INTENT TO APPLY INSTRUCTIONS & FORM
ADDITIONAL APPLICANT AGREEMENT

INSTRUCTIONS AND INFORMATION

The information provided in this form will be used to determine an applicant organization's eligibility and to ensure that there are an adequate number of examiners available for the award's evaluation process. This Intent to Apply should be postmarked no later than April 20, 2018 in order to ensure eligibility for the 2018 Awards Cycle.

What to expect: After receiving your documents, the Executive Director will verify your organization's eligibility and notify your Official Contact. The Executive Director will immediately notify ineligible organizations and return the fee. All eligible applications must be submitted **no later than May 30, 2018** for award consideration.

Fee Structure:

The market value of the Feedback Report and the examiner team evaluation an applicant receives as part of the award process ranges in the tens of thousands of dollars of consulting time. Due to the support of a community of members, sponsors and volunteers, OQF is able to offer the evaluation process at a fraction of its market value:

2018 Award Process Fee Structure				
Number of Employees	Intent to Apply Fee	Application Fee	Site Visit Fee	Total
Less than 100	$250	$2,000	$3,500	$5,750
100 to 500	$250	$3,000	$4,000	$7,250
501 to 1,500	$250	$4,000	$5,000	$9,250
More than 1,500	$250	$5,000	$6,000	$11,250
*** In addition to the fees above, those organizations who are awarded a site visit agree to cover reasonable site visit expenses for volunteer examiners for meals and lodging, estimated at $1,500 to $2,500 depending on the size of the applicant organization.				

Award Process:

Each award applicant is required to submit an application of up to 50 pages (plus a 5 page Organizational Profile) responding to the 2017-2018 Baldrige Criteria for Performance Excellence. For first time applicants, please contact Cary Hill for an orientation and guidelines for writing the application (cary.hill@excellencelivesinok.com).

The timeline for the 2018 awards process is as follows:

April 20 . . . . Intent to Apply Form is due from award applicants
May 30 . . . . Award application is due from award applicants
June through August . . Examiner team analyzes and evaluates award applications
August / September . . . Site visit planning with award applicants and examiner team
September . . . . Site visits are conducted by examiner team
October 18 . . . . Judges meet to determine award recipients
October 31 . . . . Feedback Reports due to award applicants
Mid-November . . . . Award Luncheon

2018 Intent to Apply for Oklahoma Quality Awards

Applicant Organization Name

Applicant Headquarters Physical Location

Street	City	State	Zip

Applicant Mailing Address

Street	City	State	Zip

Parent Organization Name & Address (if applicable)

Highest Ranking Official

Name	Title
Telephone	Email

Official Contact Point

Name	Title
Telephone (Office / Cell)	Email

Size of Applicant

Total Number of Employees		Total Number of Sites	
All Sites	Oklahoma Sites	All Sites	Oklahoma Sites
			2

Applicant Industry Category (place "X" next to best fit)

	Manufacturing		Service		Education
	Government		Health Care		Non Profit

Reason for Applying

Site Visit Preference

Indicate first ("1") and second ("2") preference or "X" if unable to host a site visit for the week noted

	Week of **September 10 – 14, 2018**		Week of **September 17 – 21, 2018**

Signature of Highest Ranking Official

Signature	Printed Name	Date

RELEASE, SITE VISIT EXPENSE, EXAMINER SUPPORT AND CONFIDENTIALITY AGREEMENT

Organization Name:	

Release: We understand that this application will be reviewed by members of the Board of Examiners.

Site Visit Expense: Should our organization be selected for a site visit review, we agree to host the site visit and to facilitate an open and unbiased evaluation. We will provide a light breakfast, lunch and snacks for our examiners while at our facilities during the site visit. We will also provide hotel accommodations during the site visit (4 to 5 nights) for up to 4 examiners participating from out of town, as well as an appropriate meeting space at the hotel for the entire examiner team to work collectively during site visit week. We understand we will be invoiced for our site visit fee (please see the Awards Fee Structure document) after the site visit.

Examiner support: The organization will provide one (if organization is under 500 employees) or two (larger than 500 employees) examiners for the 2018 evaluation cycle.

Confidentiality and Non-Disclosure: The Oklahoma Quality Foundation, Inc. and this organization agree to abide by the confidentiality and non-disclosure procedures outlined in the 2017-18 Malcolm Baldrige Criteria for Performance Excellence booklet(s). Specifically, all correspondence between the two parties and with Board of Examiner members is treated as "Confidential." Name of this or any applicant, information contained in this application report, evaluation by Board of Examiner members, and related information are regarded as proprietary and must be kept confidential. Such information is available only to those individuals directly involved in the application and evaluation process concerning the applicant. Board of Examiner members sign a non-disclosure statement that prohibits revealing the identity of any applicants, disclosing information contained in the application report, or using related information for any other purposes except to evaluate the applicant for the 2018 Oklahoma Quality Award. Board of Examiner members will receive no information on applicants or application reports other than those to which they are assigned.**

Signature of Highest Ranking Official	Date

****These agreements become effective upon receipt of a completed application and appropriate fee.**

Intent to Apply Checklist:

	Intent to Apply form (*be sure to have highest ranking official sign the form*)
	$250 Fee (*check made out to: Oklahoma Quality Foundation*)
	Signed Release, Site Visit Expense, Examiner Support, and Confidentiality Agreement
	Please postmark no later than April 20, 2018 and mail the original form and $250 fee to: **Oklahoma Quality Foundation, Inc.** **8210 South 72nd East Avenue, Tulsa, OK 74133**

Application Content and Format

Content

In your application, include information on all of your organization's units or subunits. Don't add links to websites. Examiners base their evaluations solely on information within your application. Your award application must contain the items listed in the order given below:

Title page. Give the name of your organization. You may also include the address and logo, illustrations, the date, a statement indicating that this is an application for the Oklahoma Quality Award, and/or a statement regarding the confidentiality of the content. Don't include additional information, text, or links to websites.

Table of contents. Indicate the page numbers for the
- Organization chart(s)
- Glossary of Terms and Abbreviations
- Organizational Profile
- Individual category and item sections

You don't need to indicate the page numbers for areas to address, tables, and figures.

Organization charts. Include these to depict the relationship within your organization:
- line-and-box organization chart(s) for your organization
- line-and-box organization chart(s) of the parent (if your organization is a subunit)

Please don't include website references.

Glossary of Terms and Abbreviations. In the glossary, include only terms and abbreviations used in your application, with very brief definitions. Don't include descriptions of processes, tools, methods, or techniques in the glossary. An acceptable example of a glossary entry is:

> **SPP:** strategic planning process

The following example is not acceptable because it includes a description:

> **SPP:** strategic planning process, which has nine steps: a review of key documents, such as the research contract with the USDA; a two-day retreat; a review of funding and mandates; a review of current organizational performance; a review of an environmental scan; appreciative inquiry; brainstorming; allocation of resources; and creation of action plans.

Organizational Profile. This section outlines your organization and states the key factors that influence its operations and future directions. Examiners use this vital part of your application throughout their review. For guidelines on preparing this section, see the appropriate *Baldrige Excellence Framework* booklet.

Responses Addressing All Criteria Items. In this section, respond to each item as a whole, using the category and item designations in the Criteria within the appropriate *Baldrige Excellence Framework* booklet. In your responses to the areas to address within the items, emphasize your organization and its performance system, maintaining the order of the areas.

Label the areas to address as in the Criteria booklets (e.g., 4.2a). You may group responses for multiple areas (e.g., 4.2a, b). If an area to address does not pertain to your organization or its performance system, explain why in one or two sentences.

Discussion of results and the results themselves should be close together in a Baldrige Award application. Trends that show a significant beneficial or adverse change should be explained. Use figure numbers that correspond to items. For example, the third figure for item 7.1 would be Figure 7.1-3.

For guidelines on responding to the Criteria, see the appropriate *Baldrige Excellence Framework* booklet for your organization's sector (i.e., Business/Nonprofit, Education, or Health Care).

Format

All applications should be submitted in an electronic, PDF format via email to cary.hill@excellencelivesinok.com.

Page Limits

The limits given below include all illustrations, figures, tables, and appendixes. Covers, labeled tabs, and divider pages that contain only titles don't count toward the limits. However, if these pages contain additional material, such as process descriptions, quotations, figures, tables, or illustrations, they count toward the total page allotment.

If any section exceeds the page limit, we will ask your official contact point to identify which pages to remove.

Section	Page Limit (Single-sided)
Organizational Profile	5
Responses Addressing All Criteria Items	50

Page and Text Format

Element	Requirement	Notes
Paper Type	Standard, 8½-by-11-inch white	Two-sided printing is strongly recommended. Please ensure that both sides of pages are legible
Paper orientation		
Text pages		Portrait
Pages with graphs, figures, and data tables		Portrait or landscape
Lines per page	60 maximum	Count headings and blank lines separating paragraphs, but don't count recurring page headers, such as "Oklahoma Quality Award Application, page X."
Leading	2 points (or the equivalent) between lines	1 point of leading equals 1/72 or 0.0138 inch
Margins		
Left		3/4 inch minimum
Right		1/2 inch minimum
Text columns	2 (preferred)	Leave at least ¼ inch between Columns
Numbering		
Pages in Responses Addressing All Criteria Items	1–50	Don't number blank pages, tabs, or divider pages
Figures within the Organizational Profile and item sections	In sequence	Use numbers corresponding to the section (e.g., Figure P.1-1, Figure P.1-2, Figure 2.1-1, Figure 2.1-2)
Font and type size		
Running text	Times New Roman or Arial, 10 point minimum	Don't use narrow, compressed, or condensed fonts.

		The font and type size need not be uniform so long as they meet the requirements. Smaller type sizes make it difficult for examiners to interpret the data and to provide accurate and actionable feedback. If you shrink graphics to fit the space available, ensure that text in the reduced figure meets the requirement.
Tables filled mainly with text	Times New Roman or Arial, 8 points minimum	

Graphics

- See the font and type-size requirements in the table above.
- Clearly label each figure using descriptive text. For example, the title of the third figure for item 7.1 might read "Figure 7.1-3: Reliability of Service: Carrier-Dropped Calls."
- Clearly label all axes and units of measure.
- For information on using graphics in category 7 (Results), see "Guidelines for Responding to Results Items" in the *Baldrige Excellence Framework* booklet that's appropriate for your organization's sector.