



Baldrige Executive Fellows Program

2015-2016 Information Packet

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The Coaching Relationship—OPTIONAL

Roles and Responsibilities	Consider whether or not you would like to have a coach to assist you in understanding the application of the Baldrige Criteria. If you wish to have a coach, one will be selected for you based on the type of assistance you request. Your coach will have received this document. Use it to help ensure a shared understanding of your roles and responsibilities.	Before the first meeting with your coach	14
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Parameters for the Coaching Relationship	With your coach, agree on your “rules of the road” for working together. Share your preferences for extent of contact, and set up tentative dates and times for discussions to ensure that you have the time to consult with your coach. Be aware that these coaches are not experts on the Fellows Program, rather are experts in their particular areas. Often Fellows choose to work with their colleagues within the program, rather than an individual coach.	Before the first meeting with your coach	16

Program Overview

Purpose and Benefits

To offer an executive development program centered on forming relationships with and learning from Baldrige Award recipients and their senior executives. Participants will benefit from

- Accelerated leadership development
- In-depth learning from world-class organizations and their senior executives
- Relationships with other executives that will benefit Fellows now and into the future
- Knowledge of the Baldrige framework and Criteria for Performance Excellence, as well as the impact of systems thinking on organizations
- Personal visits with role-model organizations and their senior executives
- A deeper understanding of leadership; strategic planning; sustainability; core competencies; customer engagement; employee engagement; integration of processes, plans, resources, and goals; and measuring the right things
- Focus on Baldrige core values and attributes
- Ongoing virtual meetings and conference calls to enhance opportunities to learn and share
- Relationships with the cadre of Fellows, who possess expertise often sought by others
- An option of one-on-one coaching by “Baldrige” senior executives

Program Components

Interaction with Successful Senior Executives

In multiple venues, Baldrige Fellows meet with visionary leaders who have achieved exceptional business results. On-site, small-group workshops with senior executives from Baldrige Award recipient organizations allow Fellows to learn how the senior executives have led their organizations effectively. In addition, the Quest for Excellence® Conference, coaching sessions, and virtual sessions provide formal and informal opportunities to network with senior executives from a variety of successful organizations.

Workshops with Role-Model Organizations

Three of the five workshops take place on-site at Baldrige Award recipient organizations, focusing on different components of a successful management system. At each workshop, Fellows learn how senior leaders have set a vision for and achieved success across their organizations, see the impact of a systems perspective on organizational success, and tour the organizations’ facilities. A key component of the workshops is the opportunity to raise and discuss questions and issues with senior leaders and with other Fellows in a small group.

Individualized Learning Objectives and Plan

In collaboration with program staff, each Baldrige Fellow develops a set of individualized learning objectives and a plan for achieving them based on the Fellow’s own needs and the

needs of the sponsoring organization. The capstone project reflects this individualized learning and development.

Personalized Capstone Project

Each Baldrige Fellow develops a capstone project addressing a strategic issue or need that is significant to the sponsoring organization. The project integrates and applies learning from the program sessions, coaches, other members of the Fellows cohort, and award recipient senior executives. Each Fellow will present information on progress at each session (beginning in June) and provides a presentation on the results of his or her capstone project at the final session.

Orientation to Baldrige Framework, Criteria Concepts, and Core Values and Attributes

Fellows participate in an orientation to the Baldrige framework, and at each subsequent session, there is a focus on specific Criteria categories. In addition, focused discussions on core values and attributes are tailored to the needs of senior executives and specifically to the cohort. From senior executives of role-model organizations, Fellows learn how executives have applied the framework and concepts to improve their own leadership effectiveness and their organizations' business results. The focus is on concepts of strategic significance.

Quest for Excellence and Baldrige Regional Conferences

Baldrige Fellows have the opportunity to participate in the Quest for Excellence Conference. At the conference, Fellows will meet senior executives from award recipient organizations and learn how their senior leaders apply Baldrige principles to achieve excellence.

Coaching

As desired, each Baldrige Fellow is paired with a coach. At the outset of their work together, Fellows clarify their preferences and level of support desired, and discuss a follow-up plan to meet their needs. Coaches are available for one-on-one discussions during the program; help Fellows hone their executive leadership skills; and conduct individual, structured telephone calls with Fellows after on-site workshops to reinforce learning and relate it to the Fellows' personal and organizational goals.

Peer Learning

Baldrige Fellows have multiple opportunities to build a network of relationships with other executives in their cohort for mutual learning and support. Fellows participate as a group in five face-to-face workshops focusing on key areas of success for senior executives. In addition, Fellows exchange ideas and opinions as they wish through both synchronous and asynchronous discussions.

Code of Ethical Conduct

Members of the Baldrige Executive Fellows Program, including coaches, pledge to uphold all applicable legal requirements as well as their ethical principles during all activities associated with their participation in the Fellows Program.

Fellows and their coaches will be guided by four principles intended to enhance the sharing and learning of all parties: integrity, professional conduct, confidentiality, and respect for intellectual property. In promoting high standards of ethical conduct, they will

- conduct themselves professionally, guided by truth, accuracy, fairness, respect, and responsibility in all their interactions
- avoid discussions or actions that might lead to, or imply an interest in, restraint of trade: market or customer allocation schemes, price fixing, dealing arrangements, bid rigging, bribery, or misappropriation
- avoid sharing information that their organization considers proprietary and protect the confidential information of others
- in any sharing exchange, be willing to provide the same level of information that they request
- on completion of the Baldrige Executive Fellows Program, be able to use the following designation: Baldrige Fellow. However, Fellows may not use the Baldrige Performance Excellence Program (BPEP) logo in advertising or promotion or on business cards.

For specific questions or guidance, please contact your employer's legal counsel.

Program Calendar

Boldface indicates an on-site session. PLEASE NOTE TIME ZONES SPECIFIED.

Date and Location	Activity	Content
March through April Virtual	Session prework	Completion of Organizational Profile and Expectations Survey, initial idea generation for capstone projects, conversations with your Baldrige Program contact
1: April 12–14, 2015 12:00 p.m., ET Baltimore, MD	Program kickoff at Baldrige Quest for Excellence Conference	Baldrige framework and concepts, networking with Fellows and Baldrige Award recipients, sharing of expectations
April 30, 11:00 a.m., ET	Conference call	Session follow up, Baldrige framework and concepts, Organizational Profile updates, individual objectives discussion
May through June Virtual	Session prework	Readings, ongoing work on capstone project
2: June 24–25, 2015 7:30 a.m., ET Orlando, FL	Award recipient visit: Lockheed-Martin	Visionary Leadership That Works
July 9, 11:00 a.m., ET	Conference call	Session follow up, Organizational Profile updates, individual objectives, capstone discussion
July through September Virtual	Session prework	Readings, ongoing work on capstone project
3: September 23–24, 2015 7:30 a.m., ET Charlotte, NC	Award recipient visit: Premier	Operational Intelligence
October 8, 11:00 a.m., ET	Conference call	Session follow up, Organizational Profile updates, individual objectives, capstone discussion
October through January Virtual	Session prework	Readings, ongoing work on capstone project
4: January 12–13, 2016 7:30 a.m., ET Pentagon City, VA	Award recipient visit: Ritz-Carlton Hotel Company, L.L.C.	Leading for Engagement
January 28, 2016, 11:00 a.m., ET	Conference call	Session follow up, Organizational Profile updates, individual objectives, capstone discussion
February through April Virtual	Preparation for final capstone presentation	Completion of capstone project
5: April 2, 2016 Baltimore, MD	Final session preceding the Baldrige Quest for Excellence Conference	Presentation of capstone highlights, graduation

Logistics

Please mark your calendars for the events listed in the program calendar (page 7). Logistics details will be provided 3–4 weeks in advance of each session.

On-Site Sessions

- **Transportation, lodging, and meals:** A block of hotel rooms will be reserved near each site. Please make flight reservations and arrange for travel from the airport to the hotel. The Fellows Program will manage transportation from the hotel to the award recipient sites, as appropriate, and will provide two-night hotel stays and meals.
- **Arrival and departure times:** Ensure that you arrive at each on-site session in time to check in, join the group at the time specified on the calendar, and attend the session opening. For sessions other than the Quest for Excellence conferences, end times will be 2:00 p.m. the following day. Please plan to stay until that time.

Capstone Project

Purpose

The capstone leadership project is intended to support you in driving a strategic results improvement with significant, systemic impact in your organization. You will accomplish this by integrating Baldrige concepts and the best practices of Baldrige Award recipients that you learned throughout your experience in the Baldrige Executive Fellows Program.

Description

In collaboration with your sponsor, you will identify and define a problem or issue, develop an approach that taps the learning and leadership skills you gain from the Fellows Program, and produce actionable results. Your coach (should you request one), the executive-in-residence, and a Baldrige staff member will serve as advisers during the project.

You will design your capstone project to fit your interests and leadership focus along with your organization's distinctive needs. Most likely, your project will require substantial personal effort and incorporate the work of others under your direction. The project, or a well-defined portion of it, must be achievable within the time frame of the Fellows Program. You will

- identify a problem or issue
- define clear goals and specific objectives
- develop a detailed proposal with a timeline for completion
- conduct primary and secondary research, as needed
- perform quantitative and/or qualitative analyses
- develop and test solutions
- formulate options and recommendations
- produce a written product for your organization
- deliver a brief presentation at the final Fellows Program session that can be written with a focus on your intended audience (e.g., board of directors, employees)
- deliver a more-detailed presentation within your organization, as appropriate

Here are two examples of capstone projects:

- After identifying a significant shift in the performance of its supply chain, a government contractor developed a project to engage its vendors and other contractors to share best practices. Read the full story: [Boiling the Ocean: How a Manufacturer Leveraged the Criteria to Improve its Supply Chain](http://nistbaldrige.blogs.govdelivery.com/2014/02/06/boiling-the-ocean-how-a-manufacturer-leveraged-the-criteria-to-improve-its-supply-chain/) (<http://nistbaldrige.blogs.govdelivery.com/2014/02/06/boiling-the-ocean-how-a-manufacturer-leveraged-the-criteria-to-improve-its-supply-chain/>).
- A large membership-based organization needed to improve its customer relationship management system. The capstone project was to implement a customer feedback loop in order to gather the voice of varied customers and staff, as well as actionable feedback. Read an interview with the Fellow: [Why and How AARP Uses the Baldrige Criteria for Performance Excellence](http://nistbaldrige.blogs.govdelivery.com/2013/11/26/why-and-how-aarp-uses-the-baldrige-criteria-for-performance-excellence/) (<http://nistbaldrige.blogs.govdelivery.com/2013/11/26/why-and-how-aarp-uses-the-baldrige-criteria-for-performance-excellence/>).

Preparing for the Project (March 2015)

We recommend that you begin planning your capstone project by assessing your organization's current status and challenges. As prework for the first session, we ask that you develop a brief Organizational Profile (pages 4–6, Criteria for Performance Excellence) for your own organization in preparation for the first Fellows session. This may be considered in planning your capstone project. Or you may use a tool from within your organization, such as a balanced scorecard.

Developing Your Proposal (April–June 2015)

Be sure to develop your ideas and write the proposal in conjunction with your sponsor, who will be asked to approve the project and commit to supporting it. Obtain input from your coach, the executive-in-residence, and Baldrige Program staff, as appropriate. Once you have gained agreement, write a project proposal for submission to the Fellows Program and your coach. Be brief, but specific, with measurable goals. In your proposal,

- Describe what the project will entail; how it relates to one or more of your organization's strategic challenges, strategic advantages, or core competencies; and how you will carry it out. Describe the problem, and briefly describe the phases in the project and their time frames.
- Describe the desired outcome.
- You will submit to Baldrige Executive Fellows Program staff the written plan and then present a brief overview to the other Fellows at the June session.

Reviewing the Proposal and Project (June 2015–April 2016)

A critical source of learning during the capstone project is the substantial individualized feedback you will receive. You will benefit from regular feedback on all aspects of the project and its implementation, as well as from the opportunity for self-assessment.

The feedback process begins in the design phase of the project. As you design your project and develop your proposal, you will receive significant input from your sponsor, your coach, the executive-in-residence, the other Fellows, and the Baldrige staff. You will provide both a written summary of updates and a verbal presentation to others at the following two sessions to gain outside perspectives throughout the project.

In April 2016, after you complete the capstone project, you will present your results to other Fellows Program participants. Some of you may also choose to present nonproprietary aspects of your projects at a national or regional Baldrige forum.

Deliverables

Session	Task	Deliverable
One	Prepare for the Fellows Program and your capstone project development by preparing and meeting with your sponsor; complete an Organizational Profile	Provide your Organizational Profile to Baldrige Program staff
Two	Draft an initial project plan related to one or more of your organization's strategic priorities; the plan should include your desired outcome(s), projected key steps, and timeline	Deliver to Baldrige Program staff your draft project plan; present a brief overview to the Fellows at the meeting (2 minutes, followed by <5-minute discussion)
Three	Work and adjust your plan	Provide written update to Baldrige Program staff; present an update to the Fellows (3 minutes, followed by <5-minute discussion)
Four	Work and adjust your plan	Provide written update to Baldrige Program staff; present an update to the Fellows (5 minutes, followed by <5-minute discussion)
Five	Complete your presentation	Present your capstone project (25 minutes, followed by <5-minute discussion)

Roles and Responsibilities for the Capstone Project

As an organization sponsor ...

You support the Baldrige Fellow by ...

- participating in the selection of the project
- ensuring that the Fellow has sufficient resources to complete the project
- serving as a sounding board for ideas
- offering insights and advice

Your organization gains ...

- attention to and potential solutions for an issue facing your organization
- the leadership skills, knowledge, and insight gained by the Fellow

To be a successful sponsor, you need to ...

- participate in discussions with the Fellow to identify the project, its expected outcomes, and the expected learning for the Fellow
- provide periodic feedback
- commit to helping the Fellow achieve project goals

As a Baldrige Fellow ...

You support your own development by ...

- applying your learning from the Fellows program to a project with the potential for significant impact on your organization
- listening to the thoughts and experiences of your sponsor and sharing your own

You gain ...

- insights and counsel on an area of critical interest to you and your organization from experienced senior executives, your fellow participants, and Baldrige staff
- an opportunity to apply Baldrige concepts to an issue within your organization
- accelerated professional development with relevance to your organization

To benefit from the project, you need ...

- the desire and initiative to tackle a significant issue within your organization
- the personal responsibility to execute the project plan

Meeting with Your Sponsor on the Capstone Project

Sponsor

Before you meet with the Fellow, consider

- your organization's needs, current issues, and areas for improvement
- your expectations for the project
- your expectations for the Fellow
- your ability to support the Fellow
- the Fellow's goals for participating in the program

During the initial meeting, you might explore

- what the Fellow's background, experience, and strengths are that could be best applied to a capstone project
- what business impact and learning objectives the Fellow wants to achieve
- what the Fellow thinks may inhibit achievement of the goal(s) of the Fellows Program
- what the Fellow needs to remove those inhibitors
- where the Fellow thinks he or she needs the most help
- which one or two things would ensure a positive capstone project experience for the Fellow

Baldrige Fellow

Before you meet with your sponsor, consider

- your goals, expectations, and learning objectives
- potential projects and their impact, possibly based on answers to questions in the Baldrige Organizational Profile or on an internal organizational tool, such as a balanced scorecard
- support you may need from your sponsor

During the initial meeting, you might explore

- the sponsor's ideas for a project with potential for a significant impact on the organization
- the sponsor's general expectations of the people he or she sponsors, if applicable
- help that the sponsor can provide