



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:
Baldrige Enterprise Update

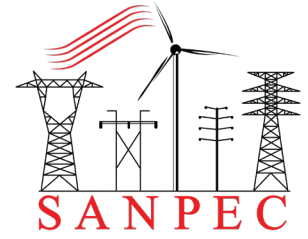
June 26, 2024



Mac Baldrige Society
Institute Trustees



A Special Thanks to Our Donors & Sponsors!



Opening Remarks/Agenda

Introduction

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

Baldrige Performance Excellence Program

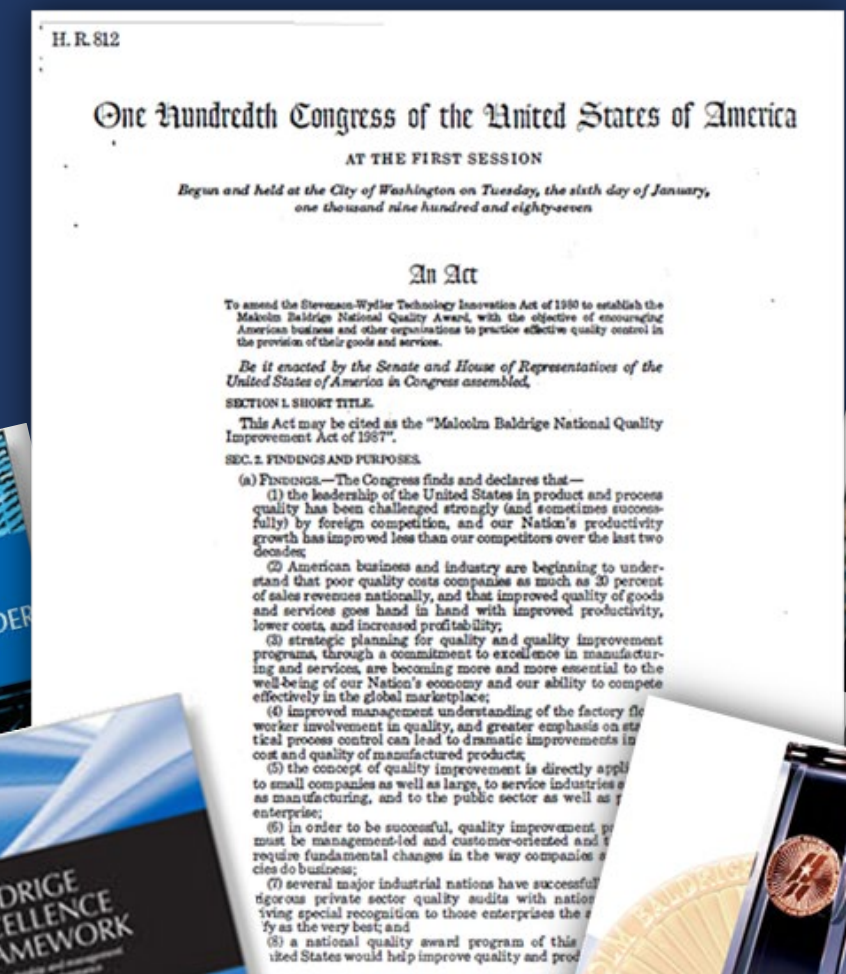
Robert Fangmeyer, Director BPEP



Baldrige Program Purpose/Mission

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

- Recognizing role models
- Fostering the adoption of proven practices
- *[Fostering a nation-wide ecosystem]*



Baldrige Program Update

Baldrige Reimagined

- Progress on Key Elements
- Transform the Baldrige Award
- 2024 Award Process



1. Enhance Relevance

- ✓ Refocus the program, award, and other offerings on a recognized need/national priority: enhancing “resilience and long-term success”
- ✓ Identify and strengthen connections to, and support of NIST/DOC priorities

2. Transform the Award

- ✓ Eliminate/lower barriers to participation, but retain rigor and integrity
- ✓ Redesign evaluation to focus on identifying role models
- ✓ Enhance and expand recognition opportunities
- Proactively recruit high-performing, industry leading organizations

3. Enhance Accessibility

- Make current offerings more user friendly and accessible, better leveraging technology
- Design future offerings to address specific needs, leveraging technology and various channel partners for distribution

4. Strengthen the Baldrige Ecosystem

- Establish strategic partnership with NIST MEP
- Establish other strategic collaboration/partnership opportunities (such as AME, ASQ, EDA, SBA, ISO/ANSI, etc)
- Enhance alignment, integration, and efficacy of the Baldrige Enterprise

Transform the Baldrige Award

1. Recognize role models of resilience and long-term success
“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.”
2. Eliminate/lower barriers to participation
 - Simplify the award criteria and minimize application requirements
 - Streamline the evaluation process & cycle time
 - Modify the fee structure
3. Create a pre-screen process that leverages existing industry recognitions
 - Drucker Institute’s Company Rankings
 - JUST Capital’s Company Rankings
 - Others?
4. Enhance and expand recognition opportunities
 - Site Visited organizations recognized as “finalists”
 - Incorporate “Special Recognition for...”



2024 Award Process

- Application Process
- Key Milestones
- Application Evaluation
- Output



Application Process

New On-line Application Platform

Primary focus is on key performance results...

- Limited number of charts/graphs/images
- Limited descriptive text
- Requested trends, comparisons, and segmentation
- Organized under 8 criteria sections

One process question per criteria section

- However, key processes not evaluated until site visit

Application Forms/Eligibility

Organizational Profile

Results provided for:

- Leadership and Governance (4)
- Strategy (3)
- Operations (4)
- Operational Continuity (3)
- Workforce (6)
- Customers and Markets (4)
- Community Engagement (2)
- Finance (2)

Key Milestones

Application Evaluation (April 23 to June 4)

- Independent Analysis
- Team Consensus

Site Visit Determination (Judges – June 20)

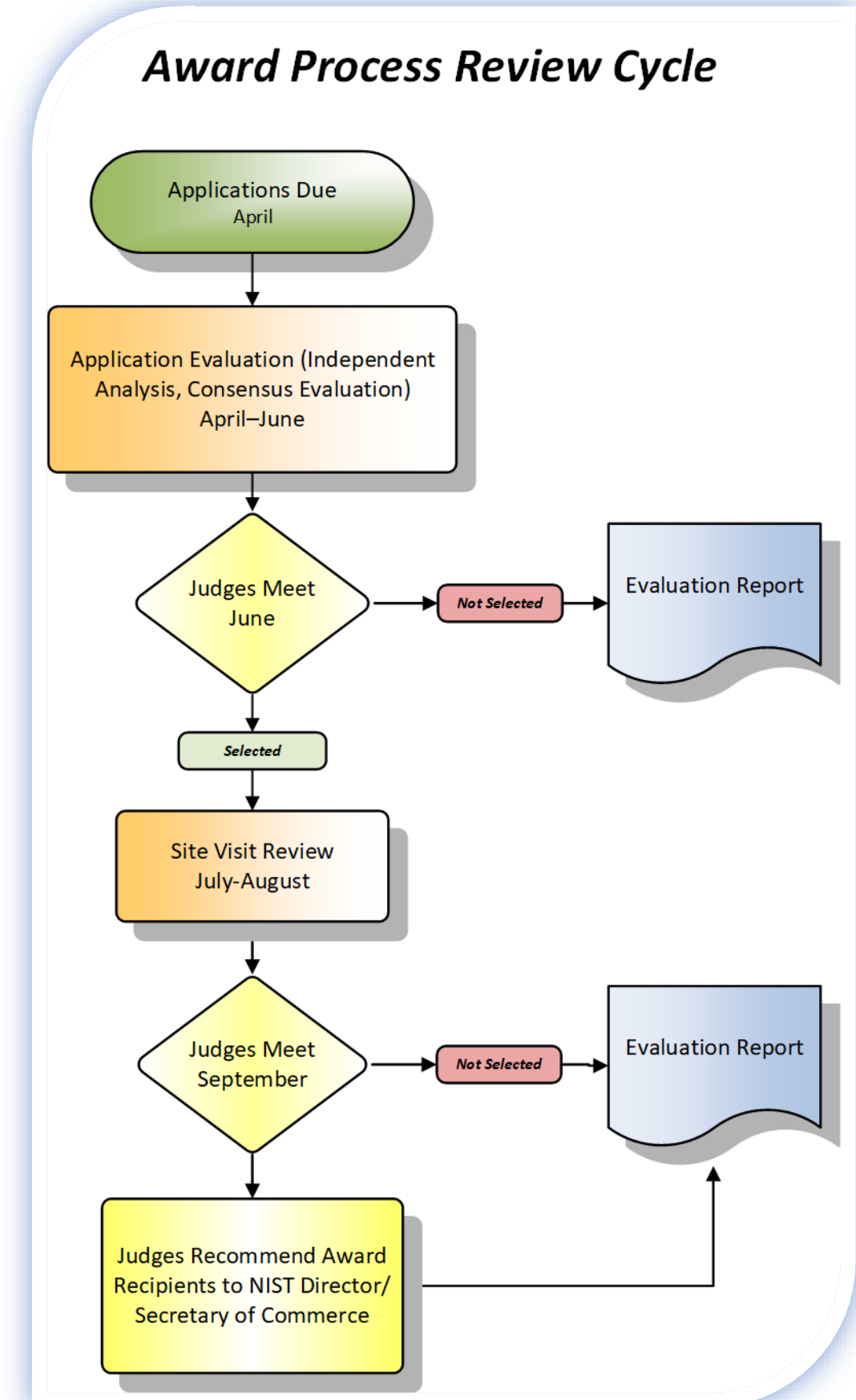
- Blinded summary data from Consensus Review

Site Visit Review (June 21 to Aug 9)

- Applicant data call (due 7/10)
- Planning and preparation (until 7/21)
- Virtual and in-person engagement (7/23 – 8/1)
- Post site visit activities (until 8/9)

Award Recommendations (Judges – Sept 9 to 13)

- Review all available data and information in advance



Application Evaluation

- 5 experienced examiners per team
- Simplified rubric used to evaluate results
- Individual Analysis using standard worksheets
- Team consensus on
 - Evaluation Factor ratings and Summary Evidence
 - Criteria Question ratings
 - Criteria Section ratings and Rationale

	Levels and Trends	Comparisons	Relevance
Low (Reactive)	Results are not responsive to the question or demonstrate adverse performance.	Comparisons to competitors or industry benchmarks are not presented or demonstrate inferior performance.	Results are not presented for areas of importance.
Med (Mature)	Results responsive to the question are presented and demonstrate satisfactory performance.	Comparisons to competitors or industry benchmarks are presented and demonstrate equivalent performance.	Some results presented are for areas of importance.
High (Role Model)	Results responsive to the question are presented and demonstrate favorable performance.	Comparisons to competitors and industry benchmarks are presented and demonstrate superior performance.	Most results presented are for areas of importance.

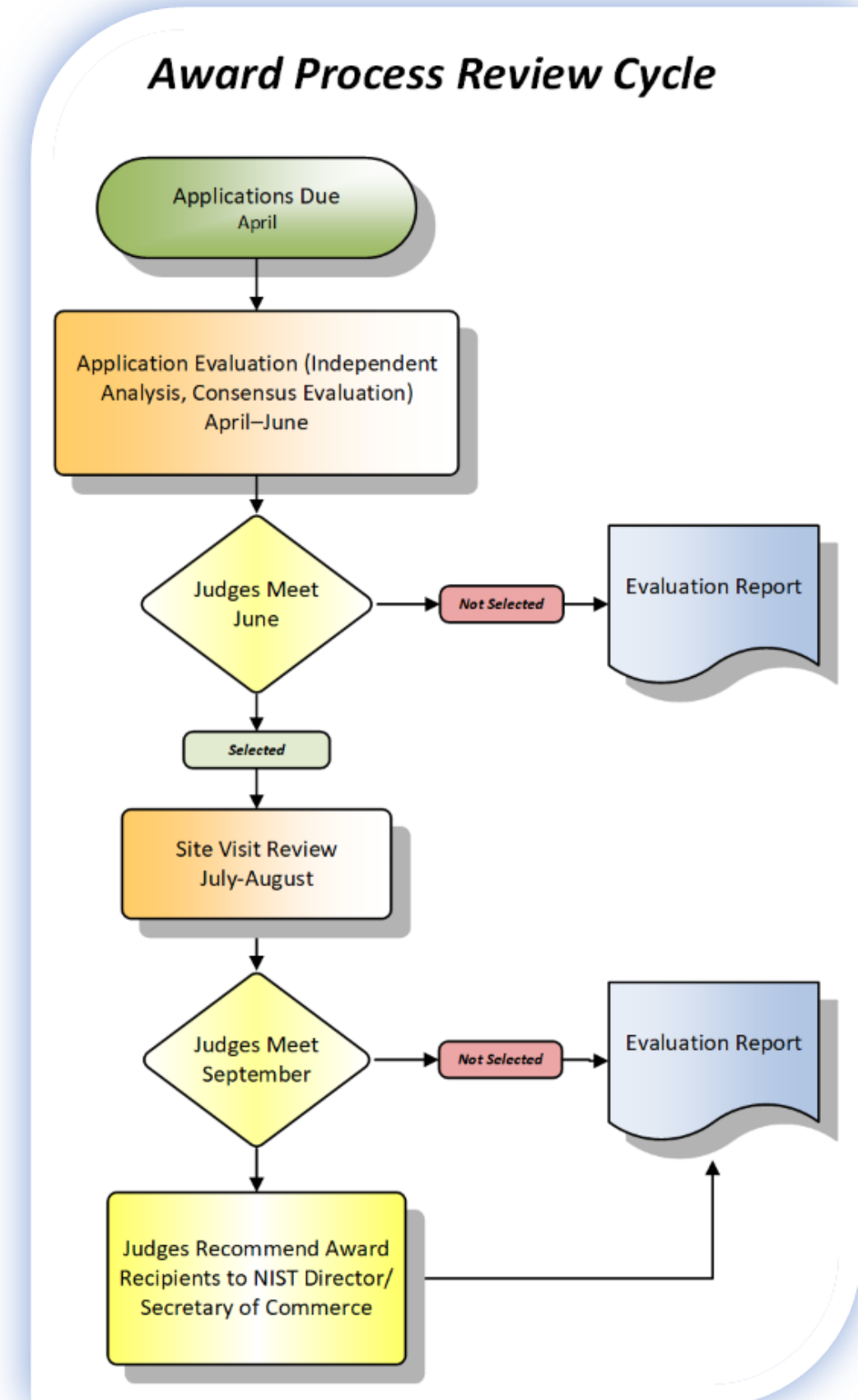
High (Role Model)	Results responsive to the question are presented and demonstrate favorable performance.	Comparisons to competitors and industry benchmarks are presented and demonstrate superior performance.	Most results presented are for areas of importance.
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Team Consensus

Leadership/Governance		Levels and Trends	Comparisons	Relevance	Supporting Evidence	Overall
1	Briefly describe and/or depict your Leadership and Governance processes and/or systems, including processes for succession planning and for two-way communication.	<i>Process questions not evaluated before site visit. Provides context for results and will be useful for Site Visit planning</i>				
2	What are your results for the effectiveness of senior leaders' engagement and communication by key workforce segments (ex. workforce ratings of leaders)?	High	Medium	High	<p>L/T: Leadership effectiveness and communication are two metrics in the annual WF Sat Survey; Both demonstrate consistently high levels,</p> <p>Comp: Better than industry average, but only slightly better than best competitor.</p> <p>Rel: Good segmentation, but missing breakout of hybrid WF.</p>	High
3	What are your results for the effectiveness of senior leaders' engagement and communication by key customer and stakeholder segments?	High	High	Medium	<p>L/T: Despite covid dip, Top 5 customers (85% of business) and Partner organizations demonstrate consistently high and</p> <p>Comp: Significantly better performance than next best competitor;</p> <p>Rel: Not evident that there is much engagement with remaining 15% of customers, or that</p>	High
4	What are your results for leadership and governance accountability (e.g., internal and external audits and assessments, certifications and accreditations)? [Comparisons not expected]	Medium	N/A	Medium	<p>L/T: Internal and external audit results are consistently very good, but</p> <p>Rel: Data is not presented for certifications referenced in the OP.</p>	Medium
5	What are your results for grievances and complaints, including safety, EEOC and ethics?	High	Medium	Medium	<p>L&T: Results presented show favorable levels and trends for all, with improved performance during pandemic that is now moderating back to pre-pandemic levels;</p> <p>Comp: Not all measures have comparisons, but those shown are above 75th percentile.</p> <p>Rel: App states they do not track ethics as a separate measure, reflected in other data</p>	Medium
Leadership and Governance Overall Rating					<i>Need clear rationale for the overall rating for Leadership and Governance based on ratings and supporting evidence--not just numeric count or average of the ratings.</i>	HIGH

Site Visit Review

- Purpose of Site Visit
- What's changed
- What will be evaluated
- How it will be evaluated
- Outputs



Verify key results, assess processes/systems, and explore role-model characteristics

- Request and review additional data and information prior to, and as needed, during the site visit
- Engage in dialogue with applicant leadership and others as appropriate
- Conduct Highest-Ranking Official (HRO) interview
- Ensure adequate information for Judges

What's different?

- 6 Examiners per Team
- Hybrid approach
- Simplified evaluation rubric
- Standardized set of “deep-dive” and “validation” questions
- Need to explore and document potential Best Practice Spotlight recognition

Process Evaluation

- Simplified rubric
- Considers all information provided and learned during site visit
- Team consensus on
 - Evaluation Factor ratings and Summary Evidence
 - Criteria Section ratings and Rationale
 - Results of process validation including supporting evidence for all “NO”s

	Approach	Deploy	Evaluate	Improve	Align and Integrate
LOW (Reactive)	Approaches not present or not systematic (ad hoc)	Limited or no deployment; missing many important segments/stakeholders	Inconsistent or missing evaluation of key approaches.	No evidence of Improvement of key approaches based on evaluation.	No alignment or integration
MEDIUM (Mature)	Most key approaches are systematic (regular and consistent); some are not.	Deployed to most key segments/ stakeholders.	Most key approaches are systematically evaluated using data and information.	Most key approaches demonstrate improvement based on evaluation.	Alignment with organizational needs
HIGH (Role Model)	All key approaches are systematic (regular and consistent).	Deployed to all key segments/stakeholders.	All key approaches are systematically evaluated using data and information.	All key approaches demonstrate improvement based on evaluation and some innovation.	Alignment with organizational needs and integrated with related processes

Site Visit Outputs

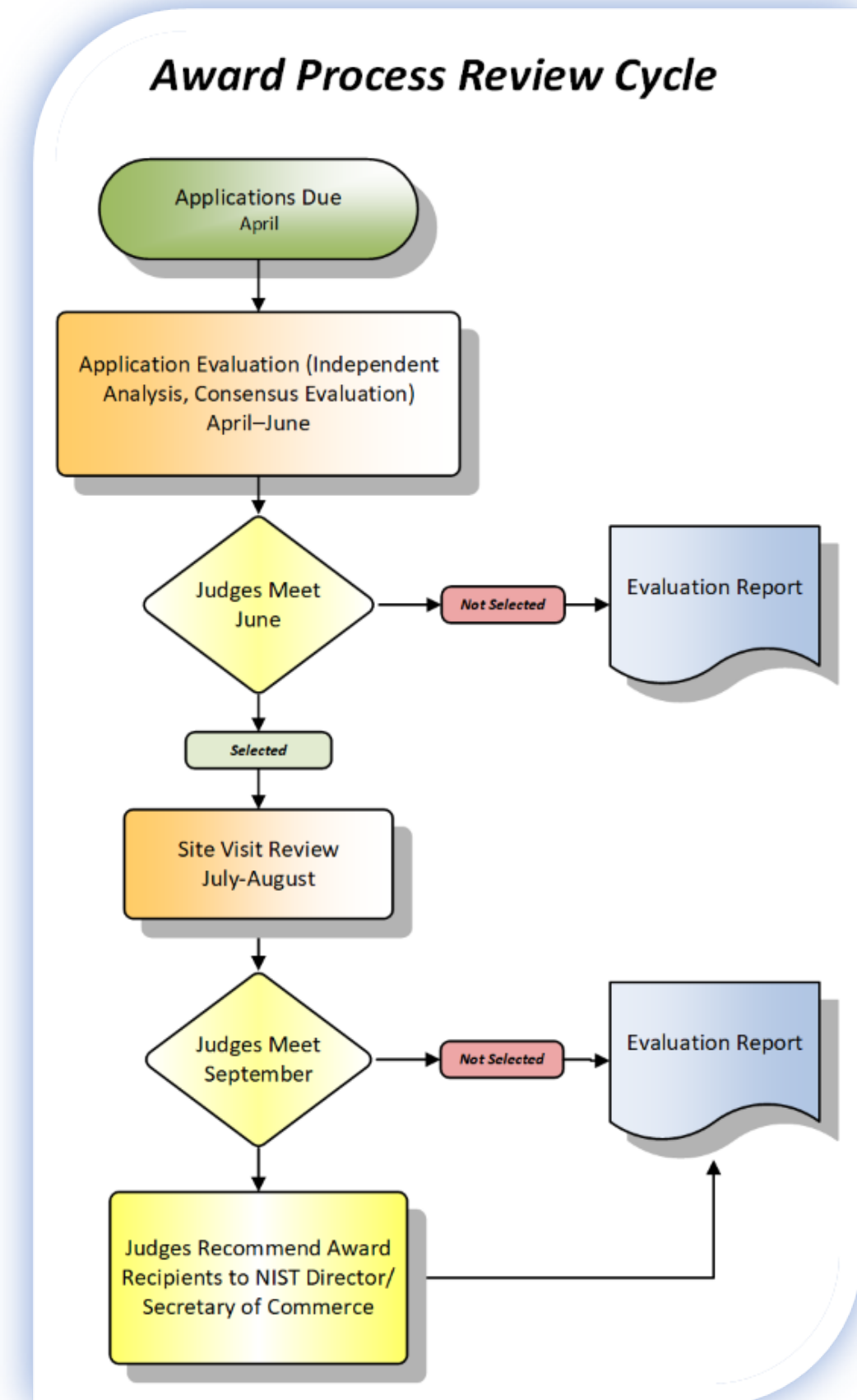
1. Updated evaluation of results, as appropriate
2. Evaluation of key processes to include rating of evaluation factors and supporting evidence
3. Results of process validation including supporting evidence
4. Overall process and results ratings for each criteria section based on all evidence compiled throughout the process
5. Which key processes/activities examiners think might be worthy of special recognition

Award Recommendations

Role models of resilience and long-term success

Virtual Judges Meeting- September 9 to 13

- Avoid all real or perceived conflicts
- Review all data and information in advance
- Dialogue with Examiner Team Leader
- Dialogue with each other
- Consider potential podium issues
- Vote – Super-majority needed
- Recommendations made to NIST Director, then Secretary of Commerce



2024 Award Applications



- New online application created inhouse
- 29* eligibility applications submitted
- 16 applications received
- ~170 Examiners trained
- 80 Examiners utilized through consensus
- ___ advanced to site visit

- Early lessons learned

Questions?

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

Platinum Transparency 2024
Candid.



"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"



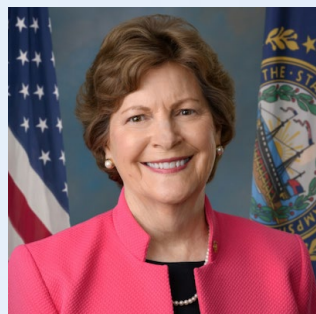
"To be recognized around the world as the premier foundation for the promotion of performance excellence in all sectors of the economy."

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.



Advocacy Update

Commerce, Justice, Science, and Related Agencies
118th Congress



Jeanne Shaheen,
D-NH (Chair)



Jerry Moran,
R-KS (Ranking)

Jack Reed, Rhode Island
Chris Coons, Delaware
Brian Schatz, Hawaii
Joe Manchin, West Virginia
Chris Van Hollen, Maryland
Jeff Merkley, Oregon
Gary Peters, Michigan
Martin Heinrich, New Mexico



Lisa Murkowski, Alaska
Susan Collins, Maine
Shelley Moore Capito, W. Virginia
John Kennedy, Louisiana
Bill Hagerty, Tennessee
Katie Britt, Alabama
Deb Fischer, Nebraska



Hal Rogers
R-KY (Chair)



Matt Cartwright,
D-PA (Ranking)

Robert Aderholt, Alabama
John Carter, Texas
Ben Cline, Virginia
Mike Garcia, California
Tony Gonzales, Texas
Andrew Clyde, Georgia
Jake Ellzey, Texas

Grace Meng, New York
C.A. Dutch Ruppersberger, Maryland
David Trone, Maryland
Joe Morelle, New York



UPDATE:
FY2024 Federal Budget Request
FY2025 In Progress....

Malcolm Baldrige Performance Excellence Program.—The recommendation includes up to \$2,700,000 for the Malcolm Baldrige Performance Excellence Program to provide the necessary funding for NIST to finalize new best practices and criteria framework for the authorized Baldrige Communities of Excellence program. The Committee encourages the program to build additional partnerships and self-assessment tools to assist organizations with cybersecurity risk management.

Fundraising



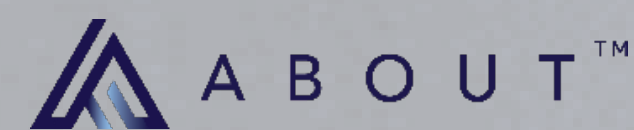
GuideStar (now Candid) Platinum Rating

The Foundation has achieved the 2024 Platinum Seal of Transparency Rating on Candid, the world's largest source of information on non-profit organizations. This rating places the Foundation in the top 0.1% of charities nationally in terms of transparency.

<https://www.aaaafoundation.org/who-we-are/guidestar-gold-rating>



Mac Baldrige Society Institute Trustees



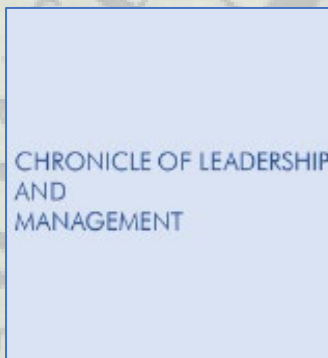


www.baldrigeinstitute.org

America's Best Investment

Thought Leadership

A System for Excellence:



Using the Baldrige Excellence Framework to Improve Organizational Resilience and Sustainability



The Baldrige Foundation Institute for Performance Excellence Presents:

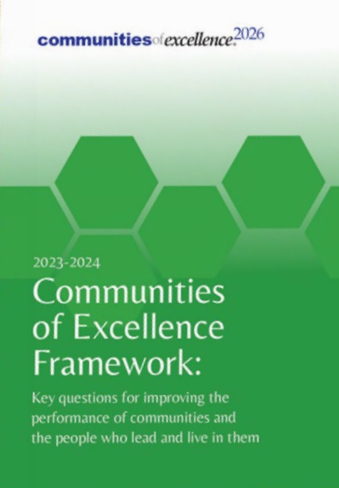
Promising Practices from a Community of Excellence: Developing a Scorecard for Community Performance Excellence



The Baldrige Foundation Institute for Performance Excellence

Presents:

State-Based Baldrige Programs: The Gateway to Performance Excellence



Communities of Excellence Framework:

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



Lean Healthcare Professional Certification

Presented to

[recipient.name]

For successfully completing and passing the SSGI/Baldrige Foundation Certified Lean Healthcare Professional (CLHP) Program



community of learners, we offer over 370 generalized courses that are specifically designed to support the unique demands of the 21st century learner. Let Baldrige turn your learning experiences into meaningful educational opportunities.

CEO Roundtables



Leader Dialogue Podcasts



Excellence in Education

The Baldrige Foundation Institute for Performance Excellence supports individuals and organizations around the world by providing quality educational programs.

Is Your Organization an Institute for Performance Excellence Partner?

Partners of the Baldrige Institute for Performance Excellence receive additional discounts on all of our training opportunities.

[Learn More About the Institute](#)

Our Programs

Lean Six Sigma Courses



Looking for training and certifications in Lean and Six Sigma? We offer a variety of industry-specific trainings, such as Lean Health Care Professional, as well as industry-agnostic trainings, such as Project Management, Agile, and Diversity, Equity, & Inclusion.

Strategic Planning & Management Training



Our training allows you to impart the full strategy management process into your everyday decisions. Make better decisions and grow by instilling the ability to think and act strategically in an ever-changing business landscape.

Degree Programs

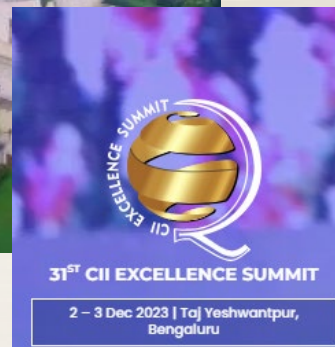


Earn your degree by enrolling in a degree program, including associates, bachelors, masters, or doctorate programs, through one of our Baldrige Foundation Institute for Performance Excellence Degree Partners.

International Outreach Initiatives



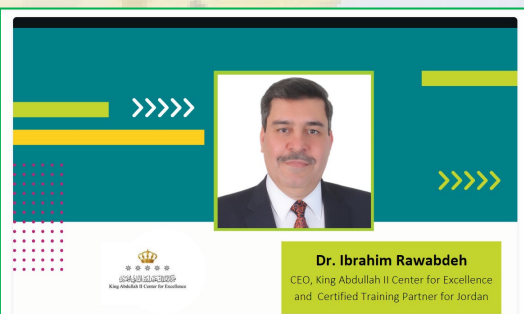
CII Institute of Quality Building Competitiveness of Industry



31ST CII EXCELLENCE SUMMIT
2 - 3 Dec 2023 | Taj Yeshwantpur, Bengaluru



Competitive & Sustainable INDIA @ 100 - Excellence Imperatives
24 : 09 : 21 : 59
COMING SOON



Dr. Ibrahim Rawabdeh
CEO, King Abdullah II Center for Excellence and Certified Training Partner for Jordan



Alliance for Performance Excellence Update



Learn. Share. Connect.

The Journey to Performance Excellence Starts Here

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

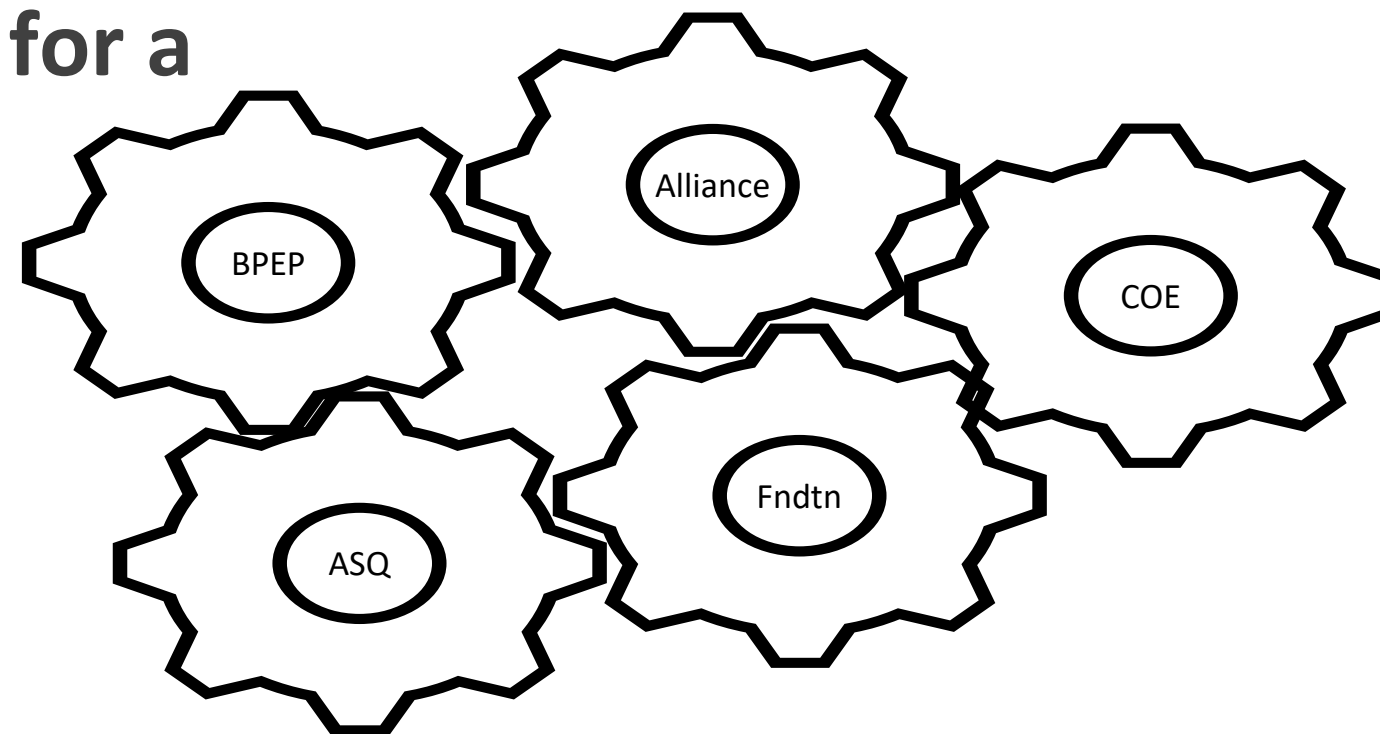
Find Performance
IMPROVEMENT
HELP NEAR YOU



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.
- **Core Values:**
 - Act with Integrity
 - Value People
 - Collaborate
 - Focus on Excellence

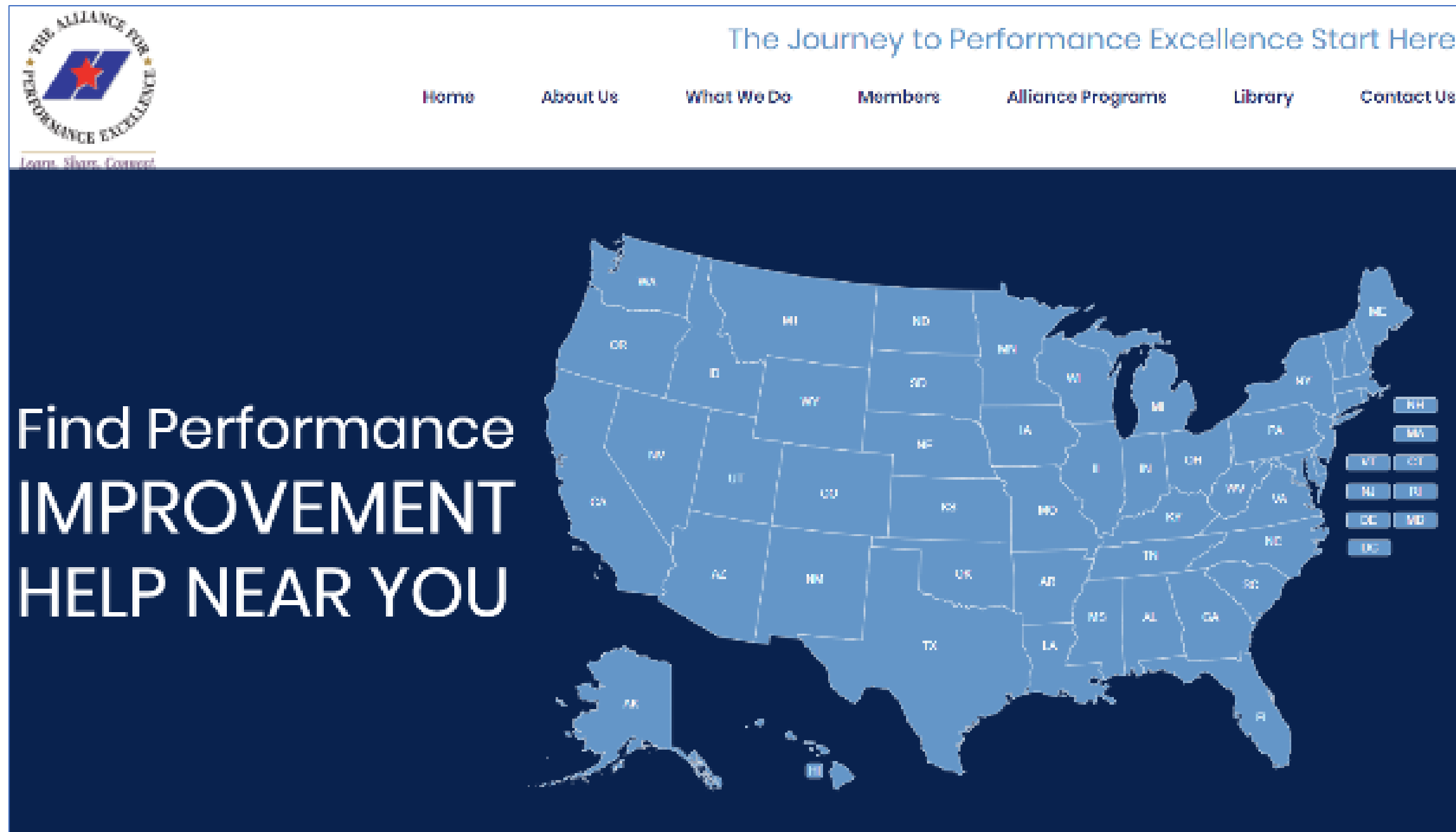


Learn. Share. Connect.

NEW!!

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, San Diego
- Sterling International, Kuala Lumpur

Other Members:

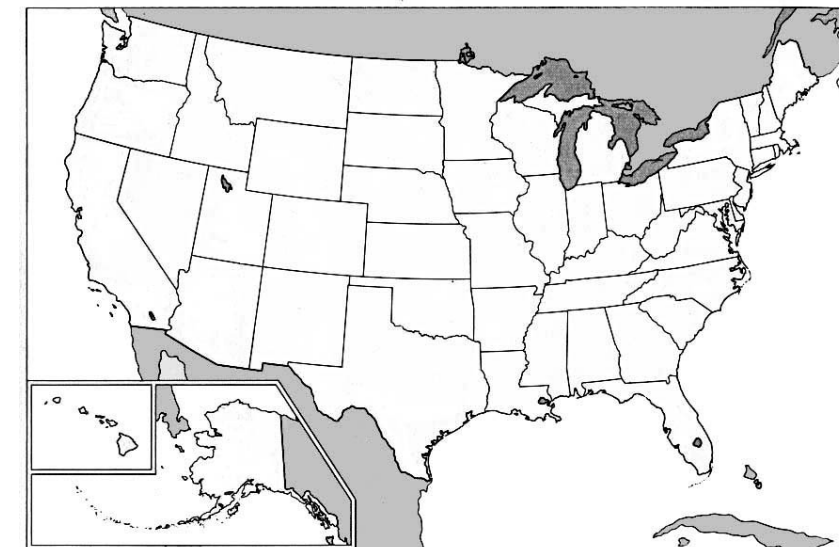
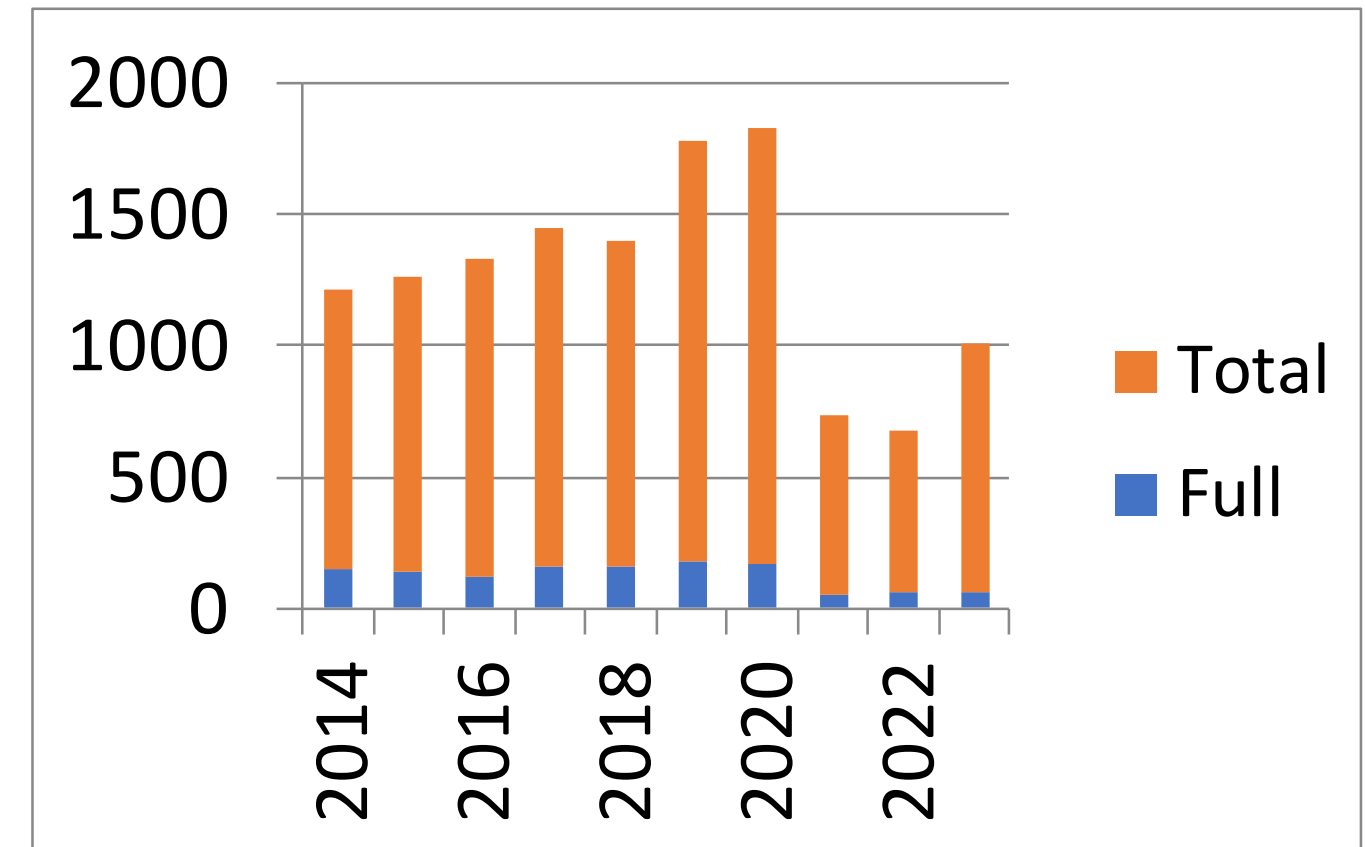
- Stratex Solutions, Kansas City
- Walden University, Minneapolis
- Mike Belter, Columbus
- Jan Garfield, Virginia



Learn. Share. Connect.

2023 Alliance Statistics

- 27 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



2024 Plan

EXCELLENCE



Purpose

To inspire individuals, organizations, and communities across the US and the world to learn, implement, and achieve higher levels of performance.

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.

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.

2024 Strategic Priorities

1. Changes due to implications of Baldrige Reimagine

- Reevaluate Top Tier requirements
- Develop discontinued tools (i.e. Case Study, AWMP)
- Determine future eligibility criteria
- Identify components of national process to be adopted by Alliance & pathway from Alliance programs to national

2. Operational effectiveness

- Contract part-time administrative position to support secretary, treasurer, committees, etc.
- Return to financial stability – breakeven or better

3. Host successful Baldrige Fall Conference

- Return to financial stability & increase attendance
- Contract part-time conference planning support

4. Alliance refresh

- Rebrand - update name/logo/colors/tag line
- Refresh website

Core Values



Act with Integrity: are honest, ethical, authentic, transparent and respectful.



Value People: show respect, professionalism, empathy, and inclusion for all people – members, customers, volunteers, and partners.



Collaborate: share ideas, best practices, resources, and achieve understanding with other members; partner with other organizations, and jointly solve problems.



Focus on Excellence: embrace systems-based improvement and learning for organizations and communities.

Alliance Scorecard	2023 Actual	2024 Target
Member Engagement		
Member Satisfaction - NPS	7.4	10
Members Good Standing (Comp. Criteria)	86%	90%
Dues discount % (Discounts/Dues)	36%	36%
Building Lasting Stakeholder Relationships		
Conference Attendance	256	350
Conference Survey Results - NPS	62	62
Conference Sponsorships/Exhibitors	\$3,700	\$5,000
Financial Performance		
Net Operating Income	-\$81,000	\$2,000
Net Income	-\$50,568	\$2,000
Conference Profit Margin	-\$31,093	\$30,000
Dues Collected	\$23,000	\$23,000
Current Assets	\$249,602	\$250,000

Learn More!...

- Attend the 2024 Baldrige Fall Conference, **October 29-30** (with Communities of Excellence 2026 conference October 28-29) in **Coral Gables, Florida!**
- 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

Foundation Statement



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.

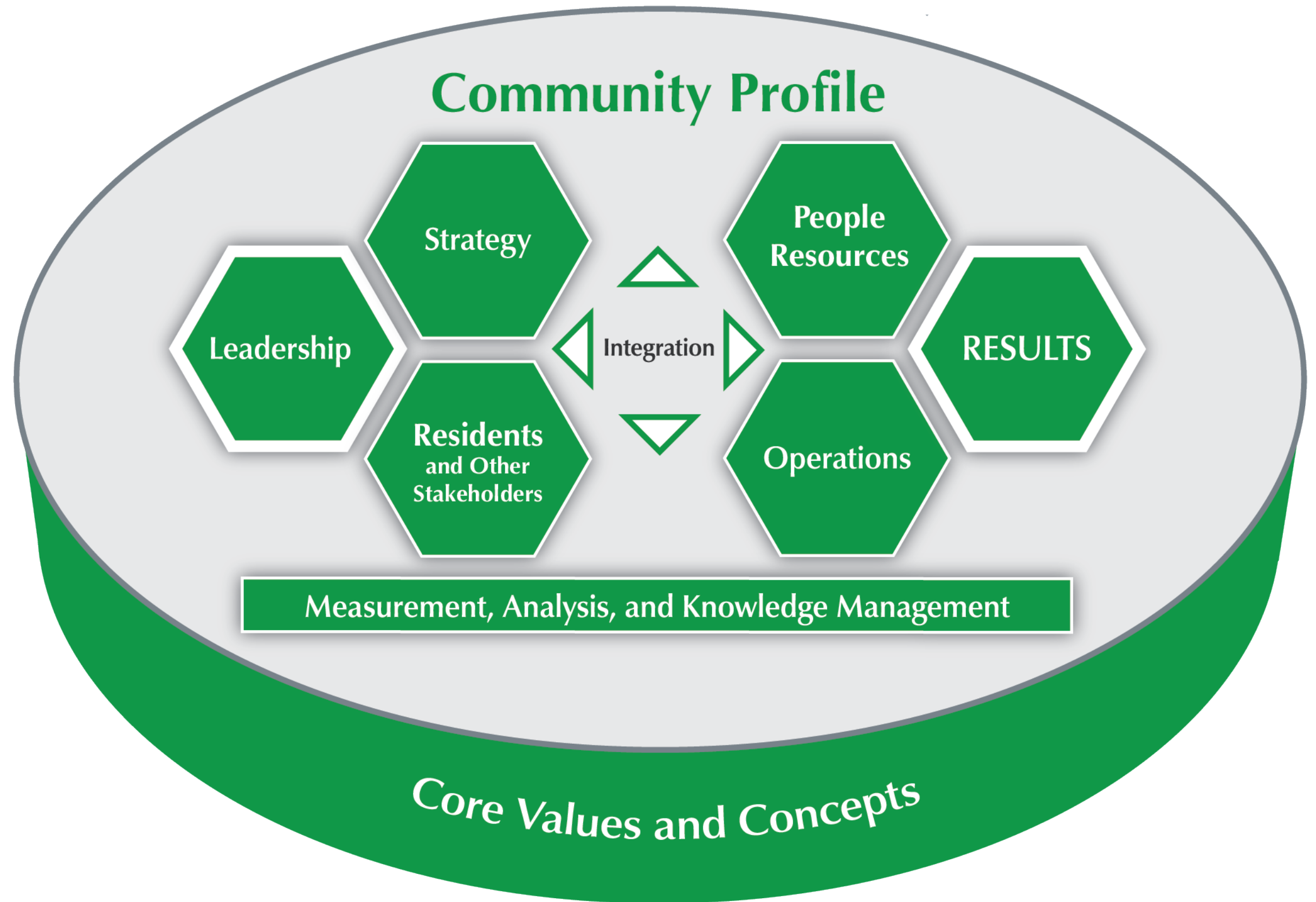
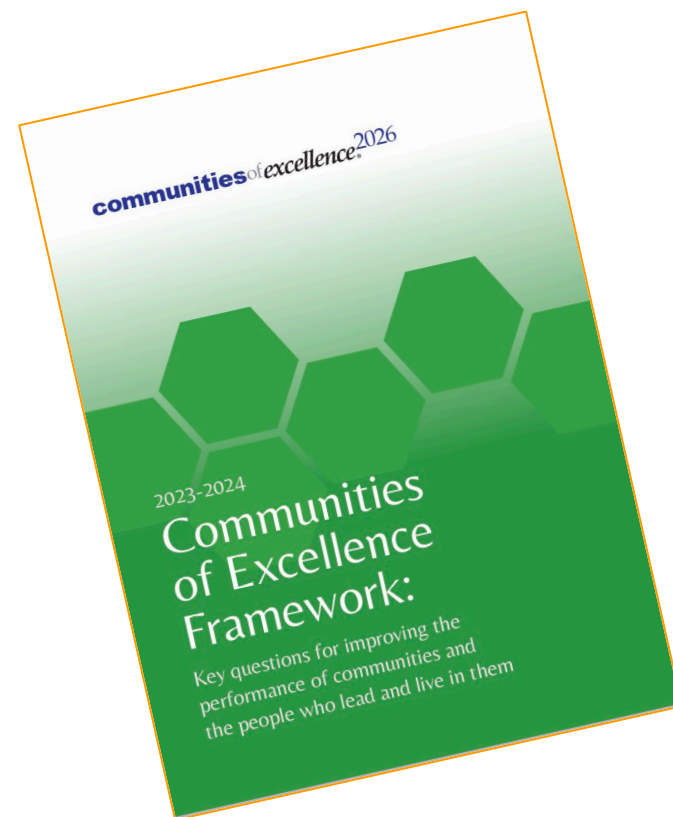
Why We Exist: To ensure that every person in America has the opportunity to live their best life in communities that are thriving.

Envisioned Future: Communities that adopt the Baldrige-based Communities of Excellence Framework are recognized as the top-performing in the nation and are catalysts for our country to again lead the world in educational attainment, economic prosperity, health and wellness, and quality of life.



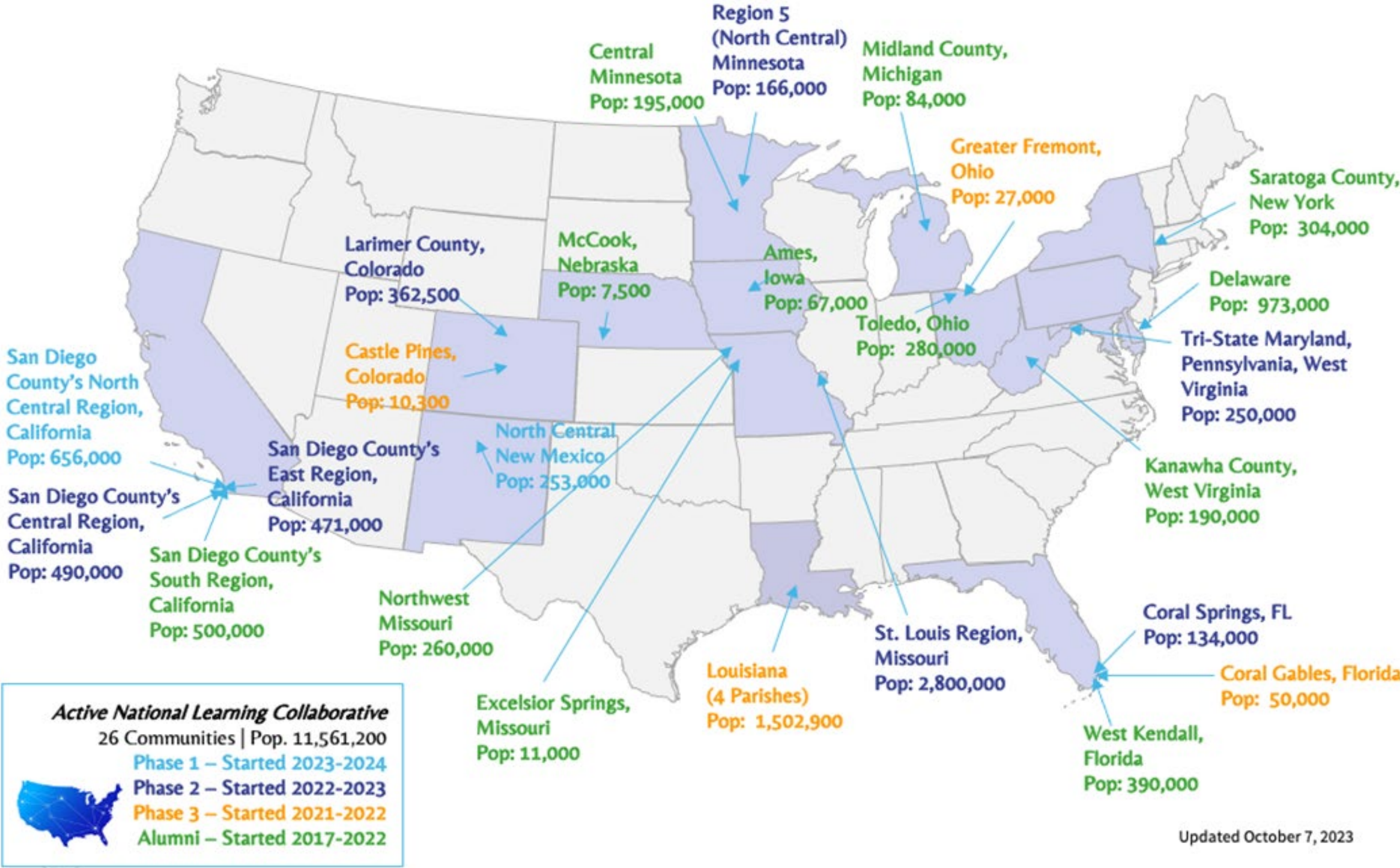
Communities of Excellence Framework:

THE CRITERIA FOR COMMUNITY PERFORMANCE EXCELLENCE



Adapted by Communities of Excellence 2026 from Baldrige Performance Excellence Program. 2023.
2023-2024 Baldrige Excellence Framework®; Proven Leadership and Management Practices for High Performance.
Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology. <https://www.nist.gov/baldrige>.

Communities Involved



2024 Assessment Program








- ◆ 13 Applications
- ◆ 9 Level 3 (Full Application) including 6 eligible for judging
- ◆ 56 Reviewers
- ◆ New Reviewer Training
- ◆ Updated Application Process



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

INTENDED OUTCOMES:

- 1) Empower community excellence groups with the necessary information to engage with residents, other stakeholders, partners, and collaborators on specific outcomes.
- 2) Provide updated, relevant, timely tools, resources and information (data) to support ongoing awareness, education, and engagement across various communities.
- 3) Drive progress towards the COE Common Community Scorecard indicators and shared community-specific strategic objectives.

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.

Education
High School Graduation: Are people prepared for they can thrive?
Why It Matters: A high school person's opportunities through impacting their income, life expectancy, high school percentage of students with diploma in 4 years or less.

COMMUNITY SCORECARD TOOLKIT
Cascading Metrics

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

ECONOMIC VITALITY - MEDIAN HOUSEHOLD INCOME

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

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.

Homes with Suboptimal Conditions

Year	Anytown	State	National
2018	33.5%	33.0%	30.5%
2019	33.0%	32.5%	30.0%
2020	32.5%	32.0%	29.5%

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.
- 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.

COMMUNITY SCORECARD TOOLKIT
Data Literacy |

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

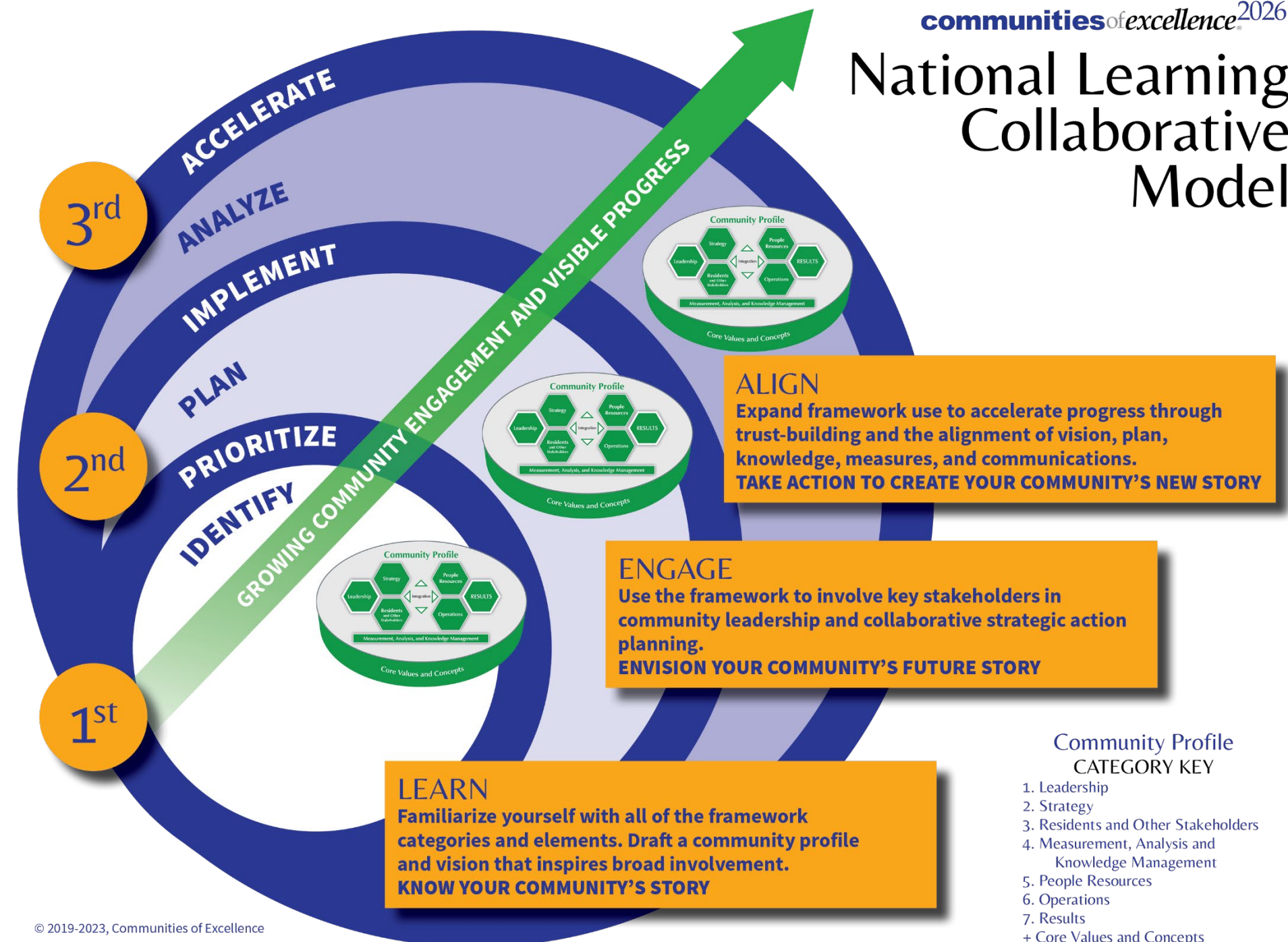
QUALITATIVE VS. QUANTITATIVE DATA: Qualitative data is non-numeric information. Quantitative data is information that can be counted or measured. Considering both are important. Qualitative is what ensures inclusivity of many diverse perspectives

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

We believe communities can achieve . . .

- EDUCATIONAL SUCCESS
- HEALTH AND WELLNESS
- EQUITABLE OUTCOMES
- OVERALL IMPROVED COMMUNITY LIFE



This three-phase experience is designed for communities to align and strengthen their collaborative efforts while learning how to identify, prioritize, and act on strategic advantages, challenges, and opportunities. Multi-sector groups learn in cohorts of several communities that have committed to participate in each phase facilitated over 12 months.

NEW Social Impact Accelerator

- ✓ Build an effective, inclusive, and collaborative team of leaders that can grow and sustain itself.
- ✓ Adopt our holistic community framework as your roadmap to address your most complex, cross-sector challenges and accelerate your social impact.
- ✓ Support the development and implementation of sustainable social impact projects.
- ✓ Equip participants with essential skills in leadership, community engagement, and project management, and use proven performance improvement and data tools and approaches in language that is easy to understand and designed around your team's readiness and need.



COE Fall Conference

October 28-29 in Coral Gables, Florida



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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