



Original Article

Identifying Critical Organizational Management Issues to Confirm Baldrige Framework 2023-2024 Change Items in a Systematic Review

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Abstract:

This research aims to identify and analyze the critical issues in organizational management from 2021 to 2024 and to assess their alignment with the updates in the 2023-2024 edition of the Baldrige Excellence Framework (BEF). By systematically reviewing management practices, this study maps the evolution and relevance of critical issues such as organizational agility, sustainability, digital transformation, and workforce retention. Cluster analysis reveals significant correlations between these management trends and the updated elements of BEF, suggesting that the framework's revisions are well-founded on contemporary management challenges. The research supports the hypothesis that modern management practices, particularly in sustainability and digital innovation, have a direct impact on operational excellence and align closely with BEF's new emphasis on adaptability and technological integration.

Keywords: Baldrige Excellence Framework, Organizational Management, Critical Issues, Sustainability, Systematic Review.

Introduction

In an increasingly complex and dynamic business environment, the need to continuously update and refine the operational excellence framework is critical. The Baldrige Excellence Framework (BEF) has long been recognized as a standard guiding organizations to achieve comprehensive excellence. Over time, updates to BEF have become essential to accommodate changes in technology, economics, and social norms impacting the operational environment of businesses. The 2023-2024 edition of BEF integrates a new focus on several critical issues, reflecting market demands and global challenges. These updates include organizational agility, transformation, diversity, equity, inclusion, workforce retention, supply chain resilience, digital economy, Industry 4.0, cybersecurity, social contributions, environmental sustainability, circular economy, and innovation. The addition and emphasis on these issues within the BEF framework are not only relevant but also vital in guiding organizations to thrive in a dynamic and often unpredictable economy.



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Since its introduction in 1992, the Baldrige Framework has evolved significantly, adapting to contemporary needs and challenges. Changes in the global economy, technological advancements, and social pressures have pushed organizations to reconsider their operational and resource management methods. For example, advancements in technology and the adoption of Industry 4.0 require organizations to be more agile and adaptive to technological changes. Additionally, issues like environmental sustainability and social justice have driven companies to operate more ethically and responsibly. The 2023-2024 edition of BEF considers these needs by integrating broader frameworks for inclusivity and sustainability, with greater emphasis on innovation as a key driver for growth and operational excellence. This update is designed to help organizations not only meet internal expectations but also respond to external pressures and demands from customers, investors, and regulators.

This research is motivated by the update of the Baldrige Excellence Framework (BEF) for the 2023-2024 evaluation, as released by the National Institute of Standards and Technology (NIST) USA. Through the BEF license holder in Indonesia, the Indonesia Quality Award Foundation (IQAF), this update focuses on raising organizational awareness of the need for organizational agility, resilience, and transformation, benefits from diversity, equity, and inclusion, workforce retention, supply chain resilience, digital economy, Industry 4.0, cybersecurity, social contributors, environmental sustainability, circular economy, and innovation. As a Baldrige examiner, this research will assess the relevance to current conditions and systematically map the reviews by analyzing relevant studies related to business management during 2023-2024, when this framework is implemented. The research will also extend to studies from 2021-2022, the period before the update.

Research on the 2023-2024 BEF update offers valuable insights on how changes in the framework of excellence can help organizations navigate the complexities of the current business environment. Through an analysis of trends and critical issues identified in the latest update, this study aims to evaluate the relevance and effectiveness of the framework in the context of modern organizational management. The emphasis on agility, for instance, is highly relevant in an era where market changes can happen suddenly and have significant impacts. Organizations that can quickly adapt tend to succeed in seizing opportunities and overcoming challenges. Likewise, the focus on sustainability and social responsibility reflects the increasing demands from various stakeholders for more ethical and environmentally-friendly operations.

Additionally, the integration of the digital economy and Industry 4.0 in the framework reflects a crucial shift in how companies create value. Digitalization has opened new opportunities for innovation and efficiency but also presents challenges in cybersecurity and data privacy. Understanding how the Baldrige framework can address these challenges is essential for long-term success. This study also explores how improvements in areas such as supply chain resilience and quality management, in the context of recent issues, can help companies enhance their operations and achieve better performance. In an often unpredictable global context, having a robust framework to manage and optimize supply chains is key to maintaining smooth production and distribution.

This research aims to provide recommendations based on findings that can help organizations implement or adjust the Baldrige framework in their operations. By

doing so, companies can strengthen their internal foundations and improve their interactions with the outside world, creating sustainable value for both internal and external stakeholders.

Thus, the BEF 2023-2024 update and in-depth analysis of its relevance in contemporary organizational management is not only crucial for academics and practitioners but also for senior leaders seeking to guide their organizations toward future excellence. This research provides not only practical guidance but also theoretical contributions to the management literature, offering new perspectives on applying the excellence framework in contemporary business practice.

Literature Review

This research underscores the importance of adapting organizational excellence frameworks to respond to the dynamic changes in the business environment. The 2023-2024 Baldrige Excellence Framework (BEF) acknowledges the need for deeper integration of emerging trends and issues from current management practices. The updated BEF framework includes a focus on organizational agility, digital transformation, and innovation as responses to the challenges faced by modern organizations. Research by [Nambisan, Wright, & Feldman \(2019\)](#) reveals how digitalization affects organizational structures and business processes, prompting companies to be more flexible and adaptive. This is relevant as BEF emphasizes the importance of innovation and adaptability in achieving outstanding performance.

Issues related to sustainability and diversity have gained significant importance in corporate agendas. A study by [De Angelis et al. \(2020\)](#) explains how companies are now more focused on implementing sustainable practices and effective CSR as part of their business strategies. This research supports the BEF update, which integrates sustainability as a key pillar of excellence. In the context of organizational resilience and workforce retention, a study by [Kowang et al. \(2021\)](#) shows that progressive and innovative human resource management strategies can improve job satisfaction and employee engagement, which directly influences employee retention and organizational performance. This resonates with the elements in BEF that recognize the importance of building strong internal capacities as a foundation for long-term excellence.

Based on this literature review, the following hypotheses have been developed to test how the critical issues in organizational management from 2021 to 2024 are supported or verified by the updates in the BEF 2023-2024. The hypothesis framework is as follows:

1. Null Hypothesis (H₀): There is no significant relationship between the critical issues identified in business management and the items updated in BEF 2023-2024.
2. Alternative Hypothesis (H₁): Organizational agility applied between 2021-2024 is positively related to the excellence performance criteria in the updated BEF.
3. Alternative Hypothesis (H₂): The critical issues emerging from organizational management practices in 2023-2024 are positively correlated with the improvement in operational performance as proposed in BEF 2021-2024.
4. Alternative Hypothesis (H₃): Workforce diversity between 2021-2024 contributes to increased innovation within organizations, which is a key focus in the BEF update.
5. Alternative Hypothesis (H₄): The adoption of digital transformation, as identified in the systematic review from 2021-2024, improves operational efficiency, supporting

the BEF update emphasizing digitalization.

6. Alternative Hypothesis (H5): Enhanced organizational resilience emerging as a critical issue in the 2021-2024 systematic review is related to better financial stability, in line with the BEF update.
7. Alternative Hypothesis (H6): Workforce retention strategies, identified as a critical issue between 2021-2024, have a positive correlation with improved employee satisfaction, supporting the BEF update on human resource management.

Each of these hypotheses is designed to examine the relationship between management practices identified as critical issues and the excellence criteria incorporated in the latest version of the Baldrige Excellence Framework. These hypotheses will guide the collection of relevant empirical data to determine the validity of the proposed relationships in this research title.

Methods

This study adopts a systematic literature review approach to analyze the trend of critical issues in corporate management related to the achievement of excellent performance and to confirm the relevance of these issues to changes in the 2023-2024 edition of the BEF. This method was chosen because of its ability to identify, evaluate, and synthesize existing research results systematically and transparently. In accordance with the stages proposed in the research of [Sanchez-Meca \(2010\)](#) and [Suarez et al. \(2017\)](#), the research stages consist of: (1) formulation of research questions; (2) inclusion and exclusion criteria for research articles; (3) search and selection, (4) analysis of search results. These stages are illustrated in Figure x.

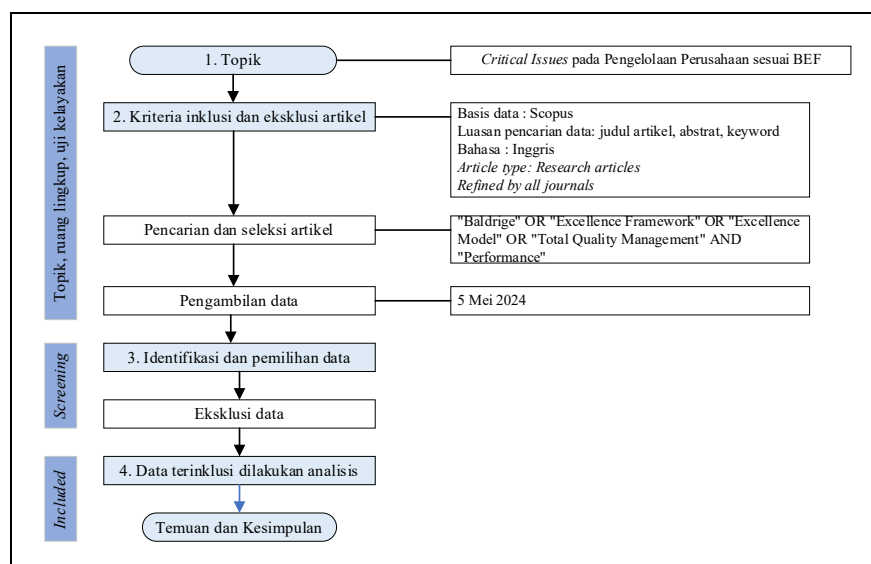


Figure 1. Research method flow

1. Research Questions Formulation

- a. What are the critical issues trends that emerged in corporate management during the years 2021-2022 and 2023-2024?
- b. How do these issues relate to the changes in the Baldrige Excellence Framework edition 2023-2024?

2. Inclusion and Exclusion Criteria for Articles

- a. Articles included in the review are those published between 2021 and 2024, covering both the period before and after the change to the BEF 2023-2024 edition.
- b. The type of articles used is research articles in the fields of business, management, and accounting.
- c. Articles must be available in the Scopus database and should be peer-reviewed Q1 journals.

3. Article Search and Selection

- a. The article search will be conducted using a search string designed to capture relevant articles. The string is illustrated in the diagram in figure X.
- b. The articles retrieved from the initial search will be screened based on the title and abstract to ensure alignment with the research topic.
- c. Articles that meet the inclusion criteria will undergo full review for further analysis.

4. Analysis of Search Results

- a. The selected articles will be analyzed to identify and compile the main trends and themes related to critical issues in corporate management through co-occurrence analysis using network visualization in the VoS Viewer tool.
- b. The relationship between the findings and the changes in the Baldrige Excellence Framework will be examined to determine relevance and implications.

This methodology is designed to ensure that the literature review conducted is comprehensive and representative of current research, allowing for valid and reliable conclusions regarding the trends in critical issues in corporate management and their relevance to the updates in the Baldrige Excellence Framework.

Results

The results of data collection conducted on May 5, 2024 obtained a collection of 9,999 articles with a growth graph of the number of studies as shown in figure x. This shows that the discussion of the framework of excellence in corporate management is a hot topic as evaluation material and consideration for benchmarking excellent performance. After identifying and selecting data according to the focus of the research year, 1,060 articles were obtained. Then, excluded from the parameters of research articles and subject areas, the results were 242 articles such as table x which can be used for co-occurrence analysis in VOS Viewer. To conduct a systematic review, another exclusion process occurred with an access type filter, namely open access and open archive, which obtained 80 articles.

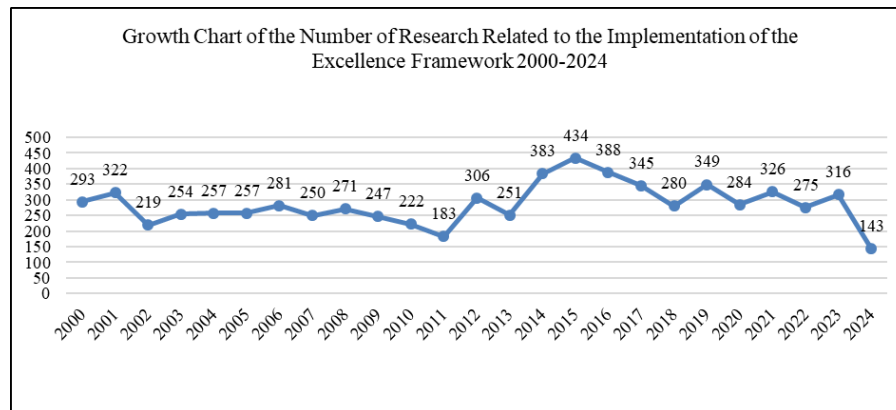


Figure 2. Graph of Growth in the Number of Research

Table 1. Journals in 2021-2024 that discuss the excellence framework (total 242 articles)

Journal Title	Total Article
Technological Forecasting and Social Change	38
Journal of Business Research	29
Research Policy	14
The International Journal of Management Education	11
Technovation	8
Socio-Economic Planning Sciences	8
Journal of Hospitality and Tourism Management	8
Cleaner Logistics and Supply Chain	6
International Journal of Hospitality Management	5
Journal of Air Transport Management	5
Journal of Purchasing and Supply Management	5
Tourism Management Perspectives	5
Journal of Engineering and Technology Management	4
International Business Review	4
Industrial Marketing Management	4
Technology in Society	4
Journal of Hospitality, Leisure, Sport & Tourism Education	4
Journal of Organizational Change Management	4
Information & Management	3
Journal of Retailing and Consumer Services	3
Transportation Research Part E: Logistics and Transportation Review	3
Annals of Tourism Research	3
Journal of International Management	3
Business Horizons	3
The British Accounting Review	3

The emergence of issues related to the Excellence Framework in academic journals indicates a growing recognition of the importance of practical standards and excellence in addressing complex global challenges. It also reflects the ongoing need for

renewal and innovation in the way organizations are operated and managed. This is not only relevant to practitioners and academics but also to policy makers and business leaders seeking insight into the principles of excellence in practice.

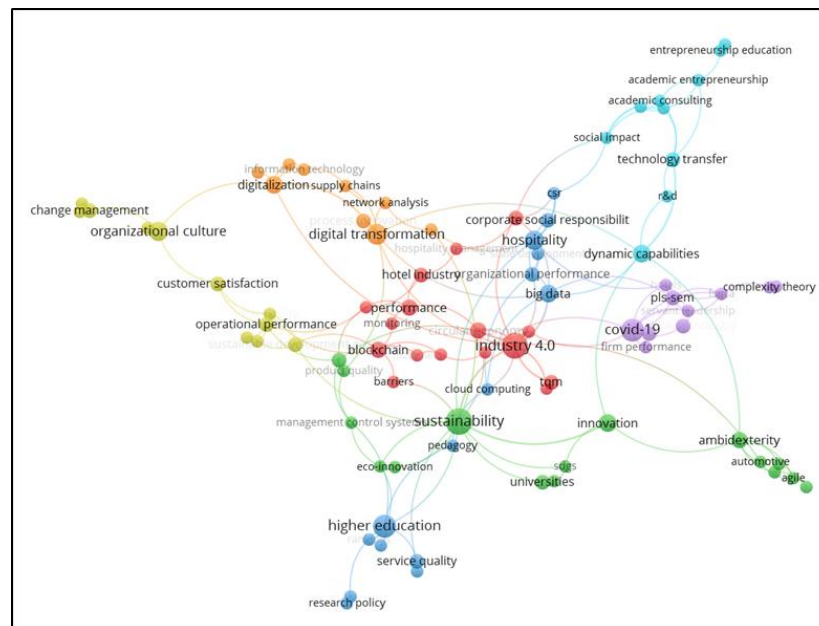


Figure 3. Network visualization of co-occurrence analysis results (2024)

Table 2. Clustering results in co-occurrence analysis (2024)

Cluster	Item title	Colour	Number of Items	Items / Critical Issues
1	<i>Circular Economy and Sustainability</i>	Red	16	<i>barriers, blockchain, circular economy, fuzzy dematel, fuzzy sets, hospitality management, hotel industry, industry 4.0, monitoring, multi-criteria decision making, performance, quality management, stakeholder theory, system dynamics.</i>
2	<i>Organizational Agility and Resilience</i>	Green	16	<i>agile, ambidexterity, automotive, business schools, contingency theory, eco-innovation, financial performance, human resource management, innovation, lean, management control systems, product quality, qualitative comparative analysis, SDGs, sustainability.</i>
3	<i>Digital Transformation and Social Impact</i>	Dark Blue	15	<i>big data, cloud computing, corporate social responsibility, CSR, higher education, hospitality, organizational performance, pedagogy, rankings, research policy, research productivity, scale development, service innovation.</i>

					<i>service quality.</i>
4	<i>Workforce and Operational Performance</i>	Yellow	11		<i>change management, customer satisfaction, innovation performance, job satisfaction, multinational corp. , operational performance, organizational culture, socio-technical theory, supply chain collaboration, sustainable development, traceability.</i>
5	<i>Education and Diversity Advancements</i>	Purple	10		<i>blended learning, complexity theory, covid-19, firm performance, Fuzzy set Qualitative Comparative Analysis, hospitality industry, hotels, Partial least squares structural equation modeling (PLS-SEM), servant leadership, social media.</i>
6	<i>Research and Technological Innovation</i>	Blue	10		<i>academic consulting, academic entrepreneurs, collaborative research, dynamic capabilities, entrepreneurship education, online education, r&d, scientific impact, social impact, technology transfer.</i>
7	<i>Supply Chain and Business Transformation</i>	Orange	9		<i>digital transformation, digitalization, information technology, network analysis, process innovation, service ecosystem, social network analysis, supply chains, technological innovation</i>

Each of these clusters demonstrates how specific elements of organizational management practices and technology relate to the critical issues addressed by the BEF in the 2023-2024 edition. These issues are crucial as they drive organizations to achieve better, more resilient, and excellent performance.

Circular Economy and Sustainability: This cluster includes critical issues such as circular economy, sustainability, and quality management. The circular economy is important because it supports environmental sustainability by optimizing resource cycles. Sustainability is a direct response to organizations' need to reduce environmental impact and strengthen corporate social responsibility. Quality management is closely tied to these initiatives, providing a framework to ensure sustainability is maintained through consistent, high standards, supporting continuity and innovation in business practices. [Geissdoerfer et al. \(2020\)](#) in their article "The Circular Economy – A New Sustainability Paradigm?" explain that the circular economy not only reduces waste but also creates value by innovatively recovering resources, directly supporting sustainability goals in the latest framework. This shows how circular economy principles contribute directly to sustainability in business practices.

Organizational Agility and Resilience: In this cluster, critical issues such as agility, resilience and transformation, and human resource management emerge. These issues represent strategies for facing market changes and economic pressures quickly and effectively. Transformation involves implementing new technologies and strategies,

reflecting a focus on business adaptation and resilience. Human resource management supports this by adjusting policies to retain and develop talent, which is crucial for innovation and workforce retention ([Sharma and Singh, 2019](#)).

Digital Transformation and Social Impact: This cluster addresses critical issues in the application of big data, cloud computing, and Corporate Social Responsibility (CSR). [Nwaiwu \(2018\)](#) in "The Role of Big Data and Cloud Computing for Business Innovation" highlights how big data and cloud computing facilitate digital transformation efficiently, strengthening aspects of the BEF related to the digital economy and the fourth industrial revolution. CSR represents the recognition of the importance of social contribution and corporate responsibility, supporting diversity, inclusion, and the well-being of broader society.

Workforce and Operational Performance: Critical issues emerging in this cluster such as change management, job satisfaction, and supply chain collaboration reflect the focus of organizations on workforce retention and supply chain resilience. Change management is important for maintaining operational performance during business transformation, while job satisfaction is directly related to employee retention. Supply chain collaboration supports resilience in facing disruptions or crises, crucial for maintaining operational smoothness and customer satisfaction.

Education and Diversity Advancements: This cluster combines critical issues emerging from educational organizations such as blended learning, complexity theory, and diversity. Blended learning and complexity theory offer new approaches in education that support diversity and inclusion, strengthening the foundation for innovation through more inclusive and adaptive educational approaches. Diversity is also a core issue in the application of the excellence framework from 2021-2024, emphasizing the benefits of diversity, equity, and inclusion. [Martin and Murillo \(2021\)](#) in "Diversity, Innovation, and Entrepreneurship: Where Are We and Where Should We Go in Future Studies?" also emphasize that education supporting diversity can increase innovation and creativity capacity. This research links competitive advantage and organizational progress, aligning with the BEF initiatives prioritizing diversity and inclusion.

Research and Technological Innovation: In this cluster, academic consulting, technology transfer, and entrepreneurship education in educational organizations are crucial for achieving excellent performance that aligns with industry needs. [Hughes et al. \(2020\)](#) in "Linking Technology and Innovation: Implications for Research, Policy, and Practice" discuss the importance of collaboration between academia and industry in creating technological innovation. This research approach focuses on technology transfer and academic consulting, providing valuable insights into how to integrate innovation within the BEF framework.

Supply Chain and Business Transformation: Critical issues emerging here, such as digital transformation, technological innovation, and supply chains, focus on the role of digital transformation and technological innovation as primary drivers for efficiency and effectiveness in supply chain management, in line with BEF's focus on industry 4.0 and the digital economy in business transformation and supply chain management. [Srinivasan and Swink \(2018\)](#) in "An Investigation into the Supply Chain's Role in Digital Transformation" describe how digitalization and technological innovation impact the evolution of supply chain management. This research focuses on adapting to new technologies and enhancing supply chain collaboration, which is highly relevant to the

BEF, which encourages industrial efficiency through digital transformation.

Conclusion

In the context of the previously developed cluster analysis, this study identified that each cluster reflects critical issues important in modern corporate management and has a strong relationship with the updates in the Baldrige Excellence Framework (BEF) 2023-2024. For example, the cluster focused on "Digital Transformation and Social Impact" shows the significance of digital transformation and CSR which is in line with the hypothesis that proposes increased operational efficiency and innovation performance through digital technology (H4). Meanwhile, the "Workforce and Operational Performance" cluster supports the hypothesis related to workforce retention and employee satisfaction (H6), underscoring the importance of effective human resource management practices for achieving excellent performance. Through this analysis, it can be seen that the trends in these clusters validate the relevance and need for updates in the elements of the BEF 2023-2024, as well as providing empirical evidence that supports the hypothesis related to improved organizational performance proposed in the framework.

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