SHINGO PRIZE

CHALLENGE GUIDELINES

SHINGO PRIZE
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Introduction

The Shingo assessment methodology has been embraced by organizations from around the world. To date, more than 350 organizations are recipients of a Shingo award.

The focus at the Shingo Institute is unique in the world. Its goal is to help every organization attain a sustainable standard of excellence. Since the inauguration of the Shingo Prize in 1988, thousands of organizations have embraced the Shingo assessment methodology as they have aspired to attain this rigorous standard. To date, more than 350 organizations are recipients of a Shingo award.

The Shingo Prize is awarded to organizations that can demonstrate robust key systems that are driving behavior ever closer to the ideal, which are informed by the principles of organizational excellence and measured by strong trends and levels of key performance indicators (KPIs) and key behavioral indicators (KBIs).

Determining whether your organization is ready to challenge for the Shingo Prize can be a big decision and, understandably, the process may seem overwhelming. Generally, an individual (possibly with the help of a small team) will represent your organization and manage the day-to-day details of the Shingo Prize challenge process. He or she will likely become the official contact person with the Shingo Institute. This document will serve as a guide through the process.

Although not all organizations are interested in challenging for a Shingo award, every organization should understand the guiding principles of the *Shingo Model*™ and the assessment methodology to expose the gaps where improvements should be made. This is the

The best way to ensure a true transformation of your organization's culture is to understand the guiding principles of the *Shingo Model* and the assessment methodology. This will expose the gaps where improvements should be made.

best way to ensure a true transformation of your organization's culture.

On the following pages, you will find guidance on completing each component of the Achievement Packet, a step-by-step outline of the entire Shingo Prize challenge process, instructions on writing the Achievement Report, answers to frequently asked questions, and much more.

The Shingo awards represent the greatest standard of organizational excellence in the world.

To maintain consistency, when referring to the "organization" on the following pages, we are referring to any applying entity that is challenging for the Shingo Prize. In many cases, the applying entity is one of many businesses affiliated with a much larger enterprise. In other cases, the applying entity is a small, stand-alone business. In either case, we will refer to the applying entity as an organization.

Three Shingo Award Levels

The Shingo Institute has developed a rigorous process of assessing organizations that relies heavily on volunteer experts in organizational excellence who are trained in the Shingo assessment methodology. We refer to these experts as Shingo examiners. They will examine your organization's culture according to the *Shingo Model*.

The three levels of Shingo recognition—Shingo Bronze Medallion, Shingo Silver Medallion, and the Shingo Prize—are awarded based on the level of cultural transformation an organization has achieved. (Remember that not all challenging organizations are awarded or become recipients.) The distinction between award levels is designed to encourage an organization to engage in and leverage the *Shingo Model* as early as possible in its cultural transformation, and to continue the improvement journey up to and following a Shingo Prize recognition. Ultimately, organizational excellence is a process that never ends.

Shingo Bronze Medallion

The Shingo Bronze Medallion is awarded to an organization that is at the developmental stage of its cultural transformation. Implementing improvement tools as the primary drivers of results has progressed within the organization. Behaviors, as informed by the *Shingo Guiding Principles,* are beginning to be better understood and identified, and the organization is working to stabilize both behaviors and results. The organization is focused on making improvement part of the work. The organization's achievements are evident as measured by the frequency, intensity, duration, scope, and role of its behaviors as well as by the stability, trend/level, alignment, and improvement of its results.

Shingo Silver Medallion

The Shingo Silver Medallion is awarded to an organization that is well along its cultural transformation path. The organization is appropriately focused on key systems, using tools to enable them and drive desired behaviors, as informed by the *Shingo Guiding Principles*. As its results continue to improve, the organization is moving toward achieving its well-defined organizational purpose. Systems are beginning to make it easier to do the right thing. Improvement is becoming part of the work. The organization's achievements are evident as measured by the frequency, intensity, duration, scope, and role of its behaviors as well as by the stability, trend/level, alignment, and improvement of its results.

The Shingo Prize

The Shingo Prize is awarded to an organization that is mature in its transformation. It has incorporated a strong organizational purpose that is realized by robust key systems that drive behavior and results closer to ideal, as informed by the *Shingo Guiding Principles.* Systems make it easier to do the right thing and more difficult to do the wrong thing. These systems, enabled by appropriate tools, are producing ever improving behaviors and results. Engagement in fulfilling organizational purpose is constant, committed, and passionate at all levels. Improvement is seen as part of the work. The organization's achievements are evident as measured by the frequency, intensity, duration, scope, and role of its behaviors as well as by the stability, trend/level, alignment, and improvement of its results. A Shingo Prize–recipient organization shows the greatest potential for sustainability.

Challenge Process at a Glance

The ten steps listed below provide a summary of what you can expect as your organization progresses through a Shingo Prize challenge.

1

Step 1: Apply for a Shingo Prize Challenge

Begin by submitting the online application, your Company Profile sheet, and your documentation of results. After these documents have been reviewed, the assessment staff at the Shingo Institute will notify your official contact person if your application has been approved and whether or not your organization is eligible to challenge for a Shingo Prize.

2

Step 2: Complete Shingo Insight

Every organization that challenges for the Shingo Prize must participate in the Shingo Insight self assessment, which assesses your organizational culture based on the *Shingo Model*. You will work directly with the Shingo Institute's research director and self-assessment system administrator throughout this process, which will take approximately six weeks to complete. Detailed information about Shingo Insight is available on pages 19–23.

3

Step 3: Write the Achievement Report

The 50-page Achievement Report demonstrates how your organization has transformed its culture based on the *Shingo Model*. It is the final component of your Achievement Packet. You should expect to spend several months creating the Achievement Report. Achievement Report guidelines and specifications are located on pages 24–28.

4

Step 4: Achievement Packet Assessment

When all the components of your organization's Achievement Packet are submitted, the Shingo Institute will begin building a team of volunteer examiners. The names of all potential examiners will be submitted to your organization for review and approval. Once the examining team is finalized, you will send your Achievement Packet to each examiner for their formal assessment. The examining team's assessment of your Achievement Packet will be complete in approximately 30 days, and you will be notified of their decision within the next two weeks.

5

Step 5: Virtual Leadership Review Meeting

As part of the Achievement Packet Assessment, the examiners will meet virtually with your organization's executive leadership and management to discuss additional information or clarification they may need to finalize their assessment. This Leadership Review meeting will occur about halfway through the assessment period (at approximately day 15).

6

Step 6: Results of the Achievement Packet Assessment

Once examiners have finished their assessment, they will determine whether your organization qualifies for a Site Visit Assessment.

Site Visit

If the examiners decide that your organization qualifies for a site visit, the Shingo Institute assessment staff will begin the process of organizing the site visit. (Hosting a site visit does not guarantee a Shingo award.)

No Site Visit

If your organization does not qualify for a site visit, the examiners will compile a detailed feedback report for your organization. The report should be used to address gaps and other observations made by the examiners for future improvement efforts.

7

Step 7: Site Visit Assessment

The examining team will be onsite for three to four days assessing all systems, or the lack thereof, to the *Shingo Model*. You should expect them to personally interview leaders, managers, and team members throughout the organization.

8

Step 8: Notification of Award Level

Based on the results of the Site Visit Assessment, the examining team will determine the appropriate award level and submit their decision to the Shingo Institute. The four possible results are: 1) no recognition, 2) the Shingo Bronze Medallion, 3) the Shingo Silver Medallion, and 4) the Shingo Prize. Your organization will receive notification of its award status approximately 30 days after the Site Visit Assessment concludes.

9

Step 9: Marketing with the Shingo Institute

If your organization receives an award, you will begin working with the marketing team at the Shingo Institute to submit photographs, testimonials, videos, and other marketing materials for use in social media, press releases, newsletters, and more.

10

Step 10: Award Recognition

Your organization and all other award recipients from the past twelve months will be recognized at the Annual Shingo Conference and Awards Gala. This event is generally held in May. Receiving a Shingo award is an honor, and the Shingo Institute works to make the celebration memorable. We encourage representatives from your organization to attend the Awards Gala to be formally recognized as a Shingo Award recipient.

Please note: The time frames noted above are subject to change without notice. They are approximate and depend upon many factors, including examiner availability and logistics.

SHINGO PRIZE CHALLENGE

Application

Before You Apply

Before you submit an appliction, it is important to determine if your organization is ready to challenge for a Shingo Prize.

Gauge Your Organization's Readiness

A good way to gauge your organization's level of improvement would be to review the award descriptions on page 7. Now consider the following questions: What is your organizational culture? How do people behave? Are key systems designed to drive the appropriate behavior? If so, are these key systems supported by strong trends and levels in KPIs and KBIs? What is the scope of improvement your organization has made since it began its journey toward excellence?

Based on this analysis, you may feel that your organization is ready for a Shingo Prize challenge. Or you may conclude that it would be best to delay until your organization's transformation is further along as evidenced in its culture and results. Remember that the Shingo Institute requires three or more years of data that demonstrate significant improvement in results—driven by behavior—in your organization's culture.

If you still aren't sure whether your organization is ready for a Shingo Prize challenge, you may consider consulting with a Shingo Licensed Affiliate. Affiliates work closely with many organizations to assess their level of transformational maturity and to help them decide when or if they're ready to challenge for a Shingo award. The Shingo Institute has also designed a tool called Shingo Insight, which can be of help. Details about Shingo Insight can be found on pages 19–23.

Attend the Shingo Workshop Series

The most important aspect of a Shingo Prize challenge is a well-grounded understanding of the *Shingo Model* and the assessment methodology. The Shingo Institute has developed a series of workshops that help all people in an organization gain this understanding. Depending on the level of experience your organization has had with the *Shingo Model,* individuals from your organization are encouraged to attend one or more of the Shingo workshops. To accompany the workshop series, the Shingo Institute has also published a series of books based on the *Shingo Model.* They are available to order at **shingo.org/books.**

Participating in all six of the workshops, which are offered by Shingo Licensed Affiliates from around the world, should be a priority for your organization before you begin the process of challenging for the Shingo Prize. If this is not possible, we strongly recommend that as many people in your organization as possible attend the DISCOVER EXCELLENCE workshop. DISCOVER EXCELLENCE is the foundational, two-day workshop that introduces the *Shingo Model,* the *Shingo Guiding Principles,* and the *Three Insights of Organizational Excellence*™. This workshop is a highly interactive experience and is designed so that all participants will learn how they can participate in achieving organizational excellence.

The Shingo workshops will help members of your organization understand the complexities of the assessment methodology and how the Shingo examiners will assess your organization.

The Shingo workshops are available in-house, virtually, or at various public locations throughout the year. Information on locations and the affiliate delivering the workshop is available at **shingo.org/education.** For maximum effectiveness, you may consider having the workshop(s) presented at your facility. Please reach out to the affiliate of your choice to discuss this option.

Information about Shingo Licensed Affiliates is available at **shingo.org/affiliates.** Detailed information about each of the Shingo workshops is available at **shingo.org/education.**

Determine the Applying Entity

Most large enterprises are made up of many smaller facilities, businesses, sites, etc. that operate independently as well as part of a greater whole. To determine whether or not your facility qualifies as an applying entity for the Shingo Prize, closely review the eligibility requirements listed on pages 14–15. Many of the requirements will naturally place limitations and restrictions on what the applying entity can be. Using these guidelines, you can best determine if your organization may challenge for a Shingo award. If you are still unsure, please contact a member of the Shingo Institute assessment staff. Their contact information is listed on page 51.

Assessment Fees

The Shingo Institute will invoice fees two times during the Shingo Prize challenge. The first invoice will be submitted after your organization completes Shingo Insight and receives the report. At that time, your organization will be invoiced the Achievement Packet Assessment fee. This flat fee is based on your organization's size and whether or not it is part of a larger enterprise.

If your organization is submitting a Shingo Insight report from the previous year, the Achievement Packet Assessment fee must be paid in full to the Shingo Institute when you submit the Achievement Report. (Please keep in mind that Shingo Insight reports are only valid for 12 months.)

If your organization receives a site visit, the Site Visit Assessment fee is influenced by your site's location, the size of your organization, and the number of employees. These factors directly impact costs because of the number of examiners necessary to complete the Site Visit Assessment and where they will be travelling from. You will note on the table below that the range of fees for a Site Visit Assessment is very broad. This is primarily due to the constant fluctuation in air travel costs.

The Site Visit Assessment fee includes expenses such as scheduling and conducting the site visit, all reasonable travel costs for Shingo examiners, and feedback processing and communication following the site visit. The fee does not include any additional costs incurred by the examiners to prepare for travel or when they enter your country, such as medical appointments and tests that are required by your organization or the country or region in which the facility is located. These fees will be confirmed by your organization's official contact person and will be the responsibility of your organization. In addition, your organization will be required to sign a travel agreement. The assessment coordinator will send this out with the site visit notification email.

The invoice for the Site Visit Assessment fee will be sent approximately 30 days following the site visit or when all reimbursement receipts have been submitted by the examiners and approved. The invoice will show the administrative fee of $8,000, plus travel expenses incurred by the examiners and other agreed upon expenses. Payment is due upon receipt.

Assessment Fees				
	Achievement Packet Assessment		Site Visit Assessment	
	Small Organization	Large Organization	Small Organization	Large Organization
United States	$4,000	$8,000	minimum $12,000	up to $22,000
International	$4,000	$8,000	minimum $17,000	up to $32,000

How to Apply

Visit **shingo.org/awards/challenge-for-the-shingo-prize** to complete the online application form. This form is only available electronically. At the time you submit the application, you must also be prepared to submit the Results document and the Company Profile sheet (see details on pages 16–17). Among other items, the application will ask for the name and contact information of the highest ranking official at your organization and for the name of an official contact person with whom the Shingo Institute staff will work directly during the Shingo Prize challenge. You should also be prepared to provide an estimated date that you will submit your Achievement Report.

Once the Shingo Institute assessment staff has received your online application, Results document, and Company Profile sheet, they will begin working directly with the official contact from your organization to verify your organization's eligibility.

Please note that your organization has one year from the date you submit your application to complete and submit all the components of the Achievement Packet. A description of each component of the Achievement Packet can be found on pages 16–18.

When you submit your application, the Shingo Institute assessment staff will determine whether the entire process can be completed in time to include your organization at the upcoming Awards Gala, should it receive an award.

Determine Your Organization's Eligibility

To challenge for the Shingo Prize, your organization must meet the following requirements:

1. *The applying entity may come from various industries, such as services, manufacturing, healthcare, mining, oil and gas, and the public sector. Unfortunately, certain industries or endeavors may pose a conflict of interest for the Shingo Institute; therefore, a brief conversation with the Shingo Institute assessment staff will clarify whether or not a conflict with the Institute exists that will prevent your organization from challenging.*

2. *The applying entity should have common ownership throughout the entire organization. A manufacturer and supplier that are not owned and operated by the same company would need to apply as separate entities.*

3. *The applying entity should have been on its transformational journey for at least three years, which is the minimum amount of time to adequately establish stability in metrics, trends, and culture. If an organization has been in business for ten years but only started its transformation within the last two years, it may be too early to apply.*

4. The applying entity must not be under investigation by a government or private entity for malfeasance.

5. The applying entity must not be in bankruptcy proceedings or be knowingly considering such proceedings.

6. The applying entity must not be proceeding with or considering significant restructuring, such as selling part of the entity or reducing operations.

7. The applying entity must not be causing harm to society or to the environment. If such harm is unavoidable, as in a mineral extraction operation, a robust strategy for leaving no trace, repairing the harm done, or eliminating the potential harm may be required.

8. The applying entity must be able to show measures that are specific to the entity. (Divisional or corporate metrics are not sufficient.) A minimum of three full years of transformational measures is required.

9. The applying entity must be able to document how operational excellence initiatives have impacted the bottom line. (The Shingo assessments evaluate the entire entity to the Shingo Model*, including support functions.)*

10. The applying entity must be able to be assessed given the current assessment methodology. Organizations that are too large or logistically challenging may need to be split up and assessed separately.

11. The applying entity must allow examiners open access to speak with employees at all levels of the organization.

Determine the Size of Your Organization

The Shingo Institute assessment staff defines your organization's "size" upfront because it directly impacts the scale of the assessment process and, therefore, the costs associated with it.

A large organization is defined as having more than 250 people or as being a part of a larger enterprise. Thus, for the purposes of a Shingo Prize challenge, a small facility of 100 people that is owned by a larger enterprise is still considered large.

An organization is considered small only if it has 250 people or less *and* is not part of a larger organization (ie., it stands alone). This includes leadership, operations, and support functions.

Please note that the assessment criteria for both large and small organizations are identical.

<table>
<tr><th>Small Organization</th><th>Large Organization</th></tr>
<tr><td rowspan="2">250 people or less in entire enterprise.</td><td>More than 250 people.</td></tr>
<tr><td>250 people or less if part of a larger organization</td></tr>
<tr><td rowspan="2">Not part of a larger organization</td><td>Govenment entities</td></tr>
<tr><td>Large organizations may need to be broken into multiple applications</td></tr>
</table>

Components of the Achievement Packet

The Achievement Packet comprises your organization's online application, Company Profile sheet, Results document, Shingo Insight report, and Achievement Report.

Company Profile Sheet

The two-page Company Profile sheet should provide a brief overview of your organization. It should detail the transformation roadmap and describe major achievements since beginning the transformation process. These should include improvements in 1) safety/environment/morale, 2) financial/cost/productivity, 3) delivery, 4) quality, and 5) customer satisfaction. It may also include a brief description of how your organization fits within the larger enterprise (if applicable) and detail the service or product it provides (its value-adding operation). View an excellent example of a Company Profile sheet from a Shingo award recipient at **https://tinyurl.com/4fzczdu5.**

Your Company Profile sheet may not exceed two pages or include confidential information.

The Company Profile sheet is necessary at the time you submit your organization's application because it aids the Shingo Institute assessment staff in determining your organization's eligibility. Later, we will send it to potential examiners when we invite them to participate in your organization's Achievement Packet Assessment and Site Visit Assessment. Each examiner will use your Company Profile sheet to determine whether or not he or she has a conflict of interest with your organization that will disqualify him or her from participating. This includes being a supplier, competitor, customer, former employee, etc.

In the event your organization becomes a recipient of a Shingo award, the Company Profile sheet (with any updates you deem necessary) will be made public via the Shingo Institute website. This will enable other organizations to review your achievements and see the benefits that a transformation focused on the *Shingo Model* brings to organizations from around the world.

CODELCO
Company Profile

Radomiro Tomic Division (DRT)

CODELCO COMPANY VISION

Codelco is one of the main copper producers in the world (~10% of world production). State of Chile Owned Company, with 8 divisions throughout the country. Through the nationalization of copper between, 1971 and 2021 we have generated surpluses of US$ 142 billion for the State of Chile (equivalent annually to 2.3% of 2021 GPD).

RADOMIRO TOMIC DIVISION

We are the first division designed, built, and led from its origin by Chileans. RT is an open-pit mine located in the City of Calama in the Antofagasta Region, with a challenging business plan that includes mining oxides until 2029 and sulfides until 2060. Since its inauguration in 1997, Radomiro Tomic Division has generated surpluses for the State of Chile of more than US$ 19 billion.

World-class Mining

OUR VISION:

"Be a leader in the industry by establishing a new way of doing mining, with a passion for teamwork and pride in our history and our people, to maximize our contribution to the corporation and the country."

OUR PEOPLE:

Our people are our main asset. The effort and commitment of each of them is the engine that drives us every day to pursue our aspiration; a collective push that even in the most adverse situations, such as a pandemic, allowed us to maintain our level of production and respond to our country when it needed us the most.

Staff: 1,240 people

Collaborators: 4,600 people

OUR PROCESS & FACILITIES:

Our main processes are: mine extraction, crushing, stacking, gravel removal, leaching, solvent extraction, electro winning and shipping. Facility summary:

- Mine equipment: 107 trucks and 12 drills
- Processing: primary, secondary and tertiary crushers
- Carrier belts: 34 km
- Largest bucket wheel in South America
- World's-largest SX-EW plant
- Robotized cathode handling system

OUR PRODUCT:

Radomiro Tomic Division mines oxidized minerals and produces electro-obtained cathodes, in the form of plates with a 99.99% copper concentration that weight approximately 70 kg each.

Discovery of potential field

1992 Project is named "Radomiro Tomic"

1995 Environmental and financial authorization

1997 Radomiro Tomic operations began (investment of US$ 2 billion*)

2001 Expansion from plant to production of 300 KT Cu/

2012 RT brand registration in Shanghai

2015 Implementation of operational excellence model (C+)

2016 Environmental authorization for Project RT Phase II

2016 Implementation of Chilean NCH 3262 gender diversity and inclusion standard

2017 SOMA implementation of plant maintenance operating system

2019 Implementation of cultural transformation index

2020 First women operator of the largest bucket wheel in South America

are delivered to the country.

As we expected to end oxide mining operations in 2018, the division had to reinvent it self in order to extend C1 costs for 11 additional years (until 2029) without major investments, ensuring continued contributions to our communities.

This was achieved amid a 50% reduction in the amount of copper in the mineral and a 15% reduction in the quality of the material to be processed.

To reverse this situation, the dry area, through the C+ system and a collective continuous improvement mindset, has been able to increase stacker productivity (DRT bottleneck) and has learned to treat new minerals.

With this, DRT has managed to produce 40% more than projected, making the asset economically viable until at least 2029.

Over the last 5 years, the dry area has been constantly challenged, and through continuous improvement its people have been able to improve productivity levels in all its main processes:

- Achieved an average battery availability of 97% for critical crushers, setting the benchmark in mining worldwide (top quartile 93%)
- Increased stacker availability by 7%
- Increased by 10% the availability of the world's-largest bucket wheel in copper mining, since its installation in 2018

In parallel, this optimization effort has managed to reduce C1 costs (excl. amortization and depreciation) of the dry area by 16%.

These indicators have leveraged improvement in delivery, where:

- Stacking production (bottleneck) has increased by 18% (an increase of 11 Millions tons)
- Surpluses totaling US$ 18 billion have been delivered to Chile during RT operation

This has been achieved through our main asset, the people, and our commitment to them and the communities, which is why we have worked toward (morale):

- Strengthened our work with students and teachers from the Radomiro Tomic School (for vulnerable people), now replicated throughout the district
- Increased the number of women in the division by 85% (since 2016)
- Achieved an increase of 5 points on the cultural transformation index (ITC), mainly through systematic work with frontline leaders (e.g., individual and group coaching, leadership in times of crisis, development committees) – Radomiro Tomic is on the 1st quartile compared to global Organizational Health Index benchmark

1. No. of accidents per million work hours
2. Estimated in current value of the investment

T)

ears

list division of Codelco to negotiate with ellvering a bonus by negotiation term of ian the previous negotiation (25% lower than the industry average), without trade union conflicts or work stoppages

In addition, the improvement of our processes has also made it possible to improve the safety and health of our people and helped protect the environment:

- Reduced the accident rate by 50% in the last 10 years, thanks to the simplification of operational processes and the systematization of safety and occupational health inspections, reducing the exposure to risks of personnel
- Improved accident rate[1] of RT up to 0.57 against 1.32 of the national average of large mining
- Reduced silica exposure in RT staff by 80%
- Recycled an average 40% of the waste emitted by the process during the last 3 years

Finally, all this work has been reflected in the perception of our clients (quality), whose claims have decreased from 7 in 2015 to 1 in the last 3 years

CERTIFICATIONS

- ISO 9001 certification – Codelco's only division certified throughout its entire process line
- Certification in Rule 3262 (2017), for gender diversity and work-life balance. RT currently uses the new diversity and inclusion approach

AWARDS

- **2015:** Recognition in Safety and Risk Management, granted by CNS.
- **2016:** Enterprise Innovation Award, Codelco. Recognition by the Association of Technology Companies (ACTI).
- **2016 and 2018:** National Security Distinction for 7 million person hours without accidents, granted by the National Security Council (CNS)
- **2019:** Equity and Inclusion Award, Codelco.
- **2019 and 2021:** Corporate Reputation Enterprise Monitor Ranking (MERCO), Codelco.
- **2022:** Shingo Prize Dry Area. Recognition by Shingo Institute.

CONTACT INFORMATION

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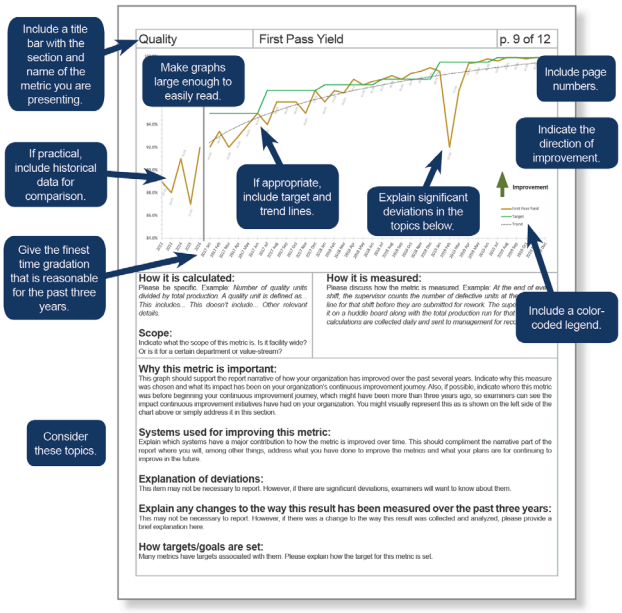
Results Document

The Results document serves two purposes. First, it is used to determine your organization's eligibility. When we receive your organization's Results document at the time you submit the application, we will verify that it provides results in every category and that it includes a minimum of three years of data. We may also suggest ways to clarify your data more effectively, such as adding more measures and correcting formatting issues. Until we review your Results document, we cannot confirm your organization's eligibility to begin the Shingo Prize challenge process.

Please note that the Shingo Institute assessment staff will not analyze any results when determining your organization's eligibility. This is the responsibility of the examiners during the Achievement Packet Assessment and is the second and primary purpose of the Results document.

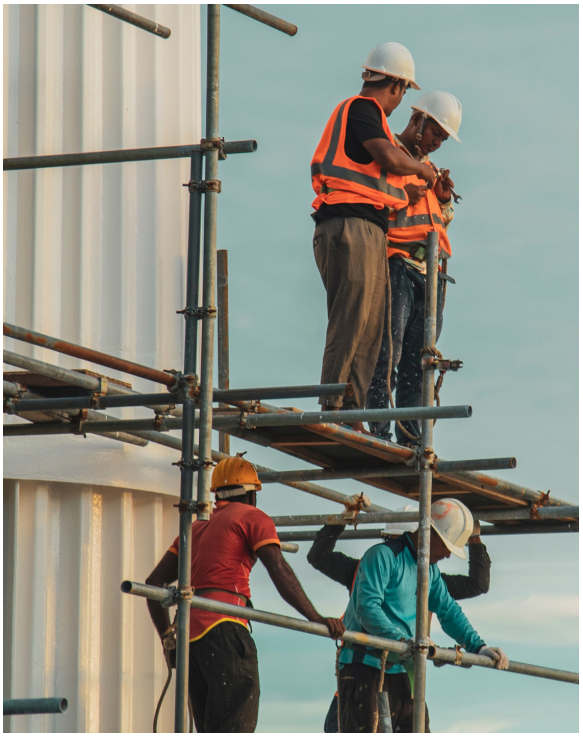
Your organization's Results document should include data that reflects improvements as a result of its transformation to organizational excellence. Data should tie closely to the changes and improvements your organization has made to systems during the process. To provide contrast, results should also show data from before your organization's transformation began.

Results must be provided for each of the following categories: 1) safety/environment/morale, 2) financial/cost/productivity, 3) delivery, 4) quality, and 5) customer satisfaction. The required measures (numeric representations of key performance indicators) are listed on the Results chart on pages 41–42. Be sure to provide each measure at the level of aggregation that is most useful for analysis, which is monthly in most



cases. If acronyms are used for measures, please define the acronym and provide the calculation used for each measure. All anomalies should be explained. See the Building the Results Pages on page 27.

The Results document is not limited by length, but we will look at it closely to ensure that it includes all of the information the examiners will need to assess the results in your organization prior to and during the transformation process. The Results document (with necessary updates and corrections) will become a part of your organization's Achievement Report.



Shingo Insight Report

Every organization that challenges for the Shingo Prize must complete Shingo Insight, a web-based, anonymous self-assessment tool that measures the satisfaction, engagement, and culture of an organization using the *Shingo Model*. This evaluation tool aims to help organizations improve the consistency of their execution and performance by measuring and addressing specific factors surrounding the ten guiding principles of the *Shingo Model*. Your organization will receive a report following the administration of Shingo Insight.

Achievement Report

This 50-page document should incorporate text, photographs, charts, and graphs to document the connection between behaviors, results, and the systems that drive them. You can find more details on creating the Achievement Report on pages 24–28.

Application Deadline

From the day your application form is submitted, your organization has one year to complete the Achievement Packet by submitting the remaining components—the Shingo Insight report and the Achievement Report.

SHINGO PRIZE CHALLENGE

Shingo Insight

Overview

The Shingo Institute has been assessing organizational performance for more than 30 years and has developed a self-assessment for determining the degree to which an organization believes the behaviors of its executives, managers, and team members are aligned with the principles of the *Shingo Model*.

The self-assessment measures the participants' attitudes and behaviors and then the Insight staff at the Shingo Institute compiles an in-depth data report, which enables leaders and managers to determine if the changes they are making to their systems are actually impacting the organization's culture. It also helps leaders and managers improve the consistency of their execution and performance because they can see where they need improvement.

The results of the self-assessment are critical to providing an accurate, detailed perspective of the culture of organization. Therefore, participation in Shingo Insight is a requirement for every organization seeking to challenge for the Shingo Prize. Your organization's Shingo Insight report will become part of the Achievement Packet.

Shingo Insight enables leaders to evaluate their organizations to determine if the changes they are making to their systems are actually impacting the organization's culture, or behavior.

Shingo Insight for a Shingo Prize Challenge

Shingo Insight self-assessments taken within one year of the Shingo Prize challenge process do not need to be re-administered as long as the challenging organization is identical to the organization surveyed earlier. As with all components of the Achievement Packet, your organization will provide the report directly to the examiners when they begin their review.

If your organization has not completed a Shingo Insight self-assessment, the Insight staff at the Shingo Institute will work directly with your team to customize and then administer the tool to your organization. You should plan for a total of six weeks to complete Shingo Insight—from building and administering to submitting and receiving the data report.

Gaps and other observations that you note in the Insight report should be addressed in the Achievement Report. For this reason, you should not submit the Achievement Report to the Shingo Institute until your organization has had the opportunity to clarify findings revealed in Insight.

Customizing and Administering Shingo Insight

The number of participants depends upon the size of your organization and its breakdown by number of leaders, managers, and team members. Targets will be determined based on the organizational breakdown and a 95 percent confidence level. It is important that there is good representation from each part of the organization. Generally, all leaders and managers participate in the self-assessment because they are smaller groupings and everyone is included in the sample size.

The assessment is web-based and self-administered. It requires responses of approximately 65 statements, primarily on how your people perceive the culture in your organization. The statements are focused on behaviors. They are clear, concise, and easy to understand, even if the participant is unfamiliar with the *Shingo Model* and the *Shingo Guiding Principles*.

The assessment will take approximately 20 minutes to complete and can be accessed on most devices, including a smart phone, tablet, and computer. It is important for every participant to honestly answer how each statement relates to the organization's behaviors.

During the administration of the assessment you will be able to see real-time progress via a dashboard.

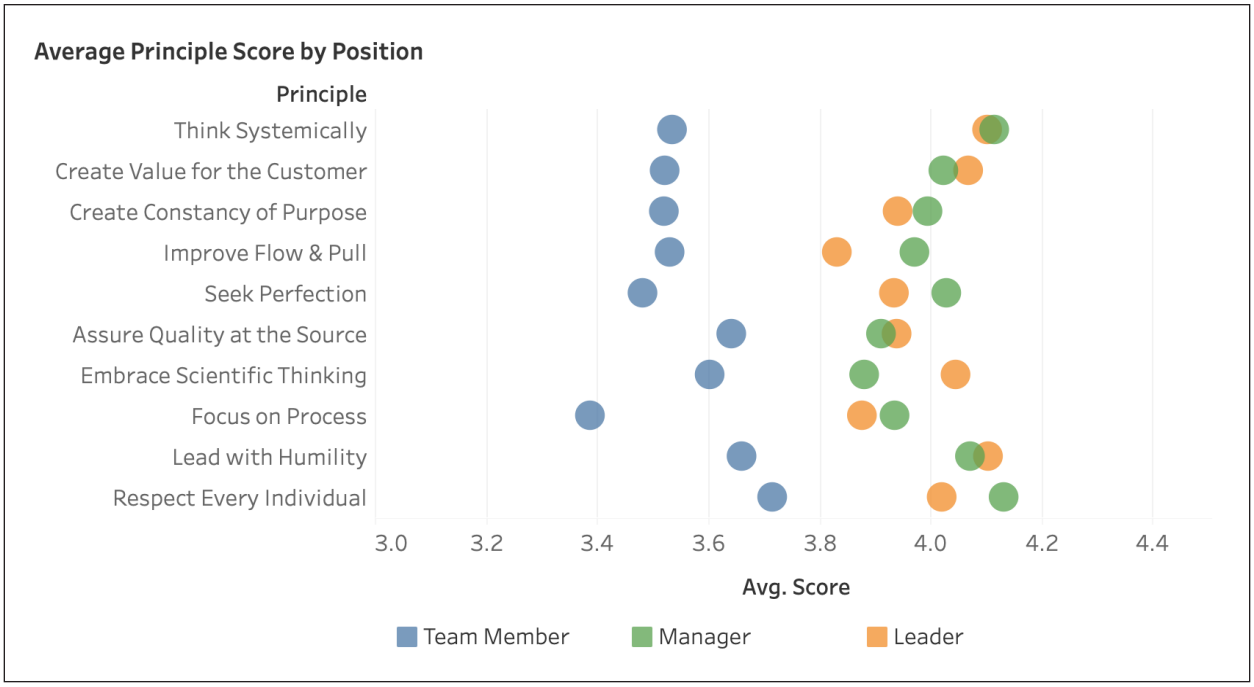
The Data Report

The Shingo Insight staff will need approximately two weeks after the self-assessment is closed to create the data report. The Insight staff will then schedule a meeting to review the results with your organization and answer any questions you may have.

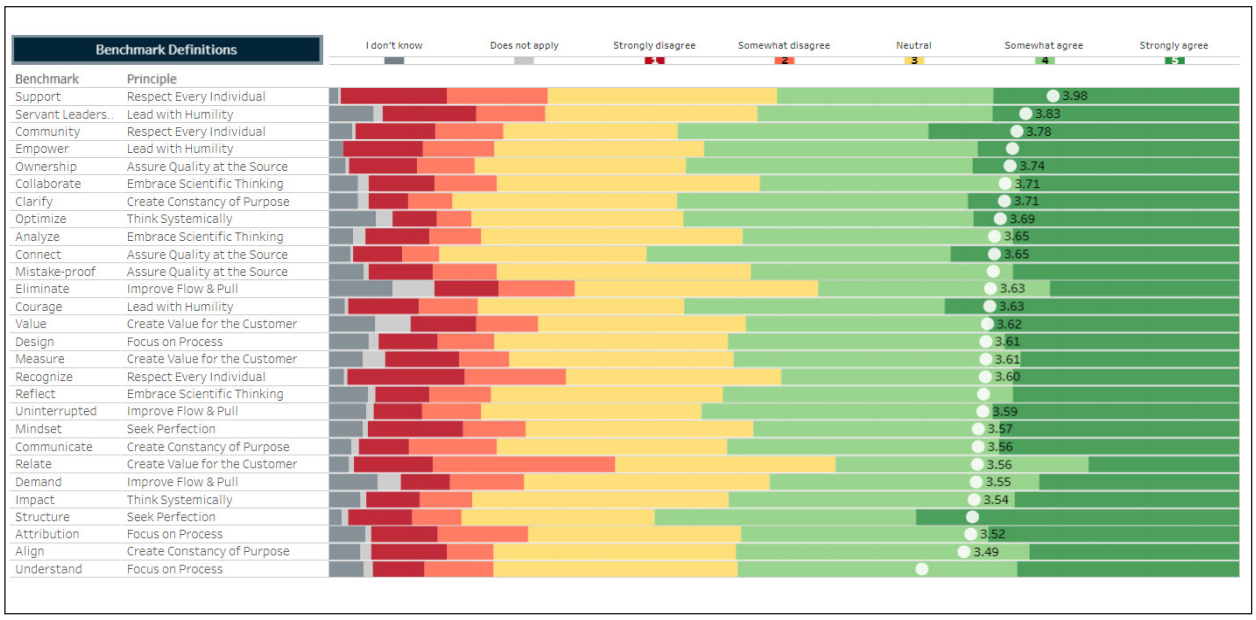
You'll want to familiarize yourself with the report's format. Review each tab in detail by applying the filters. Look for patterns and trends as well as gaps between behaviors, areas, and organizational level. If you see very high scores and very low scores, consider what might be happening in those areas of your organization. Similarly, look for places where answers are excessively "don't know" or "not relevant." These are good opportunities to "go and observe" to understand the gaps and differences in participant responses. Be sure to read through the free-form answers carefully.

Once you've completed a thorough review of the report, use the data to focus future improvement activities that can be integrated into your organization's strategy and plan. Be sure to start with the priorities; don't try to work on all the opportunities at once. Remember that the assessment report is just one lens from which to view your organization. It should be used in conjunction with other information, such as performance data, improvement projects, results, and research.

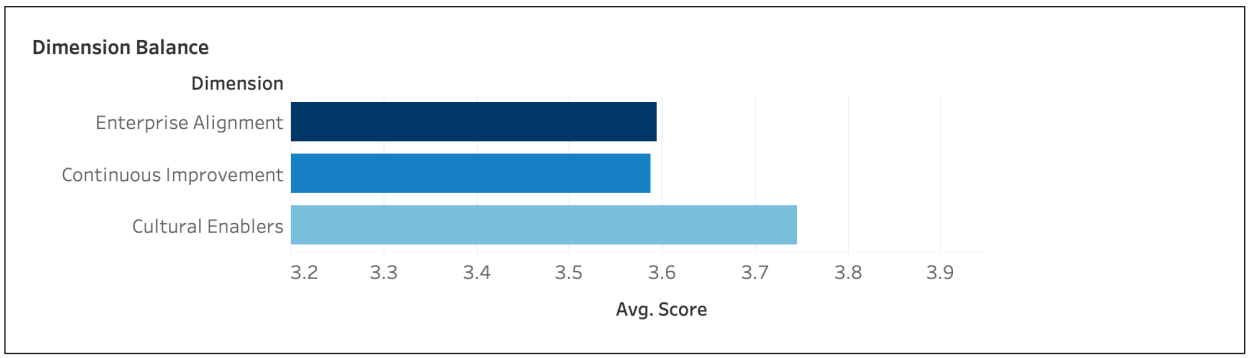
Visit **shingo.org/insight-assessment** for more information about administering Shingo Insight for a Shingo Prize challenge.



This diagram gives a high-level view of the alignment between roles in an organization.



The behavioral benchmark overview provides an in-depth perspective of how the organization compares to ideal behaviors.



The high-level dimension balance chart compares how the organization scored in each of the dimensions.

Do not submit the Achievement Report until your organization has had the opportunity to clarify findings revealed in Shingo Insight.

SHINGO PRIZE CHALLENGE

Achievement Report

Creating the Achievement Report

The purpose of the Achievement Report is to demonstrate how your organization has transformed its culture based upon the principles of organizational excellence.

The Achievement Report may be the most important and time-consuming component of the Achievement Packet. By incorporating extensive text, charts, and images, the report should describe the connection between behaviors and results in your organization's culture. It should also directly reference each of the principles of the *Shingo Model* and should describe behaviors, the systems that drive them, and the results achieved by those behaviors.

Recommended Reference Materials

The *Shingo Model* booklet provides definitions of the principles and examples of ideal behaviors, which provide context for the content that should be included in the Achievement Report. You can download the *Shingo Model* booklet at **shingo.org/shingo-model.** You will also want to refer to the assessment criteria (see the charts on pages 34-42) when writing the Achievement Report. The assessment criteria provide examples of ideal behaviors and the systems that produce these behaviors in your organization's culture. The criteria also provide the required measures, which you should include in the Results section of the report. Be sure to use both documents—the *Shingo Model* booklet and the assessment criteria—as reference material. (Remember that they are not all-inclusive.)

File Specifications

- *Use English as the official language of the report.*
- *The page size should be set at 8½ x 11 inches.*
- *Use a font size of 11 characters per inch and a standard serif font, such as Times New Roman.*
- *Single space all text in the report.*
- *The page count must not exceed 50 pages, single sided. It is important that the page count is strictly adhered to.*
- *Graphs, charts, and photographs are encouraged, but they should be included at a high resolution and should be legible and impactful. Reports that do not meet this standard will not be accepted.*
- *Export and submit the Achievement Report as a print-ready PDF.*

Showing the connections between behaviors and business results is paramount to producing an effective Achievement Report.

If your Achievement Report is not accepted because it has poor graphics or exceeds the maximum length, you may make the necessary corrections and submit a new file. The amended report must be returned within one year of the application submission.

Format

A detailed table of contents should appear on the first page of the Achievement Report. Then, the initial pages of the Achievement Report should introduce your organization to the examiners. The Company Profile sheet that you submitted with your application could be included in this section, or you could use something similar. The content on the remaining pages should make up the bulk of your Achievement Report and should include these four main sections:

1. **Cultural Enablers**
   (Dimension 1 in the Guiding Principles diamond of the *Shingo Model)*
2. **Continuous Improvement**
   (Dimension 2 in the Guiding Principles diamond of the *Shingo Model)*
3. **Enterprise Alignment**
   (Dimension 3 in the Guiding Principles diamond of the *Shingo Model)*
4. **Results**

Each dimension should discuss key management, work, and improvement systems as well as the behaviors they are driving that have achieved the reported results. In addition, where appropriate, you should discuss how systems will evolve to move the organization to the next level, driving behavior and results even closer to ideal. Be sure to provide evidence that shows how key systems are driving behavior and results closer to ideal. Supporting concepts; tools; management, work, and improvement systems may include, but are not limited to, those listed in the assessment criteria charts on pages 34-42. When addressing behaviors that are driven by systems, be sure to include references to frequency, intensity, duration, scope, and role, as used in the Behavior Assessment Scale on page 52 in the appendix.

Your Achievement Report should be specific to your organization and not to the overall enterprise. You should limit any references to the enterprise to areas that are applicable and critical, such as when you describe alignment of strategy or constancy of purpose. Measures should also be specific only to your organization. Achievement Reports with excessive reference to the enterprise of which your organization is only a part will be returned.

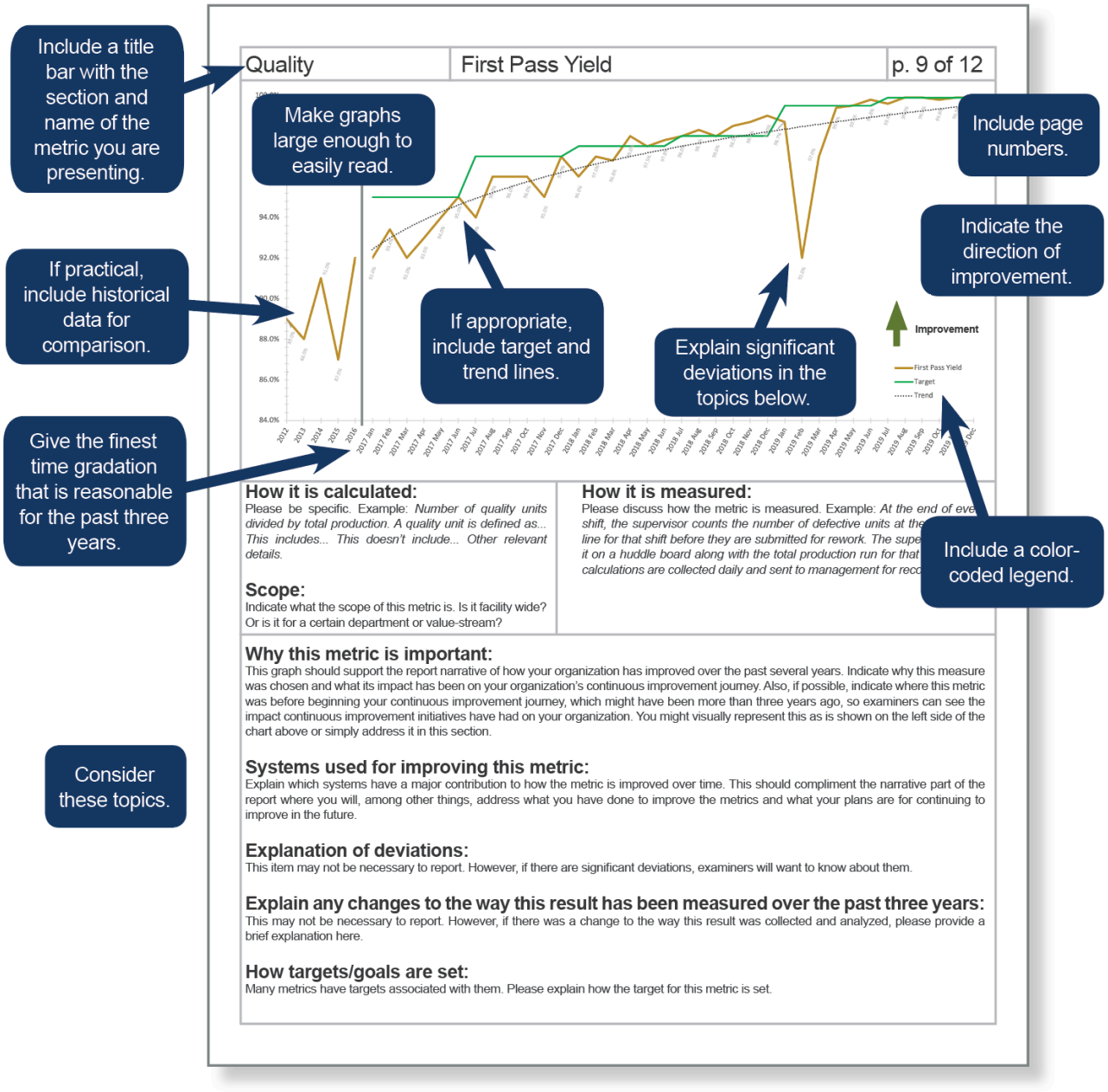
Building the Results Pages

The Results document you submitted with the application should be included in the Results section of your Achievement Report, along with updates and additional information. Be sure to focus on the five measurement areas in the following order: 1) safety/environment/morale, 2) financial/cost/productivity, 3) delivery, 4) quality, and 5) customer satisfaction.

The Results section should be easy to understand. It should detail the goals and objectives that are being impacted by the systems in the three dimensions. It should also show evidence of how behaviors driven by systems have achieved the results.

Results should analyze a minimum of three years of data. Explain how your organization selects what to measure and show how the measurements are used to drive improvement throughout the systems. Results should show where your organization is now versus where it was before its transformation journey began.

When addressing results, include references to stability, trend/level, alignment, and improvement as used in the Results Assessment Scale on page 53. Be sure to explain any anomalies that appear in the data. How is the cause-and-effect relationship between measures and results taught to and understood by team members?



Provide each measure at the level of aggregation where it is most useful and where your organization normally uses it—generally monthly or quarterly. Averaging over quarters or years may mask critical information, so it is important to use the appropriate scales. Charts that illustrate measurement and improvement should be displayed in the shortest interval possible. When the examiners are reviewing your Achievement Report, they may ask for a less aggregated version of some data.

Language and Style

When writing the Achievement Report, a logical flow with clarity of phrases and conciseness of language is critical. The examiners need to focus on the content and not be slowed down by confusing or vague text. The Achievement Report will be used by the Achievement Packet examining team to evaluate whether or not your organization qualifies for a site visit. Examiners are reviewing your organization's culture based on all of the evidence you provide. The more detailed and thorough the evidence, the more accurately they will be able to assess your organization's culture.

Keep in mind that your report will be reviewed by a team of examiners from a diverse group of industries who are very experienced in Lean principles and organizational excellence. But the examiners will likely not be familiar with your organization. Do not assume that acronyms and organizational language will be understood. Abbreviations must be written out on first reference, followed by the acronym or unique language that is used in your organization in parentheses. Abbreviations may be used in subsequent reference. If abbreviations and unique organizational language are extensive, consider including charts that show each abbreviation or unique language along with their definitions.

Proprietary Information

Remember that a Shingo Prize challenge is focused on the culture of organizational excellence that exists in your organization and how it has been transformed; therefore, examiners do not require proprietary information. Please do not disclose information in your Achievement Report regarding products, processes, or sensitive financial results. To further safeguard your organization's privacy, we require all examiners to sign a non-disclosure agreement that is kept on file with the Shingo Institute.

Submission Deadline

Once your organization's application has been submitted and approved, your team will have one year to submit the Achievement Report. However, because the Shingo Insight report provides necessary clarifying information, you should not submit the Achievement Report to the Shingo Institute until your organization has had the opportunity to clarify significant findings revealed in Insight.

SHINGO PRIZE CHALLENGE

Assessment

The Two-Part Assessment Process

The purpose of the assessment process, which includes the Achievement Packet Assessment and the Site Visit Assessment, is to determine the degree to which the systems in an organization are driving behaviors and results closer to ideal.

Part 1: The Achievement Packet Assessment

When your organization's entire Achievement Packet has been submitted, the Shingo Institute will begin building a team of examiners to review it. To avoid any conflicts of interest, the Shingo Institute will submit to you a list of potential examiners who are available to participate in your Achievement Packet Assessment. Your organization's leadership should review the names and organizations examiners work for and approve only those examiners who may participate. Members from your organization who also serve on the Shingo Executive Advisory Board or as Shingo examiners may not participate in the assessment process. Also, examiners who are suppliers, competitors, customers, or former employees are disqualified from participating.

Once the examining team is finalized, you will send the Achievement Packet to each examiner for their formal review.

The examining team will have 30 days to review your Achievement Packet, which will begin the day all examiners receive the Achievement Packet. You will receive notification from the Shingo Institute approximately two weeks after the review is complete if the examiners decide that your organization qualifies for a site visit.

During this 30-day period, the examining team will meet virtually to collaborate on and record their findings in the Achievement Packet. They will use your submitted materials to assess your organization's systems, behaviors, and results to the assessment criteria. They will also participate in a virtual Leadership Review meeting with your organization's executive leadership and management to discuss any information or additional clarification the examiners may need to finalize their review. This meeting will cover key systems, including the behaviors driven and the results achieved by the system.

You will work directly with the examiner team lead who will create an agenda for the virtual Leadership Review. The meeting will be held on a platform of your choice, such as Microsoft *Teams* or *Zoom*, and should not exceed two hours. Your organization should select an individual to coordinate the meeting.

A Shingo Prize challenge is an extensive cultural assessment that comprises up to two parts: the Achievement Packet Assessment and the Site Visit Assessment.

The Shingo Institute requires a translator for every examiner who doesn't speak the language. If translators are needed for the Leadership Review meeting, you will be responsible for making the necessary arrangements. Although there may be individuals in your organization capable of translating, we ask that you secure translators from a third party. The team lead will notify you how many translators are needed prior to the meeting.

During the meeting, not all examiners will be required to meet with the same managers or executives at the same time; they will likely break off into teams to cover more areas of interest.

Following the Leadership Review meeting, the team of examiners will determine whether or not your organization will advance to the Site Visit Assessment portion of the process.

In the event the examining team determines that your organization does not qualify for a site visit, you will receive a feedback report from the examining team, which will be invaluable in identifying and resolving gaps as your organization continues on its improvement path.

Your organization is welcome and encouraged to begin another Shingo Prize challenge at a later date. We recommend waiting at least two years before you reapply to enable your organization to adequately apply the examiners' feedback and to record and verify improved results and measures. Details about the reapplication process are located on page 48.

On very rare occasions, organizations discover that they omitted critical information or results or that they failed to explain something they believe would directly impact the examiners' decision. Under these circumstances, the Shingo Institute allows the organization to submit an addendum to their Achievement Report. Submitting an addendum is only permitted following the Achievement Packet Assessment. Specifics about the addendum are located on page 49.

Part 2: The Site Visit Assessment

Site visits are generally scheduled throughout the year as organizations qualify. If your organization advances to the Site Visit Assessment stage, the Shingo staff will contact your organization's official contact person on record to start coordinating your site visit. Initially, you would provide the Shingo Institute three consecutive days, each within a different week, ranked in order of preference. Before planning schedules, the Shingo staff will inform you if they require three or four days for the site visit. Typically, the provided dates should be within 45 to 60 days of the notification that you qualified for a site visit.

Extending the dates after 60 days for certain site visits may be necessary due to extenuating

circumstances such as holidays, examiner availability, and travel restrictions. This extended window allows additional time to facilitate travel arrangements, process visas, and accommodate logistical requirements.

While we strive to accommodate date preferences, our primary responsibility is to ensure the safety, quality, cost, delivery, and customer satisfaction of the assessment experience.

The Shingo staff will confirm the assessment team in the weeks leading up to the site visit. The number of examiners on any team depends on several factors, including but not limited to logistical considerations and the number of people in an organization, among others. The assessment team lead will create an agenda to ensure the examiners have adequate time to observe processes and talk to team members. The agenda will be shared and reviewed in advance with your organization's official contact person.

A Shingo assessment focuses on the behaviors and outcomes of your organization's systems rather than solely on the tools or systems themselves. This approach is essential in evaluating the level of cultural transformation your organization has achieved.

During the Site Visit Assessment, examiners will observe and evaluate your organization's systems, behaviors, and results against the ideal. They will focus on management systems, improvement systems, and work systems. You should expect examiners to interview leaders, managers, and team members throughout the organization and at every level, gathering evidence through open-ended questions and observations. They will use this data to evaluate your organization's current culture.

When examiners review your organization's results, they will look at key measures (i.e., quality and delivery, etc.) and then evaluate the stability, trend/level, alignment, and improvement of those measures. The results should not be static; they should be continually improving. For example, if a measure has been at 80 percent for a long time and goals have not been challenged, examiners know that the system has achieved stability but is not improving. They may ask:

- *When did the goal last change? What was the reason for the change?*
- *If you could improve a part of the process, what would it be? Is work being done to make the improvement? Why or why not?*
- *Can you show me some of the improvements that have been done recently?*

A Shingo assessment focuses on evaluating the behaviors and results that come from systems in your organization rather than solely on the systems or tools themselves. By prioritizing these factors, the assessment can accurately gauge the level of cultural transformation that your organization has achieved.

When updating data or making changes to the results, please include this information in an updated Achievement Packet provided to examiners before the site visit assessment.

About the Assessment Criteria

The charts on the following pages include examples that will provide some guidance on what Shingo examiners will look for as they investigate the behaviors within your organization and what drives them. All ten of the *Shingo Guiding Principles* within the three dimensions in the Guiding Principles diamond of the *Shingo Model*—Enterprise Alignment, Continuous Improvement, and Cultural Enablers—are presented in these charts, along with Results. Under each dimension are behavioral benchmarks that correlate to the specific principle and examples of ideal behaviors for each benchmark.

Please note that the behavioral benchmarks and examples of ideal behaviors included in the charts align best with the given principle, but the behaviors may be found within systems tied to other principles as well. It is also important to note that there is overlap between principles, behaviors, and the systems that drive them. The criteria are not intended to be a checklist for each dimension; they simply provide examples of the principles (behavior), systems, and tools in each dimension.

These charts are best used as a reference so you can know what examiners may look for as they assess your organization. When reviewing the following pages, remember that not every ideal behavior and system will be present in your organization, and that your organization may have others that are not listed here at all. The Shingo assessment is less interested in what an organization calls its systems or tools and is more interested in the behaviors and results that come from the systems. Examiners will work to define the current reality and to identify the gaps between current behavior and ideal behavior.

These charts also include the supporting concepts, key systems, and tools and techniques that we normally associate with a particular principle in the dimension. Examiners will look for evidence of these systems and tools as they assess the behaviors within your organization and what drives them. They may look at artifacts (such as boards, lines on the floor, and processes) and ask how they fit in the organization. Are they part of a system, or are they simply a point solution? The examiners will look for evidence of the interactions and connections between behaviors and systems, tools, and results.

Dimension 1 - Cultural Enablers

Respect Every Indvidual

Behavioral Benchmark	Examples of Ideal Behaviors
Support We invest in everyone's development and encourage them to realize their potential.	• Executives discuss development plans and status as part of leader standard work. • Managers schedule time for team member development and improvement. • Team members use the time scheduled for development and improvement.
Recognize We honor the contributions of every employee.	• Executives participate regularly in recognizing team members. • Managers design a formal recognition system that is timely and recognizes correct behavior. • Team members present ideas for improvement.
Community Our organization cares for the community by providing a physically and emotionally safe workplace for employees and by being a good steward to the environment.	• Executives execute a plan to reduce any harm to the environment. • Managers discuss safety as an important piece of every meeting. • Team members identify and document safety concerns.

Lead with Humility

Behavioral Benchmark	Examples of Ideal Behaviors
Servant Leadership Leaders consider the needs of others first.	• Executives work to remove barriers and provide needed resources. • Managers advocate for the team members needing barriers removed and resources. • Team members willingly assist other team members.
Courage We recognize our strengths and weaknesses, acknowledge our mistakes, and constantly seek to learn from others.	• Executives expose their own mistakes and provide lessons learned and opportunities gained. • Managers visit and benchmark other areas to learn and share. • Team members report errors and do not continue work if the error cannot be avoided.
Empower We delegate decision making where appropriate, and we trust and support each other.	• Executives ask for lessons learned from mistakes not who made them. • Managers review standard work first when mistakes are made. • Team members make decisions appropriate to the work that they do.

Tools and Techniques	Supporting Concepts	Examples of Systems
• Leadership development plan • Recruitment and succession plan • Agreements with educational institutions • Personal development plans • Lean training curriculum and materials • Meetings • Suggestion forms and measures • Community open house	• Assure a Safe Environment • Develop People • Empower and Involve Everyone • A "Learning" Organization"	• Empower and Involve Everyone • People Development • Training and Coaching • Leader Standard Work • Award and Recognition • Environment, Health, Safety, and Society (EHSS) • Engagement and Involvement • Communication and Direct Observation

Dimension 2 - Continuous Improvement

Seek Perfection

Behavioral Benchmark	Examples of Ideal Behaviors
Mindset We challenge our paradigms and expectations.	• Executives surround themselves with people that will challenge their mindset. • Managers seek improvement even in areas that have already made improvements. • Team members regularly document and improve standards.
Structure We approach improvement in a structured way.	• Executives highlight and recognize improvement behavior. • Managers coach team members daily to engage them in process improvement. • Team members follow standard work and document changes when needed.

Embrace Scientific Thinking

Behavioral Benchmark	Examples of Ideal Behaviors
Reflect We understand that decisions and changes are based on careful examination of problems, challenges, and opportunities	• Executives clearly articulate and communicate organizational challenges. • Managers provide necessary time for teams to research and test problems. • Team members regularly discuss lessons learned from experiment outcomes.
Analyze We experiment, innovate, and make decisions with an appropriate analysis of good data and facts.	• Executives provide resources to collect data needed to manage the business. • Managers analyze data and compare it to what the actual condition is where the work happens. • Team members expose and document deviations from standard work.
Collaborate We actively seek insight and ideas, especially from those closest to the work	• Executives standard work includes daily visits to where the work happens. • Managers recognize improvements and have a process to share accomplishments and spread learning with the rest of the organization. • Team members validate countermeasures and share the success of their improvement to standard work.

Focus on the Process

Behavioral Benchmark	Examples of Ideal Behaviors
Understand We go to where the work happens to develop a thorough understanding of the process.	• Executives observe data and facts by going to where they happen. • Managers actively listen daily with team members to understand process issues. • Team members always asks why, not just how.
Design We design our processes to minimize waste.	• Executives attend training to understand waste and how to support its elimination. • Managers make waste visible to all. • Team members focus improvement activities around the elimination of waste.
Attribution We first look at the process when solving a problem instead of blaming people.	• Executives focus on the process, not the person when discussing problems. • Managers coach to the process problem not the person working within the process. • Team members take ownership of problems as a team to improve the whole.

Assure Quality at the Source

Behavioral Benchmark	Examples of Ideal Behaviors
Mistake-proof Our processes are designed to prevent, reveal, and immediately resolve any problem.	• Executives create an expectation that anyone can raise a flag or stop the line, and employees are rewarded for preventing the defects. • Managers design systems to prevent and detect errors that might occur. • Team members stop the process if an error occurs.
Ownership Employees feel personally connected to the quality of their work processes and outcomes.	• Executives show responsibility by exposing and taking responsibility for their errors. • Managers design work systems to confirm quality at each step of the process. • Team members confirm the quality of their work.
Connect We ensure that people are able to see how their work impacts the work of others.	• Executives participate in meetings at the appropriate level in the organization. • Managers use huddles to communicate current status and problems. • Team members know who their internal customers and suppliers are.

Improve Flow & Pull

Behavioral Benchmark	Examples of Ideal Behaviors
Uninterrupted We design our work toward continuous creation of value.	• Executives clearly define value to the customer. • Managers focus improvement efforts toward removing barriers that prevent flow. • Team members follow standard work to stabilize the current condition of flow.
Demand We produce in response to actual customer demand.	• Executives provide long-term strategy to balance demand and capacity. • Managers define expectations toward ideal one-piece flow and coordinate improvement toward it. • Team members stop producing output if there is not a pull signal from the customer.
Eliminate We systematically look for ways to identify and remove waste from our processes.	• Executives are active in removing waste from their own processes. • Managers design systems to make waste visible. • Team members focus improvement efforts around eliminating identified waste.

Tools and Techniques	Supporting Concepts	Examples of Systems
• Idea gathering tools • Supplier development plan • A3 form, PDCA chart • Value stream map • Tools of quality (e.g., pareto charts, storyboarding, cause-and-effect diagrams • Benchmarking • Theory of constraints • Manufacturing design • Supplier rating • Customer visits • Cellular design • Software	• Stabilize Processes • Standard Work • Go & Observe • Focus on Value Stream • Keep It Simple and Visual • Identify and Eliminate Waste • No Defect Passed Forward • Integrate Improvement with Work • Rely on Data and Facts	• Voice of the Customer • Problem Solving • Total Productive Maintenance (TPM) • Visual Management • 5S Methodology • Error Proofing/Zero Defects • Production Process Preparation (3P) • Quick Changeover or Setup Reductions (SMED)

Dimension 3 - Enterprise Alignment

Think Systemically

Behavioral Benchmark	Examples of Ideal Behaviors
Optimize We consider how improvements in our area need to align with improvements in the whole organization.	• Executives promote an interconnected understanding within the organization by regularly reviewing systems and processes with the management team. • Managers participate in cross-function dialogue around improving the overall system. • Team members actively seek to understand by cross training upstream and downstream.
Impact We know how our work impacts the work of others.	• Executives encourage horizontal (not vertical) thinking to stress value stream flow over silo optimization. • Managers consider the impact of their systems on others when making improvements. • Team members participate in huddles run by other teams.

Create Constancy of Purpose

Behavioral Benchmark	Examples of Ideal Behaviors
Align Our common sense of purpose drives all of our decisions.	• Executives define organizational purpose and make it easily understood by all. • Managers connect people emotionally to their work by articulating how everyone's work is connected to the purpose. • Team members consider organizational purpose when making daily decisions.
Clarify Our contribution to society is so clear to everyone that it unifies our organization.	• Executives create experiences to exemplify how the organizational contributions unify the organization. • Managers create opportunities to rally unity around organizational purpose. • Team members talk about how their work connects to the purpose.
Communicate We know our purpose for existing and how it unifies us, and this is evident in our daily actions and communications.	• Executives include purpose in their coaching sessions. • Managers cover purpose and connection to it at every opportunity (meetings, huddles, etc.). • Team members can articulate how they are connected to the purpose.

Create Value for the Customer

Behavioral Benchmark	Examples of Ideal Behaviors
Relate We build relationships with our customers to meet and anticipate their needs and align our objectives to them	• Executives regularly meet with customers to find out whether products or services meet their needs and how they can be improved. • Managers visit the customer to understand how products or services are consumed and share with the value stream. • Team members participate in and lead customer visits.
Value We investigate what our customers really value, and we communicate it throughout the entire organization.	• Executives lead a process to involve customers in when setting strategy and aligning to their actual needs. • Managers are involved in customer satisfaction surveys. • Team members can show what the customer values in their process.
Measure We measure to know where we are in relation to our objectives.	• Executives clearly define and communicate the measures that matter. • Managers coach teams to translate organizational goals into area goals. • Team members speak specifically to the goals and objectives where they are winning and losing.

Tools and Techniques	Supporting Concepts	Examples of Systems
• Standard work document • Surveys • Meetings • Accounting reports • Accounting software • Management reporting measures • Scorecard document • Customer relationship database	• See Reality • Focus on the Long Term • Align Systems • Align Behaviors with Performance • Policy Deployment • Standardized Daily Management • Measure What Matters • Identify the Customer • Identify Cause-and-Effect Relationships	• Strategy Deployment • Assessment • Communication • Customer Relationship Management • Information Technology • Accounting/Finance • Measurement/Scorecard • Reporting/Accountability • Project Management • Risk Management

Results

Strongly Recommended Measures	Additional Supporting Measures
Safety, Enviroment, Morale	
Number of ideas per employee and degree of employee idea implementation Near-misses Survey (measure of employee trust and confidence in organization and management) Employee turnover	• Reportable • Waste to landfill • Recycling • Emissions • Energy consumption • Utilization of high-potential talent • Talent pipeline strength (succession planning) • Other appropriate measures
Financial, Cost, Productivity	
Productivity of cash (cash flow) Key value stream margins Inventory turns (raw material, work in process, and finished goods inventories compared to relevant total cost or revenue)	• Cost per unit • Labor hours per unit • Labor productivity – organizational physical or financial output as compared to labor quantity • Asset productivity (organizational output compared to value of physical assets employed) • Cost structure (reduction in key cost categories) • Energy productivity (physical or financial output compared to energy cost or quantity) • Resource utilization – floor space, vehicles, etc. (high utilization without adverse effects on responsiveness) • Return on investment • Revenue per employee hour worked • Portfolio value (new products and existing) • Maintenance profiles (e.g., percent preventive) • Other appropriate measures
Delivery	
On-time delivery complete to customer by requested date Total lead time (the time from customer order to customer receipt, assuming no finished goods inventory) Processing cycle time (in-to process to out-of process)	• Time from or to supplier to receipt of materials • Customer awards, audits, and surveys • Premium freight as percent of production costs • Shipments missed • Warranty response and service • Reorder rate • Field performance data • Backorder data • System availability • Other appropriate measures

Strongly Recommended Measures	Additional Supporting Measures
Quality	
Quality to the customer (defect-free delivery) by product/service Finished product first-pass yield and/or rework by product/service	• Internal quality (quality within the plant) • No disclosures (later recalls) • Designs that meet customer needs • Unplanned scrap rate • Overall cost of quality • Process variation measures • Customer returns • Supplier quality • Warranty cost • Other appropriate measures
Customer Satisfaction	
Market share Customer surveys	• Success of new products • New contract awards • Share of category • Customer retention • Net promoter score • Customer engagement in programs • Measure of customer intent (awareness and consideration) • Other appropriate measures

Scoring Your Assessment

The site visit will generally last three days, but in some cases it may be necessary to extend the visit to four days. Once the examiners have completed their observations, they will meet together to share what they have observed and determine whether or not your organization will receive a Shingo award, and at what level. A site visit assessment is not a guarantee of an award; there are site visits in which the organization does not receive any award.

The process of scoring your organization's behaviors is extensive. It enables examiners to reach a consensus as they evaluate the individual behaviors observed in your organization. They consider where behaviors most line up with ideal behaviors. After which, they use the Behavior Assessment Scale, focusing on the five lenses through which they evaluate the behavior they have observed. These lenses help them assess how deeply embedded or mature a given behavior is in your organization.

Examiners evaluate by asking questions such as:

- **Role:** Who exhibits the behavior? How are leaders, managers, and team members exhibiting the behavior?
- **Frequency:** How often do we see the behavior in the organization?
- **Duration:** Is the behavior new or has it been evident for years?
- **Intensity:** Is the behavior engrained and energetic throughout the site? Is the behavior developed to an extent that a deviation from it would signal problems? Is the behavior important to the people in the organization?
- **Scope:** How broad is the behavior? Is everyone in an area participating or just some of them? Do we see the behavior in just a few areas or is it widespread throughout the organization?

Feedback Report

As the examiners assess the current reality in your organization, they will identify, collect, and record gaps between your organization's current behavior and ideal behavior, and compile their findings in a feedback report. You will receive this in-depth feedback report from the Shingo Institute approximately 25 days after the site visit is complete.

As part of the feedback you will also receive a score sheet that will detail a range for each dimension level and the organizational level. There will also be a range for each result category.

The feedback report is invaluable and should not be overlooked. You will want to review it to celebrate successes and then look for gaps and themes to target new interventions for the future. The information in the feedback report will continue to be helpful to your organization as it continues along its path to organizational excellence. Remember, the improvement journey does not end with a Shingo assessment.

SHINGO PRIZE CHALLENGE

Awards and Recognition

Awards and Recognition

The results of a Site Visit Assessment, if awarded, will determine whether or not your organization receives a Shingo award at any level. You will receive notification approximately 30 days following a Site Visit Assessment.

The Shingo Public Relations Packet

If you receive a Shingo award, you will begin working with the marketing staff at the Shingo Institute to submit the materials listed in the Shingo Institute's PR packet. You will be required to submit organizational photographs, testimonials, videos, and other marketing materials for use in official press releases, social media posts, the Shingo newsletter, and more. You must return the completed PR packet at least six weeks prior to the conference you would like recognition at.

Initially, your organization will be recognized for its accomplishment through press releases and announcements on social media. But we also extend the publicity to other areas. If your organization is awarded the Shingo Prize, we will post your organization's information on the Shingo website for five years. If your organization is awarded the Silver or Bronze Medallion, your information will be posted online for three years. Your company information will also be included in the downloadable *Shingo Model* booklet and on slides in the Shingo workshops.

Receiving a Shingo award is a great accomplishment, and the Shingo Institute wants to celebrate your success with publicity and fanfare.

The Shingo Annual Conference and Awards Gala

The greatest celebration will be at the Awards Gala during the Annual Shingo Conference in the USA, which is held in May every year. All award recipients for the year are recognized at this formal event. We encourage you to bring a contingent of people from your organization to celebrate onstage and to give remarks and be formally presented with the award trophy.

You also have the option of being recognized at the LATAM or European Conference, which are both held in the autumn every year. These conferences are much smaller in nature, but they are still a great way to celebrate your accomplishments.

If your organization plans to have a celebration at your facility, you may invite a member of the Shingo Institute staff to present the award at your local celebration. You should plan to have this celebration following your organization's official recognition at the Awards Gala. This will enable the Shingo Institute marketing team to coordinate the press releases and other media. In the event that a Shingo Institute staff member attends your celebration, your organization will be responsible for all incurred expenses.

Responsibilities of Shingo Recipients

As a Shingo recipient, your organization embodies dedication to excellence and continuous improvement. The outlined standards signify a shared commitment to advancing organizational excellence and spreading the vision of the *Shingo Model*. By fulfilling these responsibilities, you uphold our institute's standards and contribute to collective learning and growth within the broader Shingo community. Your active participation in sharing successes, hosting workshops, and engaging with benchmarking visits enriches your

organization's journey and is a valuable resource for others. Supporting the role of a Shingo Examiner and adhering to our social media standards further solidifies your leadership in operational excellence. Through these actions, you inspire others to pursue excellence, shaping a culture of continuous improvement across industries and borders.

Benchmarking Visits

- Open your doors to others for in-person and virtual study tours and showcase events to help them understand how to build a culture of excellence.
- Gain valuable feedback on how your organization can continue improving while showcasing your work to others.

Hosting Workshops

- Host Shingo workshops to help others learn about the *Shingo Model* and improve their culture.

Benchmark System Video

- Provide a three-to-five-minute video highlighting a specific system in which your organization excels, describing how it was built or improved using *Shingo Model*.
- Describe key behavioral indicators (KBIs) driven by the system, expected metric results, and its evolution over time.

Become a Shingo Examiner

- Encourage qualified individuals within your organization to become Shingo examiners.
- Examiners should have completed all six Shingo workshops (Shingo Alumni), possess at least seven to ten years of leadership and management-level experience in Lean and organizational excellence, and come from organizations actively using the *Shingo Model*.
- Shingo Examiners learn as they work with a team to assess organizations that challenge for the Shingo Prize. They also gain an in-depth understanding of assessment methodology and have benchmark opportunities.

Social Media

- Share posts related to Shingo Institute events, workshops, and achievements to promote your journey and the *Shingo Model*.
- Refrain from publicly announcing Shingo Prize recipient status until we have received written approval from your organization's PR or marketing representatives.
- Provide social media handles for tagging in Shingo-related posts to enhance visibility and collaboration.

These initiatives are instrumental in sustaining the momentum following Shingo recipient status, facilitating ongoing progress. Achieving sustainability, particularly after reaching such a significant milestone, can be challenging. However, by actively engaging in these responsibilities, Shingo recipients can effectively navigate this journey toward organizational excellence.

SHINGO PRIZE CHALLENGE

Appendix

Appendix

The Reapplication Process

Because organizational excellence is a process that never ends, we know that many organizations will return to the Shingo Institute to challenge their new current state. We encourage organizations to rechallenge for a Shingo Award; however, your organization must be the same entity that applied originally. It must also meet one of the following conditions:

1. **Your organization did not receive an award as a result of a previous challenge, and it has been at least one year since the previous application.**

   or

2. **Your organization was awarded a Bronze or Silver Medallion as a result of a previous challenge and is now seeking to advance its award status.**

Typically, it takes at least two full years of intense focus and commitment to show the improvements necessary to receive an award or to advance an award. For this reason, we recommend waiting two years between challenges.

The reapplication process is the same as the original process, so be sure to become familiar with the information in this packet.

To begin the rechallenge process, contact the Shingo Institute to determine if your organization's eligibility status has changed. When filling out the online application (available at **shingo.org/awards/challenge-for-the-shingo-prize),** be sure to check the "reapplication" box on the first page of the application. Your organization also needs to submit a new Results document that highlights the results in the years since your organization's last challenge.

Further, you are required to submit a revised Achievement Report, which should highlight your organization's achievements, improvements, and results particularly since the previous challenge. The Achievement Report should be no longer than 50 pages (single sided) and can include the information presented in the prior Achievement Report, as long as it has been updated and is still relevant. All Achievement Report specifications and requirements described in this document apply to the updated report. See pages 25–28. Examiners will have access to all of the prior documents when your organization was assessed previously. This includes prior Achievement Reports, feedback reports, Company Profile sheets, Shingo Insight reports, Results documents, and any other material that will assist the examiners in re-evaluating your organization.

Reapplication fees are determined in the same manner as the original application fee.

Submitting an Addendum

If the examiners determine that your organization does not qualify for a Site Visit Assessment following the Achievement Packet Assessment, you will receive a detailed feedback report written by the examiners. Your organization should carefully review this feedback report. On very rare occasions, organizations discover that they omitted critical information or results or that they failed to explain something that they believe would directly impact the examiners' decision. Under these circumstances, the Shingo Institute allows the organization to submit an addendum to their Achievement Report. Submitting an addendum is only permitted following the Achievement Packet Assessment.

The addendum must be submitted within one year of the day the Achievement Report was originally submitted. It should provide the critical information or results that were omitted or not adequately explained originally and that the writers believe impacted the examiners' decision.

The document is limited to a maximum of 20 pages (submitted as a PDF) and the format should follow the original Achievement Report with the four main sections: 1) Cultural Enablers, 2) Continuous Improvement, 3) Enterprise Alignment, and 4) Results.

If possible, the team that participated in the Achievement Packet Assessment will also review the addendum. The examining team will make its decision using the addendum in conjunction with the original Achievement Report and the other components of the Achievement Packet.

Please note: Submitting an addendum *does not* guarantee that your organization will qualify for a Site Visit Assessment.

Translators for the Assessments

Throughout the challenge process, the Shingo Institute will make every reasonable effort to use examiners who speak the language used in your organization, but this is not always possible. Your organization should provide one interpreter for every Shingo examiner who does not speak the native language. Your official contact person and the examiner team lead should work together to determine the number of interpreters needed and the number of days they will be needed.

Interpreters may be necessary for any meeting involving Shingo examiners, including but not limited to the virtual Leadership Review during the Achievement Packet Assessment and during the entire Site Visit Assessment. To ensure that all discussions remain unbiased, you may not use a translator from within your organization during these meetings. Your organization is responsible for making the necessary arrangements from a third-party source.

For meetings with Shingo Institute assessment staff, your organization is responsible for providing an interpreter when necessary, but the interpreter can come from within your organization.

Frequently Asked Questions

What are the components of the Achievement Packet and when should they be submitted to the Shingo Institute?

The Achievement Packet comprises five components: 1) the online application form, 2) the Company Profile sheet, 3) the Results document, 4) the Shingo Insight report, and 5) the Achievement Report. You will submit the components of the Achievement Packet at different times. To begin the challenge process, you must submit the online application, the Company Profile sheet, and the Results document. The Shingo Institute will add the Shingo Insight report directly to your file when your organization receives it. The Achievement Report is due no later than one year from the day you submitted the application. Your Achievement Packet will be complete when all five components have been submitted.

What is the Unique Identity Descriptor asked for in the online application form?

The Unique Identity Descriptor is used to differentiate the precise entity that is applying for the Shingo Prize from any other part of the organization. For instance, if the organization has sites around the world, the descriptor might be the organization name, followed by the city and/or country in which the applying entity is located. If the applying entity has numerous sites but they are all located in one country, a unique identifier might be the enterprise name followed by the city and street on which the site is located. Feel free to consult with a member of the Shingo assessment staff to determine a good descriptor.

How do I know if my organization is defined as large or small?

The size is primarily determined by the amount of people in your organization and whether your organization stands alone or is part of a larger enterprise. Contact the Shingo Institute assessment staff to determine your organization's size.

When are fees due for a Shingo Prize challenge?

The Shingo Institute will submit invoices to your organization two times during the Shingo Prize challenge process. The Achievement Packet Assessment fee will be invoiced after Shingo Insight is complete and you have received the report. The Site Visit Assessment fee will be invoiced approximately 30 days after the site visit in complete. See page 13 for specifics on fees, the fee payment schedule, and invoicing.

Does a Shingo award expire?

Once an organization becomes a Shingo award recipient it can continue to claim that distinction indefinitely. (Remember that it is important to always correctly identify the part of the organization that is a recipient and the year it received the award.) The length of time the Shingo Institute promotes recipients of a Shingo award—via the website and in Shingo materials—varies depending on the award level received and the type of promotion. The Shingo Institute maintains a downloadable list of all recipient organizations at **shingo.org/awards**.

The language we speak at our facility is not English. How do we proceed with a Shingo Prize challenge?

The Shingo Institute is globally recognized for the principles that help organizations achieve ideal results and organizational excellence. This global interest makes it necessary for our Shingo examiners to visit sites around the world. The Shingo Institute will make every effort to use Shingo examiners who speak the language of your organization, but this is not always possible. For the two-part assessment, your organization is required to provide one interpreter for every Shingo examiner who does not speak the language of your facility. These interpreters will be necessary for the virtual Leadership meeting during the Achievement Report Assessment and during the Site Visit Assessment. Your organization will be responsible for making the necessary arrangements with a third-party source. To ensure that all discussions remain confidential, you may not use a translator from within your organization.

You must also ensure that the Achievement Report is written in English, including graphs. Photographs included in the Achievement Report that illustrate onsite signage do not need to be translated or altered, unless it is obvious that they will be confusing to the examiners without additional clarification.

Can my organization reapply for a Shingo Prize challenge?

Yes. After at least two years have passed and your organization has applied the suggestions noted in the examiners' feedback report, we recommend and encourage you to challenge for a Shingo Award again. See page 48 for specifics on reapplying for a Shingo Prize challenge.

Contact Us

At any time leading up to or during the Shingo Prize challenge process, anyone in your organization may contact a member of the Shingo Institute assessment staff for answers to questions and for clarification of the process as it has been outlined in this document. Please note that after the challenge process begins, the Shingo Institute will only provide information related to the challenge to the official contact person representing your organization.

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Privacy Statement

Maintaining your organization's privacy is a priority to the Shingo Institute, and we take our responsibility seriously. Please be assured that the data your organization provides during the Shingo Prize challenge will not be accessible to anyone who is not covered by a non-disclosure agreement with the Shingo Institute. All examiners are required to sign a non-disclosure agreement that is retained by the Shingo Institute.

Behavior Assessment Scale

This list of descriptors is the basis for assessing behaviors in an organization. Behaviors that match the descriptors would score at the top of the indicated range.

Lenses	**Level 1:** 0-20%	**Level 2:** 21-40%	**Level 3:** 41-60%	**Level 4:** 61-80%	**Level 5:** 81-100%
Role	**Executives** are mostly focused on fire-fighting and largely absent from improvement efforts.	**Executives** are aware of others' initiatives to improve but largely uninvolved.	**Executives** set direction for improvement and support efforts of others.	**Executives** are involved in improvement efforts and support the alignment of principles of operational excellence with systems.	**Executives** are focused on ensuring the principles of organizational excellence are driven deeply into the culture and regularly assessed for improvement.
	Managers are oriented toward getting results "at all costs".	**Managers** mostly look to specialists to create improvement through project orientation.	**Managers** are involved in developing systems and helping others use tools effectively.	**Managers** focus on driving behaviors through the design of systems.	**Managers** are primarily focused on continuously improving systems to drive behavior more closely aligned with principles of organizational excellence.
	Team members focus on doing their jobs and are largely treated like an expense.	**Team members** are occasionally asked to participate on an improvement team usually led by someone outside their natural work team.	**Team members** are trained and participate in improvement projects.	**Team members** are involved every day in using tools to drive continuous improvement in their own areas of responsibility.	**Team members** understand principles, "the why" behind the tools, and are leaders for improving not only their own work systems but also others within their value stream.
Frequency	Infrequent • Rare	Event-based • Irregular	Frequent • Common	Consistent • Predominant	Constant • Uniform
Duration	Initiated • Undeveloped	Experimental • Formative	Repeatable • Predictable	Established • Stable	Culturally Ingrained • Mature
Intensity	Apathetic • Indifferent	Apparent • Individual Commitment	Moderate • Local Commitment	Persistent • Wide Commitment	Tenacious • Full Commitment
Scope	Isolated • Point Solution	Silos • Internal Value Stream	Predominantly Operations • Functional Value Stream	Multiple Business Processes • Integrated Value Stream	Enterprise-wide • Extended Value Stream

Results Assessment Scale

This list of descriptors is the basis for assessing the measures in the results section. Measures that match the descriptors would score at the top of the indicated range.

Lenses	**Level 1:** 0-20%	**Level 2:** 21-40%	**Level 3:** 41-60%	**Level 4:** 61-80%	**Level 5:** 81-100%
Stability	Little to no evidence of stability Little to no predictability Beginning to implement Unpredictable 0-1 years		Has begun to stabilize Initiating predictability Building maturity All levels have become comfortable with the measures 2-3 years		Stable Predictable Long-term Mature 4+ years
Trend/Level	Level is low Trend is poor Little to no evidence of goals Little to no evidence of benchmarking		Moderate improvement in measurement level Benchmarking is industry-focused Trends are mostly positive to flat with some backsliding		High level of attainment considered world-class Benchmarks constantly raise the bar and are a function of process not industry Positive trend with very few anomalies to explain Trend is well above expectations
Alignment	Isolated with inconsistent usage of measures Little alignment Strong silos		Some areas aligned, other than operations Performance measures aligned in operations Silos are beginning to fall Working toward enterprise-wide alignment		All measures align to corporate goals, down to the lowest level Enterprise-wide extended value stream No silos
Improvement	Little to no systematic feedback Sporadic feedback Little evidence of goal setting, some evidence in operations		Regular feedback in some areas All areas do not address feedback systematically Many areas beyond operations have a process to set goal		Routine feedback to appropriate party Evidence of feedback in all areas Almost all areas have goals that are realistic and challenging

Score Level

Site Visit Assessment Score Sheet

	Executives	Managers	Team Members
Cultural Enablers (250 points)	Level achieved on Behavior Assessment Scale		
Weight	40%	35%	25%
Continuous Improvement (350 points)	Level achieved on Behavior Assessment Scale		
Weight	25%	25%	50%
Enterprise Alignment (200 points)	Level achieved on Behavior Assessment Scale		
Weight	40%	35%	25%
Results (200 points)			
Safety/Environment/Morale	20%	Level achieved on Results Assessment Scale	
Customer Satisfaction	20%	Level achieved on Results Assessment Scale	
Quality	20%	Level achieved on Results Assessment Scale	
Cost/Productivity	20%	Level achieved on Results Assessment Scale	
Delivery	20%	Level achieved on Results Assessment Scale	

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