

COER NEWS

A newsletter to inform you of COER's research findings and initiatives in organisational excellence, benchmarking, and performance improvement

Issue No. 5
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Welcome to the 5th issue of **COER NEWS** – the free newsletter produced by the Centre for Organisational Excellence Research at Massey University, New Zealand.

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1. THE 11TH WORLD CONGRESS FOR TQM IS COMING TO NEW ZEALAND IN DECEMBER 2006

The World Congress for Total Quality Management is the world's premier business improvement-orientated conference. For the first time it is coming to New Zealand – it is an opportunity not to be missed!

Aimed at businesses, business leaders, managers, and professionals who want practical ideas and solutions for improving the performance of their organisation, this event is also a stage for academics who want to share their business research findings. The Congress will have presentations from some of the world's best business speakers and scholars.

The Congress also provides an opportunity for all business practitioners, professionals, and researchers to submit papers and share their experiences as up to 100 papers will be presented. The best of these will be published in the International Journal for TQM and Business Excellence. In summary, the event will provide a great opportunity for learning, sharing, and networking.

The theme for the 2006 Congress is “Developing management and organisational capability to improve business performance”. The theme was selected to align with a major initiative in New Zealand called *Project Collaboration* that is aiming to improve the management and business capability of NZ organisations.

The Congress is currently calling for papers. These should provide practical examples of best practices or describe the role of a business practice in building organisational capability. The themes for the Congress are related to the Baldrige Criteria for Performance Excellence as *Project Collaboration* has selected this model as the building block for developing businesses in New Zealand.

Do you have a paper that you would like to present in one of the following areas:

LEADERSHIP

*Leadership (vision, values, developing leaders, ethics, governance)
Social and environmental responsibility (surpassing regulatory requirements/engaging with the local community)*

STRATEGY

Strategic planning and deployment

CUSTOMER AND MARKET FOCUS

Understanding customers, building customer relationships, marketing

MEASUREMENT, ANALYSIS AND KNOWLEDGE MANAGEMENT

Performance measurement (selecting measures, analysis, reporting, balanced scorecard, triple bottom-line)

Benchmarking (performance and best practice benchmarking)

Knowledge management and information technology

PROCESS MANAGEMENT

Process management and improvement (six sigma, quality control, quality assurance, and quality management, safety)

Innovation (in products/services and processes)

Supplier relationships and partnerships

Standards and certification (ISO 9000, ISO 14000 etc)

HUMAN RESOURCE FOCUS

Education, training, development and learning

Employee teams, empowerment, motivation, and satisfaction

DEVELOPING BUSINESS CAPABILITY

Business excellence assessments, awards and models

Developing management and organisational capability

The Congress is being organised by the Centre for Organisational Excellence Research, New Zealand Organisation for Quality, New Zealand Business Excellence Foundation, and Kanji Culture (the founders of the World Congress for TQM). The Congress is being supported by *Project Collaboration* with the New Zealand Institute of Management representing *Project Collaboration* on the conference committee.

Come to New Zealand to have a world-class Congress experience and a great holiday...

Enjoy:

- the cosmopolitan kiwi culture (from Maori, Pacific Islanders to European and Asian cultures),
- magnificent scenery from glaciers to tropical rain forests
- hot springs and Geysers
- bungi jumping and canoeing
- beautiful white sand beaches and snorkelling
- some of the world's best wineries, golf courses, and fishing spots
- whale and dolphin watching
- searching for the elusive kiwi (bird)
- the New Zealand summer!!

Over 50 million sheep, 20 million cows and 4 million people have chosen to live in New Zealand – they can't all be wrong!

For more information on the Congress go to www.worldqualitycongress.com or email: enquiry@worldqualitycongress.com.

For more information on New Zealand as a destination visit <http://www.newzealand.com>.

2. ENGAGING ORGANISATIONS IN BUSINESS EXCELLENCE – AN INTERNATIONAL STUDY

By Dr Robin Mann and Dr Nigel Grigg, COER

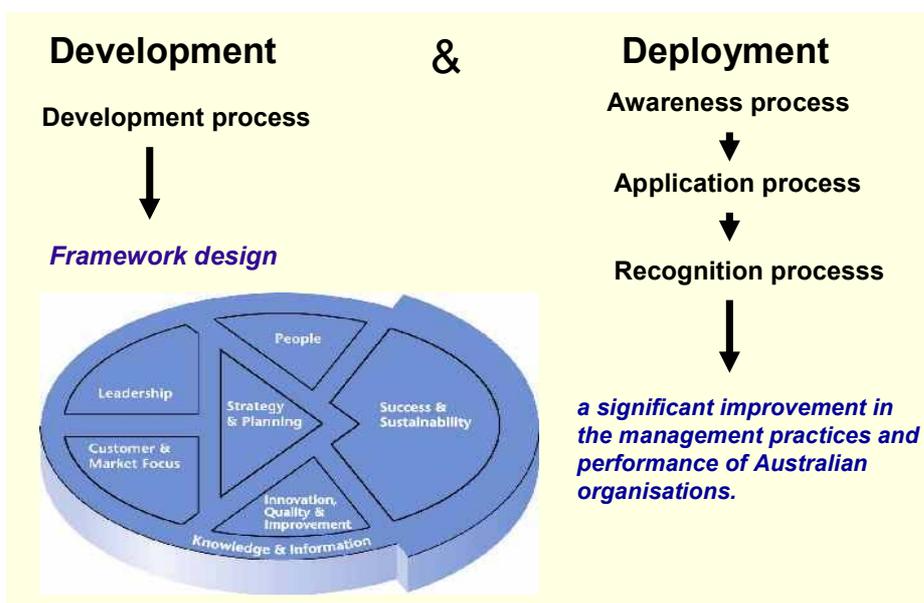
Business excellence frameworks (BEFs) play an important role in promoting and rewarding organisational excellence. Many countries see them as key strategic tools to improve national competitiveness. SAI-Global, custodians of the Australian Business Excellence Framework (ABEF), commissioned COER in September 2004 to conduct a major review of its framework and deployment within Australia. The “Beneath the Surface” project will be completed by December 2005.

The ABEF was developed in 1987 and was one of the world’s first BEFs. SAI Global (formerly Standards Australia) became the ABEF custodian in 2001 taking on the role from the former Australian Quality Council. A description of the project and some of its key findings are provided below. The project’s findings will be of particular relevance to BEF custodians worldwide and will inform national business excellence strategies.

2.1 The scope of the project

Typically BEF custodians perform one or both of the following two roles, the “development” and the “deployment” of a BEF. These roles can be further defined, see Figure 1. This diagram shows that the framework development process leads to the design of the framework, and that the framework deployment process consists of creating awareness of the framework, assisting organisations in using the framework, and finally recognising those organisations that achieve excellence as assessed against the framework. Successful framework development and deployment should lead to a significant improvement in the management practices and performance of a nation’s organisations. Figure 1 not only presents the scope of the ABEF project but also the current design of the ABEF. The ABEF has seven categories containing a total of 22 separate scoring items, and it is based upon twelve core principles. An organisation’s performance against each item of the framework is assessed against four ‘dimensions’, where the items are evaluated by exploring how the organisation puts plans and structures into place; deploys those plans and structures; measures and analyses the outcomes; and learns from its experience. These dimensions form a cycle of Approach, Deployment, Results, and Improvement (ADRI). Unlike most other models, therefore, the ‘results’ and ‘enabler’ criteria are not explicitly separated. Instead, each main criterion contains items that relate to enabler activities and results.

Figure 1 - The scope of the Australian project



2.2 The research methodology

The research methodology involved

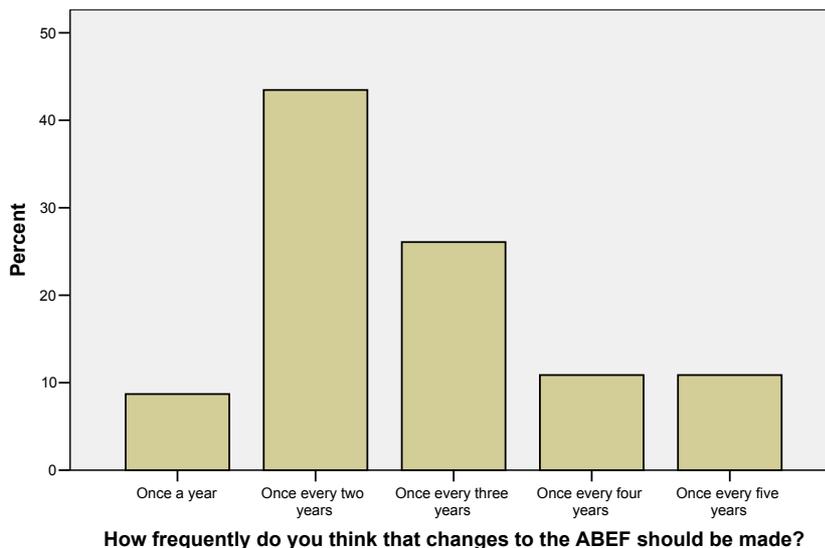
- A literature review of over 100 reports/articles relating to business drivers and their impact on business success
- Obtaining the opinions of users and evaluators through holding 6 workshops (42 participants)
- Obtaining the opinions of users and evaluators through surveys (46 participants)
- Undertaking a survey to assess the awareness of the ABEF in Australia (305 participants)
- Undertaking a survey and structured interview with 16 business excellence framework custodians. The geographic areas that were represented were: Australia, Brazil, Canada, Czech Republic, Europe, India, Ireland, Japan, Mexico, New Zealand, Scotland, Singapore, Sweden, Turkey, UK, and the US.

2.3 Findings to date

2.3.1 Framework development process

Users generally like the consistency of the ABEF over time. When changes were introduced they felt there should have been more explanation of specific changes, so that they could explain the nature and significance of these changes to their respective organisations. They felt that annual changes were too frequent, and that less frequent changes would be sufficient if fully justified and explained. 43% per cent of users favoured biennial review, with another 26% supporting triennial minor review. Almost 50% of users support a quinquennial major review period.

Figure 2 - Frequency of ABEF reviews (user opinion, 46 responses)

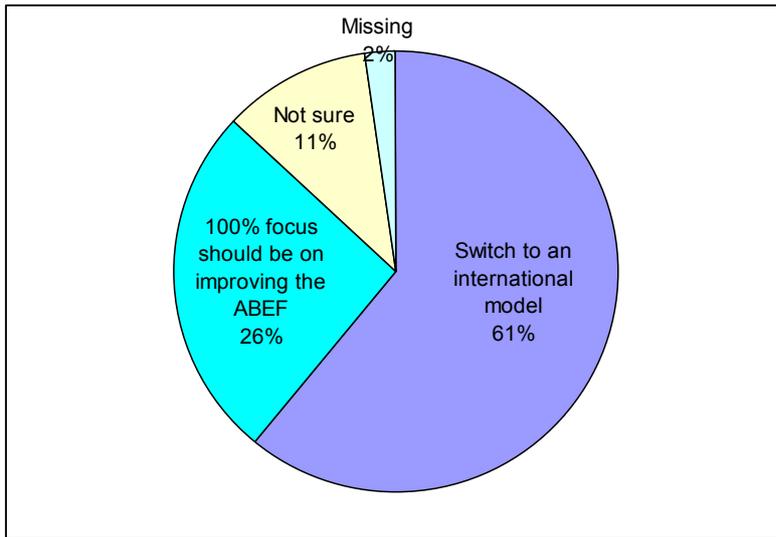


2.3.2 Framework design

There was considerable support for the current design of the ABEF. 78% of users were either “very confident” or “extremely confident” that the design is based on sound principles and facilitates a reasonable assessment of Business Excellence (BE). Users specifically reported it to be an intuitive, integrated, and balanced framework with clear links between different business drivers, and appreciated its flexibility for use in all types of organisations; large, small, for-profit, and not-for-profit organisations. There was support for the ABEF’s principles as “broad theoretical drivers for improvement that assist in encouraging appropriate behaviours, values, and fundamental truths”, its items as a basis for scoring, the ADRI dimensions, and its generally non-prescriptive approach. However, 60% of users believed that the current design is a little too complex (40% believing the language is “too academic”).

Surprisingly, based on the support for the framework, 61% reported that a switch to an international BE model should at least be considered if the cost to administer such a model is significantly reduced for SAI-Global and the advantages of other international models can be obtained (for example, tailored BEF guides for specific industry sectors). This finding will need to be investigated by SAI-Global with the advantages and disadvantages of a change in model being thoroughly considered.

Figure 3 - National or International Model? (user opinion, 46 responses)



2.3.3 Framework awareness process

The awareness survey revealed that 90.5% of surveyed Australian organisations (276 organisations) had not heard of the ABEF. Significantly more public sector organisations were aware of the ABEF than private sector (23.1% vs 7.1% respectively). This data indicates that SAI Global has a major challenge ahead if it is to raise awareness levels substantially in the future considering that it has taken over 15 years (since the development of the ABEF) to reach this level of awareness. However, indications are that this level of awareness does not differ considerably from many other nations with over 50% of other BEF custodians indicating a similar level of awareness (Mann and Grigg, 2006). There is however an opportunity for SAI Global to learn from those nations that have reported considerably higher levels of awareness such as Brazil, India, Singapore and the United States. Figure 4 shows how BEF custodians perceive that awareness of BE has changed in their countries. This indicates that some countries like Brazil and Canada have over recent years increased awareness levels substantially. Brazil cites their increase due to the introduction of a number of regional and sectoral programmes/awards aligned to business excellence and the teaching of business excellence at universities. Canada cites their increase due to the introduction of programmes that complement business excellence like the Healthy Workplace programme.

Figure 4 - Trends of national BE awareness (perceptions of BEF custodians)

Please rate below the extent to which, in your opinion, awareness of BE within your country has changed over the last three years		
A	Increased substantially	2 (Canada, Brazil)
B	Increased slightly	10 (Japan, United States, Mexico, Czech Republic, New Zealand, India, Singapore, Scotland, Turkey, Europe (EFQM))
C	Stayed the same	1 (United Kingdom)
D	Decreased slightly	3 (Sweden, Australia, Ireland)
E	Decreased substantially	0

Encouragingly, users of the ABEF favoured SAI Global as the organisation to take the ABEF forward due to its financial strength and ideal position as Australia’s leading standards / business improvement service provider. Asked to identify the most important promotional activities for SAI Global to concentrate on over the next few years, users came up with the top five priorities (from 12) shown in Figure 5 below. The count represents the number of respondents indicating that activity, and the percent figure is the percentage of the user sample group ($n = 46$).

Figure 5 - The top 5 priorities for ABEF promotion identified by framework users

Rank	Which promotional activity should SAI-Global concentrate on most over the next few years?	Count	% of sample
1	Forming strong relationships/partnerships with the government to assist in the promotion of the ABEF	18	39.1
2	Marketing of the ABEF to CEO's/senior managers	16	34.7
3	Forming strong relationships/partnerships with industry/ membership based associations to assist in the promotion of the ABEF	14	30.4
4	Forming strong relationships/partnerships with tertiary institutions to assist in the promotion of the ABEF	13	28.2
5	Articles and publications promoting the benefits of business excellence	8	17.4

2.3.4 Framework application process

On the basis of the user survey, the following top five priority activities (from 19, in Figure 6) for SAI Global were obtained in terms of helping organisation derive the maximum benefit from the ABEF.

Figure 6 - The top 5 priority activities for helping organisations derive benefit from the ABEF

Rank	How can SAI-Global assist organisations to obtain the most benefit from the ABEF	Count	% of sample
1	Provision of an information resource that provides case studies, best practice, and benchmarks from Award winners/leading organisations from all around the world	15	33
2=	Business Excellence mentoring (e.g. access to ABEF evaluators/experts for advice)	13	28
2=	Programme that assists organisations in integrating together tools such as six sigma, knowledge management, quality systems, balanced scorecard, benchmarking, and management standards within a business excellence approach.	13	28
3=	Case studies highlighting the practices of organisations that have scored highly against the ABEF.	9	20
3=	Networking meetings for CEO's /senior managers of business excellence users	9	20

SAI Global will be aiming to learn from other BEF custodians that provided effective services in the above five areas. Figure 7 shows which BEF custodians rated their services highly in these areas (with the exception of a "Programme that assists organisations in integrating together tools" as this was not included in the BEF custodian survey). It names the countries that rated their services as "Good" or "Excellent" but does not disclose the names of the countries that rated their services as Poor or Average.

Of particular interest to COER was that the only BEF custodian to rate their "On-line service/database of BE information" as "Excellent" were the British Quality Foundation in the UK. At the time of the survey they were the only BEF custodian to provide their members with free membership of the www.BPIR.com. A resource developed by COER.

Figure 7 - BEF custodian self-rating of BE application services

Application services	How would you <u>rate your own service provision</u> in this particular area? Indicate with a tick.				
	Not Provided	Poor	Average	Good	Excellent
On-line service/database of BE information e.g. showing - best practice case studies, examples of BE applications, the types of BE assessments that can be used, benchmarks, descriptions of business improvement tools and techniques.	1	7	3	3 (United States, India, Europe (EFQM))	1 (United Kingdom)
BE mentoring (e.g. access to BE evaluators/experts for advice)	6	1	6	2 (Turkey, Ireland)	1 (India)
Publications on BE e.g. showing - best practice case studies, examples of BE applications, the types of BE assessments that can be used, benchmarks, descriptions of business improvement tools and techniques.	2	2	8	2 (Brazil, India)	1 (United States)
Networking meetings for BE users	2		4	7 (US, Brazil, NZ, Singapore, Turkey, Europe (EFQM),UK)	1 (India)

2.3.5 Framework recognition process

It was noticeable that all BEF custodians rated their “framework recognition” processes considerably higher than their other processes. Recognition processes include processes such as a launch event for the award, evaluator selection process, evaluator training, provision of a guide to explain the BE model and criteria, evaluator site visits and consensus meetings, feedback reports, the judging process, and an awards ceremony. These processes have generally been refined over many years through considerable “best practice” sharing between BEF custodians using mechanisms like the Global Excellence Model Council.

ABEF users indicated support for the general prestige of the awards ceremony, and for the feedback reports received by applicants. However, many felt that the awards dinner was somewhat exclusive, in attracting only award winners and evaluators. In addition, non-profit organisations would have difficulty in being able to afford to go. Hence there was a lost opportunity in terms of marketing the framework. Additionally it was felt that the awards in general could be marketed more extensively. Suggestions received included improving feedback reports (for example providing best practice advice), raising the profile of the awards, providing multiple, sectoral awards, and providing assistance for organisations to attend the awards.

2.4 Conclusion

Through the “Beneath the Surface” project potential opportunities have been identified for SAI Global to improve the design of the ABEF and increase awareness and use of BE in Australia. Not only this, it is likely that BEF custodians around the world will use the project’s findings to improve their own frameworks and supporting services.

Reference - Mann, R. S. and N. P. Grigg (2006). ' Benchmarking Study of the Practices of Business Excellence Framework Custodians' (forthcoming). SAI Global. SAI Global, Sydney.

For more information on the project go to SAI Global's website (www.sai-global.com) or contact Dr Robin Mann, COER, r.s.mann@massey.ac.nz.

3. EXAMINING THE VALIDITY OF BUSINESS EXCELLENCE FRAMEWORKS

by Nihal Jayamaha, PhD Candidate, COER

3.1 Introduction

Quality guru Joseph Juran cited the ‘Baldrige Criteria for Performance Excellence’ as the most complete list of managerial actions US organisations needed to become ‘world class quality organisations’. Juran was basically referring to the contents (i.e. categories, items, and their sub-parts) of the ‘Baldrige Criteria’, which are very detailed and comprehensive.

If the sole purpose of an internationally recognised Business Excellence (BE) Criteria such as the Baldrige Criteria were to select, reward, and recognise the so called ‘world-class organisations’ at national level, then arguably very few people would dispute the contents of it. However selecting, rewarding, and recognising excellent organisations is not the sole purpose of a BE Framework. There are two other very important purposes:

- to facilitate communication and sharing of best practice information among organisations (of all types).
- to serve as a working tool for understanding and managing performance and guiding organisational planning and opportunities for learning.

It is on the above areas that any BE Framework has its widest application.

One way to examine whether a given BE Framework could in fact potentially meet the above two purposes (in particular the latter), is to empirically validate it.

A ‘Business Excellence Framework’ typically addresses three areas.

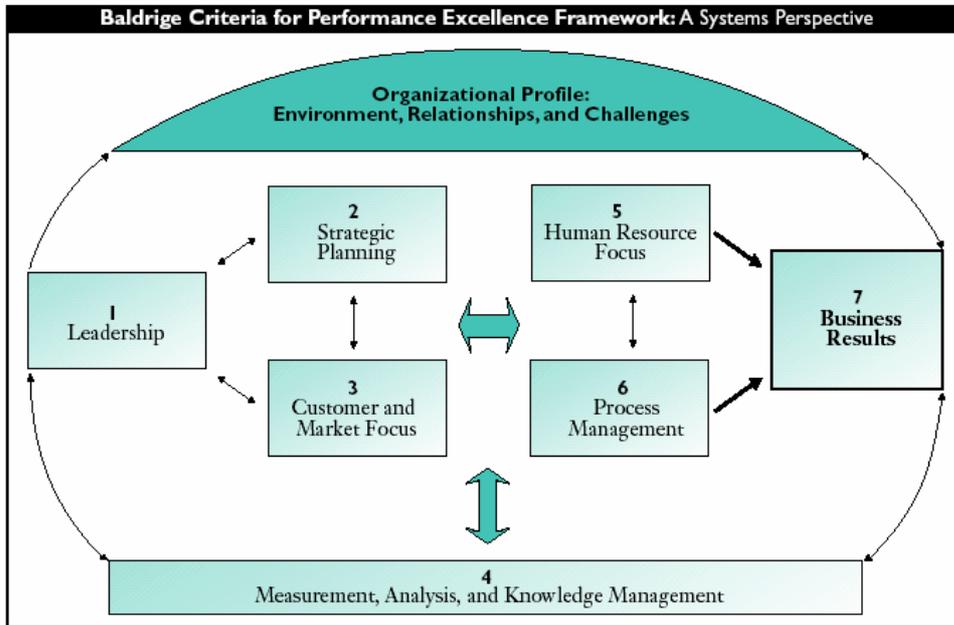
1. The Categories on which organisations are examined for excellence. As shown in Figure 8 the Baldrige criteria consist of seven categories. Each category is divided into different items (an item is in turn divided into subparts so that examination of each item can be made as objectively as possible). Each item examined is scored in accordance with the scoring guideline stipulated. The Baldrige criteria consists of 19 items altogether.
2. A series of propositions enumerating how ‘excellence’ could be achieved. The propositions are also summarised as a theoretical framework (Figure 8). These propositions together can be viewed as a

process theory on 'Business Excellence'.

3. A set of core values and concepts (principles), which serve as the foundation for the process 1.2 mentioned above.

A proper empirical validation of a Business Excellence Framework should encompass the above three areas. Unfortunately the current level of empirical research on the validity of Business Excellence Frameworks, in an Australasian context in particular, is in short supply. The researcher's doctoral study is aiming to fill this gap.

Figure 8 – The Baldrige Criteria for Performance Excellence



3.2 Current Progress

As a preliminary validation effort, one of COER databases that contain data from a small sample ($n = 91$ observations) of New Zealand organisations was used initially. These data have been collected through a survey questionnaire (designed by Dr. Robin Mann) to assess an organisation against each item of the Baldrige Criteria, in a self-assessment setting.

COER's data on Baldrige items showed high validity (e.g. there is at least one question on every subpart of a Baldrige item) and reliability (e.g. the lowest Cronbach's α on internal consistency for an item was 0.66 and the highest was 0.90) and so were used as input data on a Structural Equation Model (SEM). A similar model was developed for the Australian Business Excellence Framework. Note that the above two models contained a large number of free parameters (as reflected by 'degrees of freedom' of the order of 197) and hence had sufficiently high statistical power (84%) in spite of the small sample.

Based on the SEM analysis, the following four hypotheses can be supported (the researcher is in the process of preparing an academic paper on the findings):

- H₁: Overall, the Baldrige Criteria fits NZ empirical data (on criteria items). For example Steiger-Lind Root Mean Square Error Approximation (RMSEA) was 0.05 (90% confidence interval lower bound was 0.01 and upper bound was 0.07).
- H₂: The relative weighting of items stipulated in Baldrige Criteria are appropriate for NZ organisations.
- H₃: The measurement errors associated with some Baldrige items are far greater than the others, when the criteria is used by managers for assessment of their organisation (i.e. self-assessment).
- H₄: The Australian Business Excellence Framework (ABEF) as an alternative theory on 'organisational success and sustainability' yields a fit (to NZ empirical data) that is not inferior to Baldrige Criteria (what this basically means is that ABEF is an equivalent model in a statistical sense).

3.3 Future Plans

Although statistical distributional properties (e.g. histograms, Shapiro-Wilks' W statistics) of COER's self-assessment data do not suggest any significant respondent bias (and prejudice) these may have occurred by chance. The researcher is also planning to use data from other sources, which are free from any such bias.

'SAI Global' the custodians of the Australian Business Excellence Framework, has been very supportive of this research and has already provided item scores of Australian Businesses, based on assessments made by trained examiners. The researcher plans to use these data for validation purposes as well to identify any other contingent variable/s that might be included in a Business Excellence Framework.

For more information on the project contact, Nihal Jayamaha, PhD Candidate, COER, N.P.Jayamaha@massey.ac.nz

4. CRM SURVEY INVITATION

by Virgil Troy, PhD Candidate, COER

CRM stands for Customer Relationship Management. Although a recently new business term it has become widely known as a result of CRM software vendor hype. Its foundations are in Marketing Segmentation but it has evolved and developed as an integral part of Corporate Strategy, Management, Operations, Marketing, Accounting, Finance, Human Resources, and Information Technology.

The survey researches the state of CRM practices within businesses and organisations of all sizes, industries and sectors. Although vendor hype would have decision makers believe that CRM is a panacea for all things relevant to the customer, very little empirical research has been undertaken in the area that can stand up to scrutiny. This survey was developed as a result of the researcher reviewing hundreds of CRM articles from both a popular management journals and peer reviewed academic publications. The study is based on one of the few empirical CRM studies carried out by a team of research professors in Europe. This current research focuses on the CRM practices of New Zealand businesses and organisations at the customer facing level and is based on the work carried out by Reinartz, W., Krafft, M., & Hoyer, W. D. (2004). *The Customer Relationship Management Process: Its Measurement and Impact on Performance.*, Journal of Marketing Research (JMR) (Vol. 41, pp. 293-305): American Marketing Association.

Why should I complete the survey, what's in it for my organisation?

As mentioned previously with the exception of CRM vendor hype and articles written by self proclaimed CRM consulting experts, little exists in the way of empirical research on the subject of CRM. CRM is not a fad; it is an emerging management practice that is becoming central to all future customer-focused organisational initiatives. This ground breaking research will be the first of its kind in New Zealand, by taking part; your organisation will be the first to receive a report of the findings upon which you can measure your organisation's performance against a national average. *Dependent on the number of international participants it is hoped that international comparisons can be made.*

The data will be collected, aggregated and analysed to determine the level of CRM practices in New Zealand businesses and organisations. This aggregated information will be used as a research component within the Researcher's PhD Thesis.

In addition to the above, the aggregated findings may be used in academic and business presentations, seminars and conferences. The aggregated results may also be used for the publishing of papers and discussion documents in business and academic journals, magazines, other printed and electronic publications in New Zealand and Internationally.

Confidentiality, my rights - will I or my business be specifically identified?

No. Neither you nor your organisation will be individually identified, all data is aggregated. In addition, your rights are protected in two ways. First, this research has been evaluated by peer review and has been judged to be low risk. Secondly, as this data is being collected by S.I.L Research, you are automatically protected by the Market Research Society of New Zealand (MRSNZ) Code of Practice which is based on the ESOMAR code of conduct for market research.

Why is S.I.L Research involved?

S.I.L Research is being used as a registered (MRSNZ) member research company to afford respondents the additional security, professionalism and assurances under the Code of Practice which is based on the ESOMAR code of conduct for market research. Virgil Troy is the Managing Director of S.I.L Research.

How do I participate and what are the benefits from participating?

You can take the 10 minute on-line survey now by visiting www.silresearch.co.nz/coer.htm. **Please complete the survey by 14th September.**

In exchange for your participation, you will receive a FREE electronic copy of the aggregated findings which will allow you to benchmark your organisation's CRM practices against a New Zealand national average and an international average (dependent on the amount of international data received).

For more information on the project contact, Virgil Troy, PhD Candidate, COER, virgiltroy@silresearch.co.nz.

5. BALANCED SCORECARD – SUCCESS FACTORS SURVEY

COER has a close working relationship with the European Centre for TQM, led by Professor Mohamed Zairi. Currently the ECTQM is undertaking research on the success factors of implementing a Balanced Scorecard (BSC) strategic management system.

Increasingly, the Balanced Scorecard (BSC) has become an important and practical tool to drive performance achievement among organisations. The concept, introduced by Kaplan and Norton, has provided companies with a strategic management system that can be cascaded down from strategic to operational level, mapping performance in readily measurable and understandable performance indicators, linking and integrating every Human Resource initiative to achieve the organisation's strategic drive.

The ECTQM is now inviting organisations to participate in a survey relating to their experiences in implementing a BSC. The intended outcome is to develop a BSC model which can assist organisations with their quest for creating a competitive advantage using the BSC.

The survey can be accessed through the following link:-

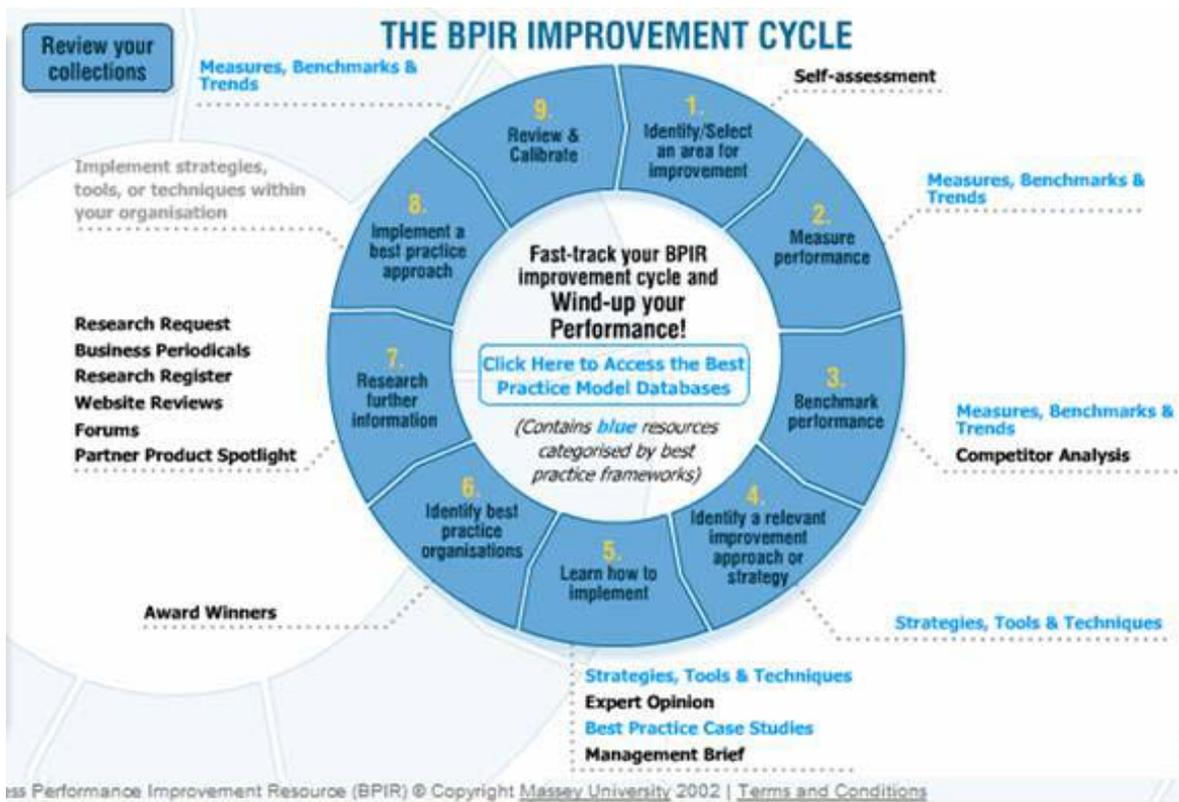
<http://www.surveyconsole.com/console/TakeSurvey?id=95626&respondentID=292903>. A 100-page report on the Balanced Scorecard will be made available to all participants and once the survey has been completed a further Executive Survey on the results will be sent to all participants.

For more information on the project contact, Neelum B. Mahmood, Deputy Director of Studies, European Centre for TQM, N.B.Mahmood1@Bradford.ac.uk.

6. UPDATE ON THE BUSINESS PERFORMANCE IMPROVEMENT RESOURCE (www.BPIR.com)

The BPIR.com, a resource developed and managed by COER, provides access to thousands of useful real-life case studies and best practices from organisations around the world, thousands of surveys revealing the changing trends among the world's organisations, thousands of articles containing opinions from global experts, hundreds of benchmarks, and a multitude of other resources. This mass of information is organised around an improvement cycle – see Figure 9 – that makes it easy to find the information or tool you really need.

Figure 9 – The BPIR Improvement Cycle



BPIR.com membership is proving increasingly popular and the volume of traffic to (and the nature of traffic through) the site testifies to its usefulness to members.

Last year twenty-five thousand visitors used the site more than once. More than two and a half thousand pages were viewed each day by an average of four hundred users. These users downloaded nearly five thousand management briefs during the year. Little wonder interest continues to grow!

It may interest some readers to know that more than 50% of “hits” originated in North America, some 20% in Western Europe, nearly 15% in Australasia and the Pacific, and nearly 10% in Asia. The United States is the country from which most hits originated, with America Online being the vehicle for the majority of these sessions. The US was followed (at some distance) by the United Kingdom and Australia. California was the state from which most contact was made. London was by far the busiest city. Most referrals came from Google – “benchmarking” and “best practices” being the most commonly used search phrases.

Whilst the BPIR Improvement Cycle has proved to be a popular and effective design the BPIR team are currently working on a complementary user interface that will make the BPIR “come alive and become more interactive”. In the meantime why not use the BPIR Help facility to download a powerpoint demonstration on how to get the most out of your BPIR membership.

If you would like to find out more about the BPIR or have ideas on how you would like the BPIR to develop in the future please contact, Steve Welch, Director – BPIR.com, COER, steve@bpir.com.

7. BPIR.COM – MONTHLY MANAGEMENT BRIEFS

The fact that BPIR members downloaded nearly five thousand management briefs last year is only the beginning of the story of their usefulness. These briefs are designed to be circulated once they have been downloaded. No attempt has been made so far to determine the extent of that circulation.

Two volumes of briefs have been produced to date. The first set relates to human resource issues, the second to customer related issues. A third volume, on a range of business improvement and new product development tools is currently being compiled in response to careful analysis of recent requests from members.

What is a management brief?

A management brief is a short and easily digestible monthly research summary based on a specific topic or tool. These summaries include comments from experts, case examples, and survey analyses. Most of the articles, case studies, and surveys used in the production of a management brief are available unabridged within the member area of the BPIR.com website.

Briefs are often used as a basis of focused discussion at monthly management meetings, as features in company newsletters, as discussion topics at board meetings, as input into strategic planning processes, and as input into formal and informal improvement programmes.

Each brief is provided in both HTML and PDF formats. You can read the HTML version by clicking the on links provided (any additional navigation can be done using the menus). PDF versions can be downloaded by right-clicking on the PDF image next to the text link and then selecting the "Save Target As..." option. Briefs are also available in MS Word format for those members wanting to re-brand them prior to distribution.

Volume One	Volume Two
<ul style="list-style-type: none"> 1 Work/Life Balance 2 Ethical Business Practices 3 Emotional Intelligence 4 Succession Planning 5 Managing Innovation 6 On-the-Job Training 7 Motivating Staff 8 Leadership Development 9 Recruitment and Selection 10 Employee Suggestion Schemes 	<ul style="list-style-type: none"> 1 Customer Satisfaction Surveys □ 2 Customer Complaints Resolution Process 3 Customer Loyalty 4 Call Centre Representatives 5 Customer Relationship Management Systems 6 Customer Market Segmentation 7 Customer Knowledge Management □ 8 Customer Support and Service 9 Customer Order Management 10 Customer Profitability Management

Management briefs can be downloaded in PDF (Adobe Acrobat) format or browsed in html from the Management Briefs pages at <http://www.bpir.com/site/management-brief/index-free-issues.asp> for non-members or via the member homepage at <http://www.bpir.com> (please log in).

8. PARTNER SPOTLIGHT – BRITISH QUALITY FOUNDATION (BQF)



The British Quality Foundation since January 2005 has partnered with COER to provide the BPIR.com, free of charge, to its members. Support for this partnership was provided by the UK's Department of Trade and Industry. If you are a member of

the BQF and would like to find out more about this service contact asmeeta.varsani@quality-foundation.co.uk for details.

The BQF is a not-for-profit membership organisation that promotes business excellence to private, public and voluntary organisations. It is Europe's largest corporate membership organisation promoting performance improvement and excellence. Its mission is to be a leader in helping organisations of all kinds to improve their performance and achieve sustainable excellence by promoting and advising on the EFQM Excellence Model (Europe's leading performance improvement methodology), by running the annual UK Business Excellence Awards (the most rigorously assessed and judged award programme in the country), and by providing a range of best practice and performance improvement services. These activities are intended to help promote continuous learning and innovation that result in improved performance and productivity. The BQF facilitates the sharing of ideas among people from diverse organisations, and learning from best practice. Its sixteen hundred member organisations range from FTSE 100 companies through to small firms and public sector bodies. They have access to a wide range of products and services designed to help on their journeys towards excellence.

Visit www.bqf.org.uk to find out more..

9. PARTNER SPOTLIGHT – QUALITY SCOTLAND (QS)



Quality Scotland recently partnered with COER to provide the BPIR.com, free of charge, to its members – this service was launched on 1 September 2005. A presentation to mark the launch was given by Dr Robin Mann in Edinburgh on the 7 September. Support for this partnership was provided by the Scottish Executive. If you are a member of QS and would like to find out more about this service contact basil.haddad@qualityscotland.co.uk for details.

QS has a membership in excess of four hundred organisations, which includes such giants as Standard Life and the Royal Bank of Scotland. It looks forward to “a world where Scotland is recognised for the competitive and innovative nature of its economy.” Its mission is “to make business excellence a national characteristic of Scotland.” Its objectives are to assist member organisations improve bottom line business performance through becoming more competitive and innovative, to be the lead organisation in the promotion of Business Excellence across all sectors in Scotland, to build strategic and effective alliances amongst member and partner organisations to support the delivery of the “Smart Successful Scotland” strategy, and to publish and sign post world-wide best management practice.

QS seeks to help member organisations to fully understand how well they are performing and to identify areas for improvement. It sets out to achieve this goal by providing members with the tools and techniques they need to develop and implement successful improvement plans. It sees self-assessment as central to understanding one’s own and one’s organisations performance. It is the lead agency in Scotland for promoting the use of EFQM’s Business Excellence Model. QS offers an accreditation process that organisations can use to help keep them from straying from their “path to excellence.” To achieve accreditation at the highest level requires an outstanding overall performance, and strong commitment to improvement throughout the organisation.

Visit www.qualityscotland.co.uk to find out more..

10. PROJECT COLLABORATION – DEVELOPING BUSINESS CAPABILITY IN NEW ZEALAND

Since early 2004, COER has been heavily involved in an initiative called *Project Collaboration*. This initiative, funded by the NZ Government, has brought together more than fifty of New Zealand’s key public and private organisations to work together on providing a consistent and unified approach to improve the performance of NZ enterprises. The project’s main focus is on “ensuring that there is strong demand for, as well as quality supply of, capability-building services.” It differs from other initiatives in its focus on improving “the delivery of business development support through action... rather than on the provision of a broader advisory function.” With its unique approach there is no doubt that *Project Collaboration has the potential to have a major impact on improving the performance of NZ’s economy*.

The Project is currently being overseen by a Steering Group comprising of senior people from the Economic Development Agencies of New Zealand (EDANZ), the New Zealand Chambers of Commerce, the Employers and Manufacturers Association, Central Region (EMA), the New Zealand Business Excellence Foundation (NZBEF), the Institute of Chartered Accountants of New Zealand (ICANZ), the New Zealand Institute of Management (NZIM), the New Zealand Council of Trade Unions (NZCTU) and Business New Zealand. The Ministry of Economic Development (MED) and New Zealand Trade and Enterprise (NZTE) are working closely with the group and MED are supplying secretariat services. The Steering Group has an independent Chair, Fran Wilde. COER, itself, played a leading role in the launch of the initiative and now sits on two working groups.

Of importance is that seven developmental mechanisms have been agreed (two of which relate to business excellence/benchmarking) as shown below

- formal and informal education, training and development;
- external advice and mentoring;
- standards and certification;
- networking and learning from other firms;
- learning from research and benchmarking;
- business assessments, business excellence models and awards;
- learning by doing

For each development mechanism workgroups have been formed to consider what needs to be done to

improve NZ's performance.

Out of the developmental mechanisms the "business excellence" related mechanism was the first off the block, with the "benchmarking" mechanism being the one to follow. Therefore we are expecting to see some serious developments in these areas within the next 12 months. Of particular note is that the benchmarking area relates to the "provision of a national benchmarking service" and the provision of a "best practice resource" – two things that COER has been pushing for in New Zealand for a number of years. COER is expecting that through *Project Collaboration* organisations in NZ will soon be able to access benchmarking services that will enable them to better compete on the international stage.

11. NEW BENCHMARKING SERVICES BEING DEVELOPED TO SERVE NEW ZEALAND BUSINESSES

In May 2004, a decision was made to merge the services provided by COER to the New Zealand Benchmarking Club (NZBC) into the product/service offering of the New Zealand Business Excellence Foundation (NZBEF). This decision was taken to make the services accessible to more organisations. As benchmarking is an integral part of business excellence it was considered that NZBEF members would be best-placed to benefit from such services.

However, the decision to launch these services has been delayed whilst COER and the NZBEF have been working with *Project Collaboration* as *Project Collaboration* is also focussed on providing National Benchmarking Services. It is considered by all that funding is essential if a range of sustainable benchmarking services are to be offered in NZ.

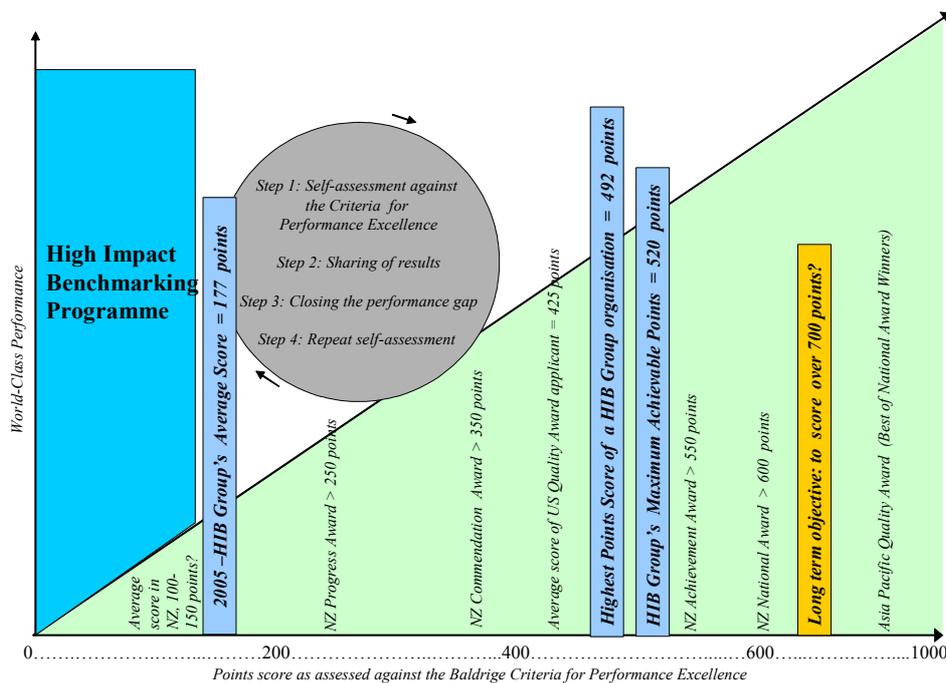
In the near future it is intended that a survey will be issued to NZBEF members to obtain their input into what services would best fit New Zealand's needs. *If your organisation is not a member of the NZBEF and would like to participate in the survey please forward your email address to Dr Robin Mann, COER, r.s.mann@massey.ac.nz.*

12. THE HIGH IMPACT BENCHMARKING PROGRAMME

Ten organisations from each of the Waikato and Auckland regions in April 2005 were selected to participate in a High Impact Benchmarking Programme. Organisations were selected based on their high growth potential. This programme, funded by New Zealand Trade and Enterprise, was designed by COER and run by Gosling Chapman (Auckland) and the Business Development Centre (Hamilton) with COER providing a facilitation role. All organisations participated in a twelve-week intensive programme designed to equip them with the tools they needed to continue along high-growth paths to become world-class in their fields. This included undertaking COER's benchmarking and performance excellence self-assessment - BPES (based on the internationally recognised Baldrige Criteria for Performance Excellence). The programme involved a consultant working inside each organisation, and three classroom sessions where participants shared experiences and formulated action plans to move their organisations into the next stage of growth. Over the next year the consultants will track each organisations' progress. The value of the programme will begin to become apparent when they take a repeat self-assessment in 12 months time.

The figure below shows that the average points score of a High Impact Benchmarking Group organisation is 177 points. Over time the programme aims to assist organisations move towards 700 points (considered to be world-class performance)

Figure 1 – The High Impact Benchmarking Group’s Journey to Excellence



The goal of benchmarking is to drive performance improvements by identifying performance gaps and opportunities for improvement and addressing them through implementing better practices. Steve Murray, a consultant with the Business Development Centre, explained that “Benchmarking is not known to many New Zealand SMEs, and for those who are aware the general perception is that it is too time consuming, complicated, and costly. The NZTE funding we’ve received for this intensive programme removes these barriers for the selected businesses.”

Eligibility criteria include turnover of less than five million dollars a year and a staff of no more than twenty. Participants have so far included DL Consulting, Egan Reid, Extreme Automotive, INI Body Care, Intaz, Jericho, Metrology Group, Meyer Gouda Cheeses, Naked Organics, New Era Plastics Ltd, Outer Aspect, Pacific Softworks, Pasta Mia, Progressive Hydraulics Ltd, Red Rocket Books/Flying Start Books, Steam Brewing Company, Stonyridge Vineyard, Trio Business Forms Management Ltd, Vogal NZ Ltd, and Enlighten Design. They were represented by Stefan Boddie, Warwick Grey, Mark Oberman, Greg Cooke, Sophia Cooke, Smina Ord, Jeff Mann, Gerald Kapoor, Lokesh Sharma, Freddie Beijerling, Ben Meyer, Angus Allan, Malcolm Ferguson, Don Hayes, Jonathan Moon, Chris Thomas, Angelo Treducci, Rodney Sharp, Sarah Ensor, Rachel Walker, Luke Nicholas, Gwyn Thomas, Don Brodie, John Snaith, and Kath Morrell respectively.

Feedback from participants has been overwhelmingly positive. On average they have rated the programme as “Very Good” to “Excellent” since it began. A number said that the programme was the most beneficial business development activity they have undertaken. Typical quotes were:

“The programme has provided answers to and created questions about the many challenges faced by our organisation. It has highlighted areas for improvement that we had not considered before and/or knew the importance of”

“The informal chat sessions between participants were extremely helpful, encouraging, and I learnt more at them than I have from most other programmes“

In the long term it is hoped that participation will result in participants joining Yellow Pages and Toyota Thames as the only New Zealand organisations to be assessed as “world-class” against the Baldrige Criteria for Performance Excellence..

For more details on the High Impact Benchmarking Programme contact Steve Murray, Business Development Centre (Hamilton), steve@businessdevelopmentcentre.co.nz, or Dianne Ludwig, Gosling Chapman (Auckland), Dianne.ludwig@goslingchapman.com.

Information on COER's self-assessment tool (BPES) can be obtained from contacting Dr Robin Mann, COER, r.s.mann@massey.ac.nz.

13. GLOBAL BENCHMARKING NETWORK - UPDATE

In September, the 14th Annual General Meeting of the Global Benchmarking Network (GBN) will be hosted by the Czech Society for Quality and held in Prague. The membership of the Global Benchmarking Network consists of organisations that are the leaders in promoting benchmarking from over 20 countries. Its president is Dr Robert Camp (who published the first and best-selling book on benchmarking in 1989) and the chairman is Dr Robin Mann. Key issues of concern to be discussed at the forthcoming meeting are: the collection of international benchmarks and best practices, proposal for a new business model for the GBN to enable it to increase its membership base and spread the use of benchmarking, and obtaining funding for international benchmarking projects.

The following organisations are represented in this Network and therefore have access to the GBN's resources:

TECTEM	Switzerland	BENSA	South Africa
National Productivity and Competitiveness Council	Mauritius	Excellence Ireland	Ireland
Best Practice Institute	USA	Slovak Benchmarking Information Centre	Slovakia
Hungarian Quality Institute	Hungary	Center for Productivity and Competitiveness	Moldova
Centre for Organisational Excellence Research	New Zealand	Danks Technology Institute	Denmark
India Benchmarking Centre	India	Swedish Institute of Quality	Sweden
National Productivity Corporation	Malaysia	Information Centre Benchmarking /IPK	Germany
RWTUV Poland	Poland	Business Excellence Department of Russian Organisation for Quality	Russia
BCS Management Services	United Kingdom	Benchmarking Club	Italy
Public Sector Benchmarking Service	United Kingdom	Czech Society for Quality	Czech Republic
Dubai Quality Group	United Arab Emirates		

If your country is not on the list above then please encourage your country's benchmarking centre/experts to visit the GBN's website www.globalbenchmarking.org or contact Ronald Orth, GBN Secretariat, Email gbn@jpk.fhg.de for more information.

14. e-TQM COLLEGE – THE STORY OF A UNIQUE COLLEGE

The e-TQM College is a unique College. It aims to become the leading educator of TQM in the Arab world and encourage the interest, uptake, and application of TQM thinking in the Arab World through, innovative, affordable and accessible means.

Together the following factors make the e-TQM College unique:

- Its commitment to TQM and sole focus on TQM education
- Its commitment to open access education (therefore to meet the needs of all that want to develop their education) and to provide education for all levels of capability (right up to doctorates)
- Its commitment to e-learning and the latest technology to give students the best education experience
- The fact that it has brought the best minds in the quality and management field together to assist the e-TQM College in its ambitious plan to become the leading educator of TQM in the Arab World. It has an advisory board consisting of Professor James Harrington, USA, Professor Tito Conti, Italy, Professor Yoshio Kondo, Japan, Professor Jens Dahlgard, Denmark, Professor Bo Bergman, Sweden, Professor Andries De Wet, South Africa, Professor Thong Ngee Goh, Singapore, Professor Gopal Kanji, UK, Professor John Peters, UK, Professor Doug Hensler, US, Professor Rick Edgeman, US, and Professor Robert Cole, US.

It is no surprise that the e-TQM College was established in Dubai. In the past decade, Dubai has stunned the world with its mind-boggling growth and its ambitious developments. Backed by its innovative approach, commitment to quality, and ambition to excel, Dubai has been defying the global trends, including the fall-out from the 9/11 developments. Its progress is the result of an inspirational public-private sector partnership

and the government's unwavering determination to be a model business and leisure destination. The College was the brain-child of the leadership of Dubai Police. This in itself would be remarkable in other countries but it is just typical of how in Dubai that TQM and innovation is becoming the norm within all institutions.

The President and Vice President of the e-TQM College are filled by representatives from the Police force, notably Lieutenant General, Dhahi Khalfan Tamim and Dr. Mansoor Al Awar. The Assistant Vice President for Academic Affairs is Professor Mohamed Zairi, one of the world's leading proponents of benchmarking and business improvement and also the Head of the European Centre for TQM at Bradford University, UK.

COER's relationship was formed with the e-TQM College in early 2005 when Dr Robin Mann became a *virtual* Associate Dean of TQM and Benchmarking at the College. It is expected that through this role mutual benefits will be obtained for COER and the e-TQM College.

At the e-TQM College's annual general meeting Dr Joseph Juran, now 100 years old and one of the fathers of the quality movement, gave a personal message to the e-TQM College and its staff via a video-recorded message. In this it was clear how impressed and excited he was that through the e-TQM College "quality" had been embraced and was going to be at the heart of future developments in the Arab world.

It is still early days for the e-TQM College as it was only formed in 2002 but it is already attracting attention worldwide... to hear of future developments in the e-TQM College story then watch this space!

For more information on the e-TQM College visit www.etqm.net.

15. CHANGES TO COER'S TEAM

This year we've been pleased to welcome the following to our team.

Nihal Jayamaha - He is undertaking a PhD investigating the validity of the Baldrige Framework and the Australian Business Excellence Framework.

Rory Blatchford – has become the BPIR.com's new customer relationship manager. If you are a member of the BPIR do not be surprised if he contacts you in the near future.

Skyla Wang – a part-time researcher for the BPIR.com team.

We were also sad to say goodbye to:

Max Saunders, who recently completed his doctorate in strategy deployment.

Craig Dewe, a member of the BPIR support team now on the obligatory OE in London..

16. INTERNATIONAL VISITS MADE IN 2005

In July 2005, Dr Robin Mann visited the China Productivity Centre in Taiwan to provide advice on their benchmarking and business excellence programmes and to encourage more Asian countries to join the Global Benchmarking Network. The visit included a Keynote presentation to over 80 delegates from SMEs to assist them in improving their organisations through using benchmarking, business excellence and innovation techniques, a presentation to CPC's i-bench team, and providing consultancy to a leading beauty salon chain, Happy Hair, that had introduced innovative new processes to servicing customers and hair design.

Photo 1 – Dr Robin Mann with members of Taiwan’s CPC team and Happy Hair



Also, earlier this year Dr Nigel Grigg accepted an invitation from Knowledgecom Management to present a seminar on 'best practices in quality system implementation, measurement and fulfilment', to a group of over 30 Malaysian executives. The two-day workshop took place at the Sheraton Imperial, Kuala Lumpur.

Other overseas visits have included Antalya (European Organisation for Quality Conference), Dubai (e-TQM College meeting), Shanghai (the International Conference on ISO9000 and TQM), Singapore (Singapore Quality Award Conference), Sydney (Global Excellence Model Council meeting), Winnipeg (the World Quality Congress) and BPIR promotional visits to Europe.

17. NATIONAL AWARD FOR BEST THESIS

In November 2004, Dr Nigel Grigg was awarded the Institute of Quality Assurance annual National Award for best thesis relating to quality management. The award was conferred on the basis of a written and presented synopsis of his doctoral thesis on 'developing statistical thinking in the food industry'. The presentation to the IQA panel, and the subsequent award ceremony took place during the IQA annual awards event at Shakespeare's Globe Theatre in London on 11th November.

Photo 2 – Nigel receives award from Jim Spiers, IQA President and fellow Scotsman.



Nigel lectures in the Institute of Technology of Engineering at Massey University in Statistical Quality Management and plays a leading role in COER's research programmes.

Nigel can be contacted at N.Grigg@massey.ac.nz.

18. PHD RESEARCHERS WANTED!

COER is interested in hearing from graduates who are interested in undertaking PhD research on improving organisational performance. At present, COER has the following vacancies for PhD research focusing on:

- Researching the activities of Business Excellence and Benchmarking Centres/Foundations worldwide to identify how they can increase the use of benchmarking and business excellence within their countries.
- Researching the role and use of on-line resources in assisting knowledge and best practice transfer and /or developing methods to increase the effectiveness of an on-line resource (the Business Performance Improvement Resource (BPIR.com))
- Identifying methods for effective Action Planning stemming from Business Excellence self-assessments or evaluations. At present little guidance is given on this critical stage of the self-assessment process.
- Determining the relevance of the Baldrige Criteria for Performance Excellence, and CPE self-assessment, to small organisations (less than 20 employees).
- Identifying Best Practices in an area which will advance an organisation's management or business capability. Previously students have related their topics to a Baldrige Item and identified best practices in Customer Relationship Management and Strategy Deployment. New topics could be related to Leadership, Strategic Planning, Customer and Market Focus, Measurement, Analysis and Knowledge Management, Human Resource Focus and Process Management.

Student fees for both national and international students (that relocate to NZ) are approximately NZ\$2000 per annum. For exceptional students from New Zealand a scholarship of NZ\$23,000 per annum tax-free will be sought. Only, B+ honours (upper second-class) and first-class honours degree holders need apply.

For more information and an application form contact Dr Nigel Grigg, COER, N.Grigg@massey.ac.nz

19. SABBATICAL OPPORTUNITIES

If your organisation can sponsor you to join COER's team for 6 months or longer and you would like to broaden your experience in benchmarking and business excellence then we would like to hear from you. There are many opportunities within COER for research or participating in projects to raise the awareness and use nationally and internationally of benchmarking and business excellence.

For more information contact Dr Robin Mann, COER, r.s.mann@massey.ac.nz

20. SPONSORSHIP OPPORTUNITIES

COER have established over a number of years an international reputation for its research and innovative services. To continue to build on this good work COER requires private funding to support its research programmes on organisational excellence (at present there are no government funds available).

Types of Sponsorship

- Donation (from \$5,000 upwards).
- Sponsoring a student (for example, contributing for three years NZ\$12,500 to a PhD scholarship). The research will topic will then be decided between the student, COER, and your organisation. Dependent on the topic the student may be located at your organisation.
- Sponsoring an academic position.

Why sponsor?

- To associate your organisation with COER – an organisation that continuously promotes organisational excellence and performance improvement.
- So that other organisations are aware of your commitment to excellence
- To increase general awareness of your organisation throughout NZ and internationally
- To support organisational excellence research for the good of the New Zealand economy.
- Priority access to non-confidential research reports and consultation on research strategies/ programmes.
- Promotion of the sponsor to Massey students.

- Proactive attempts to identify potential research projects for the sponsor that could be undertaken by Massey students.
- Preferential access rights to COER's team of staff and researchers
- Option of providing a non-executive Director to work alongside the Head of COER.

Sponsorship can include:

- Your logo/description of your organisation on COER's website and BPIR.com (accessed by 10,000's people internationally)
- Features on your organisation in COER News (reaching 1,000's of organisations worldwide)
- Promotion of your organisation at conferences and seminars around NZ and internationally

If your organisation can help, please contact Dr Robin Mann, COER, r.s.mann@massey.ac.nz

21. FORTHCOMING EVENTS AND CONFERENCES

Date	Event	Location	Contact
3-5 October 2005	EFQM Forum – Global Competition	Cardiff, Wales	www.efqmforum.org/
30 October – 2 November 2006	Qualcon 2005 – AOQ's Annual Quality Conference	Gold Coast, Australia	www.qualcon.com.au
1-3 March 2006	9th Australian International Performance Management Symposium for the Asia Pacific Area	Canberra, Australia	www.mtc.aust.com/symposium/au2006 .
10-12 April 2006	11th-International Conference for ISO 9000 and TQM	Hong Kong	www.hk5sa.com/icit
1-3 May 2006	World Conference on Quality and Improvement - ASQ	Milwaukee, United States	www.wcqi.asq.org
25-28 July 2006	Performance Measurement Association Conference	London, United Kingdom	www.performanceportal.org
4-6 December 2006	11 th World Congress for TQM	New Zealand	www.worldqualitycongress.com

22. FUTURE ISSUES OF COER NEWS

The frequency of future publication of the News will depend on the availability of new material. The intention is to publish at least once every six months.

23. SUBSCRIBE TO COER NEWS

If you would like to receive future copies of this free newsletter and you are not already on our emailing list please send your contact details (including email address) to Dr Robin Mann, COER, r.s.mann@massey.ac.nz or visit the BPIR.com homepage to register your subscription. (If you decide you no longer want to be on our mailing list you have only to let Robin know.)

Thank you for reading **COER NEWS!**

For more information on COER please contact:
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