

Preparing Your Organizational Profile

Answering the questions in the Organizational Profile—the preface to the Baldrige Criteria for Performance Excellence—will help you

- Describe what is relevant and important to your organization
- Ensure a common understanding of these factors
- Select information and collect data as you continue your self-assessment
- Identify gaps in your approaches and their deployment as a basis for performance improvement efforts

To complete the Organizational Profile, you'll answer questions about your organization in these areas:

Organizational Description

- **Organizational Environment:** your product offerings; mission, vision, and values; core competencies; workforce; technologies; equipment/facilities; and regulatory/legal environment
- **Organizational Relationships:** your governance system, key customer groups/market segments, key product and customer-support service requirements, and key suppliers

Organizational Situation

- **Competitive Environment:** your competitive position, relative size and growth, and competitors
- **Strategic Context:** your key business, operational, and human resource strategic challenges and advantages
- **Performance Improvement System:** your approach to evaluation and learning

Within the Criteria and in the sample profile below, you will find several words/phrases written in SMALL CAPS. This indicates that these terms are defined in the glossary that has been provided for your reference. Members are strongly encouraged to review the terms in the glossary and the introductory videos available as additional resources to gain a better understanding of the Criteria and response required.

ORGANIZATIONAL PROFILE

The PEAL program seeks to challenge members to review and develop a deeper understanding of their organization. Mirroring the Baldrige Criteria and the AHCA/NCAL Quality Award, you are asked to complete your facility's Organizational Profile. For the purposes of these Criteria, ORGANIZATION refers to the single facility or center that is participating in PEAL, not a multi-facility organization. The intent of this effort is to address what is most important to the organization and the key factors that influence how the organization operates.

The following page is the format to follow in developing the profile for your facility. Note the numbering which coincides with the format used in the Criteria. It should remain as identified, as this may assist you in future efforts, i.e. seeking NCAL Bronze Quality Award. On the website we have posted a Word version of the template below. You may use this for your development if that assists your efforts. Note that the spacing provided is simply to denote new elements and should not be considered a space limitation in any way. You will want to complete the information for each question in the amount of space you find necessary.

This effort may require you and your team to return to the profile should you identify that you do not have the information yet that is requested.

Organizational Profile for _____

P.1 Organizational Description: What are your key organizational characteristics? Describe your organization’s operating environments and your key relationships with residents, stakeholders, suppliers and partners.

Within your response, include answers to the following questions:

a. ORGANIZATIONAL ENVIRONMENT

1. What is the organization’s environment: urban, suburban, rural, etc.?

2. What are your organization’s main HEALTH CARE SERVICE offerings? What is the relative importance of each to your organizational success (e.g., skilled nursing, subacute, assisted living, etc.)?

3. What is the organization’s MISSION/VISION statement (verbatim) and the specific methods used to communicate it across the organization? What are your organization’s CORE COMPETENCIES and their relationship to your MISSION?

4. What is the organization’s WORKFORCE profile? *Identify your KEY WORKFORCE groups by department (e.g., nursing, dietary, housekeeping, administration), the desired number in each department, and a general description of the education level and/or professional requirements for each department. Use a table to provide your response.*

5. What are the organization’s major equipment and technologies (for example, computers, transfer equipment, alarm devices, Wii systems, WiFi, etc.)?

6. What is the regulatory environment under which the organization operates? What are the KEY bodies of regulation related to health care delivery, occupational health and safety, physical plant, payment and reimbursement regulations?

b. ORGANIZATIONAL RELATIONSHIPS

1. What are the organization’s principal STAKEHOLDER groups? Include CUSTOMERS and other groups most affected by the organization's services, actions, and success. What are the differences in requirements and expectations among STAKEHOLDER groups? In addition to RESIDENTS, identify up to three other principal STAKEHOLDERS in the first column of the table below. In the second column, identify the important requirements that each of these principal STAKEHOLDER groups has of the organization. In the third column, identify the PROCESSES that your organization uses to learn of these important STAKEHOLDER requirements. Your responses should be complete and clear.

Principal Stakeholder Groups	Requirements this Group has of the Organization	How the Organization Learned of these Requirements
1. Residents	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.

2. What are the KEY types of suppliers of goods and services, including other health care providers? What are your KEY mechanisms for communicating with suppliers?

3. From the above, what are the most important types of suppliers of goods and services?

4. What are the limitations, special business relationships, or special requirements that may exist with some or all suppliers and partners?

5. What are the organizational structures and KEY management links to the parent company if the applicant organization is owned by a parent organization? Respond "NA" if the applicant is not owned by a parent organization.

P.2 Organizational Situation: What is your organization's strategic situation? Describe your organization's competitive environment, key strategic challenges and advantages, and your system for performance improvement.

Within your response, include answers to the following questions:

a. COMPETITIVE ENVIRONMENT

1. What is the organization's position (relative size) within the local market environment? Include numbers and types of competitors.

2. What are the principal factors that determine competitive success in the local market?

3. What are your key available sources of competitive and COMPARATIVE DATA from within the long term care profession? What limitations, if any, are there in your ability to obtain this data?

b. STRATEGIC CONTEXT

1. What are at least two major STRATEGIC CHALLENGES or ADVANTAGES for the organization (e.g., entry into new markets or SEGMENTS, relationships or partnerships with Preferred Provider Networks, preparing for different expectations of the next generation of residents, human resource recruitment and retention, new alliances with suppliers, physicians, or other partners, introduction of new technologies, changes in the health care environment that impact the organization's delivery of services, changes in strategy, or other challenges or advantages)?

2. What is the reason(s) why it is important that the organization address these STRATEGIC CHALLENGES or ADVANTAGES?