

## Baldrige Glossary HD: Key Themes

(Blue words below link to definitions, detailed descriptions, examples, core values, Baldrige Best Practices, Baldrige Application Response Templates, or examples)

### Key Themes

#### Definition:

A perception or observation that recurs and is expanded upon throughout the scorebook.

#### Features:

##### Key themes

- are high-level [strengths](#) or [opportunities for improvement comments](#)
- are relevant to the applicant's [key factors](#)
- are often common (cross-cutting) to more than one [Item/Category](#) or are of such significance they emerge from one [Item](#)
- must be traceable to [comments](#) found in the Item Worksheets
- are significant in terms of the applicant's [key factors](#)
- may address a [Core Value](#) of the [Criteria](#)
- summarize how well an applicant has addressed the [Criteria requirements](#) serve as an Executive Summary

#### Where to look for [key themes](#):

For [key themes](#) related to [Process Items](#), the [A-D-L-I evaluation factors](#) are a for good starting point. Several examples follow.

- Which [approaches](#) are sound and [systematic](#)?
- What [approaches](#) are [well-deployed](#) (or not) throughout the organization?
- Does the applicant demonstrate organizational [learning](#) across the board? If so, where?
- is there [linkage](#) between and among [processes](#)? Where?

For [key themes](#) related to [Results Items](#), the [results evaluation factors](#) are a good starting point to use in determining commonality or [themes](#) across all [Results Items](#).

- Are [results trending](#) consistently either up or down? If [results](#) are tracked over time, are they [sustained](#)?
- How do [results compare](#) to competitors or best-in-class organizations?
- Are there adequate [comparisons](#) provided?
- To what extent are results [segmented](#) to reflect important [customer](#), product and service, market, [process](#), and [action plan performance](#) requirements identified in the [Organizational Profile](#) and in [Process Items \[Categories 1-6\]](#).

[Core Values](#) may also serve as a source for [key themes](#), when examples can be identified from [Item Comments](#).

- Are there [core values](#) for the sector reflected in the [Item Comments](#) (e.g., [visionary leadership](#), [management by fact](#))?

#### Customers:

##### Applicants

- The [Key Themes](#) worksheet may be the only document reviewed and used by [senior leaders](#) for acknowledging best practices and focusing improvement efforts.

##### Judges

- During stage 3, Judges use the [Key Themes](#) worksheet to develop an overall understanding of

each applicant and to distinguish role model practices and **key** vulnerabilities.

### Examiners

- During each stage of the Award process, Examiners use the **key themes** to develop a shared understanding of the applicant. **Key themes** are often used to organize and focus the consensus review and site visit.

### Example:

Sandy Hill School District uses a **systematic** Strategic Planning Process (SPP) that is **aligned** and well **integrated** with its **performance excellence approaches** in **key** areas (e.g., its **leadership system**, **process** design and management **approaches**, and faculty- and staff focused **processes**) and includes input from a variety of sources (e.g., student achievement data and performance reviews). The school board, **senior leaders**, faculty, and staff participate in the development and **deployment** of **action plans**, which are delineated at the district and school levels. The **alignment** and **integration** evident in the SPP may help the district maintain its **focus on the future**.

*This is a **key theme** because it describes a sound, **systematic process** that is important, **well-deployed** throughout the organization, **integrated**, or in harmony with other **approaches** as it includes inputs from **key sources** at a variety of **levels** across other **Categories**, and is **linked** to a **core value**—**focus on the future**.*

### Non-example:

Although Sandy Hill School District has a Culture Change Process to nurture an environment conducive to student and district excellence, it is not clear how this **process** creates an environment that fosters and requires legal and **ethical behavior**. This may be particularly important to the district, given the highly regulated environment described in its **Organizational Profile**.

*This is not a **key theme** because, although it is important to the applicant, it articulates only one of the **multiple requirements of Item 1.1**. In addition, it would typically not rate a - -. The only instance that an **Item level comment** such as this would rise to the level of a **key theme** would be if this issue had been mentioned multiple times in other **Categories** or if for example, a major **ethical** violation could have been attributed to the organizational environment.*

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