



Baldrige Executive Fellows Program 2027–2028 Information Packet

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<https://baldrigefoundation.org/what-we-do/baldrige-fellows/>

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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 Excellence 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 to enhance opportunities to learn and share
- Relationships with the cadre of Fellows, who possess expertise often sought by others
- An option of coaching by Baldrige experts

Program Components

Interaction with Successful Senior Executives

In multiple venues, Baldrige Executive 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 and virtual sessions provide formal and informal opportunities to network with senior executives from a variety of successful organizations and across sectors.

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 Executive 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 feedback and guidance are also available throughout the year-long fellowship.

Personalized Capstone Project

Each Baldrige Executive 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, 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 the Baldrige Excellence Framework, Criteria Concepts, and Core Values and Attributes

Fellows participate in an orientation to the Baldrige Excellence 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 Executive 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. Fellows may also have the opportunity to attend Baldrige-based state and regional conferences held at locations across the United States.

Peer Learning

Baldrige Executive 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.

Selection Process

Selection decisions will be based on (1) sector mix, (2) appropriate level within the organization, (3) likelihood to follow through, (4) diversity, and (5) no direct competitors with participating award recipients or other Fellows. Candidates will be notified of the decision in January 2026. Tuition payment of \$35,000 is due by February 17, 2026.

For the year-long fellowship, the tuition covers all materials, food and beverage, and hotel rooms (including at The Ritz-Carlton) for five meetings across the United States. The tuition also covers registration and hotel rooms for the Baldrige Quest for Excellence® conference that

occurs in conjunction with the first meeting of the fellowship. There are also virtual meetings, coaching, shuttles from the meeting sites back to the airport, and other recognition items (e.g., framed certificates, books of drawings) that are included with the tuition. Note: The fee does not cover Fellows' own travel expenses to the five meeting sites (three of which are typically in the Washington, DC area).

Note: Much consideration has and continues to go into offering a second, less-expensive Fellows program offering in addition to this one--perhaps using technology and less travel. We welcome ideas on what such a program might look like.

Code of Ethical Conduct

Members of the Baldrige Executive Fellows Program 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 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 Executive Fellow. Fellows may use the Baldrige Executive Fellows badge (e-mailed to them upon program completion) on business cards, résumés, and other personal promotion; however, they may not use the organizational logo of the Baldrige Performance Excellence Program (BPEP) in advertising or promotion or on business cards.

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

Expectations for Completion of the Program

Alumni of the Baldrige Executive Fellows are an elite group who have committed to performance excellence, improving their own organizations and sharing with the Fellows' network to help others succeed. Therefore, the program has certain expectations of its participants:

- Attend meetings--unless a business or personal commitment makes such attendance impossible
- Participate in meetings and small-group settings by asking questions, offering feedback, volunteering to share, etc.
- Hold confidential proprietary and personal information that you hear from other Fellows, but do share best practices learned at meetings with your own organization
- Complete a presentation on your capstone project at the end of the fellowship

Program Calendar

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

Date and Location	Activity	Content
March through April Virtual	Orientation by phone call and session prework	Completion of Organizational Profile and Expectations Survey, capstone projects initial ideas, conversations with your Baldrige contacts
April 4–April 7, 2027 11:00 a.m., ET Baltimore, MD	Program kickoff at Baldrige Quest for Excellence® Conference	Baldrige Excellence Framework and concepts, networking with Fellows and Baldrige Award recipients, sharing of expectations
April 29, 1:00 p.m., ET	Virtual meeting*	Session follow up, Baldrige Excellence Framework and concepts, Organizational Profile updates, individual objectives discussion
May through June Virtual	Session prework	Readings, ongoing work on capstone project
June 15–17, 2027 8:00 a.m., AK Anchorage, AK	Award recipient visit (note: a virtual option will be offered)	Visionary Leadership That Works
July 8, 1:00 p.m., ET	Virtual meeting	Session follow up, Organizational Profile updates, individual objectives, capstone discussion
Late Summer or Fall	Capstone check-in calls; only need to attend one	
July through September Virtual	Session prework	Readings, ongoing work on capstone project
October 18–20, 2027 8:00 a.m., PT San Antonio, TX	Award recipient visit	Operational Intelligence
November 10, 1:00 p.m., ET	Virtual meeting	Session follow up, Organizational Profile updates, individual objectives, capstone discussion
October through January Virtual	Session prework	Readings, ongoing work on capstone project
January 24-26, 2028 8:00 a.m., ET Arlington, VA	Award recipient visit	Leading for Engagement
February 17, 1:00 p.m., ET	Virtual meeting	Session follow up, Organizational Profile updates, individual objectives, capstone discussion
February through April Virtual	Preparation for final capstone presentation	Completion of capstone project
April 1, 2028 8:00 a.m., ET Baltimore, MD	Final session preceding the Baldrige Quest for Excellence Conference	Presentation of capstone highlights, graduation

*Additional virtual meetings will be added

Logistics

Please mark your calendars for the events listed in the program calendar above. Logistics details will be provided well in advance of each session. A program tuition (see <https://baldrigefoundation.org/what-we-do/baldrige-fellows/about-fellows.html>) covers hotel rooms for five meetings across the United States, meals for all meetings, executive coaching, virtual sessions, guest speakers, materials, and more.

On-Site Sessions

- **Transportation, lodging, and meals:** A block of hotel rooms will be reserved by the Baldrige Fellows program 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-three night hotel stays and meals. More details will be provided to the Fellows before each session.
- **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 approximately 3:00 p.m. the following day. Please plan to stay until that time.
- **Welcome receptions:** For most meetings, the Fellows program will arrange a time and place to meet the night before the meeting for networking. For some meetings, hors d'oeuvres and drinks will be served.

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 (typically your supervisor), 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. 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 20–25-minute 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

Examples of capstone projects and interviews with Baldrige Executive alumni can be found online: <https://www.nist.gov/baldrige/alumni-capstone-interviews>.

Preparing for the Project (March)

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 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)

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 the executive-in-residence and Baldrige staff members, as appropriate. Once you have gained agreement, write a project proposal for submission to the Fellows Program. 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 members the written plan and then present a brief overview to the other Fellows at the June session.

Reviewing the Proposal and Project (June–April)

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, the executive-in-residence, the other Fellows, and the Baldrige staff members.

You will provide informal verbal presentations to other Fellows at the face-to-face sessions to gain outside perspectives throughout the project. Suggested formats for the presentation and update include completing the tabular "Capstone Project: Format for Updates" below, writing 2–3 paragraphs, or filling out relevant portions of an A3 template (samples will be presented and available online, as well as through the Baldrige Executive Fellows).

Capstone Project: Format for Updates	
1. What's the problem that you are trying to solve?	
2. In brief, what's the context for this problem?	
3. Who are the stakeholders who will be affected and who will be needed for support?	
4. What metrics will measure progress?	
5. What progress have you made?	
6. Where would you like help/feedback?	
7. What areas of the Baldrige Criteria are relevant?	

In April, 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.

Roles and Responsibilities for the Capstone Project

As an organization sponsor ...

You support the Baldrige Executive 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 Executive 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 Executive 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