2024-2025
CALIFORNIA COUNCIL FOR EXCELLENCE FELLOWS PROGRAM

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Program Purpose and Benefits

To offer a leadership development program centered on forming relationships with and learning from California-based 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 leaders 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/conference calls to enhance opportunities to learn and share

- Relationships with the cadre of Fellows, who possess expertise often sought by others

Interaction with Successful Senior Executives
CCE Fellows meet with visionary leaders who have achieved exceptional business results. Small-group sessions with senior executives from California-based Baldrige Award recipient organizations allow Fellows to learn how the senior executives have led their organizations effectively. In addition, the CCE Conference and virtual sessions provide formal and informal opportunities to network with senior executives from a variety of successful organizations.

Sessions with Role-Model Organizations
Three sessions are scheduled to take place on-site at California-based 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 CCE Mentors, each 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 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 provide a presentation on the results of their 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.

Celebrating Excellence and Baldrige Regional Conferences
Fellows have the opportunity to participate in the Celebrating 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 also have the opportunity to attend Baldrige-based national, state, and regional conferences held at locations across the United States.

Peer Learning
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 six sessions 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 CCE Fellows Program pledge to uphold all applicable legal requirements as well as their ethical principles during all activities associated with their participation in the CCE 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 CCE Fellows Program, be able to use the following designation: California Council for Excellence (CCE) Fellow.

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

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 California-based Baldrige Award recipients that you learned throughout your experience in the CCE 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 CCE Fellows Program, and produce actionable results. The mentors and a CCE facilitator 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 CCE 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-minute presentation at the final CCE 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 from the Baldrige Executive Fellows Program:

- 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 | NIST)
- 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 voices 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 | NIST).

Preparing for the Project (April 2024)

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 (May – June 2024)

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 mentor and program facilitator, as appropriate. Once you have gained agreement, write a project proposal for submission to the CCE 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 CCE Fellows Program staff the written plan and then present a brief overview to the other Fellows at the June sessions.

Reviewing the Proposal and Project (July 2024 – April 2025)

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, mentors, the other Fellows, and the program facilitator. You will provide both a written summary of updates and a verbal presentation to others at the following 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.

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. What progress have you made?	
4. Where would you like help/feedback?	
5. What areas of the Baldrige Criteria are relevant?	

In Spring 2025, after you complete the capstone project, you will present your results to other CCE Fellows Program participants and conference attendees. 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 …	As a CCE Fellow …
You support the CCE 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	**You support your own development by …** • applying your learning from the CCE 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
Your organization gains … • attention to and potential solutions for an issue facing your organization • the leadership skills, knowledge, and insight gained by the Fellow	**You gain …** • insights and counsel on an area of critical interest to you and your organization from experienced senior executives, your fellow participants, and CCE program staff • an opportunity to apply Baldrige concepts to an issue within your organization • accelerated professional development with relevance to your organization
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	**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	CCE Fellow
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	**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 • 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 CCE 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	**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

Program Calendar 2024-2025

Date/Time	Activity	Content
Tuesday, April 30, 2024 1:00pm – 8:30pm **Wednesday, May 1, 2024** 8:00am – 3:30pm	Conference (In-Person) Long Beach, CA	Attend **Celebrating Excellence Conference:** • Meet with 2023-2024 Cohort • Board of Directors Reception and Dinner • Keynote Speakers • 2023-2024 Cohort Capstone presentations
May 2024	Session Prework	Completion of Organizational Profile and Expectations Survey, capstone projects initial ideas, conversations with CCE Facilitator and Mentors
Wednesday, June 26, 2024 8:00-12:00pm	Zoom Conference Call	Program Kickoff: • Sharing of Expectations • Baldrige Excellence Framework • Reflections on Leadership
TBD, July 2024 8:00am – 5:00pm	Session 2 (In-Person) Location TBD	Site Visit with Leaders at CAPE/Baldrige Recipient
Wednesday, August 28, 2024 8:00-9:00am	Zoom Conference Call	Session follow-up and discussion
Wednesday, August 30, 2024 Submit by 5:00 pm PST	Submit Proposal for Capstone Project	Submit proposal for Capstone project – Reviewed and signed off on by Mentors and prepare elevator speech. Fellow/Mentor shall schedule a mutually agreed upon time for meeting to discuss the capstone project proposal.
TBD, September 2024 8:00am – 5:00 pm	Session 3 (In-Person) Location TBD	Site Visit with Leaders at local CAPE/Baldrige Recipient
Wednesday, October 16, 2024 8:00-9:00am	Zoom Conference Call	Session follow-up and discussion
TBD, November 2024 8:00am – 5:00pm	Session 4 (In-Person) Location TBD	Site Visit with Leaders at local CAPE/Baldrige Recipient
Wednesday, December 11, 2024 8:00-9:00am	Zoom Conference Call	Session follow-up and discussion
January 2025	Ongoing Capstone Work	**Review Capstone project progress with mentor.** Fellow/Mentor shall schedule a mutually agreed upon time for meeting to discuss the capstone project.
TBD, February 2025 8:00am – 5:00pm	Session 5 (In-Person) Location TBD	Site Visit with Leaders at local CAPE/Baldrige Recipient
Wednesday, March 12, 2025 8:00-9:00am	Zoom Conference Call	Session follow-up and discussion
April 2025	Preparation for final capstone presentation	**Completion of Capstone Project** Fellow/Mentor shall schedule a mutually agreed upon time for meeting to discuss the capstone project.
May 2025 8:00am-5:00pm	Session 6 (In-Person) Location TBD	**Final Session:** • Capstone presentation • Conference • Graduation

Logistics

Please mark your calendars for the sessions/activities listed in the program calendar above. Logistics details will be provided in advance of each session.

On-Site Sessions (May, July, September, November 2024, February and May 2025)
- **Transportation, lodging, and meals:** Please make hotel and 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. 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.