



The Foundation for the Malcolm Baldrige National Quality Award

"The award that bears his name reflects the virtues that he brought to public service and how he lived in his private life, a commitment to excellence, shrewd judgment and sound judgment, principled leadership, integrity, and a sense of responsibility."

George W. Bush



"I was proud as a U.S. Senator to vote in favor of the Baldrige Act..." this award has helped us re-focus on the future, on quality, on performance, and most importantly maybe, on innovation."

Joe Biden

"In just a few years, the National Quality Award has literally become the standard of business excellence. And the renewed spirit of excellence in business, of making quality an integral part of America's corporate strategy, has truly, I believe, made us more competitive in the international arena."

George H.W. Bush

"The Malcolm Baldrige National Quality Award, which highlights customer satisfaction, workforce empowerment, and increased productivity, has come to symbolize America's commitment to excellence."

Bill Clinton

"I always prized the quality of Mac's vision. He had the capacity to look up from the dust of the plains to see the distant mountains."

Ronald Reagan





Presents:

2024 Baldridge Enterprise Update

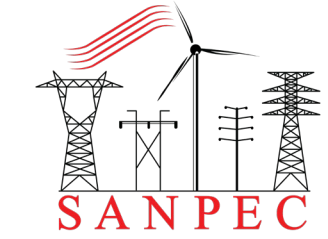
March 21st, 2024



Mac Baldrige Society
Institute Trustees



A Special Thanks to Our Donors & Sponsors!



Opening Remarks/Agenda

Introduction

Al Faber

Guest Presenters

Bob Fangmeyer, Director, Baldrige Program, NIST

Al Faber, President & CEO, Baldrige Foundation

Brian Lassiter, Chair, Alliance for Performance Excellence Board of Directors

Stephanie Norling, Executive Director, Community of Excellence 2026

**Questions from the
Audience**

Al Faber, Moderator

Closing Remarks

Al Faber

Baldrige Performance Excellence Program

Robert Fangmeyer, Director BPEP



Baldrige Program Update

BPEP Purpose and Mission

To improve the performance and long-term success of businesses and other organizations by

- Recognizing role models
- Fostering the adoption of proven practices



Highlights of 2023

- Baldrige Excellence Frameworks
- Baldrige Executive Fellows
- 34th Quest for Excellence Conference
- Job Quality Toolkit
- Manufacturing and NIST Collaborations
- **Baldrige Reimagined**

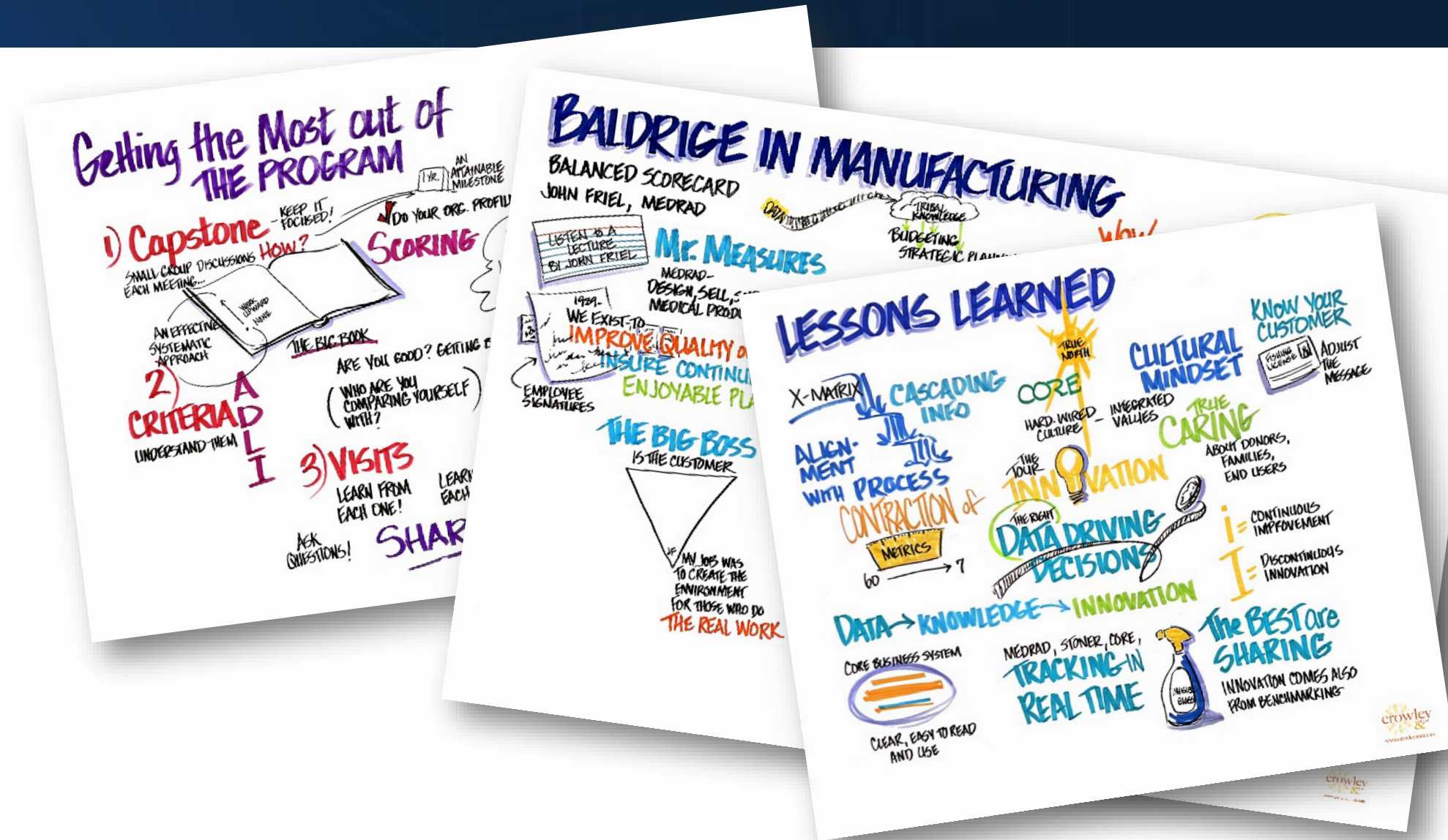
Baldrige Excellence Frameworks

- Released in Early 2023
- Incorporated, enhanced, or clarified key concepts and critical issues:
 - ✓ Agility, resilience, and transformation, including supply-chain
 - ✓ Workforce retention
 - ✓ Innovation
 - ✓ The digital economy and the fourth industrial revolution
 - ✓ Cybersecurity
 - ✓ Societal contributions, environmental sustainability, and the circular economy
 - ✓ Diversity, equity, inclusion, and accessibility
- Eliminated redundancies, reduced number of notes, some reorganization



2023 Baldrige Executive Fellows

- 16 Participants (Healthcare, Manufacturing, Nonprofit, Government, Small Business)
- 5 in-person sessions (beginning and ending at Quest for Excellence)
- 3 site visits
 - Wellstar Paulding Hospital (with Freese and Nichols)
 - Center for Organ Research and Education (with Medrad and Stoner)
 - Ritz-Carlton (with AARP)



34th Quest for Excellence



- Outstanding keynotes
 - Duncan Wardle – Creativity, innovation, and design thinking
 - Don Berwick – Future of Health Care
- Opening plenary on innovation with former recipients
- 40 concurrent sessions including special session on JQT/MEP
- ~500 Attendees and an NPS of 60

Job Quality Toolkit

Toolkit Deployment through webinars, presentations, articles, general promotion

- DOC, NIST, BPEP, MEP
- MEP National Network
- America Works
- Public Private Strategies Institute
- BPEP and Alliance

Online assessment instrument

- 80+ manufacturers from 22 states
- Provides report with comparison data
- Will be moving to BPEP website

The image shows a screenshot of a U.S. Department of Commerce press release page. The page header includes the U.S. Department of Commerce logo and the text "U.S. Department of Commerce". A search bar is visible in the top right corner. The main content area features a navigation menu with "ABOUT", "ISSUES", "NEWS", "DATA AND REPORTS", and "WORK WITH US". Below the menu, there are links for "All news", "Press releases", "Blog", and "Speeches". The main headline reads "U.S. Secretary of Commerce Gina Raimondo and U.S. Secretary of Labor Marty Walsh Launch Job Quality Toolkit". Below the headline, there is a sub-headline: "The Toolkit identifies tactics for small and medium-sized businesses to improve job quality and partner with workers". To the left of the main content, there is a vertical strip with a photo of a woman in a blue work shirt and yellow hard hat, and the text "Job Quality Toolkit" and "Strategies and actions to help small-to-medium sized organizations recruit and retain a high-performing workforce". At the bottom of this strip are the logos for NIST and the Baldrige Performance Excellence Program.

"Companies that provide higher-quality jobs get higher-quality workers, ultimately giving them a competitive advantage—it's that simple. As the economy continues to build back better, it is imperative that business, government, and other organizations come together to build a national dialogue about job quality."

--U.S. Commerce Secretary Gina Raimondo

Manufacturing and NIST Collaboration



Strategic collaboration with NIST MEP and MEP National Network

- Job Quality Toolkit
- Quest for Excellence® Conference
- Medical Device Innovation Consortium
- Advanced Manufacturing Technology Solutions assessment
- *Foundations for a Successful Business*

Strengthening ties with NIST

- Baldrige Executive Fellows participation
- NIST Engineering Lab, Community Resilience Group
- Are We Making Progress and Organizational Profiles with NIST/IIS

Other Manufacturing Initiatives

- Collaboration with the Association for Manufacturing Excellence [AME]



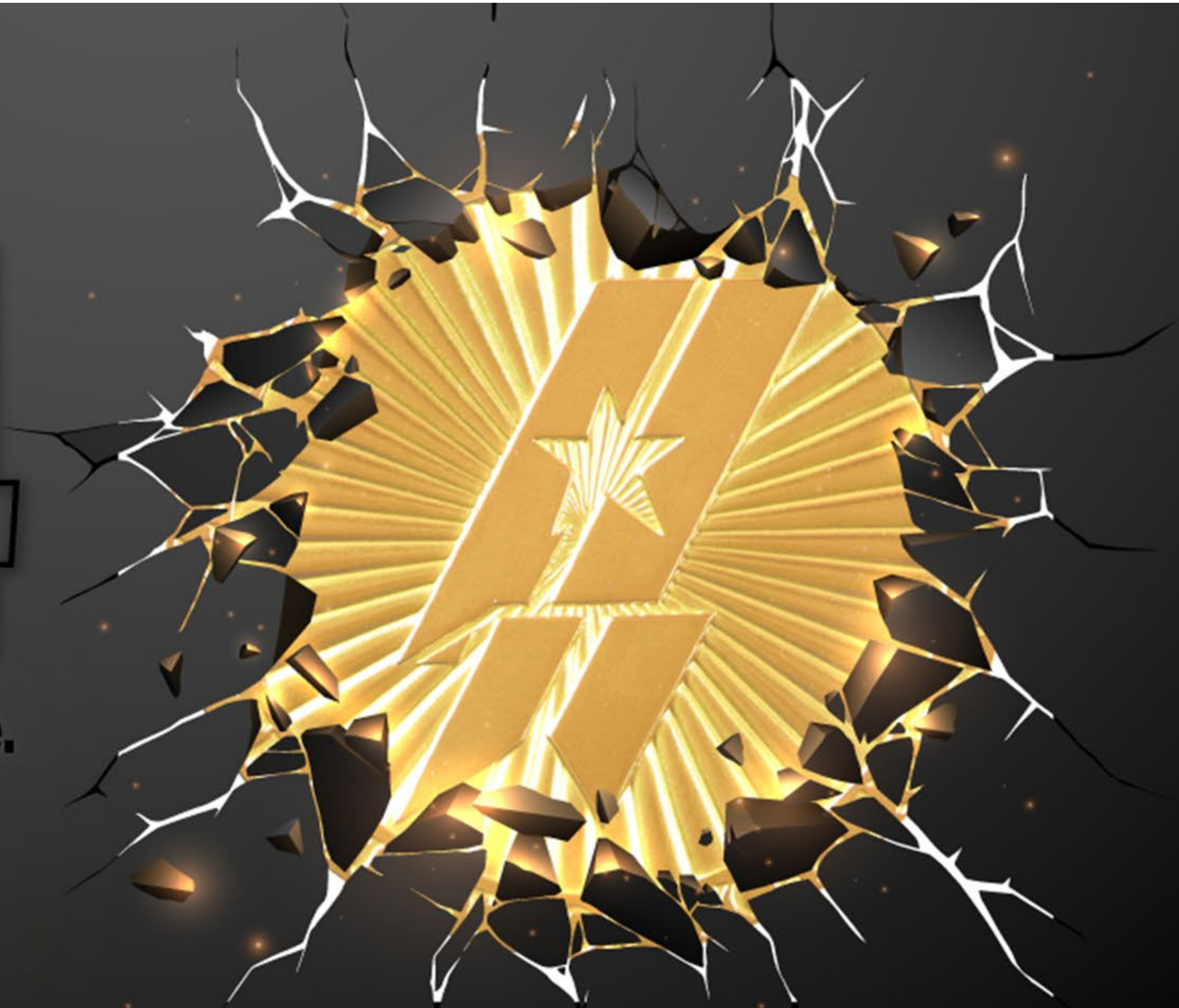
Baldrige Reimagined



2024

prepare. adapt. innovate. thrive.

something big is coming



Baldrige Reimagined

“In today’s world, change and disruption are a constant threat to an organization’s success and sustainability. Resilience isn't just bouncing back to a prior state after a disruption, it is being ready and able to adapt, innovate, and thrive in an ever-changing, dynamic environment.”

- Build on legacy of quality and Performance Excellence
- Shift to an emphasis on resilience and long-term success
- Transform the Baldrige Award process
- Enhance accessibility and user-friendliness
- Expand and enhance our ecosystem



Transform the Baldrige Award

- Make it easier for an organization to participate
- Only evaluate what is essential to determine role model worthiness
- Minimize application requirements: Start with a “results only” application;
- Verify results, assess processes, and explore role-model characteristics during site visit
- Establish tailored criteria and a simplified evaluation rubric
- Establish “standard work” processes/worksheets/tools to increase consistency and simplify work
- Enhance recognition opportunities
- Ensure appropriate rigor and process integrity



Looking Ahead - 2024 and Beyond



- Award Evaluation Process underway
- 35th Quest for Excellence[®] Conference
- Baldrige Framework revision process
- Baldrige Cybersecurity Excellence Builder Update

Evaluation Process

Application Review (Examiners) April 23-June 4

- Carefully selected 5 person teams
- Streamlined, tailored criteria
- Simplified rubric (Low/Medium/High)
- Individual Analysis and team Consensus Evaluation

Site Visit Determination (Judges) ~June 19

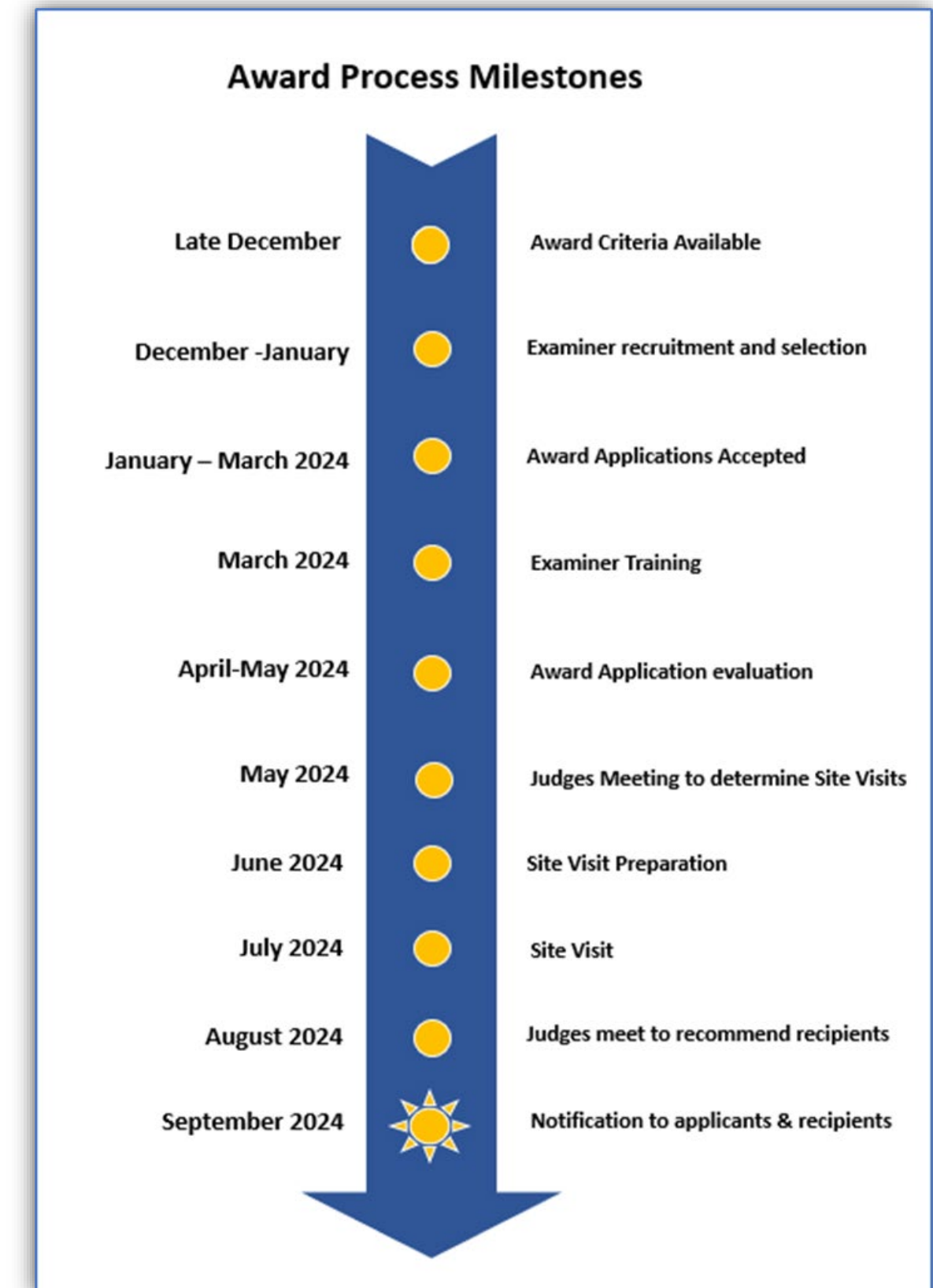
- Blinded summary data from Application Review

Site Visit Review (Examiners)

- Verify performance, assess processes, explore role model characteristics
- Standard worksheets for examiners and applicants
- Collaborative planning and preparation (June 20-July 21)
- “On-site” with applicant (hybrid; July 22-August 1)
- “Post-site” finalize evaluation report (August 2-August 9)

Award Recommendations (Judges) September 9-13

- All available data and information including dialogue with Site Visit Team Leader



Prescreen Process

Identify a limited number of well-known, industry-leading organizations worthy of being invited to participate and automatically advance to site visit

Leverage existing industry recognitions that are

- Objective, rigorous, and closely aligned to Baldrige Award criteria

2023 Drucker Institute Rankings

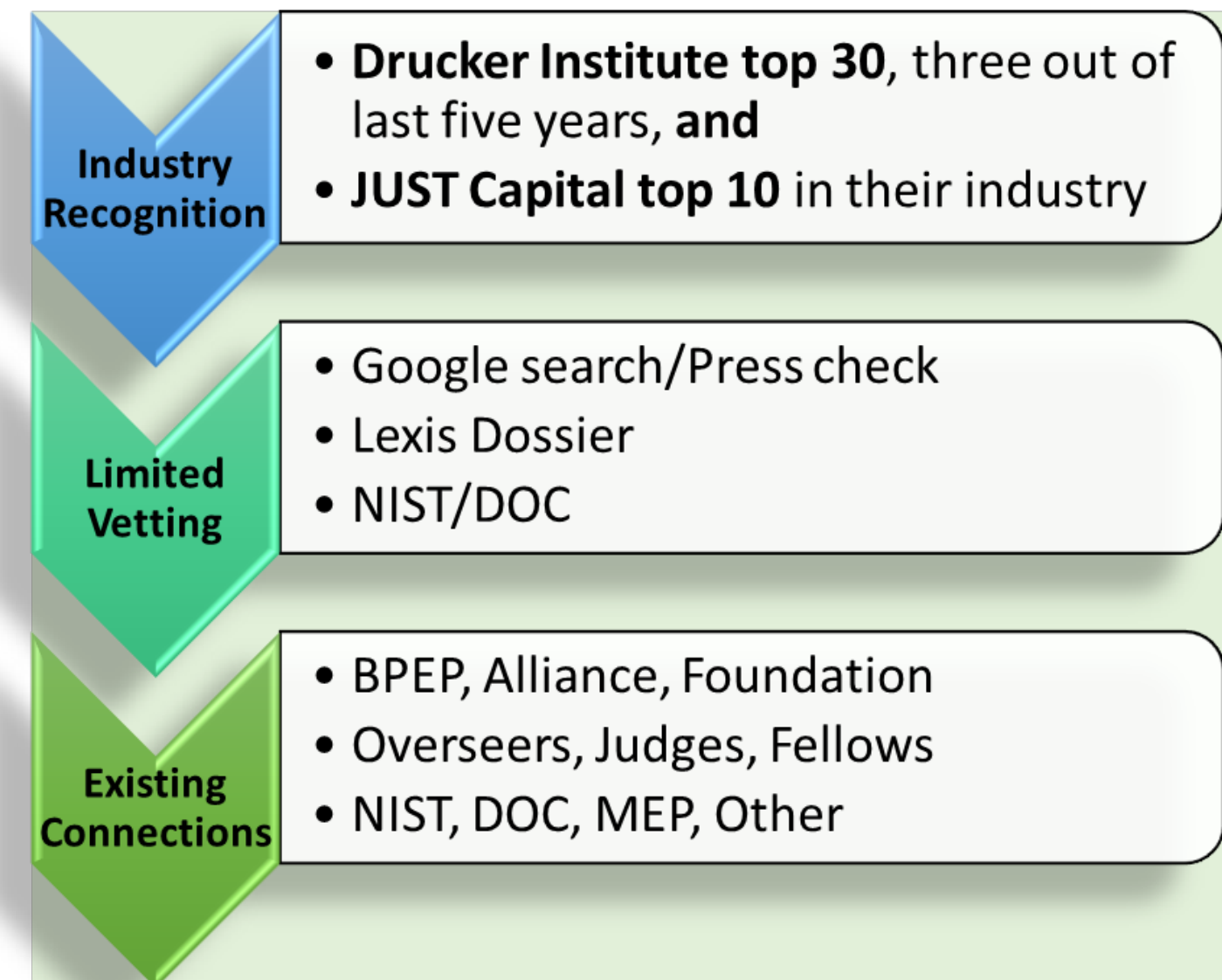
18 of top 30 are manufacturers

13 do very well on all dimensions

11 are top 30 three of last 5 years

JUST Capital top 5 Industry/100 Overall

7 of those 11 are top 5 Industry and top 100 Overall



Initial vetting is underway. Companies will complete parts of the application and go through full site visit and judging processes

35th Quest for Excellence®

April 7-10, 2024

Gaylord National Harbor
(near Washington, D.C.)

prepare. adapt. innovate. thrive.

Conference Themes: Organizational Resilience and Emerging Challenges

Monday opening keynote: Shola Richards, founder of Go Together Global™ and the best-selling author of *Making Work Work* and *Go Together*

40 concurrent sessions will highlight Baldrige Award Recipients and other high performing organizations sharing insights and best practices

Baldrige Foundation's Leadership Awards Luncheon

2025/2026 Framework Revisions

Baldrige Excellence Framework remains core foundation

- Maintaining regular revision cycle
- Collecting input from inside/outside Baldrige community
- Will incorporate learnings from deep dive into resilience
- Will look for opportunities to streamline/simplify, but
- Expect content changes to be modest



Baldrige Cybersecurity Excellence Builder

- Based on the NIST Cybersecurity Framework (CSF), helps organizations understand the effectiveness of their cybersecurity risk management efforts.
- The CSF is widely used and has become the standard maturity model to reduce cybersecurity risks
- CSF v2 recently released BPEP plans to update *Baldrige Cybersecurity Excellence Builder* in 2024

2024

prepare. adapt. innovate. thrive.

something big is ~~coming~~ here!



President & CEO Update



ORGANIZATIONAL ALIGNMENT: STRATEGY-BUDGET-ACCOUNTABILITY

Four Strategic Imperatives

ADVOCACY

- Priority #1. Restore BPER to the Federal Budget and the President's Agenda.
- Priority #2. Develop Strategic Alliances. Congress; Departments of: Education; Defense; Health and Human Services; Veterans Affairs; Small Business Administration; and others like ACHE, CHIME
- Priority #3. Build Grass Roots Support including State Programs.

"Ensure the long-term financial growth and viability of the Baldrige Performance Excellence Program..."



...and to support organizational performance excellence in the United States and throughout the world"

FUNDRAISING

- Message**
- Bold, Dynamic, Inspirational Message
 - Build and Grow Constituency
 - Strategic Communications (Internal/External)
 - Media Relations – Print, TV, Radio, Internet
 - Announcements Online & Print Advertising
 - Leverage Social Media



- Fundraising**
- Small Donations, Major Gifts, Planned Giving
 - Combined Federal Campaign with State Programs,
 - Business Partnerships/ Institute for Performance Excellence
 - Mac Baldrige Society



"America's Most Influential Leaders – Supporting the Nation's Quality Awards Program."

BOARD DEVELOPMENT

- Working Board – Trustee Board
- Embrace the Mission and Work as a "Team"
- Contribute financially and seek support
- Make connections and offer expertise
- Represent the organization



FOUNDATION OPERATIONS

- Baldrige-Based using the Framework
- Customer Focused/Driven in Everything We Do
- Stewardship Beyond Reproach
- Adding Value to the Enterprise
- Institute for Performance Excellence



Baldrige-Based, Leads by Example: "Confident, Deliberate, Process Driven, Accountable"



"To be recognized around the world as the premier foundation for the promotion of performance excellence in all sectors of the economy."

We will inspire organizations to achieve excellence in all they do with pride and societal responsibility. Together with our stakeholders we will create value through research and deployment of the latest cutting-edge management practices. We will focus on the future and manage for agility, innovation and creativity. Our Baldrige-based role-model performance will result in the Foundation's endowment exceeding \$135 million by 2050.

6 Key Ways the Foundation Supports the Baldrige Performance Excellence Program

Advocacy

FY18 – \$2.2M
FY19 – \$2.2M
FY20 – \$2.2M
FY21 – \$2.2M
FY22 – \$2.5M
FY23 – \$2.7M
FY24 – \$2.7M

BUDGET OF THE U.S. GOVERNMENT FISCAL YEAR 2023

Sponsorships

Foundation Board of Directors Meeting January 2024

35th Quest for Excellence Sponsorships

Why Sponsor

The Audience

35th Quest for Excellence
April 7-10, 2024
Gaylord National Harbor
near Washington, D.C.

prepare. adapt. innovate. thrive.

Malcolm Baldrige National Quality Award

Josh Racette
Vice President of National Programs & Development

<https://www.questsponsorship.com>

www.baldrigefoundation.org

Cybersecurity

#BaldrigeCyber

Baldrige Cybersecurity Workshop

CHIME HealthCare's most wired

BALDRIGE FOUNDATION

BALDRIGE CYBERSECURITY EXCELLENCE BUILDER

70,000+ Most Wired

PSA's

- Supporting Fellows
- Site Visits
- Quest Assistance
- Examiner Training

Individual Awards

JEANNE SHAHEEN • Government

U.S. Senator, New Hampshire

"I'm grateful to receive the Baldrige Foundation Award for Leadership Excellence in Government. The Baldrige Program does important work providing organizations in sectors throughout the U.S. economy, from health care to education or nonprofits, with the resources and tools they need to be effective and efficient economic contributors. I appreciate this award, and I'll continue to support the Baldrige Program and those like it that invest in the innovation, sustainability and strength of our national and global economies."

170+ Leaders Recognized

Promoting Baldrige

- CEO ROUNDTABLES
- POD CASTS
- WEBINARS

WST CUSTOM STUDIOS

SAVE THE DATE

PERFORMANCE EXCELLENCE IN THE AGE OF CONSUMERISM

BALDRIGE FOUNDATION
America's Best Investment

Presents:
2024 Baldrige Enterprise Update
March 21st, 2024

RESPONDING TO HINGE MOMENTS WITH DR. MICHAEL LINDSAY

170K+ Audience

6 Key Ways the Foundation Supports the Alliance for Performance Excellence

Advocacy

Letters to members of Congress, Governors, Award Recipients. Making members aware of state programs. Get additional federal funds for the Baldrige Program to administer grants to state programs.

174+/yr

Fall Conference Sponsorships

Lighting the Way to Excellence
2022 Baldrige Fall Conference
October 19 and 20, 2022
Hard Rock Hotel, San Diego, CA

inspire
The 2023 Inspire Conference & Encore Presentation are over. Join our mailing list to get updates on the 2024 Baldrige Fall Conference. Join our mailing list [HERE!](#)

Creating New Applicants

HEALTH SYSTEM CEO ROUNDTABLE
You are invited, with 24 other CEOs by the President /CEO's of ACHE and the Baldrige Foundation to participate in a Leader Dialogue Executive Roundtable Event

INNOVATION: THE NEW TRANSFORMATION

12/yr

Collaborative Fundraising

BALDRIGE FOUNDATION
INSTITUTE FOR PERFORMANCE EXCELLENCE

How are we supporting state programs?

CFC Today
Combined Federal Campaign

3 Key takeaways:

1. State programs can now offer their constituents access to the Institute for Performance Excellence thanks to a new referral program.
2. This referral program is designed to help drive additional revenue back to the state programs in the form of grants to support state level initiatives and help offset operating expenses.
3. The Institute for Performance Excellence brings a leading online, networking community with employee engaging benefits, training, and resources to help organizations improve leadership and management practices in pursuit of performance excellence.

Individual Awards

Collage featuring a bronze bust, a gold medal, a blue award plaque, and photos of award recipients.

Marketing & Awareness

BALDRIGE FOUNDATION
America's Best Investment

2022 BALDRIGE FALL CONFERENCE
OCT 19-20
Hard Rock Hotel

The Baldrige Foundation Institute for Performance Excellence
Presents:
State-Based Baldrige Programs: The Gateway to Performance Excellence
May 26th, 2022

baldrigeinstitute.org

6 Key Ways the Foundation Supports Communities of Excellence 2026

Advocacy

AMERICA COMPETES ACT
OF 2022
January 25, 2022

COMMUNITY is now the 7th Category of the Baldrige National Quality Awards!

communities of excellence 2026

Administrative Support

- IT Cybersecurity
- CRM Database Management
- Budget
- IRS 990, Preparation & Submission
- Donation Acknowledgment
- Payment Tracking
- Banking Transactions & Reconciliations
- Marketing & Communications Assistance

ESET Protect Cloud Security
Dashboard

Total number of devices: 8

Security risks: 0

Attention required: 0

Keep Password Security

IRS 990
Return of Organization Exempt From Income Tax

Marketing & Awareness

Promising Practices from a Community of Excellence: Developing a Scorecard for Community Performance Excellence

communities of excellence 2026

thrive EXCELSIOR

The Baldrige Foundation
Institute for Performance Excellence

Presents:

Elevate Your Community's Performance: Exploring the New Communities of Excellence Framework

November 21, 2023

Stephanie Norling
Communities of Excellence 2026
Halfhill
Consultant, KH Consulting

7th Category

\$38k (GIK Support Annually)

Complimentary Institute Community

INSTITUTE FOR PERFORMANCE EXCELLENCE

BALDRIGE | PERFORMANCE EXCELLENCE | QUALITY | LEADERSHIP

Home About Research Resources Education Knowledge Center Communities Events Leader Dialogue

COMMUNITY HOME DISCUSSION 15 LIBRARY 31 EVENTS 8 MEMBERS 128

Alumni Group

Thought Leadership Support

KEY SUCCESS FACTORS IN COMMUNITIES OF EXCELLENCE

The Value of Innovation and Inclusivity
Christel Gollnick, MSOL

COMMUNITIES OF EXCELLENCE 2026 EXCELS DURING PANDEMIC YEAR

by Stephanie Norling, Executive Director, Communities of Excellence 2026

CHRONICLE OF LEADERSHIP AND MANAGEMENT

BALDRIGE FOUNDATION INSTITUTE FOR PERFORMANCE EXCELLENCE

Volume 2, Number 1
September 2022

Framework Sponsor/Printing/Dist.

communities of excellence 2026

2023-2024

Communities of Excellence Framework:

Key questions for improving the performance of communities and the people who lead and live in them

United States Senator for West Virginia The Honorable Shelley Moore Capito



**Recipient, The Baldrige Foundation's 2024
Award for Leadership Excellence in Government**



Alliance for Performance Excellence Update



Learn. Share. Connect.

The Journey to Performance Excellence Starts Here

- Home
- About Us
- Members
- Events & Training
- Contact Us

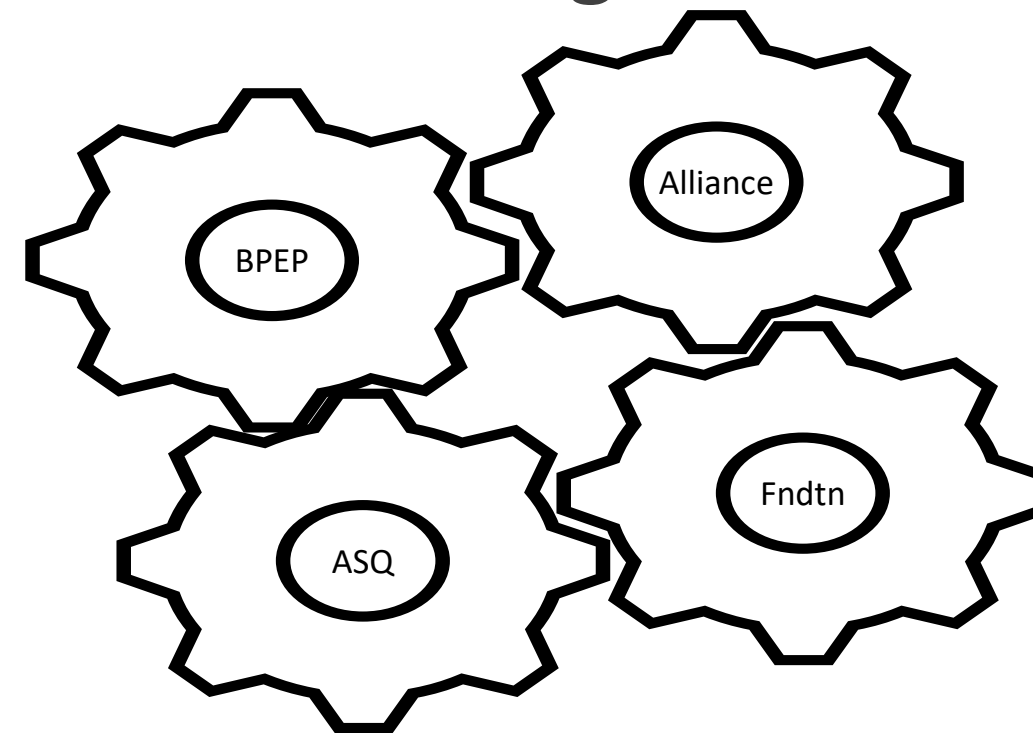
Find Performance
IMPROVEMENT
HELP NEAR YOU



Brian Lassiter
Chair
Alliance for
Performance
Excellence

(re)Introducing Alliance for Performance Excellence

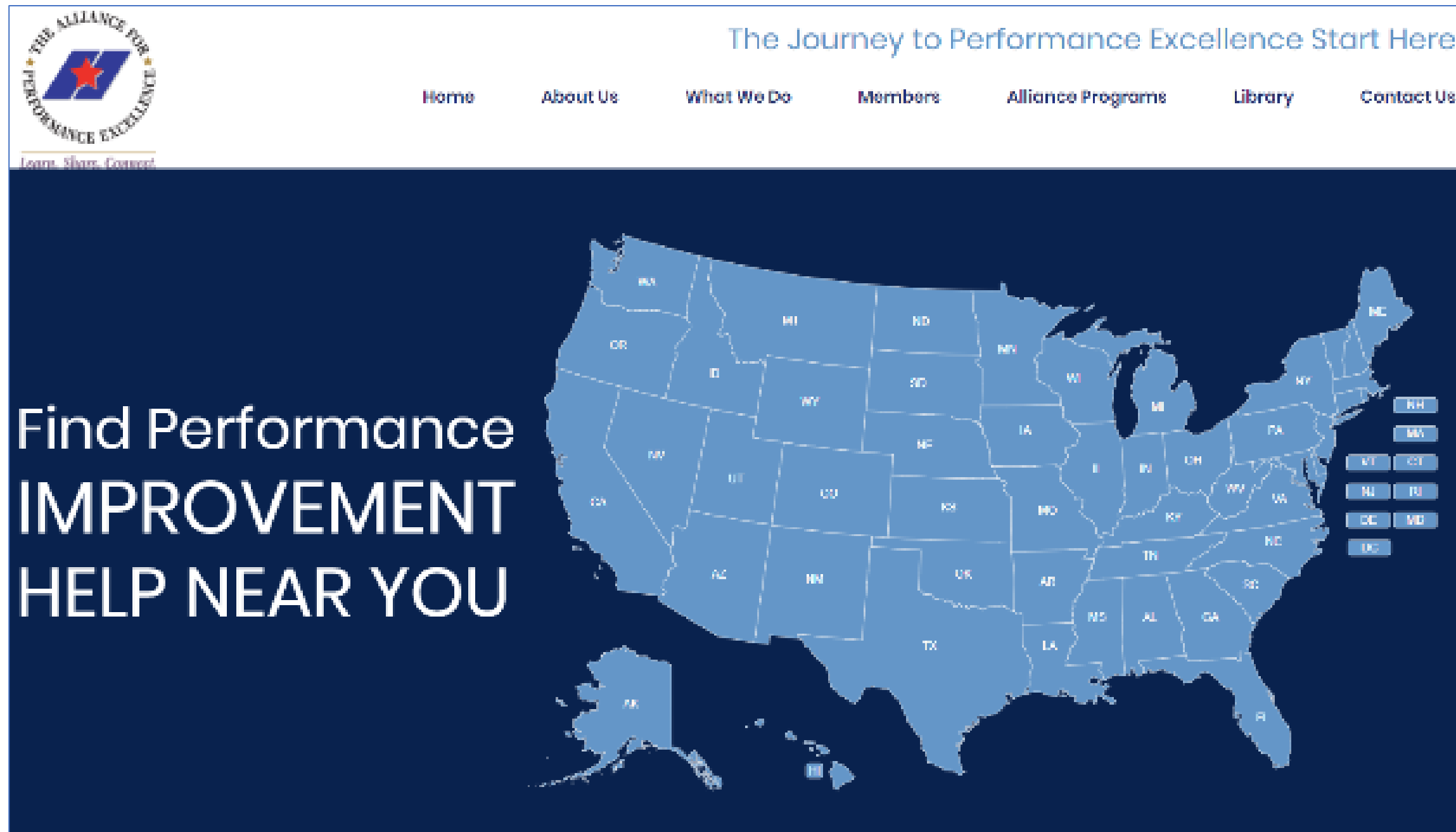
- Founded in 2005, the Alliance for Performance Excellence is the network of Baldrige-based programs and other members supportive of performance excellence.
- **Purpose:** To inspire individuals, organizations, and communities across the U.S. and the world to learn, implement, and achieve performance excellence.
- **Mission:** To strengthen members through training, mentoring, collaboration, and sharing of resources, best practices, and service offerings.
- **Vision:** to be the premier resource for a thriving Baldrige community.



Learn. Share. Connect.

A National/International Footprint

Local, State, Regional Programs:



National/International Programs:

- American Health Care Association (AHCA), National Center for Assisted Living (NCAL), Washington DC
- Communities of Excellence 2026, St. Joseph
- Sterling International, Kuala Lumpur

Other Members:

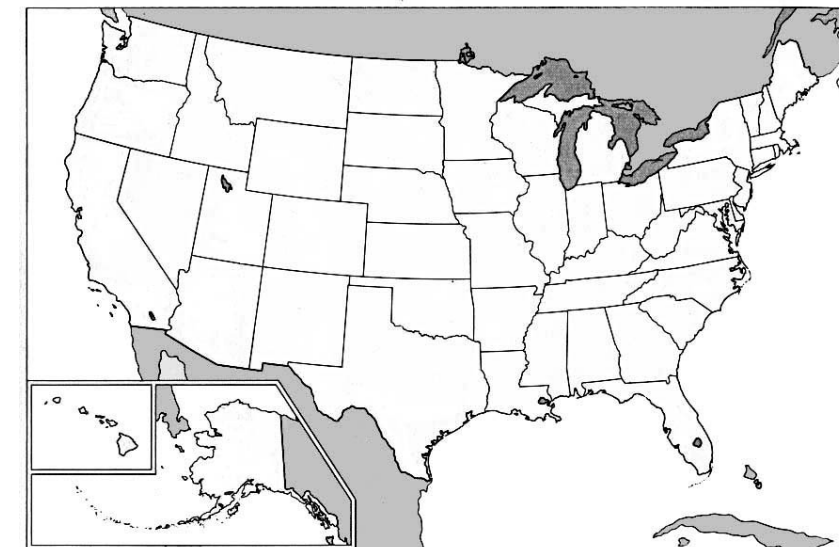
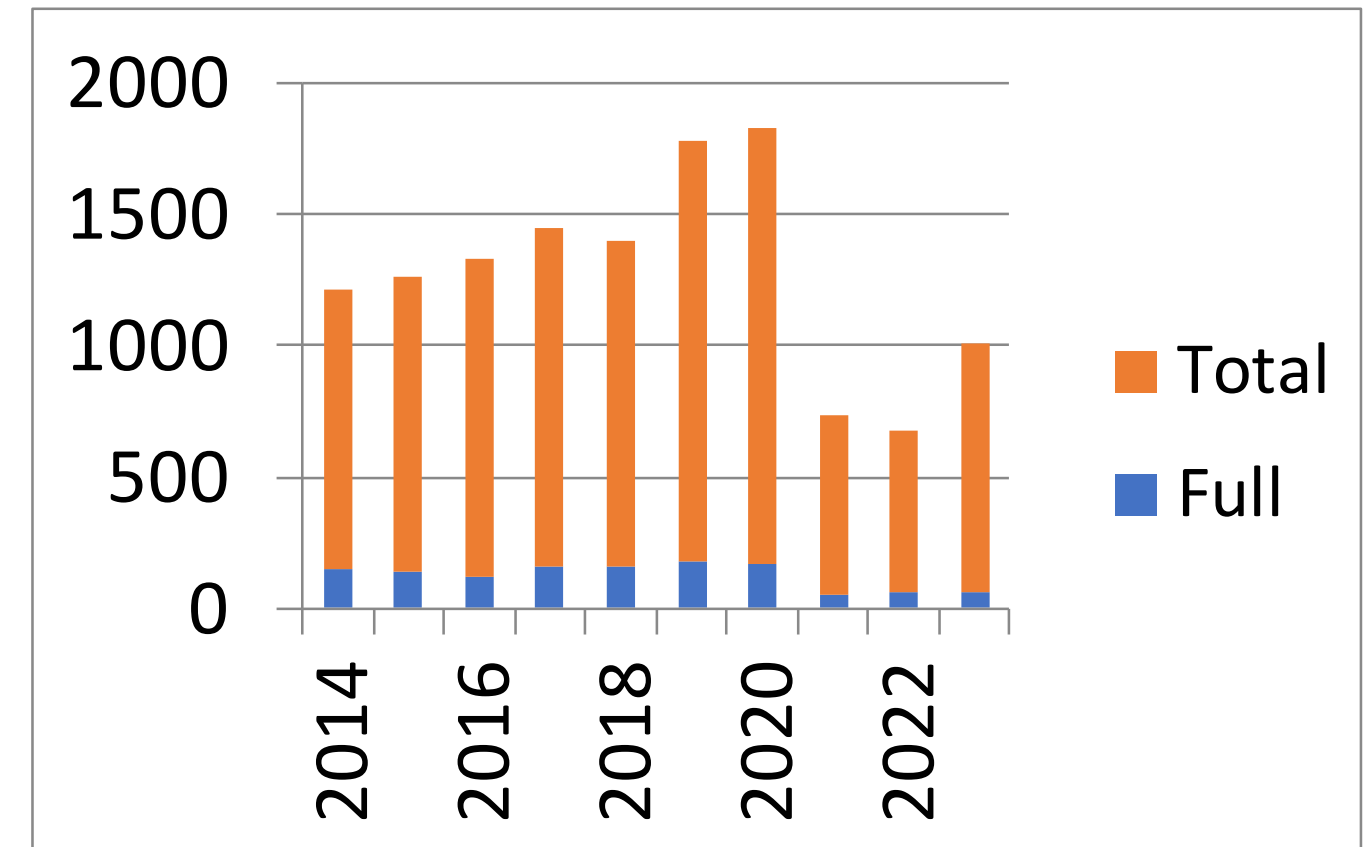
- Stratex Solutions, Kansas City
- Walden University, Minneapolis
- Mike Belter, Columbus
- Jan Garfield, Virginia



Learn. Share. Connect.

2023 Alliance Statistics

- 29 Baldrige-based programs serving all 50 states and US Territories
- 941 – Applications received (up from 617)
 - 63 full 50 page (up from 59)
- 998 – Examiners trained (up from 970)
- 14 – Top Level Recipients
- 10 – Conferences (hosted 1543 attendees)
- 25 – Paid staff (up 4), 184 non-examiner volunteers
- ~\$9M* – Combined budget
 - * estimate



Alliance 2023 Plan on a Page



Purpose

To inspire individuals, organizations, and communities across the US and the world learn, implement, and achieve performance excellence [or higher levels of performance]

Mission

To strengthen Alliance Members through training, mentoring, collaboration, and sharing of resources, best practices, and service offerings

2023 Strategic Priorities

1. Define Alliance Identity (& update Org Profile)

- Identify Customer Groups & their key requirements
- Identify Alliance Products and Requirements
- Review/revise:
 - Vision, Value Prop, Core Values
 - Competitor/collaborator info

2. Improve Operations & Core Processes

- Mobilize Communities Committee (in progress)
- Define how we operate (bylaws/business model, budget, finalized scorecard etc.)
- Identify needed paid Staff roles (to support Alliance)
- Collaboration/Alliance University

3. Improve Awareness of Alliance/Baldrige (Marketing)

- Rebrand (aligned with COE and Enterprise, as possible)
- Redesign Website

4. Define, Promote & Advance Alliance Role in Baldrige Enterprise

- Launch Baldrige Transformation Committee & participate in BPEP/Enterprise redesign

Revision 19Jun2023 – DRAFT, not approved

Vision

To be the premier resource for a thriving Baldrige community.

Value Proposition

The Alliance for Performance Excellence is a collaborative network that provides members with credibility as well as access to resources and knowledge that strengthen their ability to engage and deliver Baldrige-based services to customers.

Core Values

Collaboration- Cooperatively working with others in mutually beneficial relationships.

Passion for Excellence- Achieving excellence through innovation, agility and continuous improvement.

Ethics- Acting with integrity and principles.

Knowledge Growth - Continuously increasing and sharing our knowledge.

Customer Focus- Serving the needs and acting on behalf of our members.

Scorecard (See recommendations from March BOD discussion in Notes below)

Member Engagement (aligned with Mission)

- Member Satisfaction
- Members in Good Standing (%)
- Programs Receiving Dues Discount (%)
- Utilization of Alliance Services (# of LMS users)
- Utilization of Alliance Services (roundtable attendance)

Building Lasting Stakeholder Relationships (aligned with Purpose)

- Baldrige Fall Conference Attendees
- Conference Satisfaction
- Social Media (posts/views)
- Mailing Contact List
- Conference Sponsorships (#/\$)

Financial Stability (aligned with 990)

- Net Operating Income
- Conference Profit Margin
- Current Assets or Days Cash on Hand
- Achievement of Strategic Priorities (%)

Alliance Updates

- Supporting Baldrige Re-Imagined effort and beginning Alliance Transformation
- Beginning Branding study
- Beginning to plan for the 2024 Baldrige Fall Conference, **October 29-30** (with Communities of Excellence 2026 conference October 28-29) in **Coral Gables, Florida!**
- To explore the value of getting started (or accelerating) your journey to excellence using Baldrige, contact your Alliance member program at <http://baldrigealliance.org>



Learn. Share. Connect.

communities of excellence²⁰²⁶



“For America to sustain its vitality, promote opportunity, and create a more equitable society during its second 250 years of existence, we must improve the performance of communities and the people who lead and live in them.”



Stephanie Norling
Executive Director
Communities of
Excellence 2026

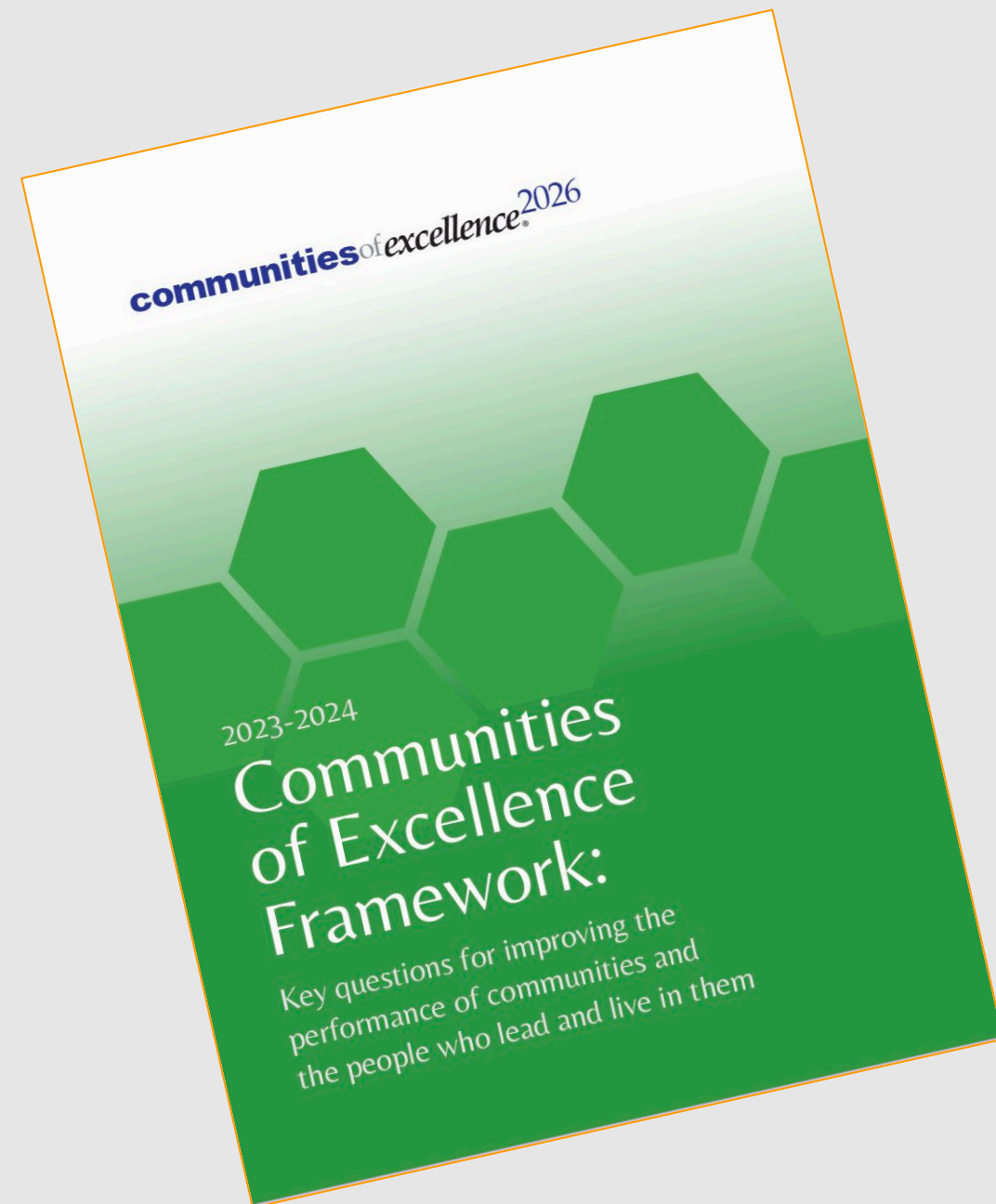
Who We Are

communitiesof*excellence*²⁰²⁶

A nonprofit organization committed to improving the quality
of life for all residents at the community level

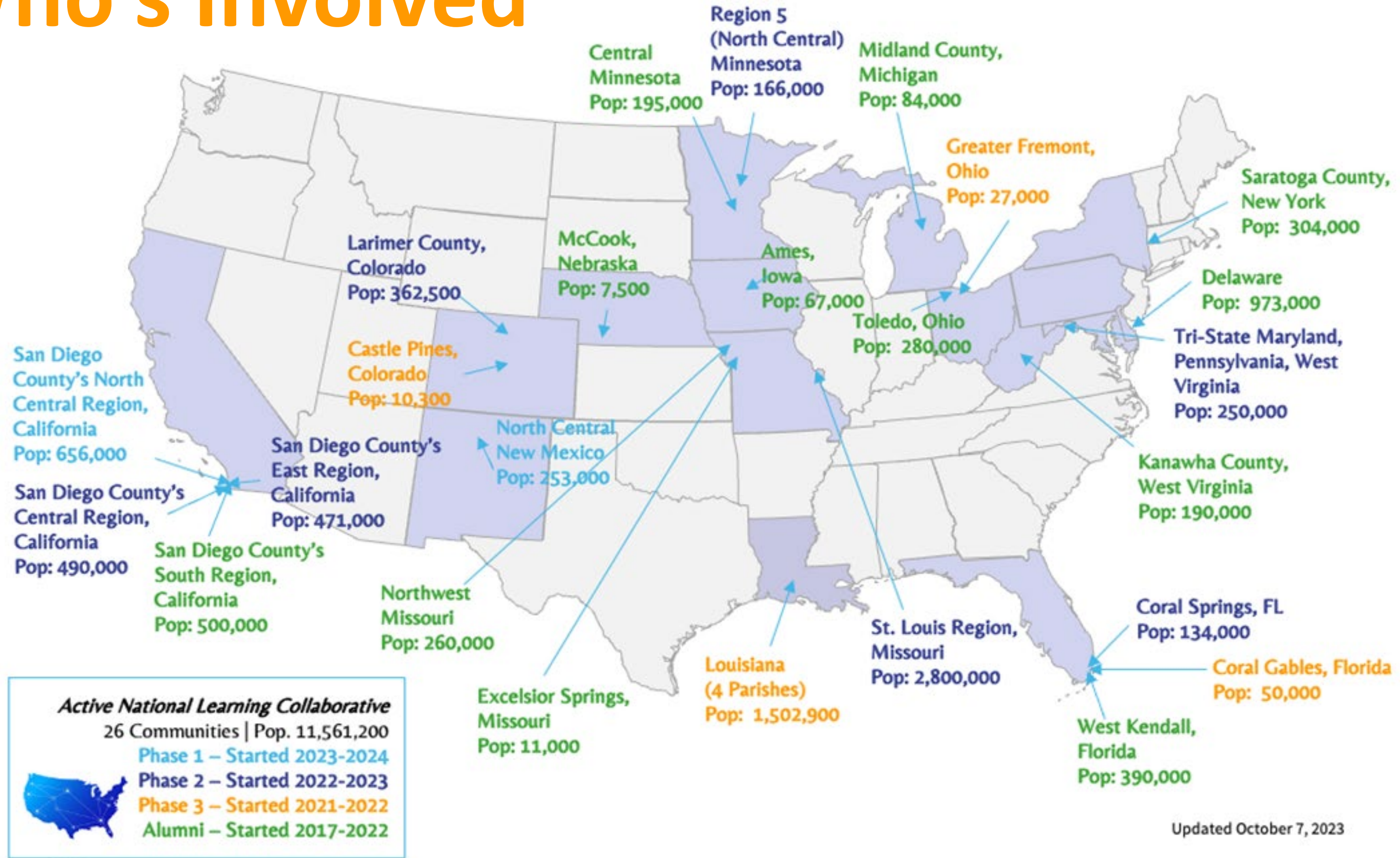
by assisting communities in implementing the Baldrige-based Communities of Excellence Framework as a roadmap for addressing the most pressing community challenges and opportunities with systematic thinking and action, inclusivity, collaboration, and a commitment to performance excellence.

2023-2024 Communities of Excellence Framework








- ◆ 4th and most comprehensive revision to the framework since 2013.
- ◆ Six-month effort with over 100 voices contributing
- ◆ Alignment to Baldrige Framework 2022-2023 Revision
- ◆ Equity Task Force – Six national DEIA leaders

Who's Involved



COE Common Community Scorecard

THE INDICATORS (a.k.a. Primary or KEY Metrics)

 Health	Life Expectancy
 Education	HS Graduation Rate
 Economy	Median Household Income
 Housing	Homes with Suboptimal Conditions
 Quality of Life: Social and Community	Adults with 14+ “Not Good” Mental Health Days Per Month

The Common Community Scorecard Toolkit

communities of excellence 2026 UNIVERSAL COMMUNITY SCORECARD TEMPLATE | 7.1(1)

ANYTOWN, USA COMMUNITY SCORECARD

Anytown, USA is committed to fostering a safe and healthy community. We measure our long-term impact using the following key metrics:

Health

Life Expectancy: Do people live a healthy, full life?

Why It Matters: Life expectancy refers to the average number of years a person can expect to live, based on the year of their birth. Many factors like economic stability and access to quality education, housing, and healthcare impact our overall health and life expectancy.

Where to Find the Data: Life expectancy is available from the National Center for Health Statistics. Learn more at [nhlfi.org](#).

Education

High School Graduation: Are people prepared for the jobs of the future?

Why It Matters: A high school diploma is a person's first step toward economic stability and a better life. High school graduation rates are a key indicator of a community's economic vitality and quality of life.

Where to Find the Data: High school graduation rates are available from the U.S. Department of Education. Learn more at [countyhealthrankings.org](#).

communities of excellence 2026 COMMON COMMUNITY SCORECARD TOOLKIT Cascading Metrics

This resource is a companion to the Communities of Excellence Framework as a component of the Common Community Scorecard Toolkit. Communities of Excellence 2026 has established a Universal Scorecard Template (See separate document) of results that value of benchmarking participating communities across the country.

Here is the summary table of the indicators included:

Health	Life Expectancy
Education	HS Graduation Rate
Economy	Median Household Income
Quality of Life: Social and Community	Adults with 14+ "Not Good" Mental Health Days Per Month
Quality of Life: Housing	Homes with Suboptimal Conditions

These five primary indicators have been chosen based on their long-term impact measurement and free access to data by any community size. They are high-level indicators that also demonstrate the interconnected and interdependent nature of the four domains: Safety, Educational Attainment, Economic Vitality, and Quality of Life.

In addition to these primary indicators, you may wish to select additional cascading metrics in each domain to tell a more complete story over time. This resource is a reference list of cascading metrics that are interconnected with the primary measure for each domain. For this toolkit, best practices suggest tracking no more than five metrics in each domain. The indicators on this list are not intended to be used as a checklist. Please note that because some data will be collected from state and local data sources as indicated. Please note that because some data will be collected from state and local data sources as indicated. Please note that because some data will be collected from state and local data sources as indicated. Please note that because some data will be collected from state and local data sources as indicated.

When possible, it may be appropriate and helpful to view data by additional levels of segmentation including but not limited to age, socioeconomic status, and geographic area to ensure that equitable outcomes are being achieved across all demographics and diverse communities. Communities of Excellence 2026 continues to seek best practices for measuring equity across multiple dimensions including historical legacies, awareness, voices, access discrimination, output differences, and disparate impacts. Future tools will provide guidance and recommendations for how to use this resource. It is simply a suggested tool and resource available to you.

© 2022, Communities of Excellence 2026

communities of excellence 2026 UNIVERSAL COMMUNITY SCORECARD TOOLKIT

ECONOMIC VITALITY - MEDIAN HOUSEHOLD INCOME

Follow the instructions below in the DATA SOURCE section to access the local data for your community. Use the instructions below in the GRAPH section to update the graph below will update automatically.

Year	Anytown	State	National
2018	\$57,521	\$57,422	\$60,293
2019	\$59,123	\$59,597	\$62,843
2020	\$60,897	\$62,843	\$64,994

Median Household Income

DATA SOURCE
Follow the instructions below to access the data for your local community and/or state.
Step 1: Use this link to directly access the data for your local community and/or state: <https://data.census.gov/cedsci/table?q=MedianHouseholdIncome&tid=ACST1Y2020.S1901>
OR visit data.census.gov and enter S1901 in the search box. Select the link for TABLE S1901.
Step 2: Select the GEOGRAPHY filter on the left toolbar.

GRAPH
Cut and paste this graph into documents and presentations. The font and colors may be edited to reflect the branding of your community excellence group.

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communities of excellence 2026 COMMON COMMUNITY SCORECARD TOOLKIT

Housing

Substandard Housing: Do people have a safe place to live?

Why It Matters: Poor housing quality is linked to injuries, chronic disease, and childhood development. This measure includes homes that are overcrowded, may not have complete plumbing or kitchen facilities, OR cost its occupants more than 30% of their income.

This data calculated using information reported by the U.S. Census Bureau.

Learn more at countyhealthrankings.org

Homes with Suboptimal Conditions

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communities of excellence 2026 COMMON COMMUNITY SCORECARD TOOLKIT Six Steps Towards Better Data Visualization

- Keep it simple.** It might be tempting to add extra elements like fancy fonts or pictures to the graph, but don't do it! These additions will clutter up the visualization and distract from the real star - the data. Choose the simplest fonts within your brand guidelines. If you want to call attention to something, try using a callout box instead.
 - High School Graduation Rate (Incorrect: High School Graduation Rate)
 - High School Graduation Rate (Correct: HIGH SCHOOL GRADUATION RATE)
- Choose colors carefully.** Too many colors or not enough can make a chart hard to read. Follow these guidelines to make sure your chart comes to life with just the right amount of color.
 - Only use one color for each category of data.
 - Limit colors to six or less in a single visualization.
 - Avoid colors that are too high in contrast (like red/green for example) or too low in contrast (light blue/very light blue).
- Trust your intuition.** There's a rhyme and reason to everything and charts shouldn't be any different. When planning the layout for a chart, order the data by its natural hierarchy (sequentially, alphabetically, or numerically). The same goes for color. Some colors have common associations like red for hot or blue for cold. Intuitive design will help stakeholders make sense of the data more easily.
- Label with care.** Labeling a chart correctly ensures that all of the necessary information is easily visible and understandable. Each chart should have a clear, easy-to-read title. When labeling the data within the chart, avoid vertical or diagonal text. Labeling lines or data points directly (instead of using a legend) avoids confusion.

communities of excellence 2026 COMMON COMMUNITY SCORECARD TOOLKIT Data Literacy

This resource is a companion to the Communities of Excellence Framework as a component of the Common Community Scorecard Toolkit. Communities of Excellence 2026 has established a Universal Scorecard Template (See separate document) of results that all communities are requested to track for the value of benchmarking participating communities across the country.

ANALYSIS: The examination of facts and data to provide a basis for effective decisions. Analysis often involves determining cause-effect relationships

BENCHMARKS: Processes and results that represent the best practices and best performance for similar activities or initiatives, inside or outside your community

BIAS: Systematic and/or human errors that occur in data analysis or interpretation

CHANGE OVER TIME: How much an indicator changes between measurements taken at different times

PERFORMANCE PROJECTIONS: Estimates of future performance

QUALITATIVE VS. QUANTITATIVE DATA: Qualitative data is non-numeric information. Quantitative data is information that can be counted or measured. Considering both are important. Qualitative is what ensures inclusivity of many diverse perspectives

RANK: Compares relative position of a geographic area based on a particular metric

TRENDS: Numerical information that shows the direction and rate of change of your community's or community excellence group's results or the consistency of its performance over time

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Membership Levels At-a-Glance

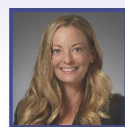
BENEFITS	INDIVIDUAL		BUSINESS/ORGANIZATION			COMMUNITY	
	Supporting \$500/yr	Collaborating \$1,500/yr	Forming \$5,000/yr	Accelerating \$15,000/yr	Sustaining \$20,000/yr	Learning Collaborative \$25,000/yr	Alumni \$5,000/yr
The Communities of Excellence Framework	✓	✓	✓	✓	✓	✓**	✓**
Website Recognition	✓	✓	✓	✓	✓	✓	✓
Newsletter	✓	✓	✓	✓*	✓*	✓	✓
Special Discounts**	✓	✓	✓	✓**	✓**	✓	✓
Exclusive Trainings**	✓	✓	✓	✓**	✓**	✓	✓
Social Impact Assessment				✓	✓**	✓	✓
Social Marketing/Technology Assessment				✓	✓	✓	✓
Coaching Training Program Access					✓	✓	✓
Online Community Scorecard						✓	✓

* Accelerating and Sustaining Members receive an online spotlight

** Number, hours, and value of offerings increase across membership levels.

communities of excellence²⁰²⁶

EMPOWERING MEANINGFUL SOCIAL IMPACT:
Welcome to the Communities of Excellence Newsletter!



Message from Stephanie

Stephanie Norling, Executive Director,
Communities of Excellence 2026

Welcome to the inaugural edition of the **Communities of Excellence Newsletter!** We are thrilled to share our vision for communities across America and embark on this journey of knowledge-sharing, collaboration, and inspiration with all of you. Our aim is simple yet profound: to **encourage, support, and celebrate** community performance excellence within and across the diverse communities that make up our nation. With the Communities of Excellence (COE) Framework as their roadmap, communities are uniting individuals, groups, and sectors under a common vision while empowering their collective expertise and resources towards addressing our most pressing community challenges.



This newsletter will spotlight the extraordinary communities that are demonstrating meaningful social impact using the COE Framework. A deeper understanding on how these communities tackle issues like sustainability, education, access to healthcare, equity, and more.

Components of this and future newsletters will include:

- Impact Spotlights:** Discover the untold stories of individuals, organizations, and groups within communities who are leveraging their skills, knowledge, and passion to create lasting social impact.
- Collaborative Strategies:** Elevating the innovative approaches, tools, and strategies that successful community excellence groups employ to foster collaboration, generate

What's New with Us:

The 2023-2024 Revision of the Communities of Excellence Framework: The much-anticipated revision has been successfully completed, and we couldn't be more thrilled to unveil the changes that reflect our dedication to continuous growth and improvement. In addition to input from community leaders and our performance excellence colleagues, a national task force of DEI&A content experts contributed their insights and experience to help us ensure that the framework embodies the leading-edge practices for ensuring that excellence and equity are one and the same.

Inspire Fall Conference: We were delighted to see many of you on October 16-17 in Milwaukee, Wisconsin for two days full of sessions designed to be inspiring and informative. We heard from nationally known keynote speakers, learned about promising practices from communities that have adopted the COE Framework, and networked with like-minded colleagues from across the country.

Partnerships: COE conducted research on the needs our communities are facing, as a result we have identified specialty technical assistance teams to support you! We are proud to announce a new partnership with PMG Consulting and Tapp Network to further our impact and ability to reach more communities. Through collaborative and organizational development specialists and marketing and technology expertise we can help grow, accelerate and stabilize your work. To learn more please visit: <https://communitiesofexcellence2026.org/>.



WHY JOIN?
If you want to make an impact in your community and communities across the United States but don't know where to start, our membership program provides tools, resources, and access to professionals who share your passion for community transformation.

Coming Soon – COE “Examiner” Training



Benefits

Take advantage of this hands-on experience

- Increase your understanding of the Communities of Excellence Framework.
- Learn how community applications are evaluated and feedback is developed.
- Use this program’s tools and knowledge to support your organization or community excellence group.



Training takes place in June

4 Weekly Sessions | Fridays

June 14th, 21st, and May 5th 2-hour virtual sessions

June 28th – 2-hour self-study session

Panelist Questions and Discussion



Bob Fangmeyer
Director
Baldrige Performance
Excellence Program



Al Faber
President & CEO
Baldrige Foundation



Brian Lassiter
Chair
Alliance for Performance
Excellence



Stephanie Norling
Executive Director
Communities of Excellence 2026



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