



**Positivity. Optimism. Excellence. – PENworks 2018**  
**May 3-4, Earle Brown Heritage Center – Final Schedule**

**Day 1: May 3, 2018**

7:00am	7:30am	<b>Registration and Breakfast – Carriage Hall</b>				
7:30am	8:30am	<b>Facilitated Roundtable Discussion and Breakfast Continues – Carriage Hall</b>				
8:30am	8:40am	<b>Welcome &amp; Opening Comments – Carriage Hall</b>				
8:40am	9:30am	<b>Opening Keynote: <i>Positive Energy. Positive Teams. Positive Results.</i> Brandon Johnson, The Positive Energy Guy and co-author of <i>Hospitality from the Heart</i></b>				
9:30am	9:40am	<i>10 minute Break/Session Interchange</i>				
		<b>Tack</b>	<b>Harvest A</b>	<b>Harvest B/C</b>	<b>Garden City</b>	<b>Captains</b>
9:40am	10:30am	<b>Cornerstone Parking Group</b>  <i>Creating a Culture of Service</i> Jeff Weinberger, Senior Vice President, Client Services	<b>LifeSource</b>  <i>Leadership Excellence: We're On a Mission</i> Susan Gunderson, CEO	<b>Wayzata Public Schools</b>  <i>Learning Your Way Toward Excellence</i> Chace Anderson, Superintendent	<b>IBM</b>  <i>Enterprise Design Thinking by IBM</i> Justin Gilbert, Enterprise Design Thinking Coach & Patty Clancy, Dir Sys Transformation	<b>Olmsted County</b>  <i>Thriving Communities: Data Driven Practices in Government</i> Michael Garner & Leigh Durbahn, Continuous Improvement
10:30am	10:50am	<i>20 minute Break/Session Interchange</i>				
10:50am	11:40am	<b>Stratis Health</b>  <i>Intentional Quality Improvement and Innovation</i> Susan Severson & Mary Lou Haider, Vice Presidents	<b>Cardinal of MN</b>  <i>Pioneering Your Baldrige Journey</i> Jack Priggen, CEO; Kyle Mullen, Chief Program Officer; Kristin Nagel, COO; & Kate Smith, Dir of Training	<b>Normandale Community College</b>  <i>Learning Continuous Improvement by Practicing Continuous Improvement</i> Jeff Hudson, Cont Ed,	<b>Daktronics</b>  <i>The Performance Development Cycle at Daktronics</i> Carla Gatzke, VP of HR	<b>Hormel Institute</b>  <i>It's all about the Why</i> Gail Dennison, Dir of Development
11:40am	12:30pm	<b>Lunch</b>				
12:30pm	1:00pm	<b>Keynote: Bristol TN Essential Services</b> <b>Baldrige Power: How an East Tennessee Utility Company Became a National Role Model</b> <i>R. Michael Browder, PE, Ed.D. BTES CEO</i>				
1:00pm	1:15pm	<i>15 minute Break/Session Interchange</i>				
1:15pm	2:05pm	<b>Fairview Health Services</b>  <i>A Case Study for Strategy Deployment</i> Didier Rabino, Vice President Nadine Paitich, Operations Executive	<b>LeadingAge Panel</b>  <i>Performance Excellence in Aging Services: Stories from the Field</i> Julie Apold, Leading Age, Dawn Nash, Walker Methodist, Katie Perry and Angie Urman, Knute Nelson	<b>Brookings Public Schools</b>  <i>Launching Continuous Improvement: Perspectives and Process</i> Klint Willert, Superintendent	<b>Cirrus Aircraft</b>  <i>The Power of Observation – Making Data Based Decisions</i> Teresa Riffel, VP, and Jon Wright, Executive Director Continuous Improvement	<b>MRCI Worksource</b>  <i>Building Your Bench: The Power of Talent Development</i> Tami Reuter, Chief Business/Mktg Officer
2:05pm	2:30pm	<i>25 minute Break/Session Interchange</i>				



		<b>Tack</b>	<b>Harvest A</b>	<b>Harvest B/C</b>	<b>Garden City</b>	<b>Captains</b>
2:30pm	3:20pm	<b>Mayo Clinic</b>  <b>Quality Management-Where We Have Been and Where we are Going</b> <i>Janna Galbreath, Quality Manager, Lab Medicine/Pathology</i>	<b>State of MN DEED</b>  <b>Cutting Edge Culture: Motivating Your Workforce of Then, Now, and the Future</b> <i>Julie Brock, Workforce Strategy Consultant</i>	<b>Austin Public Schools</b>  <b>Capitalizing on Serendipity...to Facilitate Organizational Change</b> <i>David Krenz, Superintendent; John Alberts, ED; Dave Maroney, Kara Rise, ATS&amp;R</i>	<b>Communities of Excellence 2026</b>  <b>Using Baldrige to Improve Community Outcomes: West Kendall, FL's Journey</b> <i>Michelle Mejia, Executive &amp; Stephanie Norling, Managing Director</i>	<b>SD DOT</b>  <b>Strategic Planning in a Government Organization</b> <i>Craig Smith &amp; Jeff Senst, Region Engineers</i>
3:20pm	3:40pm	<i>20 Minute Interchange and Cash Bar Opens</i>				
3:40pm	4:10pm	<b>Keynote: Stellar Solutions (CA)</b> <b>Actually, We Are Rocket Scientists: Baldrige in Action at Stellar Solution</b> <i>Patrick Logsdon, Vice President - Intelligence Programs</i>				
4:10pm	5:00pm	<b>Keynote: Jazz Impact</b> <b>The Tools of Jazz in An Age of Uncertainty</b> <i>Michael Gold, Founder &amp; Principal</i>				
5:00pm		<b>Day 1 Closing Comments:</b>				
5:00pm	6:30pm	<b>Happy Hour, Networking, Live Jazz, Fun! – Exhibitor Area Carriage Hall</b>				

## Day 2: May 4, 2018

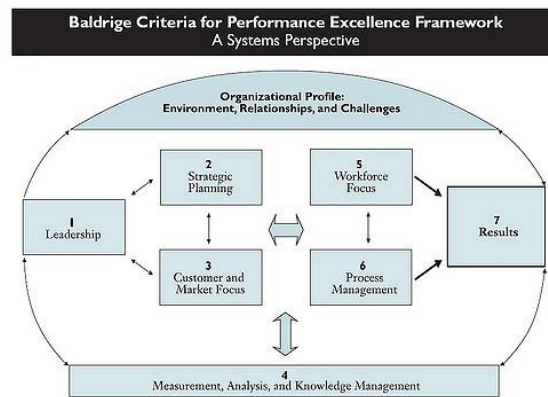
7:15am	7:30am	<b>Registration &amp; Breakfast – Carriage Hall</b>				
7:30am	8:30am	<b>Facilitated Roundtable Discussion and Breakfast Continues – Carriage Hall</b>				
8:30am	8:40am	<b>Welcome &amp; Opening Comments – Carriage Hall</b>				
8:40am	9:10am	<b>Keynote: City of Fort Collins, CO</b> <b>Journey to World Class</b> <i>Jeff Mihelich, Asst City Manager</i>				
9:10am	9:40am	<b>Intensive Speakers: Panel Introductions – Carriage Hall</b>				
9:40am	10:00am	<i>20 minute Break/Session Interchange</i>				
		<b>Tack</b>	<b>Harvest A</b>	<b>Harvest B/C</b>	<b>Garden City</b>	<b>Captains</b>
10:00am	11:30am	<b>Intensive Session</b>  <i>Using the Baldrige Core Values to Improve Leadership Effectiveness</i> <i>Paul Grizzell, Core Values Partners</i>	<b>Intensive Session</b>  <i>Business Transformation-Delivering Results In 90 Days</i> <i>Chris Vogel, MiPRO</i>	<b>Intensive Session</b>  <i>How to Inspire Real Engagement during Tough Change</i> <i>Irina Fursman, Hue.Life</i>	<b>Intensive Session</b>  <i>Leading with Courage</i> <i>Lee Eisenstaedt &amp; Trent Clark, Leading with Courage Academy</i>	<b>Intensive Session</b>  <i>Ikigai: Aligning Your Work and Your Purpose</i> <i>Irene Kelly, Prisma LLC</i>
11:35am	12:05pm	<b>Keynote: Southcentral Foundation (AK)</b> <b>Using the Voice of the Customer to Drive Improvements</b> <i>Karen McIntire, Director of Human Resources</i>				
12:05	1:00pm	<b>Lunch – Carriage Hall</b>				
1:00pm	1:30pm	<b>Minnesota and South Dakota Performance Excellence Award Ceremony – Carriage Hall</b> <i>Governors Mark Dayton and Dennis Daugaard, invited</i>				
1:30pm	2:20pm	<b>Closing Keynote: Bring It: The Power of Leadership Positivity</b> <b>Terry Watson, Hilarious Motivational Speaker, Trainer, Coach</b>				
2:20pm	2:30pm	<b>Closing Comments – Carriage Hall</b>				



## Helping Connect the Dots: How the sessions relate to the Baldrige Framework.

Whether your organization formally uses Baldrige or not, PENworks will feature 32 “case studies” – ways that you can improve organizational results. Those case studies will focus on one or more categories, each represented in the Baldrige Framework. So even if you’re not officially “using” Baldrige, you can still benefit from the methods, best practices, and insights that improve leadership, operations, workforce capability and engagement, customer focus, and so forth. Those categories are:

1. **Leadership:** How upper management leads the organization, and how the organization leads within the community.
2. **Strategy:** How the organization establishes and plans to implement strategic directions.
3. **Customers:** How the organization builds and maintains strong, lasting relationships with customers.
4. **Measurement, analysis, and knowledge management:** How the organization uses data to support key processes and manage performance.
5. **Workforce:** How the organization empowers and involves its workforce.
6. **Operations:** How the organization designs, manages and improves key processes.
7. **Results:** How the organization performs in terms of customer satisfaction, finances, human resources, supplier and partner performance, operations, governance and social responsibility, and how the organization compares to its competitors.



**Thursday, May 3, 2018**

**Keynote:** Brandon Johnson

**Title:** Positive Energy. Positive Teams. Positive Results.

**Time:** 8:30am – 9:40am

**Room:** Carriage Hall

**Overview:** We are all in the ENERGY business – whether we acknowledge it or not - as you go about life you are either bringing energy to your career and life or you are taking it away - and there is no in-between to that. People are not just buying your product or services, they are buying you and your ENERGY!

Your family, friends, career, clients, and community deserve your very best ENERGY.

The unfortunate thing in our world is that most people have never been taught 1) that energy is critically important to your career and life, and 2) how to bring your very best along with positive energy to your life and business.

That all changes now - Brandon’s interactive, energizing, and reflective keynote will share the latest research, strategies and techniques to bring the Power of Positivity into your business and life.

The research shows the Power of Positivity has this level of impact:

- 300% more innovation (HBR)
- 43% more productivity (Hay Group)
- 37% increase in sales (Shawn Achor)
- 33% higher profitability (Gallup)



- 51% lower turnover (Gallup)
- 66% lower sick leave (Forbes)
- 125% less burnout (HBR)

THIS IS NOT ABOUT FLUFF AND RAH RAH.

This is about ENGAGEMENT, RELATIONSHIPS and COMMITMENT that will infuse your life and business with POSITIVE ENERGY and RESULTS.

**Bio:** Brandon W. Johnson, named the #1 Global Guru of the Hospitality Industry in 2017, is a leadership and service industry speaker, trainer, and consultant.

As an award-winning author of the "Business Book of the Year" - *Hospitality from the Heart*, he delivers a critical message for business professionals about how to create and develop a winning attitude and culture that creates a place where employees love to work and your guests/customers love to come again, again and again.

Brandon's diverse background in operations and leadership in the restaurant and hospitality industry, non-profits, and higher education has led him to believe strongly that success in business and life is about 2 main things:

It's all about Positive Energy. It's all about HEART.

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**Organization:** Cornerstone Parking

**Session Type:** Breakout

**Session Time:** 9:40am – 10:30am

**Room:** Tack

**Title:** Creating a Culture of Service

**Overview:** Excellent front line customer service starts at the top of an organization. From executive leadership through the management team a consistent focus to serve others is imperative. Additionally, creating a service culture has strategic organizational benefits well beyond front-line performance. Jeff will share the management platform Cornerstone has embedded throughout its organization, as well as tools and strategies you can implement immediately with your own team.

**Baldrige Category:** **Customers:** How the organization builds and maintains strong, lasting relationships with customers.

**Bio:** Jeff Weinberger – Senior Vice President, Client Services, brings a passion for detailed, excellence-focused operational implementation. Jeff recognizes that every service interaction can be used to advance client image and reputation while improving a patron's overall experience. Jeff reminds on-site leadership regularly, "We cannot assume that a guest or visitor knows where to go, how to use a particular service, or what service may be best for their particular situation. We need to greet each person to learn how we can help them best."

Jeff's engineering background, combined with 20 years listening to clients and implementing the applicable service platform, correlate directly with growing client assets entrusted to our care. Clients want to be heard and understood and Jeff realizes this process cannot be rushed or skipped. There must be a link between what clients ask for and what the service team delivers. Jeff brings vast expertise of breaking down what can be seemingly complex client needs to simple steps for front-line staff implementation and execution.

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**Organization:** LifeSource

**Session Type:** Breakout

**Session Time:** 9:40 am – 10:30am

**Room:** Harvest A

**Title:** Leadership Excellence: We're On a Mission

**Overview:** Led by CEO, Susan Gunderson, you will hear from a panel of LifeSource senior leaders about how they systematically approach leading with excellence. Keys include: fostering a mission-driven, highly engaged workforce;



commitment to societal responsibility, stewardship, and integrity; and a culture of continuous improvement and innovation.

**Baldrige Category: Leadership:** How upper management leads the organization, and how the organization leads within the community.

**Bio:** Since 1989 Susan Gunderson has dedicated her career to saving lives through organ and tissue donation as founder and CEO of LifeSource. LifeSource is the federally designated organ procurement organization for Minnesota, North Dakota, and South Dakota that saves lives and offers hope and healing through donation and transplantation. LifeSource is widely recognized as a leader in innovation and best practice in organ donation. Ms. Gunderson has held national and international leadership positions, including President, Association of Organ Procurement Organizations; Board director for multiple organizations including the United Network for Organ Sharing, the Alliance for Organ Donation and Transplantation, HHS Advisory Committee on Organ Transplantation, the Musculoskeletal Transplant Foundation and the International Society for Organ Donation and Procurement. Since 1996 her international experience has included a faculty appointment with the University of Barcelona, Transplant Procurement Management (TPM) advanced international training course on transplant coordination, and co-director of the Global Leadership Symposium. Susan has a strong commitment to community involvement and currently serves on the St. Olaf College Board of Regents and the University of Minnesota Medicine and Health Board of Overseers. She received her Bachelor's degree from St. Olaf College and a Masters of Healthcare Administration from the University of Washington.

Meg Rogers is the Director of Transplant Center Relations for LifeSource, the federally designated nonprofit organ procurement organization (OPO) serving Minnesota, North Dakota and South Dakota. Meg's career at LifeSource has spanned 22 years and includes 16 years leading LifeSource's organ donation operations. She is past chair of the Association of Organ Procurement Organization (AOPO) Procurement Director's Council and has served on multiple Organ Procurement and Transplantation Network (OPTN) and industry committees. She is currently a member of the OPTN Transplant Administrators Committee, the AOPO Data and Information Committee, and the Organ Donation Alliance OPO/Transplant Communications council. Meg received her Bachelor of Science in Nursing from Villanova University.

Brenda Welsch is the Director of Quality and Regulatory Affairs at LifeSource where she has passionately helped to save lives through organ and tissue donation for the past 25 years. As part of the Executive Team, she leads LifeSource's journey to performance excellence. She is an active member of the Association of Organ Procurement Organizations, former chair of the AOPO QI Council, and has participated as a PEN evaluator and member of the advisory council. Brenda served as a National Improvement Advisor for the Organ Donation and Transplantation Breakthrough Collaborative which led to 20% increase in donation through the multi-year initiative (2004-2007). She received her Bachelor of Science in Nursing from the University of North Dakota and a certificate in Quality Management from the University of St. Thomas.

Julie Kemink is the Chief Clinical Officer at LifeSource. She has been working in the field of donation and transplantation for over 30 years. Julie leads the clinical operations team at LifeSource which begins with the referral call through the delivery of organs and tissues to the transplant center and tissue processors. She is an active member of the Association of Organ Procurement Organizations and has served as past chair of both the organ and tissue councils and is a current member of the COO council. She is the Region 7 representative on the UNOS OPO Committee. Julie holds a nursing degree from North Hennepin College, a Bachelor's degree in Organizational Communication and Management and an MBA from Concordia College in St. Paul.

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**Organization:** Wayzata Public Schools

**Session Type:** Breakout

**Session Time:** 9:40am – 10:30am

**Room:** Harvest B/C

**Title of Presentation:** "Learning Your Way Toward Excellence"

**Overview:** Key Takeaways



- Learning occurs in many ways including: formal education, professional experiences, engagement with work associates, serendipitous encounters with strangers/new acquaintances and through professional development experiences. Every formal engagement or casual encounter is an opportunity to learn.
- Using one's new learning to help maintain focus on the organization's chosen discipline, while avoiding the temptation of "being all things to all people," is an important key to success. Using Treacy and Wiersma's research on the discipline of market leaders, attendees will have an opportunity to reflect on their organization's product leadership, customer intimacy and operational excellence; the three disciplines espoused by these authors that are essential to successful organizations.
- Seeking to synthesize new learning from diverse perspectives and multiple disciplines can lead to the development and/or strengthening of an enterprise's strategy and success. Attendees will receive a suggested/recommended reading list from various categorical areas that are applicable to education, business and the non-profit sectors.

**Baldrige Category: Workforce:** How the organization empowers and involves its workforce.

**Bio:** Dr. Chace B. Anderson has served the Wayzata Public Schools in the role of superintendent since July of 2008. Prior to joining the Wayzata team, he served 16 years with Edina Public Schools as assistant superintendent, high school principal, and middle school principal and associate principal. He served as a junior high school associate principal with the Burnsville-Eagan-Savage Public Schools for two years and as the administrator for the Rochester Montessori School for two years. Dr. Anderson began his career as a science teacher, high school football and track coach, and gifted education instructor with the Bellevue Public Schools (NE). He finished his time in Bellevue as a junior high school dean of students and athletic director. Dr. Anderson earned his B.A. at the University of Northern Iowa in Biology Education, his M.S. in Secondary School Administration from the University of Nebraska-Omaha and his Ph.D. in Curriculum and Instructional Systems at the University of Minnesota. Serving as an educator for 35 years, Dr. Anderson has come to realize that one of the best ways to learn is to read, read, and then read some more! He complements his reading from education with books from business, non-profits, leadership, psychology and organizational design. He and his wife Barb have two adult children.

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**Organization:** IBM

**Session Type:** Breakout

**Session Time:** 9:40am – 10:30am

**Room:** Garden City

**Title:** Enterprise Design Thinking by IBM

**Overview:** Ready for a new way to work? Enterprise Design Thinking by IBM can help. Design Thinking is a collaborative and inclusive way for cross-disciplinary teams to address complex problems with human focus. In basic terms, Design Thinking is a practical framework for action. Hear the story from two Minnesota IBMers how IBM is embracing Design Thinking and Agile in concert to enable greater client value and measurable outcomes. In this 50 minute interactive session, Patty and Justin will engage you in the Enterprise Design Thinking framework, further explain how Agile fits in, and expound on the benefits within reach for any organization willing to do the same. For more about Enterprise Design Thinking -> [www.ibm.com/design/thinking/](http://www.ibm.com/design/thinking/)

**Baldrige Category: Operations:** How the organization designs, manages and improves key processes.

**Bio:** Patty Clancy - Director, IBM Systems Transformation – Agile, Design Thinking, & DevOps

Patty joined IBM in 1992, after working for five years in IT at Mayo Clinic for Laboratory Medicine. She has a Bachelor of Science in Computer Science from Winona State University and a Masters in Business Administration from the Carlson School of Management – University of Minnesota.

She has held many software engineering, people management, and offering management positions in IBM across multiple



divisions including Systems & Software. Currently, she leads the IBM Systems Transformation team which drives several initiatives that enable teams to work in new ways to achieve their business commitments and accelerate their adoption of Agile, IBM Design Thinking & DevOps.

### **Justin Gilbert - IBM Enterprise Design Thinking Coach**

Justin is an Enterprise Design Thinking Coach, Master Black Belt, IBM Mentor, Supply Chain Engineer, Performance Excellence Advocate, Industry 4.0 Explorer, Midwest Country Lover, Dad, “Creative Confidence” Builder, and Performance Excellence Network 2017 Karl Shurson Quality Award Recipient!

**Organization:** Olmsted County

**Session Type:** Breakout

**Session Time:** 9:40am – 10:30am

**Room:** Captains

**Title:** Using Data in Government to Build Value for People

**Overview:** Learn how improvement professionals are part of the effort to rethink how “government” works! Join members of the Olmsted County Health, Housing and Human Services Administration team as they discuss how the Continuous Improvement and Analysis (CIA) Unit supports their colleagues using data collection, program evaluation, process improvement, and planning in pursuit of the vision of achieving a safe, thriving and inclusive community. You’ll learn how we’re transforming how people – including our own colleagues – think about the way we meet the needs of those in our communities.

**Baldrige Categories:** **Measurement, analysis, and knowledge management:** How the organization uses data to support key processes and manage performance.

**Bio:** Michael Garner and Leigh Durbahn are members of the Olmsted County Continuous Improvement and Analysis (CIA) team for the Health, Housing and Human Services Division.

Leigh has over 12 years’ experience in the social services sector, and 4 years in her current role. She has a great passion for organizational analysis and planning. Leigh live in Stewartville, MN with her two children. She enjoys the outdoors, playing music, and engaging in her community.

Michael has over 15 years’ experience working in Human Services while leveraging his experience and education in Human Resource Development, Adult Education and Organization Development. Michael volunteers with PEN in a variety of ways, including as a member of the SE Minnesota PEN Advisory Board, as a trainer for Baldrige Evaluators, and as a Judge in the PEN Assessment process. Michael lives in Kasson, MN, and enjoys building his skills as an amateur photographer, walking his dog Cooper, and visiting Minnesota’s North Shore.

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**Organization:** Stratis Health

**Session Type:** Breakout

**Session Time:** 10:50am – 11:40am

**Room:** Tack

**Title:** Intentional Quality Improvement and Innovation - our Journey Inspired by PEN

**Overview:** Key Takeaways

- Description of our internal journey to integrate quality improvement and innovation consistently throughout the organization.
- Both QI teams and quality goals positively affect innovation.
- Description of early methods and lessons learned as well as our current approach in supporting a culture of quality improvement and innovation.

As a Quality Improvement Organization, Stratis Health has a history of supporting and implementing quality improvement (QI) initiatives. Our current organizational strategic plan includes a more intentional and consistent approach to both internal QI and Innovation. Previously the organization had separate QI and Innovation teams. The QI



team had developed and implemented an ongoing education plan that included foundational QI topics and tools as well as support for efforts of smaller groups of individuals to get practical experience with tools by applying them to projects. The Innovation Team spent time understanding innovation as it applies to the organization and used a survey to get a sense of organizational readiness related to innovation. In the fall of 2016 the QI and Innovation team leads attended the PENworks Innovation Conference and the Systematic Inventive Thinking workshop. The conference and workshop led us to the realization of the benefits of joining our separate QI and Innovation teams. We discussed this plan with our sponsor (CEO), created a joint charter, and brought together a blended team – Quality Improvement and Innovation (QII) team.

The goal of the team is to promote a culture of quality improvement and innovation throughout the organization and find ways to engage all staff. One of the ways that we found to engage staff is the implementation of SparQ sessions that are open to all staff. The sessions are designed to support and coach employees bringing forward improvement ideas. As a result of these sessions, several ideas have been generated and moved into projects. We have added SparQ cards for those ideas that are smaller in scale and can be done quickly. In addition, we have started a QI/innovation visibility initiative where employees are starting to identify innovations and displaying them for all to see. There are also educational sessions and other communications methods that are being implemented to keep our efforts in front of staff. We are looking for ways to continually have more impact and understand a measurement scheme. We will discuss our journey, describe some of the projects that have been generated and plans for the future.

**Baldrige Category: Operations:** How the organization designs, manages and improves key processes.

**Bio:** Susan Severson, BAS, CPHIT, CPEHR, Vice President of Health Information Technology Services – Stratis Health

Ms. Severson leads Stratis Health’s HIT and Rural project portfolio. She has more than 23 years of experience in health care, with special focus on clinical process improvement in ambulatory settings to improve quality outcomes. She has in-depth knowledge and experience in providing technical assistance on topics relating to practice readiness, HIT optimization, practice strategies to meet Meaningful Use and Merit-based Incentive Program standards, and strategies to expand health information exchange across settings of care and into the community. Ms. Severson served as the Program Director for the Regional Extension Assistance Center for Health Information Technology (REACH) for Minnesota and North Dakota, assisting 5,200 primary care providers at 662 clinic locations which included health centers, achieve Stage 1 Meaningful Use and being recognized as one of the most successful Regional Extension Centers in the country. Sue plays a leadership role at Stratis Health to foster innovation within the organization. In addition, she is an Affiliate Faculty member at the University of Minnesota Institute for Health Informatics and a member of the Minnesota e-Health Advisory Committee. She has two years post-graduate studies in Healthcare Administration, University of Minnesota-Carlson School of Management and a Bachelor of Applied Sciences, Community Health and Wellness Education, University of Wisconsin-Superior and is a Certified Professional Health Information Technology Professional (CPHIT) and Electronic Medical Records Professional (CPEHR). Ms. Severson was a 2015 Women’s Health Leadership TRUST – honoree and a 2014 Leadership and MN e-Health Initiative Impact Award winner.

Mary Lou Haider, MBA, IDIQ Director - Lake Superior Quality Innovation Network, Vice-President, Contract Management & Internal Quality - Stratis Health

As IDIQ Director Ms. Haider provides management and oversight for the Lake Superior Quality Innovation Network for the states of Michigan, Minnesota, and Wisconsin. As Vice President, Contract Management and Internal Quality for Stratis Health she leads the center that provides data analysis expertise for the organization and manages the internal quality and process improvement and performance measurement activities of the organization. Ms. Haider has extensive background in a variety of healthcare areas including dentistry, behavioral health and substance abuse, and general medical. Prior to her current positions she held academic and management positions with the University of Minnesota, Cigna, United Healthcare, and Medica Health Plans. She received her undergraduate degree from the University of Minnesota and an MBA from the University of St. Thomas. Ms. Haider is interested in end of life care issues and has been a hospice volunteer since 1991.

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**Organization:** Cardinal of MN

**Session Type:** Breakout

**Session Time:** 10:50am – 11:40am

**Room:** Harvest A





**Title:** Pioneering Your Baldrige Journey

**Overview:** Key Takeaways

- Tips for implementing the framework to your organizations/department
- What worked & what didn't
- Panel - answering FAQs / Q&A
- Maintaining momentum with next steps

**Baldrige Category:** **Leadership:** How upper management leads the organization, and how the organization leads within the community.

**Bio:**

Jack is the President/Owner/Founder of Cardinal of Minnesota, Ltd. (est. 1995). Cardinal provides residential care to adults with intellectual and developmental disabilities, mental health concerns and other related conditions. Cardinal operates 50 homes in southeastern Minnesota and Bemidji, and has approximately 500 employees. Jack has been in this field (disability services) for 40-plus years.

Over the past ten years, Cardinal has been deeply involved with the Performance Excellence Network and submitted their first Baldrige application in 2007 and subsequently submitted applications every two years. They recently received their sixth feedback report. Jack has been through evaluator training seven times (slow learner!!) over the past ten years and have served on three evaluator teams.

He is a native of Massachusetts and grew up mostly in New Mexico. He lives with his wife, Buff Hennessey, in a 110 year old farm house in rural Zumbro Falls. His hobbies include photography, beekeeping and umpiring. When he grows up he wants to be a nuclear submarine commander, an astronaut or a professional baseball player... if none of these works out perhaps he will return to his college job as a school bus driver.

Kyle Mullen, Chief Program Officer: Kyle came through Cardinal of Minnesota's door in 2005 and found a company culture uniquely dedicated to the people it served. He began with Cardinal as a Residential Supervisor and transitioned to the Director of Training and Development before his current role. As the Chief Program Officer, he oversees the daily operations of residential, in-home, and medical services. He has been involved with Cardinal's last five Baldrige application cycles, focusing on Categories 4, 6 and 7. He has served as a Performance Excellence Network evaluator and is Cardinal's resident geek and prank master.

Kristin Nagel, Chief Operating Officer: Kristin has worked for Cardinal for 19 years. Originally hired as "Girl Friday", she spent almost all of those years as a Program leader, significantly influencing the quality of supports Cardinal offers to all stakeholders. Today, she leads the organization as the Chief Operating Officer by overseeing the departments of HR, Training, and Quality and Strategy. Kristin holds a B.S. in Community Health Education and a Masters in Health Care and Human Services Administration. Kristin has attended Performance Excellence Network's evaluator training and leads Cardinal's Category 1 efforts.

Kate Smith, Director of Training: Kate is Cardinal's Director of Training. She began working for Cardinal in 2001 as a Residential Supervisor. She has invested most of her time building and supporting teams that provide services for the individuals in our homes. Kate embraces Cardinal's culture – she is the epitome of fun. Over the last 17 years, she has demonstrated her passion for continuous improvement, high performance and client focus. As her role has evolved, she loves that she is able to maintain close relationships with many of our clients, families and workforce. Kate helped to write Cardinal's first Baldrige application and has been a leader in Cardinal's Category 3 and Category 5 approaches.

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**Organization:** Normandale Community College

**Session Type:** Breakout

**Session Time:** 10:50 – 11:40am

**Room:** Harvest B/C

**Title:** Learning Continuous Improvement by Practicing Continuous Improvement



**Overview:** Traditional workforce education involves an educational event followed by (hopefully) an application of new knowledge and skills into the workplace. While the connection from learning to application has improved, there is still significant evidence that much learning never takes hold.

Through a public-private partnership made possible through a grant from the state of Minnesota, Normandale Community College and GN ReSound were able to take an innovative approach to education where the learning is the application.

In this interactive session, participants will learn how a 2-day Kaizen workshop not only taught continuous improvement skills but also set the stage for an important shift in how the company captures and acts upon its VOC data.

**Baldrige Category: Workforce:** How the organization empowers and involves its workforce.

**Bio:** Jeff Hudson is program director for continuing education and customized training at Normandale Community College. Jeff has extensive curriculum development and facilitation experience in a variety of public and private sector organizations. Jeff's particular interests include innovation and change management, and he helped build the Minnesota Change Management Network hosted by Normandale. Jeff holds an M.A. in Communication and serves as adjunct faculty at several colleges in Minnesota.

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**Organization:** Daktronics

**Session Type:** Breakout

**Session Time:** 10:50 – 11:40am

**Room:** Garden City

**Title:** The Performance Development Cycle at Daktronics:

**Overview:** The Performance Development Cycle at Daktronics: Daktronics is a world leader in providing video and scoring displays for customers in sports, business, and transportation. Our vision for engaging employees and developing people is Long Term Mutual Prosperity. In recent years, we have experimented with different approaches to fostering more helpful development and more robust performance assessment for our employees. This year we are practicing a set of supervisor-employee conversations we call the Performance Development Cycle. Our Cycle engages a plan-connect-reflect approach for helping employees build capabilities, and a curiosity-based approach for helping employees chart a course for their future. Our supervisors and employees are expressing positive feedback about the Cycle. We are excited to share our learning with other at PENworks.

**Baldrige Category: Workforce:** How the organization empowers and involves its workforce.

**Bio:** Carla Gatzke is the Vice President of Human Resources for Daktronics, Inc. Gatzke began her career at Daktronics in 1981, as a student employee in Inventory, Information Systems, and Engineering. In 1984, she graduated from South Dakota State University with a bachelor's degree in electrical engineering and minors in math and computer science. She then moved to a full-time role in Systems Sales Engineering, where she was responsible for sales and project management for legislative voting systems. In 1988, Gatzke took an 18-month leave of absence to earn a master's degree in business administration from Drake University, and to teach a semester in its finance department. In 1990, Gatzke returned to Daktronics and managed Star Circuits, which manufactures printed circuit boards. In 1992, Gatzke transferred to Administration, where she led the company's Personnel department. Four years later, Gatzke also assumed responsibility for the company's Information Technology and Systems. During the next ten years, the company's revenues increased ten-fold, to \$400 million. In 2006, the HR and IT responsibilities were separated, and Gatzke retained Human Resources. The Human Resources group furthers the company's success through people. Their efforts include organization design, staffing, talent development, compensation and benefits, and communications and training. Gatzke also serves as Corporate Secretary.

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**Organization:** Hormel Institute

**Session Type:** Breakout

**Session Time:** 10:50 – 11:40pm

**Room:** Captains



**Title:** It's all about the Why

**Overview:** Every single person and every single organization on the planet knows what they do. Some know how they do it. But only a select few know why they do what they do. "It's all about the why" looks at the ways we follow (purchase, join, support) those who lead, not for them- but for ourselves.

This session looks at Simon Sinek's (thought leader) study of this most important aspect of how the world works in an effort to impact better outcomes. As it turns out, there's a pattern. As it turns out, the great inspiring leaders and organizations in the world, whether it's providing technology, clothing or services - or support for The Hormel Institute University of Minnesota's cancer research - all think, act and communicate the exact same way: People don't support what you do; they support why you do it. If you talk about what you believe, you will attract those who believe what you believe.

Why? How? What? This session seeks to help managers inspire and lead where others aren't through an understanding of "It's all about the why."

**Baldrige Category:** **Leadership:** How upper management leads the organization, and how the organization leads within the community.

**Bio:** Gail Dennison, M.A., CFRE is the director of development and public relations for The Hormel Institute, University of Minnesota.

Gail is responsible for external marketing for The Hormel Institute and for 10 years has led the fundraising development for cancer research and the major expansions of The Hormel Institute, including growing collaborations to support The Hormel Institute's cancer research, two major capital campaigns, grants for technology, and regional research fundraisers.

In 2012 she co-lead lobbying for Austin Port Authority's bonding bill receiving \$13.5 million from the State of Minnesota and \$23.5 million from The Hormel Foundation, resulting in the newly completed 2016 expansion. The expansion added another 20 labs to The Hormel Institute and a separate "Coming Together for the Cure" campaign developed the "Ray Live Learning Center," a 250-seat lecture hall and large event room providing cutting edge global communications technology used for international cancer research conferences, seminars and collaborative meetings.

Gail has her master's degree in Philanthropy and Development from St. Mary's University of Minnesota. She is past president of the Austin Area Chamber of Commerce and currently serves on boards including the executive board of Austin Area Foundation, executive board of ACGV Austin Community Growth Ventures board, executive board of GRAUC (Greater Rochester Advocates for Universities and Colleges), APEX Austin Diversity council, Association of Fundraising Professionals and Development Corporation of Austin. She was a member of Minnesota Chamber of Commerce's 2015-16 "Leadership Minnesota" group.

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**Keynote:** Bristol TN Essential Services (2017 National Winner)

**Title:** Baldrige Power: How an East Tennessee Utility Company Became a National Role Model

**Time:** 12:30pm – 1:00pm

**Room:** Carriage Hall

**Speaker:** R. Michael Browder, PE, Ed.D. BTES CEO



**Bio:** R. Michael Browder has served as CEO of Bristol Tennessee Essential Services since 1977. He earned a Doctorate of Educational Leadership and Policy Analysis from East Tennessee State University, a Master of Administrative Science degree from the University of Alabama Huntsville and a Bachelor of Electrical Engineering degree from Auburn University. He is a registered Professional Engineer in both Tennessee and Alabama. Under Browder's leadership, BTES received the Excellence Award from the Tennessee Center for Performance Excellence in 1994 and 2012 and the National Baldrige Quality Award in 2017. Browder served on TNCPE's Board of Directors from 1997-2009.

**Overview:** For BTES, the journey to receiving the Malcolm Baldrige National Quality Award began in the late 1980s. Hear how this electric utility created a culture of continuous improvement and a focus on three key areas to help them succeed.

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**Organization:** Fairview

**Session Type:** Breakout

**Session Time:** 1:15pm – 2:05pm

**Room:** Tack

**Title:** A Case Study for Strategy Deployment

**Overview:** Learning Objectives

- Create organization alignment and focus to deploy strategies and goals
- Use visual systems to manage improvement work and decision making
- Develop problem solving skills while getting results

In 2013, HealthEast Care System, an organization strong of 7,300 employees, started using strategy deployment to align and focus the entire organization toward its vision, strategies and goals. They created a four-tier connected system that uses catch ball, scorecard, dashboard, A3 strategies, plans and A3 projects to get the right things done. The visual management system and its standard review process provide clarity and direction to leaders and front line employees. Following the combination of HealthEast with Fairview, the strategy deployment system is expended to the 32,000 employee organization. This presentation will discuss the strategic rationale behind the approach and the results of the implementation.

**Baldrige Category:** **Strategy:** How the organization establishes and plans to implement strategic directions.

**Bio:** Didier Rabino is Vice President, Lean Executive Sensei at Fairview Health Service, a 32,000-employee healthcare organization located in Minnesota. In this role, he supports the development of the Fairview Operating System and provides Lean coaching to the senior executive team. Prior to holding this position, he worked for Andersen Windows as plant manager and architect of the Andersen Manufacturing System. He also worked for Steelcase in England, France and in the United States supporting the development of the Steelcase Production System while leading and supporting lean transformations and new process implementations.

Didier is also the president of Lean Management Systems LLC, director of the AME North Central Region Board, instructor for Manufacturers Alliance and a regular presenter at Lean conferences. He holds a Wood Mechanical Engineering degree from the University of Nancy, France; a Business and Administration degree from the University of Perpignan, France and a Master's degree in Industrial Sciences from Louis Pasteur University in Strasbourg, France. He obtained Lean certificates from the University of Michigan, the University of Tennessee, Kellogg University and the Shingo/AME/SME Lean certification. He is the 27th recipient of the Institute of Industrial Engineering Honorary Member Award; the highest honor IIE grants an individual of acknowledged professional eminence who is not a member of the institute.

Nadine Paitich is Operations Executive, System Care Management Executive for HealthEast, a healthcare organization located in Minnesota. In this role, she is responsible for integrated care management, population management and transition of care activities across the continuum. Additionally, she has executive-level accountability for a multi-disciplinary team overseeing care management and transition of care functions in the acute care hospitals, utilization review, ambulatory and primary care, medical care for seniors, MSHO community care management and diabetes education in collaboration with a physician dyad partner. She also is the executive nursing leader for practice and clinical education for all non-hospital based ambulatory services including primary care.



Prior to this position, Nadine most recently served as Operations Executive Community-Based Services, Home Health, Hospice, Palliative Care, and Clinic Care Coordination/Health Care Home from 2012 to 2017. She led key strategic initiatives to achieve quality outcomes, improve operational efficiency, redesigned care delivery through Value Based Improvement (VBI), achieved smart growth targets and improved employee engagement.

Nadine is a member of Living Well Disability Services Board of Directors. She has a Master's degree in Business Administration from the University of St. Thomas; Opus College of Business, Bachelor of Science in Nursing and Public Health Nurse Certification, an Associate of Applied Science Degree/Nursing and achieved a SME Lean Bronze Certification.

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**Organization:** Leading Age Panel

**Session Type:** Breakout

**Session Time:** 1:15pm – 2:05pm

**Room:** Harvest A

**Title:** Performance Excellence in Aging Services: Stories from the Field

**Overview:** We know that moving from a culture of compliance to a culture of excellence is important but can be overwhelming. Join us to hear how we created a structured and accessible approach to performance excellence to support aging services providers in beginning, or advancing, their performance excellence journey. Learn about the approaches developed and hear from providers who are actively engaged in this process on their successes and lessons learned.

**Baldrige Category:** **Operations:** How the organization designs, manages and improves key processes.

**Bio:** Julie Apold is the Vice President of Quality and Performance Excellence at LeadingAge Minnesota. In her role, Julie is responsible for providing strategic and technical assistance to members on quality and performance improvement, advising the Association on state and federal policy issues related to quality, and developing tools and resources to assist members in their quality improvement efforts. Julie has over 20 years of experience leading and supporting health care quality and safety efforts within different settings and across the continuum of care.

Katie is the Foundation Executive Director/Senior Vice President and is responsible for the foundation's fund development activities, marketing and community outreach activities, select strategic business development and performance excellence initiatives. Her professional experience encompasses more than 20 years of both nonprofit work and for-profit work. She serves as Chair on the Board of Directors for the Alexandria Area YMCA, as Past President of the Association of Fundraising Professional's Central and Southwest Chapter Board of Directors, and Past Chair of the Alexandria Area Leave A Legacy Group. Katie is an active member of Lakes Area Professional Women, Alexandria Area Chamber of Commerce Ambassador Team, the Association for Health Care Philanthropy and Minnesota Planned Giving Council. She holds a Bachelor of Arts Degree in Management from the College of Saint Benedict, is a Certificated Fundraising Executive, and graduate of the Blandin Community Leadership Program.

Angie, a Registered Nurse, is the Chief Operating Officer where she is responsible for the operational and clinical divisions throughout Knute Nelson's continuum of services. Angie has been an employee of Knute Nelson for over 24 years in a variety of nursing and leadership capacities including Director of Nursing and Administrator. Her leadership experience includes Chair of the Care Ventures Cooperative, Minnesota Directors of Nursing Administration, Clinical Practice Committee, Regulatory Affairs Committee, and Quality Committee for Leading Age of Minnesota, Quality Committee for PrimeWest Health Systems. Angie completed the Minnesota Area Geriatric Education Center Fellowship Program and received her Nursing Home Administrator license in 2009. Angie is past Chair of the Health Science and Human Services Academy at the Alexandria Area High School and now serves on the Academy Committee. She holds a Bachelor of Science Degree in Nursing from the College of Saint Benedict.

Dawn Nash, R.N. is the Quality Improvement Specialist for Walker Methodist Shared Services. In her role, Dawn is responsible for the management of specialized programs including performance excellence, outcome and improvement



measures, and care protocols. Dawn has over 40 years of experience leading and supporting clinical quality and performance improvement efforts across the continuum of long term care.

**Dana Vetsch, RN** Dana started in 2014 as TCU nurse manager at the Benedictine Health Center. In 2016, Dana accepted the role of Quality Management Coordinator. Dana serves a key role in developing, implementing and tracking quality initiatives that are instituted on the Benedictine Living Community of Duluth campus. Dana works to support others in understanding how various quality measures are tracked and how they can make positive improvements.

**Brian Pattock LNHA, MBA, HSE** Administrator, Brian joined the Benedictine Living Community of Duluth's campus as the licensed administrator of the Benedictine Health Center in 2015. As of fall of 2017, he now serves as the Administrator for the entire campus where he oversees the operations of the 96 bed skilled nursing facility, 149 units of assisted and independent senior housing, an adult day program and a pre-school program.

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**Organization:** Brookings Public Schools

**Session Type:** Breakout

**Session Time:** 1:15pm – 2:05pm

**Room:** Harvest B/C

**Title:** Launching Continuous Improvement: Perspective and Process

**Overview:** All continuous improvement journeys begin with a single step! Learn how the Brookings School District has started the continuous improvement journey and how their approach could help your organization too. From the session, you will learn what an already very successful organization (2<sup>nd</sup> best school district in South Dakota according to Niche.com) has done to start their Baldrige journey in a positive, future-focused way.

**Baldrige Category:** **Leadership:** How upper management leads the organization, and how the organization leads within the community.

**Bio:** Klint is a dynamic educational professional with an extensive background as a recognized leader. He currently serves in one of the largest districts in South Dakota. Prior to serving as the superintendent in Brookings, SD, Dr. Willert served as the superintendent of the Brainerd School District, one of the largest rural districts in MN. He had also served as superintendent of Marshall Public Schools, one of the largest regional centers in Southwestern MN. He graduated in 2013 with an Educational Doctorate in Educational Leadership from the University of St. Thomas. His study was on leadership practices in Baldrige Award recipient organizations. He provides consistent leadership of community and regional initiatives, which is possible through his in-depth understanding of public and private partnerships to foster regional growth and success.

With an impressive track record as a talented leader and communicator, Klint has garnered experience working effectively with governance teams by providing ongoing support, development, and engagement with the Board of Education. He has exceptional financial management skills and a keen ability to manage costs while identifying opportunities for advancement through prudent stewardship. Passionate about his work, Klint is a results-driven individual committed to a student-centered philosophy, faculty development, and student growth.

Finally, Klint is a member of the John Maxwell Team and can provide support and training on core principles from John Maxwell. He welcomes the opportunity to extend his network and relationships with like-minded professionals.

In 2015, Klint was named as finalist for the National Association of School Superintendents (NASS) Superintendent of the Year.

Core Competencies: Baldrige performance system, Strategic Planning, Leadership, Education Administration, Board Relations, Community Relations, Public Speaking, Relationships, Resource Management, People Development, Cultural Competency.

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**Organization:** Cirrus



**Session Type:** Breakout

**Session Time:** 1:15pm – 2:05pm

**Room:** Garden City

**Title:** The Power of Observation – Making Data-Based Decisions

**Overview:** Improving is a challenge when you don't measure. Effective, data-based decisions are essential in today's fast-paced environment. Measuring performance to key objectives requires selecting, collecting and using the right data to make effective decisions.

What is the difference between data and information?

How important is observation to understanding and collecting the right data?

**Baldrige Categories:** **Measurement, analysis, and knowledge management:** How the organization uses data to support key processes and manage performance.

**Bio:** Teresa Riffel is the Vice President of Manufacturing Operations and Continuous Improvement at Cirrus Aircraft. She joined in early 2015 and with responsibility for quality assurance, quality engineering, air safety and continuous improvement in the company. Teresa is an accomplished aerospace executive with extensive industry experience. She has held executive leadership positions in quality, global strategic sourcing and supplier integration for international Fortune 500 companies as well as other aerospace suppliers.

Teresa has a Bachelor of Science degree in business management, a Master's degree in management information systems and has certificates from the Thunderbird School of Global Management Executive Leadership Program and Michigan State Strategic Supply Chain Management program. She is a certified six sigma master black belt and is an APICS Certified Supply Chain Professional (CSCP).

Jon Wright is Executive Director of Continuous Improvement for Cirrus Aircraft.

Most recently Jon was Senior Manager of Operational Excellence for United Rentals. In this position Jon was responsible for implementing process improvement initiatives and coaching others on Lean tools and techniques to provide superior customer experiences and to strengthen the company in multiple business divisions. Recent projects include reducing hauling cost, increase fleet utilization, increase time utilization on high rented items and implementing Best Practices. Jon started his career with the Boeing Company as a senior mechanic/inspector and rapidly progressed to Strategic Development Lean Project Manager. Besides leading numerous results producing Kaizen events and starting lean programs at tier 1 suppliers Jon was instrumental in creating a pulse production line for the Apache Helicopter. Jon had Lean responsibility for a 1,500 person business unit to set strategy and implement/lead projects. During this time he was also able to earn his Master and Bachelor degrees.

Jon left the Boeing Company and became an external consultant to pursue additional challenges in new industries such as Rail Transportation where he was able to reduce repair cost and increase machine productivity. He was also able to increase yearly cash flow in the Plastic Injection Molding industry.

Jon was recruited from consulting to join RSC Equipment Rental as Manager of Operational Excellence for 10 regions across the United States. At RSC he was able to start the Operational Excellence program from scratch and recruit and then coach others on Lean tools and techniques. During this time he was able to lead teams/individuals on reducing equipment requisition time, reduce customer contract processing time and reduce non value added tasks from District and Branch Managers.

Due to United Rentals acquiring RSC Equipment Rental and United Rentals not having an Operational Excellence program Jon became the West Region Lean Manager for Simmons Bedding where he had Lean responsibility for nine production facilities and leading site managers to set strategy and action plans. He was also able to lead/coach site level Kaizen leaders on specific projects such as reducing inbound freight cost, increase supplier defective material claims, and production increases. Once United Rentals started an Operational Excellence program Jon was then recruited by Senior Leadership to join United Rentals.

Jon received his Master of Science in Technical Management degree from Embry-Riddle Aeronautical University and his Bachelor of Science in Business Management from University of Phoenix. Jon also has his Private Pilot's License with Instrument Rating and Airframe and Powerplant License.

Jon grew up in Southern California and resides in Superior, WI with his wife Tiffany where they enjoy taking cross-country motorcycle trips, participating in charity fund raising activities and spending time with their four rescued dogs.

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**Organization:** MRCI Worksource



**Session Type:** Breakout

**Session Time:** 1:15pm – 2:05pm

**Room:** Captains

**Title:** *Building Your Bench: The Power of Talent Development*

**Overview:** Is your organization ready to hit a home run? Talent development starts with building your bench for individuals within your organization. What's the score? MRCI partners with local employers to present forward-thinking ideas to coach all talents and abilities to build capacity for your organization. Join us for an inspiring talent development session – review stat's, learn the importance to development a team, and receive four strategies to help you build your bench.

**Baldrige Category:** **Workforce:** How the organization empowers and involves its workforce.

**Bio:** Tami Reuter serves as Chief Business and Marketing Officer for MRCI, a nonprofit organization that provides genuine opportunities for individuals with disabilities or other disadvantages.

Reuter's focus in the nonprofit industry has always aligned with developing the talents of the future workforce. Her past professional roles as Executive Director of South Central College's North Mankato Campus Foundation and Vice President of Operations for Junior Achievement were firmly grounded in developing the potential of others. Reuter also finds inspiration from many of the organizations she personally supports with her contributions of time including the YWCA, Rotary, Greater Mankato Growth, St. John's church and several others.

Outside of work, Reuter, her husband and four daughters live in Mankato. When they are not in the car pool or on the sidelines, you will find them enjoying the various Minnesota seasons

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**Organization:** Mayo Clinic

**Session Type:** Breakout

**Session Time:** 2:30 – 3:20pm

**Room:** Tack

**Title:** Quality Management-Where We Have Been and Where We A re Going

**Overview:** This presentation will provide a brief overview of the evolution of laboratory quality management. It will identify regulatory requirements and events that have contributed to the development of quality systems development for clinical laboratories. This presenter will discuss the life cycle of the Quality Management System and the importance of continual process improvement. A highly functional Quality Management System is vital to laboratory operations and effective integration within the laboratory's parent organization.

**Baldrige Category:** **Operations:** How the organization designs, manages and improves key processes.

**Bio:** Janna Galbreath is the Quality Manager for the Department of Laboratory Medicine and Pathology. She began her career as a medical technologist at Mayo Clinic in 1973. Janna has experience in Transfusion Medicine and Microbiology, and for the last 30 years has worked to promote quality management in the clinical laboratory. She began her role as Quality Manager for DLMP in 2006. Janna is recognized as a subject matter expert in laboratory quality management and has presented quality management topics locally, regionally, nationally and internationally.

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**Organization:** MN Deed

**Session Type:** Breakout

**Session Time:** 2:30 – 3:20pm

**Room:** Harvest A

**Title:** Cutting Edge Culture: motivating your workforce of then, now, and the future.

**Overview:** Key takeaways





- Assessment tool through the eyes of the employees (outreach to retirement)
- Learn the 3 Cs to a cutting edge culture (consistent, communicated, collaborative)
- Practical steps to engage regional workforce systems

If we boil it down to the bottom line, we want and need workforces who are motivated, engaged and productive. With a statewide unemployment rate hovering in the 2-3% range, it is a job seeker's market and will be for another decade.

In this interactive session, assess your organization through the eyes of your employees, learn how to activate the workforce system, and take hope key steps to create a cutting edge culture that will retain your current workforce, attract your future workforce, and activate your retiring workforce.

**Baldrige Category: Workforce:** How the organization empowers and involves its workforce.

**Bio:** Julie Brock, Workforce Strategy Consultant for the state of Minnesota (DEED), develops innovative workforce solutions by aligning resources, facilitating collaborations, and leveraging expertise in targeted industry sectors to drive economic equity and growth.

With a background in K-12 education and workforce development, Brock hopes to help the Southeast Minnesota economy grow and prosper by ensuring all residents, current and future, see their work as valuable and aligned with their individual strengths, passions, and skill sets. "We are in competition with the globe to be an attractive place for both employers and employees. We are a standout region with our quality of life, and I am excited to see us continue to be proactive about our growth."

Julie Brock resides in Eyota, Minnesota with her husband and two sons. If they aren't home, you can find them outside, taking in the best of each Southeast Minnesota season.

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**Organization:** Austin Public Schools

**Session Type:** Breakout

**Session Time:** 2:30 – 3:20pm

**Room:** Harvest B/C

**Title:** Capitalizing on Serendipity...to Facilitate Organizational Change

**Overview:** When looking at the notes section for Strategic Planning Category 2.1a(2), an interesting reference to strategic opportunities arising from, among other things, "capitalizing on serendipity." In this interactive session, Austin Public Schools will outline how it capitalized on a major building project to create change throughout the organization. It will discuss work it did to help it capitalize on this moment and lessons learned in the process.

**Baldrige Category: Workforce:** How the organization empowers and involves its workforce.

**Bio:** David Krenz, Superintendent, Austin Public Schools

David has served as Superintendent of Austin Public Schools since 2009. Previous to Austin, he served as Superintendent, High School Principal and Assistant Principal, Director of Technology, and math and science teacher in Wisconsin and Minnesota school districts over his 40 plus year career in education. David earned his Bachelors, Masters and 6<sup>th</sup> Year degrees from Winona State University. David has served as a member of the Board of Directors for the Minnesota Association of School Administrators, the State Superintendents Professional Association. He is currently on the Region 1AA Executive Board of the Minnesota State High School League, Hormel Foundation Board of Directors and Executive Board of the Austin Chamber of Commerce. He is a member of the Austin Rotary, Austin Noon Kiwanis, and Austin Morning Lions Clubs. David's immediate family consists of wife Eileen, son Christopher (39) – daughter-in-law Krista and granddaughter Violet (8 years), and sons Michael (37) and Brian (32).

John Alberts, Executive Director of Educational Services, Austin Public Schools

John Alberts is the Executive Director of Educational Services for Austin Public Schools in Austin, MN. In this role, he is responsible for oversight of teaching and learning, staff development, technology, gifted programs, English learner



programs, integration programming, and federal funds. Additionally, John is a trained Baldrige evaluator and has served on several evaluation teams through Performance Excellence Network (PEN), and is on the Southeastern MN Board of PEN. John received his BA in English and psychology from the University of MN, Morris, and a MA in curriculum and instruction from the University of MN.

Dave Maroney, President, ATS&R

ATS&R President, David Maroney, has 33 years of experience specializing in educational architecture with extensive involvement in new facilities, additions, and alterations projects. His knowledge encompasses facilities assessments, long-range planning, facility programming, building design, cost estimating, scheduling, and quality control with a strong sensitivity to educational curriculum and 21st century learning solutions.

Kara Rise, Associate Partner, Interior Design, ATS&R

Kara Rise is an associate partner and interior designer specializing in educational projects. She provides planning, research, programming, workshops, interior design, cost estimating, and construction documents preparation. Kara has a passion for helping their clients create future-ready learning spaces.

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**Organization:** Communities of Excellence

**Session Type:** Breakout

**Session Time:** 2:30 – 3:20pm

**Room:** Garden City

**Title:** Using Baldrige to Improve Community Outcomes: West Kendall, Florida’s Communities of Excellence 2026 journey

**Overview:** Beginning in 2010, a small group of leaders passionate about Baldrige developed the hypothesis that the Baldrige Framework, which is proven to transform business and organizations could be adapted to transform the health and wellbeing of residents in communities. In this session, COE 2026 Director Stephanie Norling will explain their approach, provide an overview of the communities that have adopted this framework to date, and describe her takeaways about key requirements needed for communities to pursue community performance excellence. Michelle Mejia, Assistant Vice President, Health Promotion and Strategic Partnerships with West Kendall Baptist Health will share the details of one of the first communities to adopt this framework, the role of the Healthy West Kendall Coalition, and her insights and lessons learned so far from their Communities of Excellence journey.

**Baldrige Category:** **Leadership:** How upper management leads the organization, and how the organization leads within the community.

**Bio:** **Stephanie Norling, MBA,** Stephanie Norling has been Managing Director of Communities of Excellence 2026 since 2014. After graduating with a BA in Anthropology from Tufts University in 1999, Stephanie joined the Institute for Healthcare Improvement in Boston as a Project Coordinator. After moving to San Diego in 2001, she worked for 12 years at the San Diego Zoo and Safari Park, first in the Operations Department and later taking a lead role in the Elephant Department at the San Diego Zoo Safari Park. In 2012 Stephanie graduated from the University of San Diego with a Master’s in Business Administration and a Certificate in Nonprofit Management.

Stephanie is an active member of her community, with volunteering history at Father Joe’s Villages, the House of Denmark, the San Diego Zoo, and many others. In addition, Stephanie recently completed her third year as a National Baldrige Examiner.

Michelle Mejia is the executive leading Healthy West Kendall; a community wide movement working to transform the community into one that embraces social wellbeing. The coalition looks to re-imagine itself by using a multidimensional intervention that assesses and addresses all of the determinants of health. Michelle conceptualized the Health Hub, a wellness kiosk, referral to care and resource center which has been identified by the Department of Health as a model for their “innovative interventions”. Michelle was part of the senior executive team that opened West Kendall Baptist Hospital in April of 2011. She currently oversees the Medical Staff Office, Nutrition Services and Community Relations & Outreach. In addition, to the auxiliary departments; the Volunteer program and the Gift Shop.



Michelle started her career at Baptist Health 20 years ago. She was previously at South Miami Hospital where she assisted in the development of the International Services Department with a special focus on healthcare for cruise line employees. She also launched the Physician Relation's department and was subsequently promoted to director of that department.

Ms. Mejia is a two-time past president of the Juvenile Diabetes Research Foundation. She served on the foundation's government relations committee and for a decade served as Logistics Chair for the Walks to Cure Diabetes.

Following a path of increased leadership, Michelle has completed training with The Center for Executive Leaders. Ms. Mejia has a bachelor's in Health Administration and a master's degree from Barry University. In 2014, she completed training in "Leading Through Innovation" from the University of Berkeley. She is part of the adjunct faculty at Barry University.

Michelle grew up in the Republic of Panama and lives in Miami with her husband and two children.

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**Organization:** South Dakota Department of Transportation

**Session Type:** Breakout

**Session Time:** 2:30 – 3:20pm

**Room:** Captains

**Title:** Strategic Planning in a Government Organization

**Overview:** Key takeaways

- How we determined a strategic planning process was needed
- Overview of our strategic planning process development and implementation
- Improvements that have come from strategic planning process
  - Employee engagement efforts
  - Leadership communication
  - Process improvement
- Challenge in getting involvement from front line to executive team

In 2015 the Department of Transportation developed an annual strategic planning process. In the past the Department's strategic plan was not systematic and focused mostly on actions to be taken. This change provided for defined objectives, short & long term goals, Department wide action plans, and improved communication. Additionally the use of an annual strategic planning cycle has resulted in significant improvements to align the Department's resources on our key work objectives; Customers, Workforce, Service, Safety and Assets. These improvements have included stakeholder engagement & communication, employee engagement efforts, leadership communication and process improvement.

**Baldrige Category:** **Strategy:** How the organization establishes and plans to implement strategic directions.

**Bio:** Craig Smith, PE received his Bachelors of Science degree in Civil Engineering from the South Dakota School of Mines and Technology, Rapid City, SD in 1992. He has worked for the SDDOT since 1992 primarily as a construction and maintenance engineer and manager in the Sioux Falls metro area. Over his 25 year career with the Department he has overseen multiple major highway construction projects in and around Sioux Falls. Since 2012 Craig has served as the Mitchell Region Engineer responsible for nearly 2500 miles of state highway and interstates in the southeast quarter of South Dakota.

As a member of SDDOT's Executive Team he has led the efforts to integrate the Baldrige Criteria into the Department's culture, including as a tool for leadership development. SD DOT conducted a Baldrige Express assessment in 2015 and a full assessment in 2017.

Jeff Senst, PE received his Bachelors of Science degree in Civil Engineering from the South Dakota State University, Brookings, SD in 1983. He has worked for the SDDOT since 1984 in various positions in the Sioux Falls metro area as a construction and maintenance engineer and manager. In 2002 relocated to Aberdeen SD to accept his current position as Aberdeen Region Engineer. As Region Engineer he is responsible for over 2300 miles of state highway and interstates in northeast South Dakota.

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**Keynote:** Stellar Solutions (2017 National Winner)

**Title:** Actually, We are Rocket Scientists: Baldrige in Action at Stellar Solutions

**Time:** 3:40pm – 4:10pm

**Room:** Carriage Hall

**Speaker:** Patrick Logsdon, Vice President - Intelligence Programs

**Bio:** Mr. Logsdon is the Vice President of Intelligence Programs for Stellar Solutions Inc., an aerospace engineering company that focuses on meeting the critical engineering needs of the nation's most important aerospace engineering programs, in the areas of Intelligence, Defense, Civil, and Commercial applications. He is responsible for overseeing a significant number of programs within the Intelligence Sector, managing performance and providing resources and oversight. His duties include development of employees and program plans for the Three-letter Intelligence agencies, and providing outreach to government and contractor customers, building lasting relationships that focus on Mission Support and their critical needs.

Mr. Logsdon's career is built on a foundation in Leadership, Systems Engineering, R&D support, (applied and advanced), Telecommunications, Mission Assurance, Process Engineering, and Cryptologic support to deployed military customers. His most recent experience has been in Senior Management, and Program Leadership as the VP for Stellar Solutions and previously as the Director of Operations for NRO and DNI contracts at Welkin Associates, Ltd. That capability along with his military experience is the foundation to his sensible approach to leadership, decision-making, sound judgment, desire to support the mission, and for personal development. He succeeds in leading people and managing large programs.

Prior to joining Stellar Solutions and the aerospace industrial base, Pat served 29 years, as a Cryptologist in the United States Navy, starting as enlisted and retiring as a Commander. He began his service to the Intelligence Community operating out of the Philippines as a SIGINT, C4ISR and an ELINT specialist where he conducted Direct Support operations on P3 aircraft and 11 various ships operating in and around the Pacific Rim, Gulf of Tonkin and the Indian Ocean. He subsequently deployed on 13 ships in the Mediterranean and Black Sea while stationed at both Spain and Italy and 8 more deployments, readying combatants and cryptologists for forward deployment to the Far East and Indian Ocean, while supporting operations out of San Diego, Ca.

Additional career developing assignments included tours with Commander Naval Security Group Headquarters' as an instructor for the Cryptologic Officers School, National Security Agency (NSA) with a rewarding tour as the Director for the Executive National Intelligence Support Team (NIST) in Sarajevo, Bosnia-Herzegovina, Executive Officer Diego Garcia BIOT, and retired after a tour at the National Reconnaissance Office (NRO) as the Director of the Applied SIGINT Technology Division in 2001.

Pat holds a Bachelor of Science (BS) degree from the University of New Mexico and a Master's of Science (MS) from Marymount University.

Pat has a wife Donna and together they have four children Shanna (Dental Hygienist in Fayetteville, Ark), Bryan (Training Director Life Time Fitness Reston, Va), Jake (Real Estate Agent, New Orleans, La) and Logan (Systems Engineer, Chantilly, Va). They weekend retreat to their 45 acre "gentlemen's farm" in Berkeley Springs, West Virginia where Pat enjoys his hobbies that include refurbishing their 180 year old farmhouse and bringing new life to antique vehicles like his 1963 Impala, 1965 Corvette, 1967 Camaro and the 1969 Chevelle (SS 396).

**Overview:** Talking Points / Learning Objectives:

1) Stellar's foundation is its vision of satisfying our customers' critical need while realizing our dream jobs. That is what we care most about (customers and employees) and everything we do is driven by that vision and our values (do the right thing for our customers, employees, and the community).



2) Stellar is “built to last”. We support our vision with our Leadership System, Strategic Planning Process, Metrics & Results, and Continuous Process Improvement. We adopted the Baldrige Framework in 2004, using it to build a sustaining business with steady growth and continuous process improvement that will stand the test of time.

3) Stellar’s leadership is key to its culture and its success – leadership communication keeps employees informed and working toward their dream jobs, and helps us ensure we are satisfying our customers’ most critical needs. It is crucial to the deployment and integration of our vision and values.

Abstract:

Stellar Solutions, Inc. is a global systems engineering provider solving the most complex issues that commercial and government clients face today – from national security and space exploration to the revolutionary impact of integrated technology on our lives – and delivering depth and breadth of industry knowledge through nimble teams of strategists, systems and aerospace engineers, and technical specialists. Stellar was founded in 1995 by CEO Celeste Ford with the vision of satisfying customers’ critical needs in alignment with employees’ dream jobs. That vision persists today, paired with deeply rooted values of doing the right thing for the customer, the employee, and the community. Stellar’s vision and values drive everything that we do, and supported by our Leadership System, Strategic Planning Process, and Continuous Process Improvement, make Stellar Solutions a company that is “built to last”.

Organization Mission: Satisfy our customers’ critical needs while realizing our dream jobs.

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**Keynote:** Jazz Impact

**Time:** 4:10pm – 5:00pm

**Room:** Carriage Hall

**Title:** The Tools of Jazz in An Age of Uncertainty

**Overview:** There is something hidden in the process of jazz that speaks directly to the way you live your life and, more specifically, to the way you function in the business world. What do jazz musicians do?

Jazz musicians are improvisers. Experts at collaboratively embracing and working with change. They are comfortable with the discomfort of uncertainty.

What does improvisation mean? *Improv-Is-Ation* is literally the act of improving upon what “is.” To improvise well requires individual skills. But one person improvising alone, compelling as it might be, isn’t relevant to business. Business is all about the interaction of people within and between organizations. To sustain collaborative improvisation you need creative organizations that understand how to balance the need for structure with the need for flexibility.

Jazz ensembles are improvisational organizations that blend individual intention and behavior with group intention and behavior to consistently surface highly creative ideas. The behaviors of APRIL -- Autonomy, Passion, Risk, Intuition and Listening -- will give you and your company the skills you need to become the improvisers of the business world.

Dr. Michael Gold and the Jazz Impact Ensemble will engage you in a set of conceptual skills that will help you -- as individuals and as organizations – hone the collaborative capability to simultaneously discover, interpret, and integrate new ideas in real time.

**Bio:** Michael Gold is the founder of Jazz Impact, where he develops and conducts arts based learning designed to build interpersonal skills essential to the innovative process. He has worked for companies like IBM, Target, Microsoft, GAP, Siemens, Aetna, Starbucks, McGraw- Hill, Thomson International, HSBC Bank, Credit Suisse, Blue Cross Blue Shield, General Dynamics, The Hay Group International, Cargill, Accenture, General Mills, The United Nations, and many others. Michael’s background in music, business and academia was essential in developing Jazz Impact. He held various management positions in the real estate and financial services industries, holds a Ph.D. in music and created and ran the first jazz program at Vassar College. He uses jazz in a unique approach to teaching leadership development for The Executive MBA and Leadership Development Programs at the Kellogg School of Management at Northwestern



University and with Surgeons, Physicians, and Chief Administrators at The Mayo Clinic. He has lectured at the University Of Chicago Graduate School Of Business, The Richard Ivey School of Business, and The Schools of Public Health Policy and Law at The University of Minnesota. Michael is an accredited practitioner of Appreciative Inquiry and has recently published a paper in The Journal of Thoracic and Cardio Vascular Surgery, October 2017, entitled “The Role of Imaging, Deliberate Practice, Structure and Improvisation in Approaching Surgical Perfection” with Joseph Dearani, MD and Anders K., Ericsson, PhD.

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**Friday, May 4, 2018**

**Keynote:** City of Fort Collins

**Title:** Journey to World Class

**Time:** 8:40 – 9:10am

**Room:** Carriage Hall

**Overview:** Description: The Deputy City Manager from the City of Fort Collins, CO, recipient of the 2017 Malcolm Baldrige National Quality Award, will share the City’s journey to World Class. Mr. Mihelich will cover Category 1 Leadership and Category 2 Strategy and describe how the Baldrige process for performance excellence has made Fort Collins one of America’s most satisfied cities.

**Bio:** Having joined the City of Fort Collins in April of 2014, Deputy City Manager Jeff Mihelich is responsible for day-to-day operations of the City’s municipal services and staff as he works with the City’s Executive Leadership Team (ELT) to implement the organization’s strategic plan. Jeff tries to lead a team of 1800 employees with a “play hard, work hard” attitude.

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**Presenter:** Paul Grizzell

**Session Type:** Intensive

**Session Time:** 10:00am – 11:30am

**Room:** Tack

**Title:** Using the Baldrige Core Values to Improve Leadership Effectiveness

**Baldrige Category:** **Leadership:** How upper management leads the organization, and how the organization leads within the community.

**Overview:** Leadership is the key driver of performance excellence in an organization. This intensive presentation will focus on strategies to align leaders, gain their commitment to performance excellence and start to see improving results.

**Bio:** Paul Grizzell of Core Values Partners is an international speaker, trainer, and leadership coach and consultant who helps leaders *focus, align, and accelerate* their improvement efforts through effective deployment of the Baldrige Criteria for Performance Excellence. He works with clients in several sectors - all with an eye toward advancing performance excellence through outcome-focused, evidence-based practices.

Paul has been involved with Baldrige-based performance improvement since 1997. He is an Alumni Examiner on the Baldrige Award Board of Examiners where has led multiple site visits and trained Baldrige Examiners. He is a past Examiner and Judge for the Performance Excellence Network and a current Judge with the Illinois and Virginia Performance Excellence Awards. He is also a Judge for the Gold Level of the American Health Care Association Quality Award. He is an Assessor, Licensed Advisor, and Licensed Trainer for the European Quality Award and is the Foreign Evaluation Expert for the China Quality Award.

Paul is a co-author with Mark Blazey of *Insights to Performance Excellence, Using the Baldrige Framework and Other Integrated Management Systems*, published by the American Society for Quality.



**Presenter:** Chris Vogal

**Session Type:** Intensive

**Session Time:** 10:00am – 11:30am

**Room:** Harvest A

**Title:** Business Transformation- Delivering Results In 90 Days

**Overview:** Are you interested in transforming the results from your processes in 90 days?

Leveraging a proprietary approach and combination of the best integration of continuous improvement methodologies your company, division or function can achieve exceptional results! Our proven approach is built from over 20 years of helping transform organizations into high performing companies. Understanding this approach can help if you are looking for a proven performance improvement approach or are looking to strengthen your existing capabilities.

This intensive hands-on session will walk you through the process and engages you in exercises that show you how to create a “model process” that doubles the good, halves the bad and doubles the speed!

**Baldrige Category:** **Strategy:** How the organization establishes and plans to implement strategic directions.

**Bio:** Chris specializes in the Development of Lean Leaders and Administrative Lean. He has over 15 years of Lean Administrative and Process Improvement experience including holding a variety of senior management positions in Operations Management, Lean Deployment, Financial Analysis & Planning and Information Technology.

During his 15 years at Wells Fargo, Chris led and used Lean to transform a division of Wells Fargo with 1,200 staff members. Starting in 2002 new costs of imaging and data lifting in Wells Fargo were rapidly rising due to independent growth across organizational lines. The Document Management department was formed to control costs through focused vision, consistent technologies and reduction in redundant processes. Taking the leadership of this department Chris saw the opportunity for Lean / Six Sigma / Operational Excellence and began to drive culture, knowledge, and tools learned from the Toyota Production System. The actions undertaken created a transformation of processes, physical environment, and most importantly, mindset. While the numerical results clearly proved the worth of this approach, we were also able to fully engage our work force completing the transformation with retention of nearly 100% of the original workforce.

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**Presenter:** Irina Fursman

**Session Type:** Intensive

**Session Time:** 10:00am – 11:30am

**Room:** Harvest B/C

**Title:** How to Inspire Real Engagement during Tough Change

**Overview:** There's an old adage about motivating change: "you need to either feel the pain or see the light." True, but the real challenge is in the "how." How to rally people together around a mission that is exciting to some and scary to others. How to set common goals for people with different agendas. How to deal with the baggage of history so everyone can move forward. To be a high-performing organization, you need to know *how* to address these common challenges. In this interactive discussion, Irina will explain and demonstrate methodology to guide people toward authentic engagement and a shared vision.

**Baldrige Category:** **Strategy:** How the organization establishes and plans to implement strategic directions

**Bio:** Irina Fursman is Chief Facilitator and OD Practitioner at HUE.Life, an organization development and facilitation firm that focuses on human understanding and engagement as a core strategy for change. Her work includes a variety of strategic consulting services such as retreat planning and facilitation, strategic planning, and organizational or community engagement projects.





As a certified Technology of Participation (ToP) facilitator and trainer at Minnesota Technology of Participation (MNTOP), and a licensed practitioner of the Insights® people development program, Irina has worked with national and international organizations to teach the art and science of facilitation, engagement and strategic thinking.

In addition, Irina is president of the non-profit Institute of Cultural affairs in Ukraine that provides experiential leadership development opportunities for current and future leaders. She also co-founded the non-profit Global Synergy Group to create leadership development and engagement opportunities for civic leaders around the world.

Irina holds a Bachelor's Degree in Education and an M.S. in Mathematics and Computer Science. She is a Doctoral Candidate at the University of St. Thomas, pursuing her dissertation in Organization Development and Change Leadership.

Her creative presentation skills and extensive facilitation expertise provides a fun, engaging and motivating experience for participants to help foster more successful organizational change and performance.

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**Presenter:** Lee Eisenstaedt & Trent Clark

**Session Type:** Intensive

**Session Time:** 10:00am – 11:30am

**Room:** Garden City

**Title:** Leading with Courage

**Overview:** Did you know that 40%-50% of leaders fail, quit or are pushed out within the first 18 months in their jobs? If you want to be successful in today's rapidly changing business environment, there are nine behaviors you need to be aware of and adopt. They are key to moving your agenda forward and making a bigger impact, sooner. Failure to respect them can prevent you from implementing your plans, reduce the impact you make, and even derail your career.

This interactive session will be based on Lee Eisenstaedt's Amazon bestseller, *Being A Leader With Courage*. Lee and Trent Clark, his business partner, will be leading this session that emphasizes tools that you can begin to use immediately. In addition to learning about the nine behaviors of effective leaders with courage, attendees will:

- Identify which of three leadership styles they prefer using;
- Assess their skill at delegating tasks and projects;
- Learn how answering just two questions can help identify the best person to delegate a task to;
- Be introduced to a tool that will help them decide which of five decision making styles is most appropriate for a situation;
- And more!

Lee and Trent will also share with the attendees some of their "aha moments" from the research they've done for their forthcoming book, *Leading With Courage In Sports*.

**Baldrige Category:** **Strategy:** How the organization establishes and plans to implement strategic directions

**Bio:** Lee Eisenstaedt brings more than 35 years of diverse leadership, finance and operations experience to the clients of the Leading With Courage® Academy. The CFO of SC Johnson has described Lee as a well-rounded businessman because he's "...worked for more than two companies, in more than two functions, in more than two countries." Lee focuses on helping new and emerging leaders make a bigger impact, sooner. He is accomplishing this through the Leading With Courage® Workshop and the Leading with Courage® Academy, both of which are based on his Amazon best-seller *Being A Leader With Courage: How To Succeed In Your C-Level Position In 18 Months Or Less* (May 2016). Prior to founding Leading With Courage Academy, Lee was a founding partner of L. Harris Partners, LLC, during which time he surveyed/interviewed several thousand clients of professional services firms. He has been a Chief Operating Officer of a Top 5 and a Top 50 CPA firm. Lee spent the majority of his career, 22 years, with the SC Johnson family of companies – including the consumer products company, the SC Johnson family office, and Johnson Outdoors, Inc. – in the U.S. and Western Europe, frequently as the "right hand" to the leader of the division, subsidiary or country to which he was assigned.



Lee's second book *Being A Leader With Courage* was published in May 2016 and became an Amazon best seller in July 2016. He is also the co-author of the book *Wallet Share: Grow Your Practice Without Adding Clients*, and is a frequent speaker at national and regional conferences of practitioners of professional services. Lee is currently working on his third book, *Leading With Courage® In Sports*.

Lee received his MBA from Northwestern University and his BA from Franklin & Marshall College. He has attended executive programs on marketing at Harvard, Wharton, and Northwestern Universities, and executive development programs at INSEAD and the Center for Creative Leadership. Lee is also a Certified Everything DiSC Trainer, Net Promoter® Certified Associate and a member of Attorneys for Family Held Enterprises (AFHE), Family Firm Institute (FFI), Private Directors Association (PDA), Society for Human Resource Management (SHRM) and Association Forum.

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**Trent Clark:** Trent Clark is Co-Founder of the *Leading With Courage® Academy*. Having spent his adult livelihood among top 3% producers in sports and business, Trent is dedicated to empowering people to reach their goals, peak performance, and attain their dreams through alignment and positioning. Trent is a nationally recognized certified coach.

Trent has received accolades as both an athlete and coach. He served over 12 seasons - including three (3) trips to the *World Series* - working with the Detroit Tigers, two-time *American League Champion Cleveland Indians* and *World Champion Los Angeles Angels of Anaheim*. Trent has worked on staff with famed personalities, coaches and executives Mark Shapiro, Nick Saban, Tom Izzo, Mark Dantonio, John Hart, Paul DePodesta, Sparky Anderson, Mike Hargrove, Mike Scioscia, Don Wakamatsu, Jerry Jenkins, Joe Maddon, Bud Black and many others.

“Trent is a fabulous presenter!” - Technology Retail Executive, Canada

In business, Trent is a founder, an educator and investor. He is a 5-year member of the *Entrepreneur Organization* (EO) serving the EO Global Board Mentorship Sub Committee and operates as an *EO Mentorship Facilitator* worldwide. As a professional speaker, Trent has served organizations for over 25 years, providing motivation and useful knowledge transfer from the lessons of sport to practical business application. In addition, he is a Certified Everything DiSC® Facilitator and Authorized Partner of both DiSC and Pat Lencioni's *The Five Behaviors of a Cohesive Team®*.

He is currently working on his first book, *Leading With Courage® In Sports*, which he is co-authoring with Lee Eisenstaedt.

Since 2011, Trent has launched two separate startup firms that rose to revenues exceeding \$1M USD within the first 15 months of existence.

He has served the charitable organization *ALL-PRO DAD, Compassion International, Educatis International, Red Mountain Community Church* and *Hickory Creek Community Church Missions*.

A University of Toledo BS Graduate with an Education Degree (K-12), Trent earned Varsity Letters in both Tennis and Baseball and was an All-Mac 1<sup>st</sup> Team Academic Recipient. In addition, Trent played in the 1989 & 1990 NJCAA National Tennis Championships.

Born in Battle Creek, Michigan, Trent and his wife reside in the Midwest and have five children.

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**Presenter:** Irene Kelly

**Session Type:** Intensive

**Session Time:** 10:00am – 11:30am

**Room:** Captains

**Title:** Ikigai: Aligning your Work and your Purpose

**Overview:** Presentation Talking Points of Presentation She supports clients to examine the barriers that interfere with full satisfaction, living in your “bliss”. Many organizations recognize that work-purpose alignment brings positive results while lack of it leads to unhappy and unproductive staff.



**Baldrige Category: Operations:** How the organization designs, manages and improves key processes.

**Bio:** Irene Kelly, PCC, CVI™ VAR, a Leadership & Academic Coach, supports leaders to increase self-awareness and generate new possibilities. Her “Ikigai” dovetails with her work as she supports clients to enhance connections to self & others, develop ability to see possibilities and identify the help needed to succeed. Irene has a diverse background in business ownership, management, sales and organizational leadership. She works with leaders in organizations, teams and small businesses to ensure that purpose and passion are present. Her organizational work is with those who care as much about people and relationships as they do about the bottom line.

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**Keynote:** Southcentral Foundation

**Title:** Using the Voice of the Customer to Drive Improvement

**Time:** 11:35am – 12:05pm

**Room:** Carriage Hall

**Overview:** Southcentral Foundation is an Alaska Native customer-owned health care system that is responsible for providing health care and related services to approximately 65,000 Alaska Native and American Indian people in southern Alaska. SCF took on this responsibility in 1998 from Indian Health Services, and made major changes to the health care system based on over a year’s worth of feedback from patients (who are called “customer-owners” at SCF).

SCF continually uses the voice of the customer to drive improvement at the organization, using three tools to collect feedback data. The first is a customer satisfaction survey that uses tablets to collect regular, daily customer experience and satisfaction data which is used to benchmark and make immediate improvements. Survey results are quickly actionable and confidential. The second tool is an employee satisfaction survey which gathers employee satisfaction data to improve work processes and promote happiness in the workplace. This helps support employee performance, and links to customer satisfaction data since approximately 52 percent of SCF employees are Alaska Native/American Indian customer-owners who use the system. The third tool is a trend-reporting database that is used for non-quantitative data. These tools have allowed SCF to make changes desired by customer-owners quickly and efficiently.

Once the customer-owners have given direction for what to do, SCF implements change on an organizational level. SCF incorporates their feedback into its annual strategic planning cycle. Performance is evaluated at the division, department, and employee levels, and customer-owner feedback is assessed at the corporate level. Change at the corporate level is tailored to meet customer-owners needs and expectations.

This session will detail the ways in which SCF collects feedback from customers, and uses that feedback to bring change to the organization.

**Bio:** Karen M. McIntire, Director of Human Resources. Karen McIntire joined Southcentral Foundation (SCF) in 1996. She plays a key supporting role in strategic planning and development. Karen is responsible for the development and management of human resources policies, programs, and procedures related to recruitment and employment, compensation and benefits, employee relations, human resources information systems, safety, and other associated programs. Karen played a key role in the application that led SCF to become a Baldrige award-winning organization. She holds a bachelor’s degree in business administration with emphasis in marketing from the University of Alaska Fairbanks in Fairbanks, Alaska. She is certified as a Professional in Human Resources. Karen is of Yup’ik-Aleut descent. She presents nationally and internationally on whole-system improvement, customer focus, workforce improvement, innovation, and SCF’s Nuka System of Care.

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**Keynote:** Terry Watson

**Title:** Bring It! The Power of Leadership Positivity

**Time:** 1:30 – 2:20pm

**Room:** Carriage Hall



**Overview:** In today's stressful world, if ever there was a time to recharge, reinvent and refocus, it is now! Unfortunately, most leaders are busy working IN their business, instead of ON their business. Terry will give you the tools to work ON your business – to remain positive as leaders, optimistic as professionals.

The difference between good and great often lies in subtle, unconscious things we do to sabotage ourselves. Many times, just being aware of our mindset can help us remain more positive. Terry will show us how. In this high energy, informational, motivational session, Terry will explain and demonstrate the simple things you must do TODAY to be the person who you know you are. You will learn why you should never let perfect get in the way of better, and how remaining positive can elevate your – and your team's – performance. Expect to laugh; expect to ponder; expect to be motivated; expect to be moved!

**Bio:** Terry provides ridiculously effective and easily implementable strategies.

Terry Watson is the “AHA guy”, who makes people, companies and organizations large and small aware of the conscious and unconscious ways they sabotage their businesses and their lives.

In short, Terry gives your organization the tools your people need to get out of their own way while making them laugh till they snort in the process

Terry's unique and vibrant presentations are powerful, positive and results based. He teaches audiences how to improve relationships with both clients and consumers, close transactions more efficiently and work smarter, not harder.

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