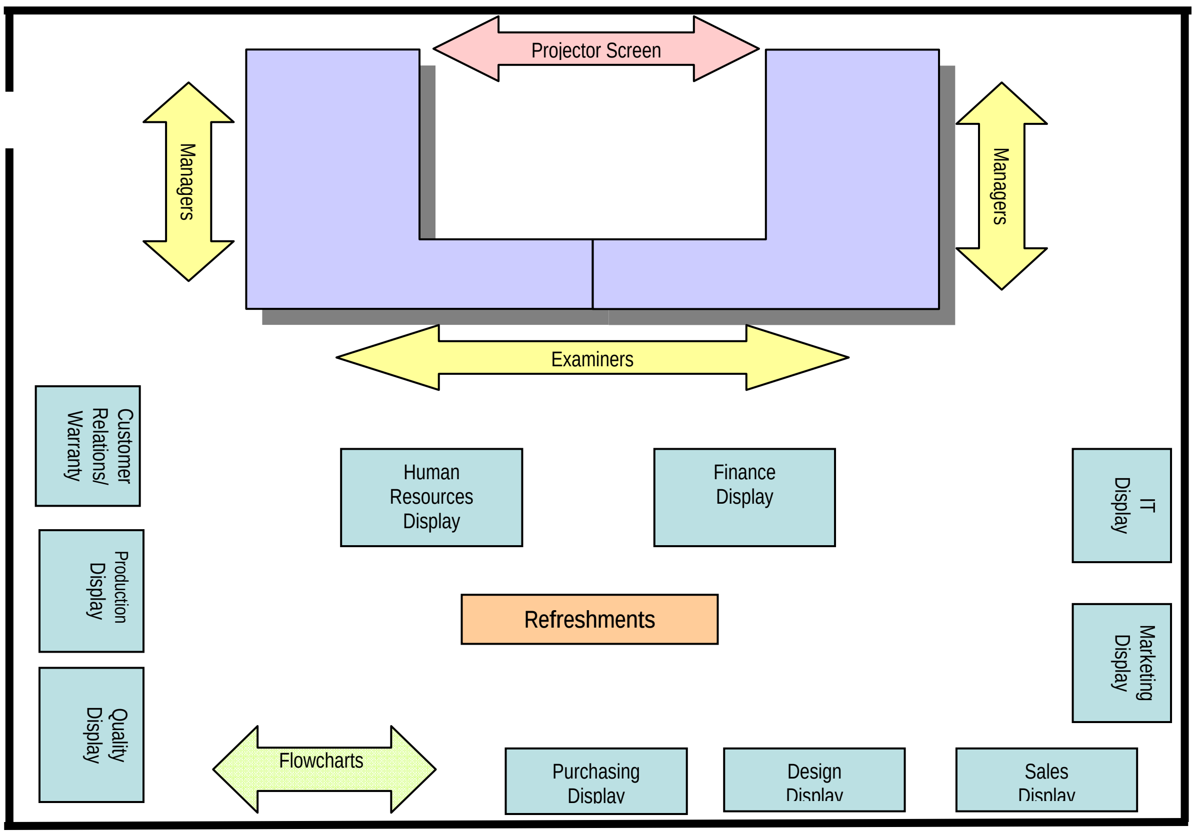

Figure 3.4 Example of Layout for Displaying Best Practices for Site Visits

TIPS FOR GAINING MAXIMUM VALUE FROM BALDRIGE OR STATE QUALITY AWARD SITE VISITS AND FEEDBACK REPORTS

Entering a National, State or local quality award process is a major step for any company and a time for excitement and anticipation. However, the real goal is taking action on the feedback report Opportunities for Improvement (OFI's) and so it is critical that focus is not lost once the application is submitted. Two critical areas of focus are the site visit and addressing the feedback report.

Making the cut for a site visit is a major achievement, however, quite naturally many are anxious about the process and view the arrival of a team of Examiners as a stressful experience.

This stress often arises from the perception that absolutely no mistakes should be made during the site visit and as a response some applicants actually avoid the Examiners as much as possible during the visit. While it is natural to be nervous about a visit it should be seen as an opportunity. Obviously this is not an ideal approach. The Examiners are not visiting to tear apart the organization or to be negative about the applicant. Their focus is to accurately reflect what they find and *they* are the nervous ones since they are responsible for providing the most valuable feedback possible, which can ultimately result in significant improvements. Therefore, the site visit is an occasion to ensure that Examiners have all the information they need to fully understand the organization.

THE SITE VISIT

Remember you probably had difficulty trying to relate all the great things you do in the application document due to the restricted number of pages. This site visit is your big chance to fill in the gaps and to show them the wonderful things that make your company outstanding.

The following are some tips that can ensure that you have a productive and stress free site visit:

Ensure that a schedule of appointments for key people the Examiners may wish to speak with is fully completed and rooms assigned for these 'interviews' well in advance of the site visit. This will be coordinated between the organizations 'representative' and the site visit team leader. Back ups should be provided in case of unforeseen circumstances.

Ensure a number of rooms are free during the visit that can be used to conduct interviews outside the scheduled interview times.

Organize a team to meet the Examiners during the introductory meeting. Be selective in regard to the number of people attending this meeting, often too many attend and it becomes unwieldy.

It is crucial that the senior leaders especially the CEO or President attend the opening meeting. This sets the tone and reflects how important this really is to the organization.

Structure what the organization team should focus on during the opening meeting comments. Often precious time is lost through repetitious discussion by each member of the team. Focus on the key points you want the Examiners to be aware of, mainly from the Organizational Profile and Results sections. But also point out 2-3 key distinguishing issues that set your organization apart. Also don't forget to thank the team for their time and efforts.

In addition to the company 'representative' being available at all times during the visit as a key contract for all issues it would be ideal to also have one 'expert' for each site visit criteria category assigned to each category team leader. In this role the expert can efficiently locate the key people and documents the Examiner may require during the visit in addition to acting as a guide. Once again the emphasis is on an effective use of the limited time the examination team has at the organization.

Use lunch as an opportunity and don't avoid the Examiners! The Examiners may have a working lunch in their base area to co-ordinate the post lunch schedule. However, they may decide to eat for example in the company canteen as this provides an opportunity for them to further gauge the atmosphere and culture and perhaps talk with some employees. But don't leave this to chance. Organize (if the Examiners would like) this as an opportunity to have employees talk with the Examiners over lunch. This can include your organizations managers, teachers, administrators, shop floor operators, nurses or whatever is relevant. Again this is a chance to ensure that the Examiners are getting all the information they need and for you a chance to relate to the Examiners all the great things your organization does.

Try to have the majority of information and documentation that will be required for validation and clarification in the Examiners 'conference/meeting room'.

Have a computer in the Examiners meeting room so that the organizations intranet can be accessed easily. Many organizations use such mechanisms to share information on employee issues, training opportunities, benefits and links to other information.

Provide a phone with an up to date internal phone book so that Examiners can contact whomever they need quickly and easily. Include a separate list of key contacts such as the category experts on a separate page.

The site visit is a working trip. Ensure the room has a number of large tables for working space a flipchart and/or whiteboard to provide the Examiners with an adequate team/project working environment. Other simple items like notepads and pens should be provided.

Have the basic needs of the Examiners in mind. While gifts obviously cannot be given this does not mean that simple comforts such as bottled water and sodas cannot be provided in the meeting room. Remember you are striving for excellence and so courtesy is paramount.

Ensure everyone knows that the Examiners are coming and are aware of what is going on; often this is not the case. This might mean ensuring that every one at least has a copy of the relevant Baldrige Criteria Handbook to become familiar with it and so that they can refer to it during interviews if they wish as an aid to focusing their answers.

Ensure that at a minimum the ‘experts’ guiding/escorting the Examiners, those scheduled for interviews and key managers have a copy of your application document.

Finally, just as with the opening meeting ensure that the senior leaders and especially the CEO or President are available for the close out meeting at the end of the site visit. This is not a time to find out what the results of the visit are but rather are to ensure that all their questions are answered. This is your last chance! This is also the time to thank the Examiners for the hundreds of hours they have volunteered to analyze your organization and provide you with valuable and actionable feedback.

SUSTAINING MOMENTUM AFTER THE SITE VISIT

Once the site visit is over there is a period of intense curiosity as to how not only the site visit went and how the organization is doing in the overall award process. This curiosity is natural and is needed to spark learning once again.

A review of the site visit process can begin by having the organization representative, category experts and others that worked with the Examiners to submit notes on their views of how the process went based on the questions they were asked. These members can be brought together to form a summary of the visit.

This is not to try and discern the score you think the Examiners will give but to focus as early as possible on OFI’s. This would include evaluating questions that helped to uncover gaps or raised critical issues. All of these members can be brought together in a discussion and to finalize the ‘debrief report’ and help to create an announcement that should be made to provide feedback to the whole organization. This would include thanking all employees for their hard work followed by highlighting the next focus, that of preparing for the feedback report and addressing the OFI’s it will identify.

Such preparation for a site visit ensures that the energy and momentum gained in the lead up to the application submission is sustained up to and during the site visit can be continued. By also preparing to respond to the feedback report in a structured manner this momentum can be continued. This avoids the common ‘resting on ones laurels’ or ‘freezing’ that often occurs when the application is submitted. This results from mistaking the application submission as the achieved goal. When in actual fact the goal is implementing the actionable OFI’s identified in the feedback report.

ADDRESSING THE FEEDBACK REPORT

The feedback report can result in a freeze due the amount of OFI’s reported, but remember even award winners receive OFI’s. They are after all the real benefits of the process it is through these that an improvement plan can be developed. However, the number of OFI’s can be overwhelming and result in the OFI’s being sidelined and no action plan being put into place. In addition many organizations take offense at the OFI's and regress as a result.

Whether or not a site visit is achieved teams need to be formed based on each criteria to distribute information from the feedback report when received following a similar format to the site visit debrief and announcement that was described earlier. These teams need to be made up of category experts and stakeholders from a range of departments or divisions to ensure that the knowledge and resources required are brought together. These teams need to work together on related issues so that work is not duplicated and that learning is maximized. Consensus within the teams and from the organization as a whole is crucial.

Every one must be informed of the OFI action plans that are being developed and have input to the decisions being made. Input can be via email responses, cross-functional meetings or retreats for example. Timelines, resources and milestones need to be scheduled to ensure that each of the identified OFI action plans are indeed addressed successfully. The implementation of these can follow the Plan, Do, Study, and Act process.

The resulting improvements or best practices can then be shared across the organization. These can be shared through internal conferences and using shared folders or the organizations intranet to share processes, procedures and other tools and techniques that have been developed.

By using the methods outlined momentum can be sustained beyond the application submission and ensure that the OFI's are addressed and the resulting impacts can be incorporated into the next application to continue to sustain and identify improvements on an ongoing basis driving continual improvement.

CONCLUSION

Attaining a site visit is in itself an achievement. It also ensures that a more accurate feedback report will be provided. The site visit provides opportunities and if well planned will be a valuable and not stressful experience.

By focusing the organization on the feedback report and addressing the most critical and prioritized OFI's rather than the application submission, the Quality Award process becomes a driver of continual improvement.

SECOND SITE VISIT

If your company is getting a second site visit the production of two reports which are provided to the examiner team either at the site visit opening meeting or by working with the site visit team leader and if approved by him/her by email prior to the visit. These reports focus on addressing how each of the OFIs listed in the last feedback report have been addressed with a reference to evidence (the evidence can be provided in a short appendix or detailed evidence file available during the site visit) it is a good use of time to focus the examiners on exactly how their recommendations have been implemented. The second report lists in bullet point criteria by sub criteria the changes that have occurred since the last visit above and beyond the OFIs this may or may not include listing the expanded strengths, this would include projects that have been run , new tools and techniques etc