

**Baldrige Screening Questionnaire  
Telephone In-Depth Interviews**

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INTERVIEWER: _____	INTERVIEW CELL SUMMARY:
DATE: _____	(Circle cell and fill in time below)
Respondent: _____	<b>A: Committed</b>
Address: _____	Date: _____, Time: _____
City/Zip Code: _____	<b>B: Interested/not committed</b>
Work Phone: _____	Date: _____, Time: _____
Home Phone: _____	<b>C: Un-committed</b>
	Date: _____, Time: _____

**INTRODUCTION:**

Hi, I'm \_\_\_\_\_, calling from Aeffect, Inc., an independent marketing research firm in the Chicago area. (ONLY IF CALLING FROM THE BALDRIGE SUPPLIED LIST: We are calling on behalf of the Baldrige Performance Excellence Program, formerly known as the Baldrige National Quality Program.) We are offering a \$40 American Express gift card to qualified individuals who complete a 30-minute telephone interview in the next two weeks. We are conducting the interviews on behalf of a national quality and performance improvement oriented organization and we would like to potentially include your opinions. This is not a sales call and your responses are kept confidential. We would like to ask you a few questions now to see whether or not you qualify?

**INSTRUCTIONS:**

[IF RESPONDENT TERMINATES, PLEASE SAY, "THANK YOU FOR YOUR WILLINGNESS TO PARTICIPATE, HOWEVER WE HAVE FILLED UP OUR \_\_\_\_\_ [MENTION SUBJECT OF QUESTION SUCH AS 'SMALL BUSINESS'] QUOTA. THANKS AGAIN, WE'LL KEEP YOU IN MIND FOR FUTURE STUDIES."]

[IF RESPONDENT DOES NOT HAVE TIME TO TALK, ASK, "IS THERE A MORE CONVENIENT TIME THAT I MAY CALL YOU BACK TO SEE IF YOU QUALIFY?"]

- Are you responsible or do you share responsibility for making decisions regarding the improvement of your organization's performance (e.g., improving quality or excellence in leadership/management practices, strategic planning, customer satisfaction, employee retention, process management, sales results, etc.)?

Yes  
No  
Don't Know

1
2
DK

THANK AND END

2. What industry or sector is your company or organization a part of? [DO NOT READ LIST. IF "OTHER," RECORD RESPONSE BELOW. CONFIRM ONLY IF NECESSARY...] What one category best describes your company or organization? [READ LIST]

		<b>OBTAIN A MIX (TARGETS)</b>
<b>Business</b>		<b>(n=6)</b>
Manufacturing	1	<b>(n=3)</b>
Service	2	<b>(n=3)</b>
<b>Education</b>		<b>(n=6)</b>
Education (K-12)	3	<b>(n=3)</b>
Education (Higher Education)	4	<b>(n=3)</b>
<b>Health Care</b>		<b>(n=6)</b>
Health Care	5	
<b>Government/Non-Profit</b>		<b>(n=6)</b>
Government	6	<b>(n=3)</b>
Not-for-profit	7	<b>(n=3)</b>
Definitely not one of these categories	8	
Don't Know	-1	TERMINATE

3. Is your company or organization for-profit or not-for-profit?

For-profit	1	<b>OBTAIN A MIX</b>
Not-for-profit	2	

4. Which of the following best describes the role you have at your organization? [READ LIST. IF "OTHER" RECORD RESPONSE BELOW AND CHECK WITH AEFFECT]

Owner	1	<b>OBTAIN A MIX</b>
Senior Officer (President, VP C-Level)	2	
Director	3	
Manager	4	
Supervisor	5	
Administrator	6	
Other (Specify) _____	7	

5. How long have you been in your current position? [DO NOT READ LIST]

Less than one year	1
1 – 2 years	2
3 – 5 years	3
6 – 10 years	4
More than 10 years	5

6. Which of the following best describes your department or area of work? [READ LIST. IF "OTHER," RECORD RESPONSE BELOW]

Production	1	<b>OBTAIN A MIX</b>
Human Resources	2	
Finance	3	
Marketing	4	
Quality Control	5	
Management	6	
Other (Specify) _____	7	

7. Approximately how many employees does your company or organization employ at all locations?  
 [RECORD FOR ALL; OBTAIN A MIX OF SMALL/MEDIUM/LARGE FOR BUSINESS:  
 MANUFACTURING/SERVICES]

1-9 employees	1	<b>[SMALL BUSINESS] QUOTA (n=2)</b>
10-49 employees	2	
50-99 employees	3	
100-299 employees	4	<b>[MEDIUM BUSINESS] QUOTA (n=2)</b>
300-499 employees	5	
500-999 employees	6	<b>[LARGE BUSINESS] QUOTA (n=2)</b>
1,000-4,999 employees	7	
5,000 employees or more	8	
Don't know	-1	THANK AND END

8. Which of the following performance excellence organizations, programs, approaches or awards have you heard of? [READ LIST. ROTATE.]
9. [ASK FOR BRANDS AWARE OF] Of the ones that you are aware of, which of these performance excellence organizations, programs, approaches or awards has your company or organization ever used or participated in (for example, you have reviewed their online materials or training pamphlets, attended their conferences, etc.), or competed for? [ROTATE LIST]

	Q8: Aware	Q9: Used	
The Baldrige Performance Excellence Program, formerly known as the Baldrige National Quality Program	1	1	<b>IF USED BALDRIGE (Q9 CODES 1, 2 OR 3), RECRUIT AS CUSTOMER (n=12)</b>
Malcolm Baldrige National Quality Award	2	2	
Baldrige-based Consultants	3	3	
The International Organization for Standardization (ISO)	4	4	<b>OTHERWISE, RECRUIT AS PROSPECT (n=12)</b>
The Deming Award	5	5	
The Joint Commission on the Accreditation of Healthcare Organizations (JCAHO)	6	6	
Lean	7	7	
Shingo Prize	8	8	
Balanced Scorecard	9	9	
Six Sigma	10	10	
ISO 9000 or other ISO standard	11	11	
J.D. Power and Associates	12	12	
State or Local Quality Awards	13	13	
None of the above	14	14	

**INVITATION**

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Thank you! I would like to invite you to participate in a 30-minute telephone interview scheduled sometime in the next two weeks. Our executive interviewers are available anytime between 8:00 a.m.-8:00 p.m. EST Monday through Friday starting from this Monday, XX x<sup>th</sup> through Friday, XX x<sup>th</sup>. After completing the interview, you will be sent a \$40 American Express gift card as a thank you for your time.

10. Will you be able to participate in this study?

Yes..... 1  
No..... 2 ] THANK AND END

**STATEMENT OF INFORMED CONSENT**

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I want to confirm that you understand we are not selling anything and that we are conducting interviews with other business decision-makers like you. There are no known risks in participating in this research, nor any benefits to participating, with the exception of the \$40 gift card. All of the information you give us will be kept private. To protect your privacy, we will group your answers together with answers from other persons, so that no one will know how you answered questions. Taking part in this project is your decision, and should you choose to do so, you may end the discussion at any time.

11. Do you understand the information that I just read to you?

Yes..... 1  
No..... 2 ] CLARIFY AS NECESSARY

12. What date and time would be convenient for you?

[Record date and time] : \_\_\_\_\_

13. What phone number should we call to reach you? And can you provide a backup number in case we can't reach you on that day?

Primary phone number: \_\_\_\_\_ Secondary phone number: \_\_\_\_\_

14. May we call you one day before your interview as a reminder?

Yes..... 1  
No..... 2

Please give me your name and address so we know where to send the gift card upon completion of the interview.

**Respondent Info**

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**If you need to re-schedule or have any questions, please feel free to call Catherine or Myrna at 847-267-0169. Thank you!**