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**The Baldridge Foundation  
Institute for Performance Excellence**

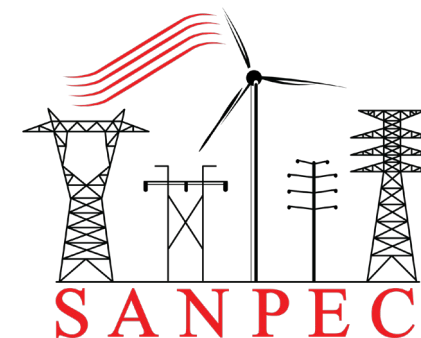
*Presents:*

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

*November 21, 2023*



## Mac Baldrige Society Members



# Opening Remarks/Agenda

**Introduction**      **Al Faber, President & CEO, Baldrige Foundation**

**Panelist**            **Stephanie Norling, MBA**  
Executive Director  
Communities of Excellence 2026

**Audience  
Questions**          **Moderator – Al Faber**

**Closing**            **Al Faber Remarks**

# Exploring the New Communities of Excellence Framework

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**Stephanie Norling**  
**Executive Director**  
November 21, 2023



# 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.

# Our 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



# Timeline

2010 – First Conversation

2012 – Six State Convening in St Joseph, MO

2013 - Established as a Nonprofit/1<sup>st</sup> Version of the COE Framework

2014 – Executive Director Hired

2015 – Pilots – San Diego South Region, CA and 18 Counties of Northwest MO

2016 – National Learning Collaborative Launched

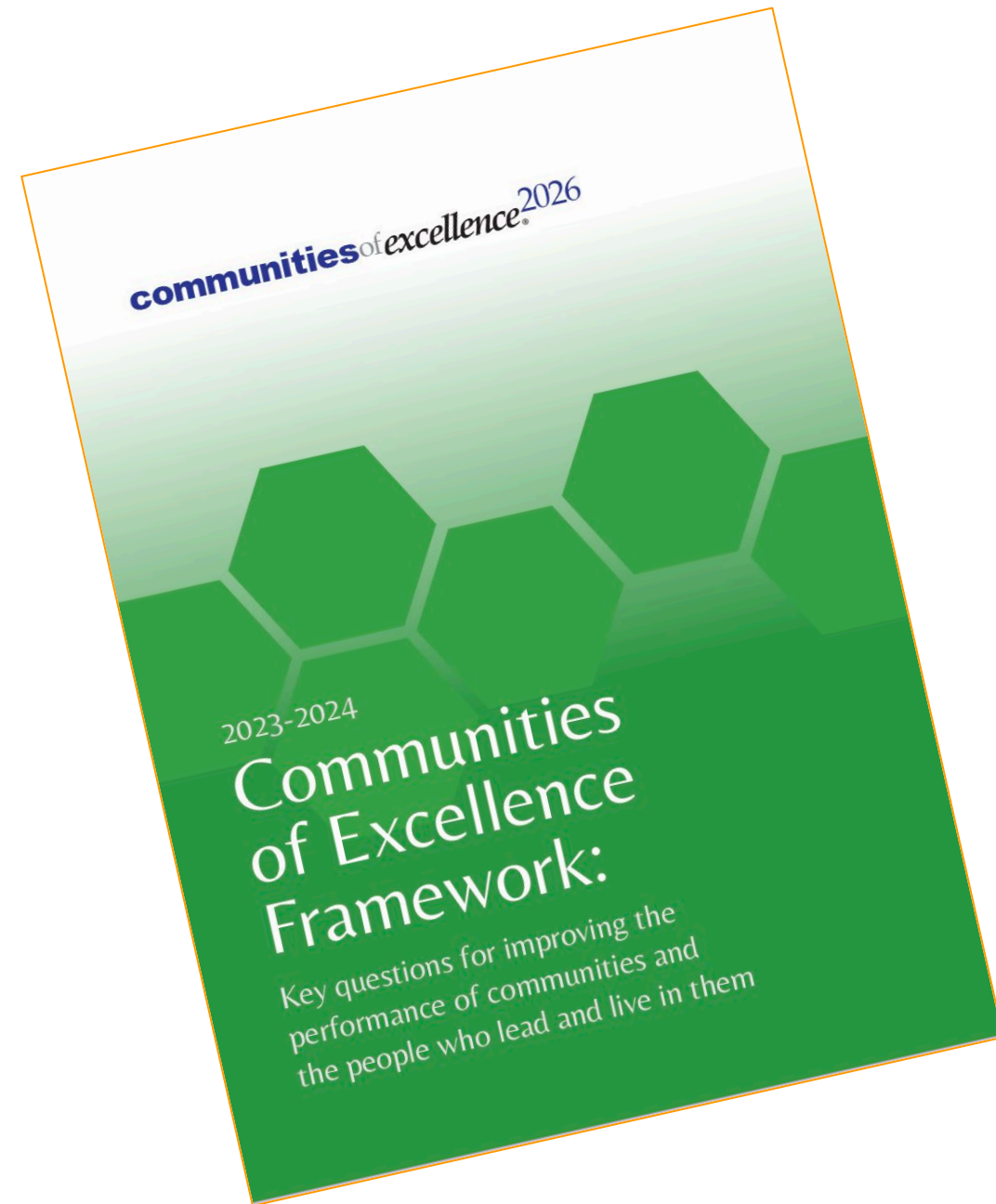
2022 – Congress Authorized “Community” as 7<sup>th</sup> Award Category

2023 – Comprehensive revision to the COE Framework

2026 – Center for Community Performance Excellence



# 2023-2024 Communities of Excellence Framework Revision Process



- ◆ Six-month effort with over 100 voices contributing
- ◆ Two webinars for further input and exploration of concepts
- ◆ Writing Team
- ◆ Alignment to Baldrige Framework 2022-2023 Revision
- ◆ Equity Task Force – Six national DEIA leaders
- ◆ Expert Reviews
- ◆ Final Revisions

# Initial Input – Some Examples

- ◆ “Make a clear distinction between the community leadership group, the community agencies/groups, and the community at large.”
- ◆ “Limited mention of elected officials and community governance.”
- ◆ “One item that I have found missing in customer engagement is “Involve customers and residents in the design and improvement of programs and services to the community.”
- ◆ “Safety has become an essential issue in today’s communities. There are areas of the framework where safety could be addressed.”
- ◆ “Need additional clarity around who we should be comparing ourselves against.”

# Equity Task Force

## Purpose:

- Provide specific recommendations to the next revision of the Communities of Excellence Framework to ensure that it is methodically integrating diversity, equity, and inclusion (DEI) into its criteria to ensure every resident can thrive.
- Ensure that equity and excellence are one and the same.

## Some of the Key Contributions:

- Definitions: Diversity, Equity, Inclusion, Accessibility
- Addition of Housing to Core Elements
- Safety – Physical, Psychological, Emotional, Social
- Residents and Other “Stakeholders”
- Key Segments Defined and Questions Added in All Categories

# Why Segment?



Image: source unknown

- Targeted Insights
- Resource Allocation
- Stakeholder Engagement
- Monitoring & Accountability
- Compliance & Reporting
- Informed Decision-Making

# Segmentation in the COE Framework

**SEGMENT.** A part of your community's base of residents, other stakeholders, community offerings, or people resources. Your residents and other stakeholders should be segmented by **key protected classes appropriate to your federal, state, and your community improvement efforts.** At a minimum, your segments should include **race/color, religion, sex, national origin, age, disability, and genetic information.**

The U.S. Equal Employment Opportunity Commission references these protected classes, as does the U.S. Department of Housing and Urban Development, the U.S. Department of Health and Human Services, the U.S. Department of Justice, and more.



# Key Concepts – Community and the Community Excellence Group

**Community** - Geographic region you define in the Community Profile.

**Community Excellence Group** - Specific individuals, organizations, and groups that have come together for your community excellence efforts.



## DISTRIBUTED STRUCTURE SAMPLE

**Key Roles:**  
Backbone  
Governance Council/Leadership Council  
Task Groups

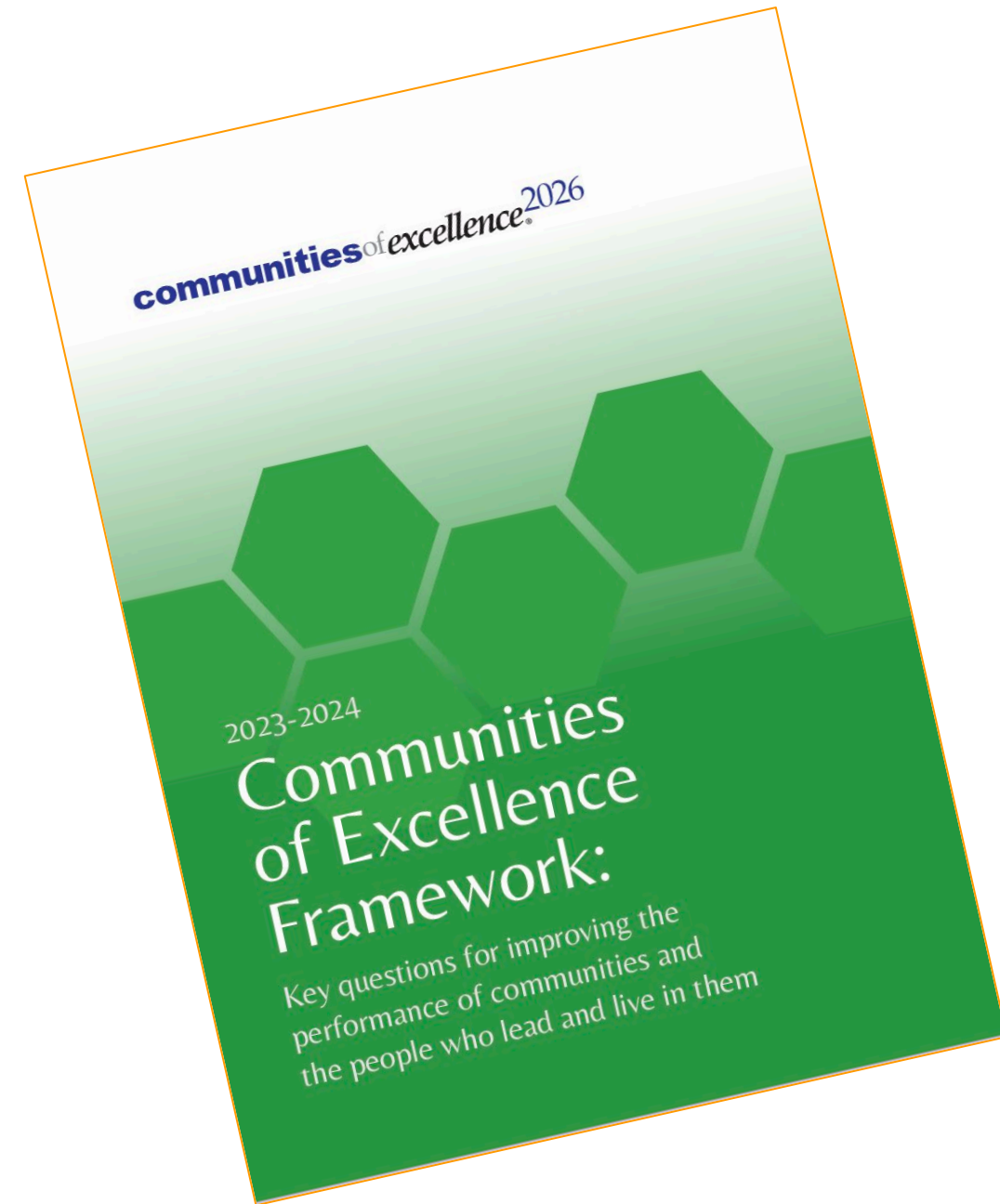
# Key Concepts – Quality of Life

Quality of Life refers to the overall satisfaction and well-being experienced by individuals within a community and its natural environment, encompassing various aspects such as physical health, mental well-being, social connections, financial/economic security, and access to essential services.



communitiesofexcellence<sup>2026</sup>

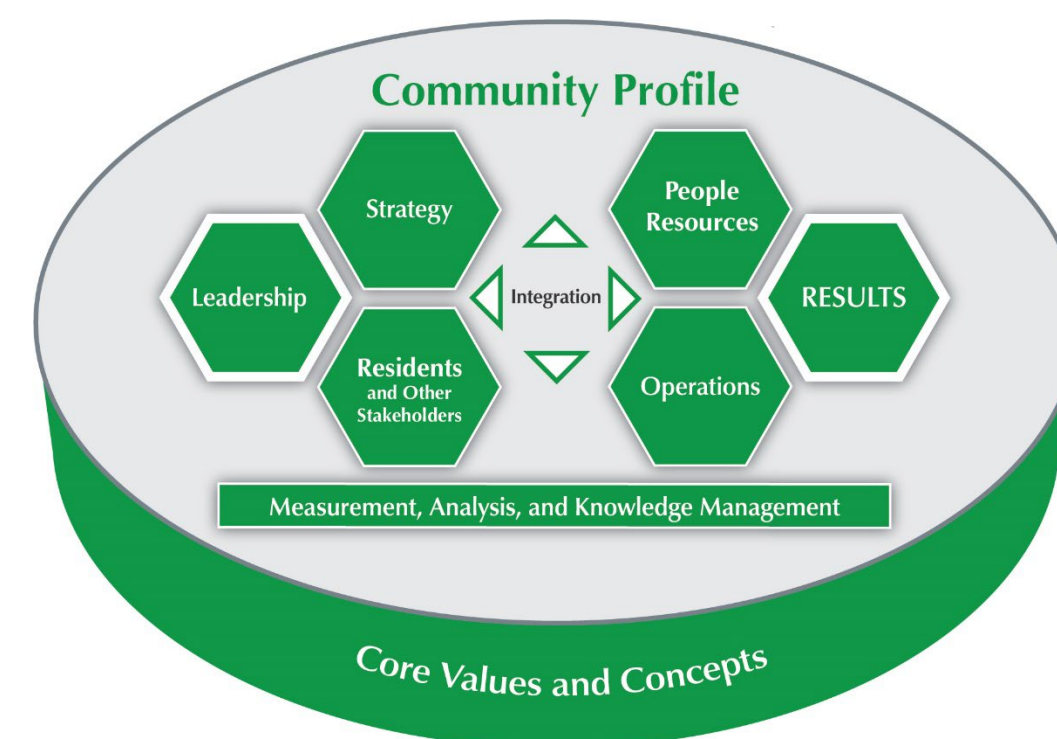
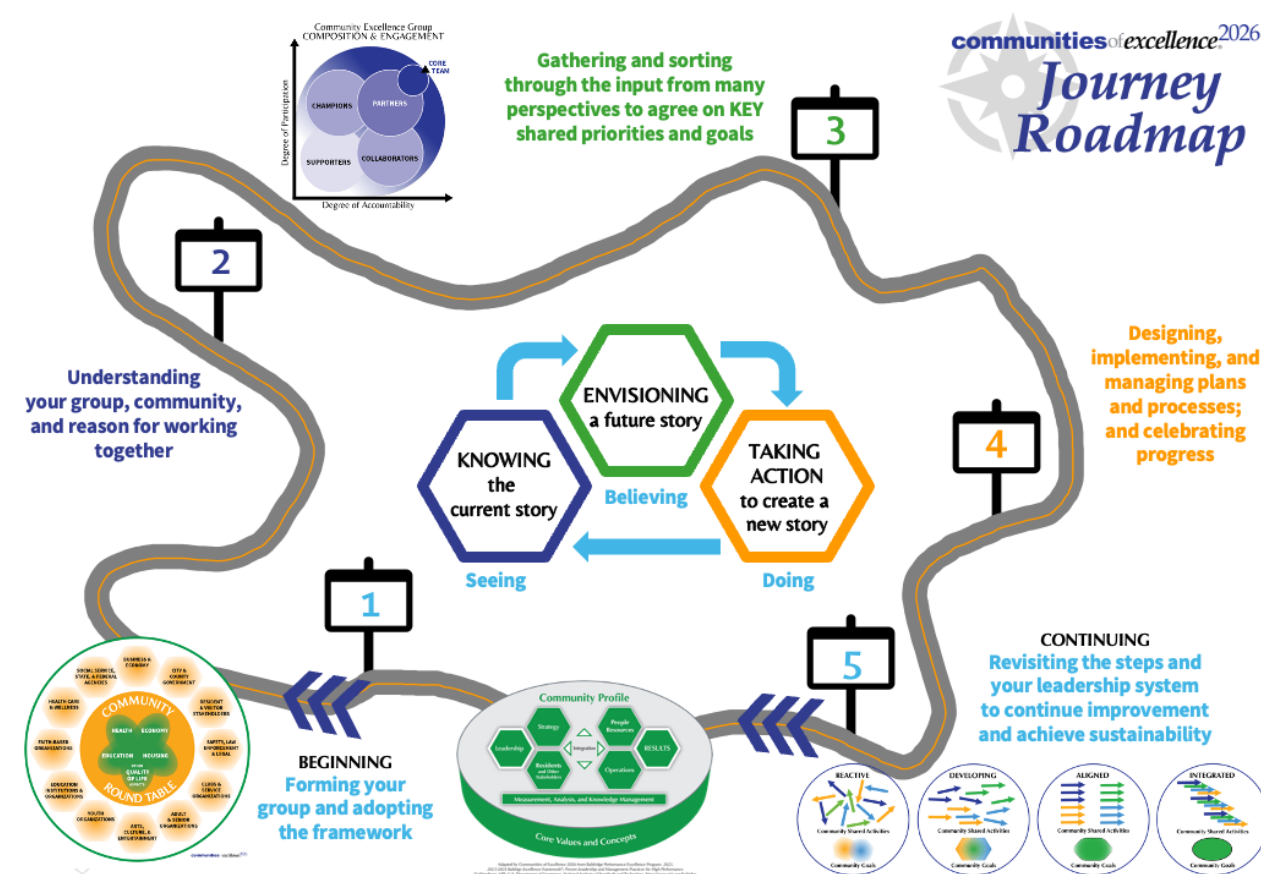
# 2023-2024 Communities of Excellence Framework



- ◆ Clarification of Community vs Community Excellence Group
- ◆ There are several edits throughout the Community Profile, in some cases reordering of questions
- ◆ "Community" has been deleted from the titles of all categories except for the Community Profile
- ◆ Category 6 has been restructured
- ◆ "Suppliers" has been removed
- ◆ More front and back matter has been added








# Communities, like Organizations, Need Support...



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>.

# COE Common Community Scorecard

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

|  |  |
|--|--|
|  <b>Health</b>                                      | Life Expectancy  |
|  <b>Education</b>                                   | HS Graduation Rate   |
|  <b>Economy</b>                                    | Median Household Income                                    |
|  <b>Housing</b>                                   | Homes with Suboptimal Conditions                           |
|  <b>Quality of Life:<br/>Social and Community</b> | Adults with 14+ “Not Good”<br>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.  
Where to Find the Data: Life expectancy is available from the National Center for Health Statistics.  
Learn more at [nhf.org](#).

**Education**  
**High School Graduation: Are people prepared for the jobs of the future?**  
Why It Matters: A high school diploma is a key to economic stability and social mobility. High school graduation rates are a key indicator of a community's economic vitality and social well-being.  
Where to Find the Data: High school graduation rates are available from the U.S. Department of Education.  
Learn more at [countyhealthrankings.org](#).

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UNIVERSAL COMMUNITY SCORECARD  
Instructions for Accessing and Using the Scorecard

**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 access the local data for your community. 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.

| 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 |

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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 of your community's progress over time. This resource is a reference list of cascading metrics that are interconnected with the primary measure for each domain. For this internal tool, best practices suggest tracking no more than five metrics in each domain. The indicators on this list are intended for long-term impact measurement and free access to data by most communities in the United States. Many indicators are available from state or local data sources as indicated. Please note that because some data will be collected from state or local sources, not every cascading metric is available in every community. In this case, state or regional comparisons should be used as appropriate. Consult with your local data sources for more information.

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, access, discrimination, output differences, and disparate impacts. Future tools will provide guidance and recommendations for how to use this data. You are not required to use this resource. It is simply a suggested tool and resource available to you.

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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 of the show - 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 (Correct)
  - High School Graduation Rate (Incorrect)
- 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.

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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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**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](#)

Source: U.S. Census Bureau, American Community Survey 2020 ACS 5-Year Estimates, Selected Tables, Table B20722, U.S. Census Bureau, Available from: <https://data.census.gov/tables?q=tables%3Ftable%3D%20Household%20Income&tid=ACST5Y2020.S1901>

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%    |

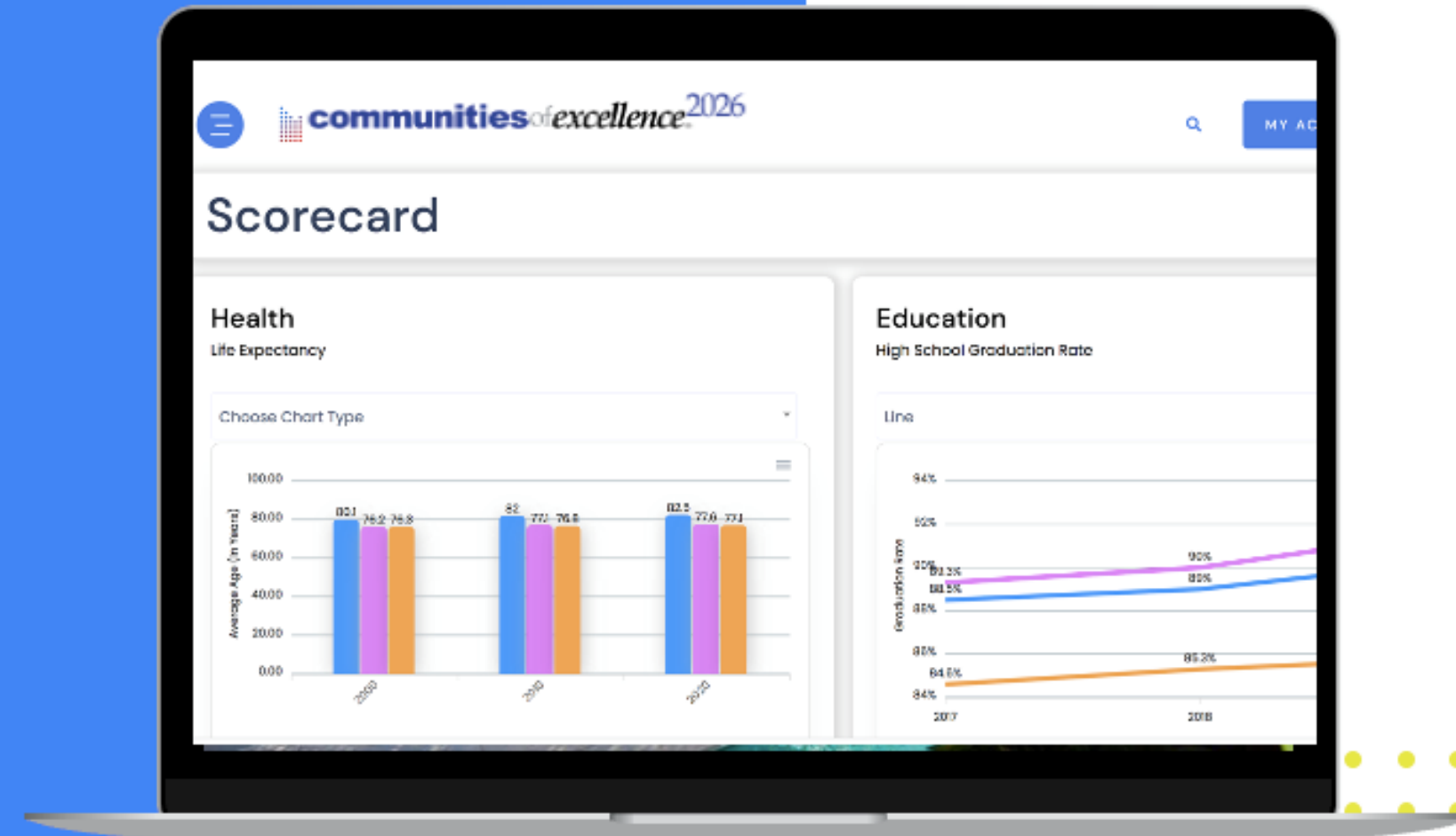
Coming Soon!



## Community Dashboard

### Tapp into Community Transformation

- Scorecard Digitization
- Data Integration
- Systems Alignment
- Website and Software Dev
- Marketing Communications



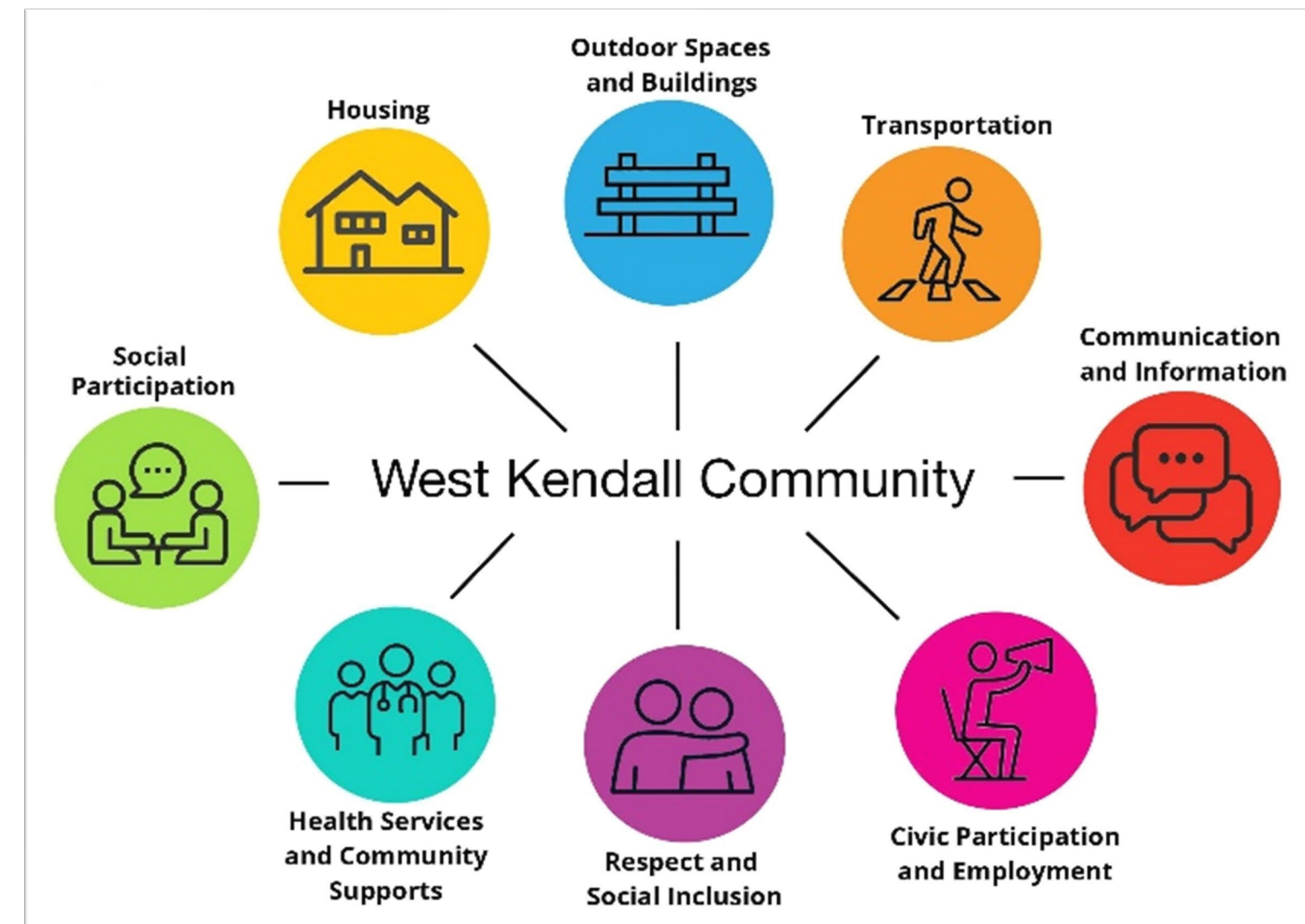
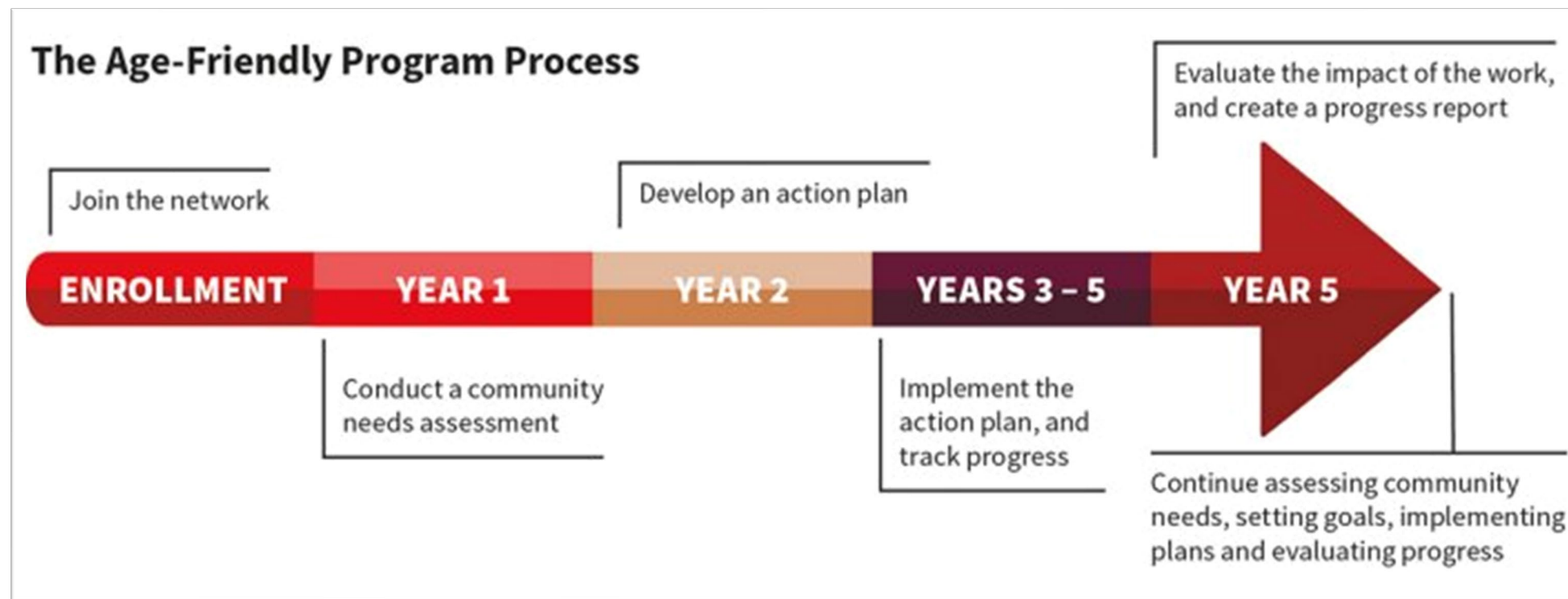


# Age-Friendly Initiative

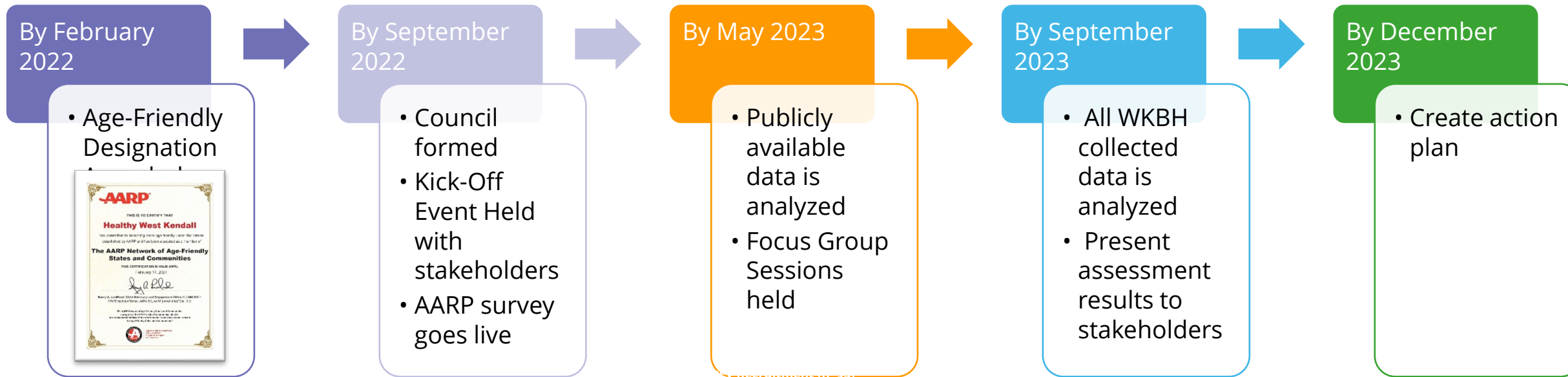


## Our Purpose

To create an age-friendly community in West Kendall, one that enables people of all ages, especially the elderly, to actively engage in community activities and treat everyone with respect.



# Age-Friendly Initiative Needs Assessment

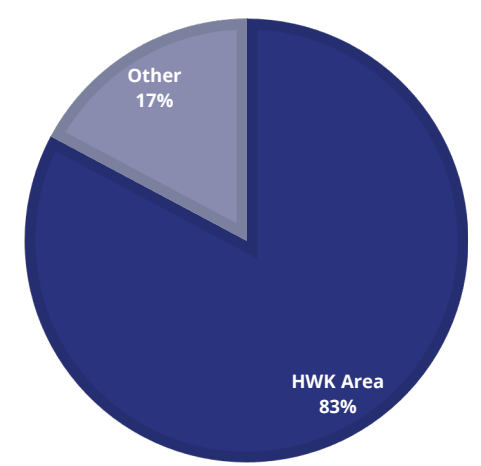
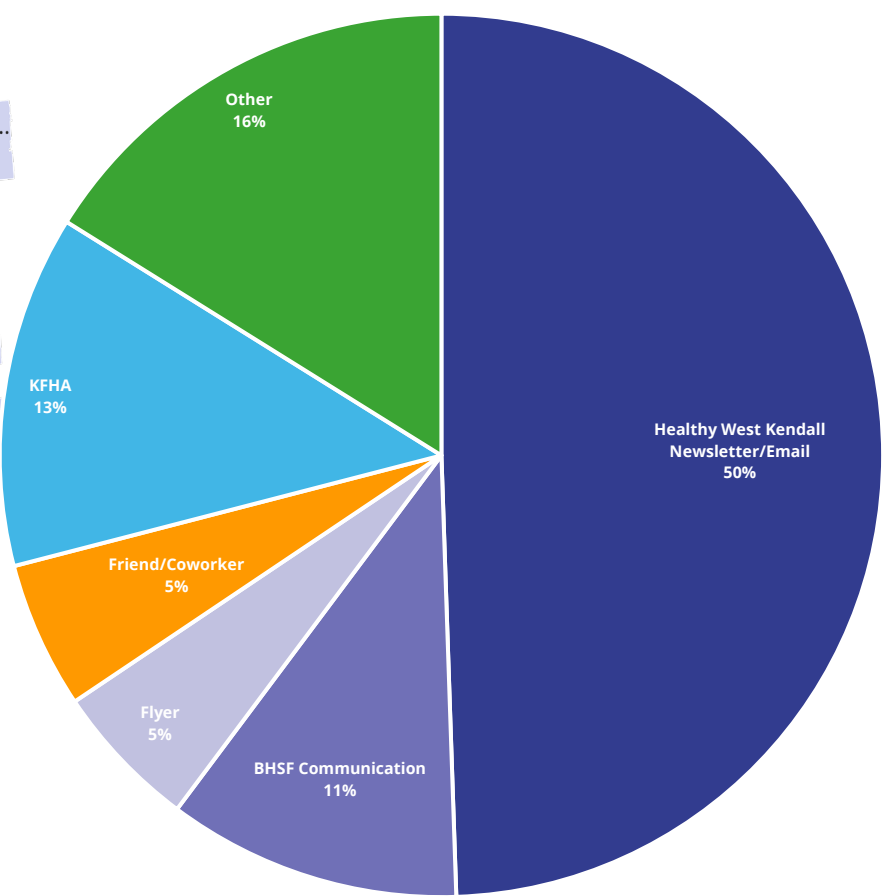
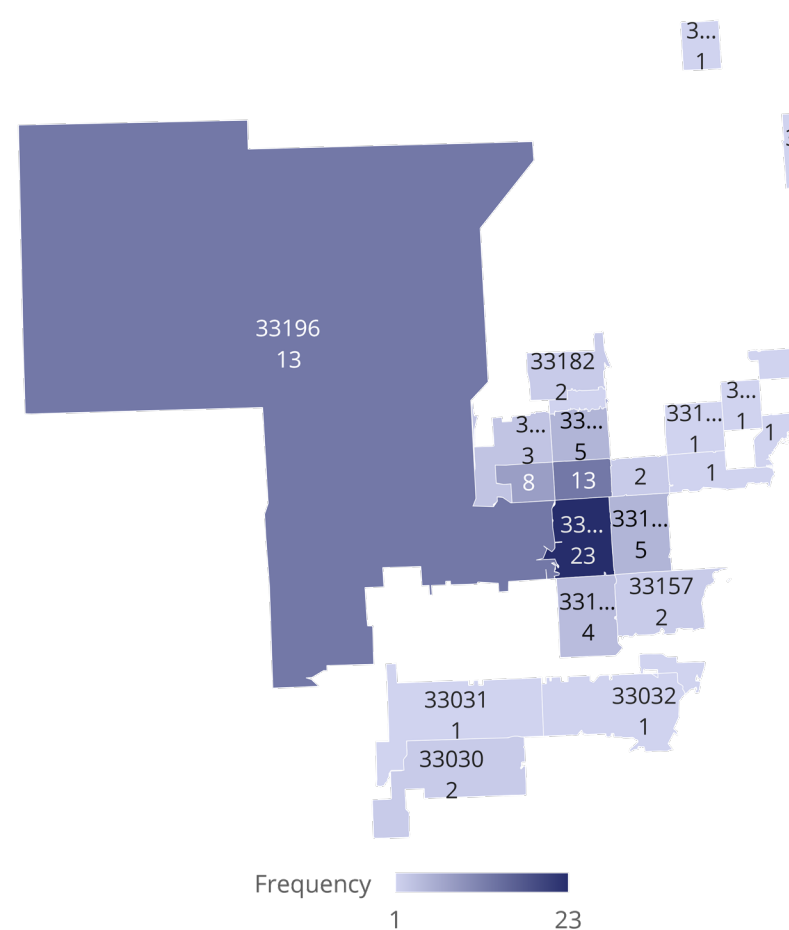


## Publicly Available Data

- AARP Livability Index
- U.S. Census Bureau
- Miami-Dade Matters
- Consortium for a Healthier Miami Dade

## West Kendall Collected Data

- AARP Survey of 93 Community Members through Healthy West Kendall & Email Distribution
- 3 Focus groups, with 40 Community Members in total





# Needs Assessment Results

Creating a livable community for all in West Kendall



## Top 2 Factors that Influence Residents Age 50-Plus to Relocate as They Age



97% of residents age 50-plus want to live in areas with safe parks and buildings



96% of residents age 50-plus want to live in areas with quality healthcare and community based wellness services

## Did You Know?

over 100,000 the number of adults 50-plus that reside in West Kendall

\$40,320 is the median household income for adults 65-plus in West Kendall

57% the percentage of adults 65-plus who have difficulty speaking English in West Kendall

25% the percentage of adults 65-plus with a disability in West Kendall

## Community Information

11% of residents age 65-plus live alone

54% of residents age 50-plus have lived in their community for over 25 years

41% of residents age 65-plus spend more than 30% of their income on housing

## Community Insights

75% residents age 50-plus rate their community as good, very good, or excellent for people to live as they age

38% of residents age 50-plus say they have an unmet health related social need

68% of residents age 50-plus say remaining in their current community is extremely or very important

## AARP Livability Index Results

| Livability Index | 2022 Median US Neighborhood | WKBH Service Area Zip Code |       |       |       |       |       |       |
|------------------|-----------------------------|----------------------------|-------|-------|-------|-------|-------|-------|
|                  |                             | 33183                      | 33186 | 33196 | 33175 | 33185 | 33193 | 33177 |
| Overall Score    | 50                          | 52                         | 49    | 50    | 50    | 49    | 52    | 49    |
| Housing          | 52                          | 57                         | 48    | 44    | 52    | 41    | 53    | 48    |
| Neighborhood     | 48                          | 62                         | 60    | 59    | 61    | 56    | 64    | 60    |
| Transportation   | 49                          | 60                         | 55    | 57    | 57    | 51    | 62    | 52    |
| Environment      | 54                          | 49                         | 50    | 58    | 49    | 61    | 57    | 54    |
| Health           | 50                          | 60                         | 61    | 61    | 57    | 62    | 59    | 53    |
| Engagement       | 53                          | 34                         | 34    | 35    | 35    | 35    | 35    | 35    |
| Opportunity      | 52                          | 40                         | 38    | 38    | 37    | 37    | 37    | 38    |

Older Adults spending more than 30% of income on housing

| Location | %    |
|----------|------|
| MDC      | 38.4 |
| 33175    | 37.7 |
| 33177    | 44.6 |
| 33186    | 44.3 |
| 33193    | 38.7 |

## Tree canopy coverage

| Location | %     |
|----------|-------|
| MDC      | 20.1  |
| 33175    | 11.89 |
| 33177    | 20.57 |
| 33183    | 12.3  |
| 33185    | 17.7  |
| 33186    | 13.54 |
| 33193    | 11.82 |
| 33196    | 11.34 |

# Needs Assessment Results



## Housing

26% of residents age 50-plus say they need to make major repairs, home modifications or changes

**Greatest Features** % excellent/very good

**Greatest Opportunities** % fair/poor

82%

of older adults 65-plus own their home

42%

homes with at least one substandard condition

75%

residents age 50-plus have lived in their community more than 15 years

58%

housing is not affordable, accessible, and adapted to their needs



## Outdoor Spaces & Buildings

51% parks, places and buildings are very good or excellent and safe to live or be active

**Greatest Features** % excellent/very good

**Greatest Opportunities** % fair/poor

77%

well-maintained parks

14%

tree canopy coverage

38%

live less than a 10-minute walk from a park

4%

parks that have older adults programs



## Transportation

88% of residents age 50-plus drive themselves within their community

**Greatest Features** % excellent/very good

**Greatest Opportunities** % fair/poor

54%

safe, reliable, and accessible transportation

3%

of residents age 50-plus with health related social needs reported transportation as a barrier

15%

bike or walk to get around for shopping, doctor visits, and errands

3%

households without a vehicle



## Communication & Information

88% of households have an internet subscription

**Greatest Features** % excellent/very good

**Greatest Opportunities** % fair/poor

76%

community information that is available in different languages

55%

linguistically isolated

97%

have at least one computing device at home

35%

utilize digital communications to receive information about programs, events and services



## Community & Health Care

30% of adults 65-plus received recommended preventive services

**Greatest Features** % excellent/very good

**Greatest Opportunities** % fair/poor

98%

older adults are insured in West Kendall

57%

affordable health and wellness classes and programs

76%

quality of healthcare and community based wellness supportive services

51%

a service that helps seniors easily navigate the health care system



## Civic Participation & Employment

53% of residents age 50-plus say they are employed full-time

**Greatest Features** % excellent/very good

**Greatest Opportunities** % fair/poor

60%

wide range of employment and entrepreneurship opportunities

19%

residents age 50-plus participate in elections less than half the time

57%

opportunities to get involved with local government and advocate for issues

4%

of residents age 50-plus rely on communication via government officials



## Social Participation, Respect & Inclusion

87% of residents say they are in contact with family, friends or neighbors weekly

**Greatest Features** % excellent/very good

**Greatest Opportunities** % fair/poor

71%

residents age 50-plus are married or living with a significant other

45%

residents age 50-plus communicate with family or friends outside of their home daily

63%

have a sense that older adults are welcomed and valued in all settings

26%

have a disability or chronic condition preventing them from working, attending school, or doing housework

## Four Priority Areas



1. Community Health Services



2. Housing



3. Social Engagement and Opportunity



4. Outdoor Spaces

## Healthy West Kendall

Powered by West Kendall Baptist Hospital

Source: 2023 AARP Age-Friendly Community Survey of West Kendall Residents Age 50+ and review of Miami-Dade Matters Community Dashboard.  
For more information, contact: Cristina Brito, Baptist Health.  
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# Contact Information

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786-467-3418



# What's Coming Up with COE

- New Partnerships
- COE Common Measures Dashboard
- Coaching/Backbone Facilitation Training Program
- Best Practice/Knowledge Sharing Platform
- COE Membership Program
- COE International



# Thank you!

For More Information:

[www.communitiesofexcellence2026.org](http://www.communitiesofexcellence2026.org)

[snorling@communitiesofexcellence2026.org](mailto:snorling@communitiesofexcellence2026.org)

# Panelist Questions and Discussion



**Stephanie Norling**  
Executive Director  
Communities of Excellence 2026



**Al Faber**  
President and CEO  
Baldrige Foundation  
(Moderator)



# Training & Professional Development

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- Grant Writing Skills
- Nonprofit Ethics and Compliance



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