KEY SUCCESS FACTORS IN COMMUNITIES OF EXCELLENCE

The Value of Innovation and Inclusivity

Christel Gollnick, MSOL

Innovation can mean creating something brand new out of nothing. It can also be defined as

applying a proven idea in a new way to solve a different problem or the same problem in a different setting or context. This second description is what is happening in the national nonprofit organization Communities of Excellence 2026 [COE]. This article is a case study of COE's progress to date and may be of interest to any leader in a community, experienced Baldrige practitioner or not. The tried-and-true principles of Baldrige that have helped many organizations over several decades (Blazey and Grizzell, 2019) are now being applied to the unique and complex characteristics of communities in placemaking and revitalization initiatives (Kim, et al., 2021; Low and McClure, 2020).

The need for a new approach to problem-solving is urgent in America's communities. Health, wealth, and well-being indicators have been on the decline for decades long before the COVID-19 global pandemic further challenged the nation's systems. There are significant education disparities. The average performance levels for students in the least socioeconomically advantaged districts are at least four grade levels below students in the most socioeconomically advantaged districts (Rabinovitz, 2016). Public health is deteriorating. The life expectancy of Americans is now below the Organization for Economic Development and Cooperation average and the United States has the highest prevalence of obesity in the developed world (NCHS, 2018). Inequalities in economic opportunity impact nearly all social determinants of health indicators. There are 40-45 million Americans who live in poverty (Fontenot, Semega, and Kollar, 2018), and smaller cities, towns, and rural areas are particularly suffering, with average annual incomes about $54,000 less than larger metropolitan areas (Brainard, 2017).

A collective of performance excellence, leadership, strategy, process improvement, and communications experts, practitioners, and learners has been testing and tweaking an evolving adaptation of the Baldrige criteria for leaders who are interested in improving the health care, education, economic, and quality of life outcomes of communities. The Communities of Excellence Framework [COE Framework] is focused on guiding leaders from all sectors to discover how

to best work together on shared priorities to improve the overall performance of communities. Cross-sector and cross-boundary collaboration that considers many different perspectives and coordinates a wide range of resources is proving to be the innovative difference-making key to uncovering root causes of problems and finding practical and effective solutions in communities of place.

Communities of Excellence 2026 is focusing its performance improvement and quality excellence efforts on the people who lead within geographic places where many different organizations, businesses, groups, and individuals have chosen to live, learn, work, and play. There are now more than two dozen community excellence groups serving communities of a wide range of population and geographic sizes involved across the United States. According to their 2021 Annual Report, the COE leadership team is applying its COE Framework, multi-year National Learning Collaborative, and other community leadership development programs to help ensure "every American is living their best life in communities that are thriving." Best lives cannot be pursued in places where quality education, health care, economic opportunity, and quality of life is compromised, absent, or declining. The organization has begun to establish a pathway for role-model communities to share their promising practices with others and be recognized at the nation's highest levels of influence (Blazey and Grizzell, 2019, 2). COE is working with the Baldrige Foundation to solicit Congress to establish "community" as an official category for the Baldrige Award by 2026 to publicly uplift the essential and challenging work of leaders committed to working together to improve lives in their communities. The foundational statement driving the work of all those involved in this cross-sector and cross-boundary effort is "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" (COE, 2020). COE believes an innovative adaptation of the integrated Baldrige approach to quality excellence is the best model for encouraging and empowering many diverse perspectives and existing programs and processes in America's communities, small and large.

Why Baldrige as a Basis for Community Performance Excellence Improvement

There is no single line of accountability, chain of command, or hierarchy that encompasses the whole of geography-defined communities. There is not even a single governmental entity that presides given that local, county, state, and federal bodies have departments, laws, regulations, and guidelines that impact day-to-day activity in small rural towns and large cities alike. "Community issues are so complex that we need an approach that can help us get at the complexity," said co

founder of Communities of Excellence 2026 Lowell C. Kruse when asked about the longitudinal and innovative growth mindset required for improving life in America's communities.

There are many well-researched approaches for facilitating collaboration and strategic project

implementation available to businesses and other entities. Just a few of them include the National Institute of Advanced Technology's [NIAT] Community Resilience Program, the National Trust for Historic Preservation's Main Street America, WealthWorks, Strategic Doing, FSG's Collective Impact, and the Aspen Institute's Community Strategies Group. While they are all valuable programs producing measurable and meaningful outcomes, nearly all of them address only specific areas of interest or projects instead of the entire diverse and interconnected network of stakeholders in a community that simultaneous priorities that must be addressed. Systematically pulling all betterment efforts and stakeholders together for a sustained period of time is rare.

COE's co-founders, both former chief executive officers of Malcolm Baldrige Quality Award winning health care systems, recognized more than a decade ago that a coaching system for addressing systemic problems and long-term priorities is needed that goes beyond convening people, making plans, and implementing short-term projects. All of these activities are critical to making positive change, however, the present's significant challenges and opportunities require more effort and long-term vision and commitment from leaders.

Today's world requires being comfortable with the uncomfortable exhilarating and scary changes that must be made to not only keep up with what three-time Pulitzer Prize recipient Thomas Friedman calls "The Age of Accelerations" (2016) but to also protect the deep-seated values people hold most dear. Doing the same things in the same way as leaders have always done them is not producing desired results as evidenced in social determinant, population, and other key indicators. W. Edwards Deming's wisdom, first published in 1986, has been brought forward for today's relevance by The MIT Press in their 2018 republication of *Out of Crisis,* highlighting thoughts such as, "Every system is perfectly designed for the results it gets" and "The greatest waste in America is failure to use the abilities of people." Communities need a different system to produce different – and improved – results for all sectors. What that means is engaging many residents and other customers of communities to "sequence and synchronize their work" (Atkins, 2021), utilizing the combined strengths of each entity and individual leader in a way that respects their many unique experiences while also discovering commonalities that, if leveraged, can maximize the potential of communities. A systems approach can help leaders deal with communitywide crises, gaps in key services, and desired amenities that uplifts what is working and gives permission to move on from what is not.

The Baldrige Excellence Framework depicted in Figure 1, is our nation's top-level criteria for

quality excellence in manufacturing, business, health care, education, government, and nonprofit organizations. Itis a proven approach for addressing the many complexities of traditional hierarchal organizations with multiple internal and external stakeholders (Blazey and Grizzell, 2019). Since the 1980s, departments of corporations and other entities have discovered the value of working together through the common language of Baldrige's questions around leadership, strategy, customers, measurement, workforce, operations, results, and core values. Doing so highlights the

interdependence, influence, and impact each department has on the others within their "system" or full organization.

Figure 1: The Baldrige Excellence Framework

From Baldrige Performance Excellence Program. 2021. *2021-2022 Baldrige Excellence Framework: Proven Leadership and Management Practices for High Performance (Education)*. Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology. https://www.nist.gov/baldrige.

Communities of Excellence 2026's board of directors hypothesized that the Baldrige Performance Excellence Framework "could be modified to achieve performance excellence in communities to benefit the health and well-being of all residents with a primary focus on education, health, economic vitality, and safety." They wanted to find a way to help communities improve their interconnected quality of life key performance indicators. Over the past dozen years since forming in 2010, their hypothesis has been proven correct based on feedback from

the communities piloting the Baldrige principles adapted in the COE Framework (Gollnick, 2020). While the results are still process-oriented and qualitative in most cases, some participating communities are starting to see new businesses sprout in areas where economic vitality and entrepreneurship are the focus of their community excellence group. In others, high-speed broadband projects are finally getting the attention they need to connect all households. Policy changes are also being discussed and approved to remove roadblocks to ensure available childcare is available to the workforce.

Other community collaboration researchers are coming to similar conclusions and recognizing that helping leaders get out of their comfort zones to discuss their shared interests and how they do or do not consider or communicate with each other is a huge undertaking (De Jong, 2021). Collaborating on shared priorities with organizations and people that are typically considered competitors requires consideration for the interdependent nature of communities alongside the independent operations, cultures, and goals of each organization, entity, and individual. One group cannot do much of anything without impacting others somehow, so the first step for many of the communities involved in COE is to know and understand their current reality of connectedness. Recognizing the interdependence and being non-political and non-threatening has been an effective coaching strategy that opens the door to building stronger communications channels and relationships. A comprehensive Baldrige-adapted approach has opened up conversations that are leading to the solving of root-level problems. One of the participants in COE's first year of programming, Josh McKim, Maryville Missouri Economic Development Director, said, "We are getting out of our traditional thinking and seeing things happen across organizations. I give credit to this approach [COE2026] for that. We're busy working on the priorities we identified."

Innovations in Communities of Excellence 2026

Supporting communities on their journey to community performance excellence requires building on innovation and inclusivity as foundational values. The organization has embraced these concepts itself in the development of its Communities of Excellence Framework and National Learning Collaborative programming for leaders working in collaborative initiatives. Establishing a common language, considering communities of different sizes and locations, and the inclusion of many diverse perspectives are key innovations that establish the COE approach as a comprehensive continuous improvement guide for informal and formal community leaders.

A Common Language

Initially, participants in the National Learning Collaborative, COE's flagship program, who have had no prior experience with continuous improvement or performance excellence language were challenged to see how the probing questions of the profile and seven categories pertained to their work. The categories of Baldrige and questions had to be adapted to pertain to community excellence group members to give the criteria context. The organizational profile has been renamed the Community Profile, and the categories for COE include (1) Community Leadership, (2) Community Strategy, (3) Residents and Other Customers, (4) Measurement, Analysis and Knowledge Management, (5) People Resources, (6) Community Operations, and (7) Results. Community Culture and Core Values underpin the Framework (Figure 2.). For those who had been

through a similar integrated management process in their professional roles, it seemed natural to think about the criteria through the lens of community.

Figure 2: The Communities of Excellence Framework
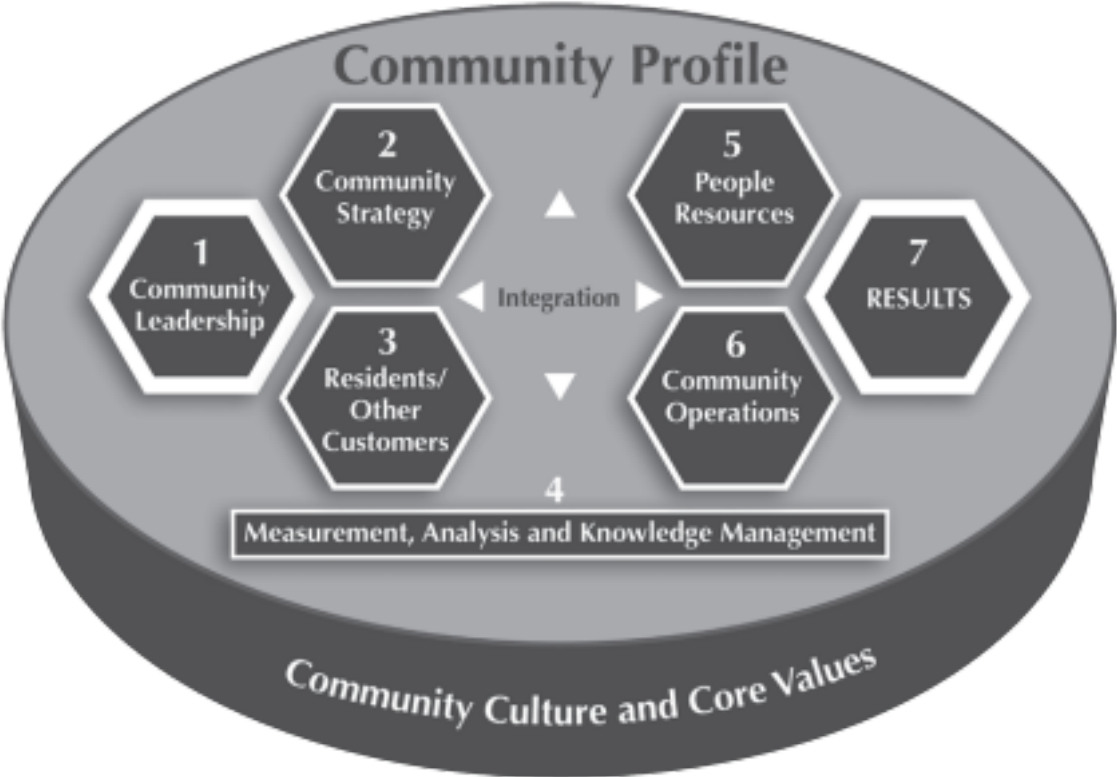
Adapted from the Baldrige Performance Excellence Program. 2015. 2015-2016 Baldrige Excellence Framework: A Systems Approach to Improving Your Organization's Performance. Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology. http://nist.gov/baldrige.. UPDATED 6.2020

For example, Residents and Other Customers fill the role of the customers of the community excellence group within the COE Framework. They are the community's shareholders and stakeholders. Resources are the people who show up to help with their time, talent, and financial contributions. The Operations category is how all of the sectors in the community work together through the community excellence group of leaders who serve as diverse representatives of the community at the intersection of shared priorities and common goals. How they put aside their personal and organizational agendas and pool assets to address the priorities that are bigger than any one of their organizations defines the decision-making and task implementation processes of operations. True to Baldrige principles, the COE Framework is not prescriptive in telling users how to operate. Through the National Learning Collaborative, participants are exposed to many promising practices to help guide them to the processes and tool that are right for their unique

situation, vision, priorities, and resources. What legal structure or strategic planning model works in one community may not be appropriate for another. Participants are simply taught the best questions to ask to help them make those important decisions.

Shifting the language of Baldrige to word choices that are more familiar to leaders volunteering in communities has been the relatively easy part of piloting the idea of applying proven Baldrige principles (Wright, 2018). The principles, however, are typically applied within existing organizations and hierarchal leadership structures. Communities have less defined layers of responsibility than top-down entities. Shifting the mental models of community leaders to the integrated approach of Baldrige is more complicated than just suggesting new language and talking about systems leadership. Innovative thinking is about more than cooperative partnerships. It is about collaboration that compels people to work together for and with each other's benefit. Learning these principles experientially over time is critical. People have to practice believing in the possibilities. The shift can take several years of using the new language, a timeframe that can try the patience of people used to directing all of their energy towards projects, grant cycles, annual activities, and elected terms of office. However, participants have reported that the journey is worth the wait once the "aha" moment happens for a leader and the purpose of the criteria becomes a useful decision-making, planning, project management, and alignment tool (JUPER, 2021). Communities of Excellence 2026 Executive Director Stephanie Norling shares, "Taking the time necessary to build trust and leadership capacity while learning a framework that includes all parts of a community can contribute to transformational results."

Considering Communities of Different Sizes and Locations

Communities of all sizes are facing systemic challenges, but not all of them have the same challenges. For instance, depopulation over decades and the cascading impact of fewer people on

the economy, health care, and education is a serious root cause of many problems Rural America faces daily (Atkins et al., 2021). Conversely, most urban areas face challenges resulting from rising population density (De Jong et al., 2021). While seemingly opposite, the founders of COE suspected they would find that both community sizes have many things in common as they balance the reality of too many people who do not having enough resources nor opportunities to make healthier choices for themselves. The human needs and dynamics are the same, making the COE Framework applicable to all sizes and locations of communities.

To test their initial theory, the organization aimed to involve communities of varying size and geographic location in an online learning experience that teaches and discusses how communities coast-to-coast might answer the questions of the framework. This experience is what has become the National Learning Collaborative. The first year introduced San Diego County's South Region in California (pop. 500,000) to the Baldrige-adapted principles right alongside community excellence

groups representing populations such as West Virginia's Kanawha County (pop. 190,000), Toledo, Ohio (pop. 280,000), West Kendall, Florida (pop. 390,000), Kings County, California (pop. 150,000), Excelsior Springs, Missouri (pop. 11,000), and the primarily rural 18-county region if Northwest Missouri with communities ranging from populations of fewer than 1,000 to 100,000. Participants report their enjoyment of being able to learn from each ther. While there are 26 community excellence groups in 14 states participating in COE 2026 learning programs, these groups represent more than 150 unique communities plus 57 incorporated municipalities in the State of Delaware (Delaware.gov, 2021) and four parishes comprising a third of the State of Louisiana's population (lma.org, 2021). These groups are bringing many voices to the roundtable of collaboration (Figure 3.).

Figure 3: Community Excellence Groups Participating in the Communities of Excellence 2026 National Learning Collaborative Over Five Years

communities of excellence 2026
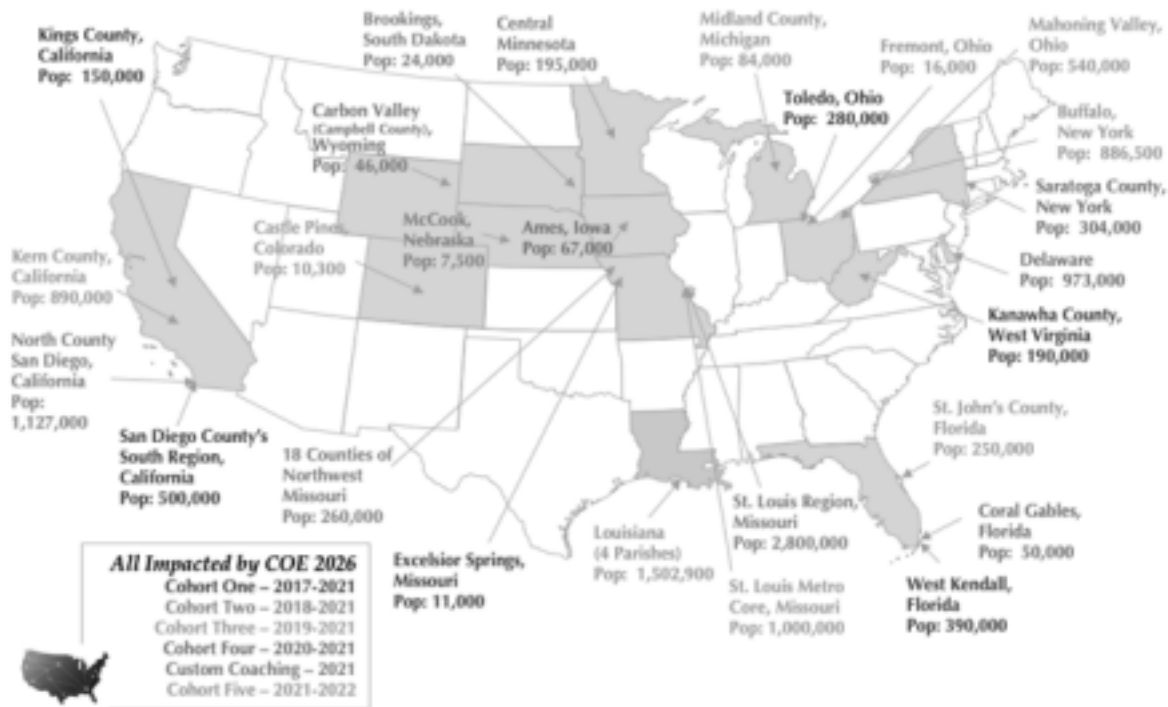
Including Many Diverse Perspectives

The very definition of innovation within COE efforts is a nod to the importance of diversity: "Making meaningful change to improve your community's health, educational status, economic vitality, quality of life, operational processes, and mode of operation, with the purpose of creating new value for residents, other customers, and stakeholders. The outcome of innovation is a

discontinuous or breakthrough change (COE Framework, 2020)." The definition does not single out any specific demographics. It is inherently inclusive of all who reside, do business within, travel through and serve the defined geographic place.

Creating new value and making meaningful changes to improve are the key phrases that apply to all definitions of innovation. The mention of health, education, economics, and life quality deems this definition unique to COE. Inclusion of these elements recognizes the growing desire for greater inclusivity and equity, improved life experience for the greatest number of people, and more sustainable community environments and economics. At the same time, this inclusive approach to community improvement and development is respectful of everyone's position, is non-political/partisan, and neutral in taking extreme sides. It seeks to find shared values, needs, and desires in a pursuit of excellence through compromise and collaboration.

Organizations applying the principles of Baldrige are forced to think about all of the diverse

perspectives within their shareholder and stakeholder groups, including different internal departments and external vendors, suppliers, and target customer markets, to name a few. In communities of place, the diversity of perspectives grows from one organization's list to a much broader circle of life experiences, positions of power and influence, and expectations from the place they have chosen to live, learn, work, and play. To help people come together to lead a community and not get overwhelmed by this extensive definition of inclusivity, the COE Framework focuses on the geographic place in the Community Profile. The categories, then, primarily focus on the community excellence group that has gathered to serve the community collectively without prescribing how they decide to carry out that service.

The COE Framework's guidance of encouraging groups to practice the values of diversity, inclusion, and equity is evident in the leadership structures that community excellence groups have put into place. While most have smaller core teams and larger partner groups within their structure for practicality reasons, all COE communities are conducting their decision-making and work activities in ways that inform, consult, involve, collaborate, and empower many diverse perspectives (iap2, 2022).

Those involved in providing residents with health care, quality of life services, education, and economic vitality opportunities are used to working within their individual organizations, businesses, and entities. They may be proficient at networking within their specific silos of interest and expertise and possibly even partnering with others outside their lane to support community events and youth activities. Based on the findings of researchers such as Robert Putnam (2000), Putnam with Shaylyn Romney Garrett (2020), Rosabeth Moss Kanter (2007), Margaret Wheatley and Deborah Frieze (2011), and many others who have examined the rise and fall of trends and challenges in community can-do spirit and organizational leadership, it has become rare over the past 100 years for community involvement to go beyond the surface of needed projects and

desired events. Addressing more deeply rooted challenges and higher-reaching opportunities that cannot be solved or leveraged without systems-thinking and strong relationships requires a greater volunteer commitment to advanced citizenship. Community development that improves the community through its processes beyond the treadmill of repetitive activities and funding cycles requires a more organized and integrated approach that the COE Framework answers.

In addition to the diversity of sectors mentioned in COE's innovation definition, the description of diversity as it applies to community collaboration efforts in the pursuit of progress and excellence is: "Personal differences among community members that enrich the community environment. The differences address many variables, such as race, religion, color, gender, national origin, language, disability, sexual orientation, age and generation, education,

socioeconomic status, geographic origin, and skill characteristics, as well as ideas, thinking, academic disciplines, and perspectives (COE Framework, 2020). One of the first processes that the COE Framework addresses is how leaders come together, who they are and why they are coming together. To help catalyze the recognition of the diversity of perspectives that exists within a community, COE developed a "Community Round Table" tool (Figure 4.)

**Figure 4: Sample of Diverse Community Perspectives**

Listening to, considering, and involving leaders and other volunteers that represent the perspectives of many sectors and interest areas included in this graphic, as well as the more recognized labels of diversity, are proving to be key elements of community collaboration success (Rohd and Lord, 2021).

Solving Community Challenges

The challenges that are being addressed in communities are as diverse as the communities themselves. The following two communities are examples of the 26 community excellence groups across the country that are applying the COE Framework to their community

collaboration efforts. They have discovered the importance of moving away from past chaotic reactive activities, projects, and events towards new proactive aligned and integrated plans and implementation that involve many organizations. In one case, San Diego County, South Region, California, over 400 organizations are involved as partners, collaborators and suppliers, champions, and supporters (Figure 5.). Everyone plays an important role when and where they desire and are most needed.

Figure 5: Participation and Accountability Expectations of Various Collaboration Roles

Community Excellence Group
COMPOSITION AND ENGAGEMENT
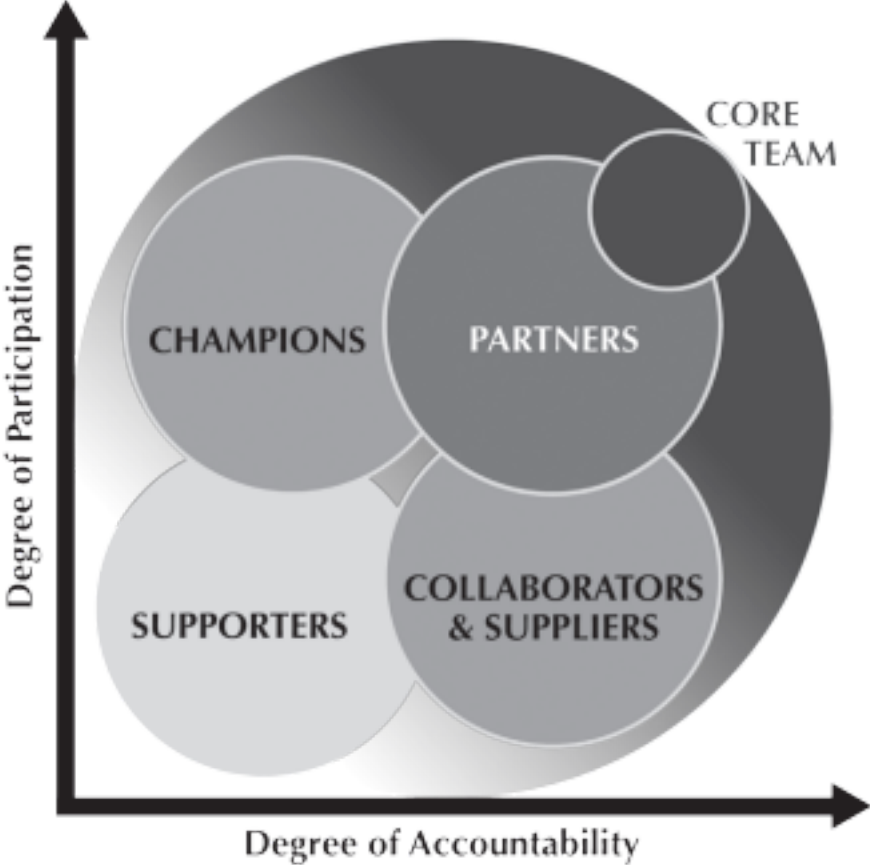
Building off our prior history and successes allow us to implement the COE Framework and propel the collective work of our partners to advance the vision of Live Well San Diego. Specifically, our enhanced strategic planning process has enabled us to further respond to the community's changing needs and allowed for innovative ideas. The governance structure ensures that we're advancing our collective work. – *Barbara Jiménez, MPH, Live Well San Diego, San Diego County, South Region, California*

In the past, we often focused on our challenges, without necessarily considering our many strategic advantages. We've also learned that the key requirements of residents in

the different geographic areas of our county are very different. We are also thinking about customers beyond our residents. They are employees of businesses in the region, legislators, [visitors], and key stakeholders in our contiguous counties that benefit from our efforts. To be excellent, we need to consider all of our customers and their requirements. – *Judy Crabtree, The Kanawha Coalition for Community Health Improvement, Kanawha County, West Virginia*

Both of these initiatives are looking at their strengths and going about their work differently by opening their discussions to new ideas (Deming, 2018). Kanawha County has moved from addressing topics primarily around wellness and chronic disease prevention to understanding the interconnectedness of all sectors. Through listening to residents and leaders outside of the health care institution that is serving as their effort's backbone organization, this West Virginia County is now prioritizing additional issues such as road safety; access to affordable and adequate childcare options; barriers to employment; and access to safe and adequate recreation, exercise, and play opportunities.

In describing the development of their Community Improvement Plan that is now being implemented through Kanawha County's experience in applying the COE Framework, Crabtree shares how important a systems approach is to engaging residents in a more meaningful way, "We now have new systems and processes in place to help us make decisions that are informed by the input from diverse customer groups and across all the areas of social determinants to health. As we strive for Kanawha County to be a great place to live, learn, work and play, we do so collectively. We look forward to improvements in our offerings, including systems, policy, and environmental changes that will result in long-lasting change."

Another health-focused initiative in West Kendall, Florida has also expanded is work beyond the partnership between West Kendall Baptist Hospital and the Florida Department of Health. The leaders of the group were recently recognized in their State Capitol for their participation in Communities of Excellence. "Looking at our community through the lens of education, economic

vitality, safety and quality of life [in addition to health] is a shift in approach that has allowed us to tap into key stakeholders and create a sustainable initiative. Our new vision statement is 'To be a blueprint for a healthy and thriving community.'" – *Michelle Mejia, West Kendall Baptist Hospital, West Kendall, Florida*

Mejia tells stories of how helpful it has been to have stronger relationships with the Florida Department of Transportation, for instance, to better understand pedestrian and cyclist traffic in their community. Promoting safe walking and cycling for wellness requires knowing the road,

sidewalk, and bike path conditions and usage data. Adopting a systems view with participation by many leaders has contributed to a more robust culture of trust and camaraderie.

The Impact of COVID-19

Perhaps the most disruptive challenge other than a natural disaster any community has faced within the last 75 years is the COVID-19 global pandemic of 2020-2022. The virus has served as a pivotal testing ground for the effectiveness of the COE Framework and the innovative and inclusive work of the community excellence groups. For those community excellence groups comprised primarily of health care providers, leading community collaboration efforts all but ceased for a time. Hospitals serving as the action network coordination and administrative support backbone had to reallocate time to patient care. However, that was not the case for those that had taken the time ahead of the crisis to build strong cross-sector relationships. Mejia has shared that West Kendall Baptist Hospital's strong relationship with their local business community has literally opened doors during the COVID-19 global pandemic allowing the hospital to partner with a nearby hotel for patient overflow. Other communities found that having a wide range of sector types already involved was a key to their ability to respond to COVID while also continuing their work on other priorities as much as possible. Following are several direct quotes shared by participants:

> This is when working together has legs, in a crisis like this…This [Communities of Excellence] isn't just something you do when you have time, this is how you solve problems. – *Quentin Wilson, Community Leader, St. Louis County, Missouri*

> Our experience using Communities of Excellence and Baldrige-based principles in the community positioned us to naturally approach the COVID-19 pandemic through a collaborative and inclusive lens. Work Groups for all sectors in the community were quickly formed and now communicate weekly through well-attended robust digital

> sessions, ensuring all stakeholders are current on the latest developments and can get their questions answered. We swiftly and collaboratively moved to protect vulnerable populations, taking steps that have been recognized by the state governor during his daily news conferences. We worked side by side with all our health care community to creatively expand medical capacity well in advance of the expected surge. Our experience with COE and Baldrige has allowed us to collectively and collaboratively

ensure our community remains healthy, safe, and thriving. – *Nick Macchione, Director, County of San Diego Health and Human Services Agency, San Diego North Regions, California*

The networks, communication channels, and relationships established through our COE work over 2 ½ years are proving extremely beneficial to community leaders during this time.As we move into [COVID-19] recovery, these same channels will be used to coordinate a long-term response and recovery effort.We have a common strategic planning process that can be replicated to develop a community-wide response.Our shared processes and network would not exist without the work we've put in because of COE. The systems approach provided in the COE Framework is an asset to communities anytime, but especially in times of crisis and instability. – *Kim Halfhill, Community Coach, Excelsior Springs, Missouri*

Right after the COVID-19 crisis began, the chair of our Community Success Panel, which coordinates our Communities of Excellence efforts, called a meeting to bring together city leaders, county leaders, our health system, and pretty much all the major players in our community. We formed a coalition, that really came out of Communities of Excellence, that meets twice a week to strategize and work together across the community around this crisis. Communities of Excellence provided a great way for us to get started with this coalition, which is now doing some excellent work. – *Sharon Mortensen, President and CEO, Midland Area Community Foundation, Midland County, Michigan*

It is not just densely populated areas with existing collaboration efforts that are benefitting from the application of the COE Framework. Micropolitan and rural communities that are gathering leaders to begin a community collaboration effort are also finding value in asking the questions of the community profile introductory section of the Framework. While it is difficult to answer many of the questions without an entity or initiative in place, the questions along with an asset-based community development [ABCD] approach (Nel, 2018) are guiding these groups by helping them discuss the topics that will empower them to lay a strong and sustainable foundation for their future work together.

Slow depopulation over many decades is the root cause of many of the challenges we have throughout our rural region but going around and talking just about the data

wasn't getting us anywhere in starting a regional vitality initiative. Once we started asset-mapping and analyzing gaps and opportunities throughout our 18-county region of just over 250,000 people spread across 9,300 square miles, we began to gain a little traction. An uplifting brand story for our collaboration efforts along with a sincere attempt to support many volunteers coming together to better connect and promote what we do have that already helps keep and attract talent to the area are the key factors that are convincing leaders from many sectors that there is value in cross-sector strategic action planning. There is hope! – *Steve Wenger, Maximize NWMO Navigation Team and The Community Foundation of Northwest Missouri*

Hope along with a can-do attitude and a willingness to invest in themselves financially and through leadership development are the ingredients of success in community collaboration efforts (Macke, 2021). In the process of answering the COE Framework questions, several community excellence groups have decided to implement and or expand support for community leadership programs that build the capacity for systems leadership, innovative ideas, managing by fact, and including as many perspectives as possible in decision-making. "Our game plan of building the capacity and capability of leaders is an application of the infinite mindset of investing in long-term generational transformation starting with those informal and formal leadership positions today," said Wenger.

Driving Results from Improvement Mindsets

Opposite of hope and very real and present in early collaboration efforts is the emotion of fear. A lesson for Communities of Excellence 2026 leaders who are mentoring and coaching community collaboration efforts, and any other Baldrige practitioner, is that many of the people involved in each community are unfamiliar with the principles of Baldrige. These leaders are uncomfortable with what they do not yet know about the COE Framework. While those with experience know that the questions within each category are designed to enhance systems thinking and drive quality excellence, the probing can quickly put performance excellence novices on the defense if they do not understand the intentions. Even with the adapted language now in place specific to communities, an orientation to the Framework's innovative interconnectedness and inclusivity along with a strong sense of urgency and shared vision among members of each community excellence group can be helpful. Another key lesson learned is the importance of starting from a place of positivity and willingness to invest in themselves (Macke, 2021).
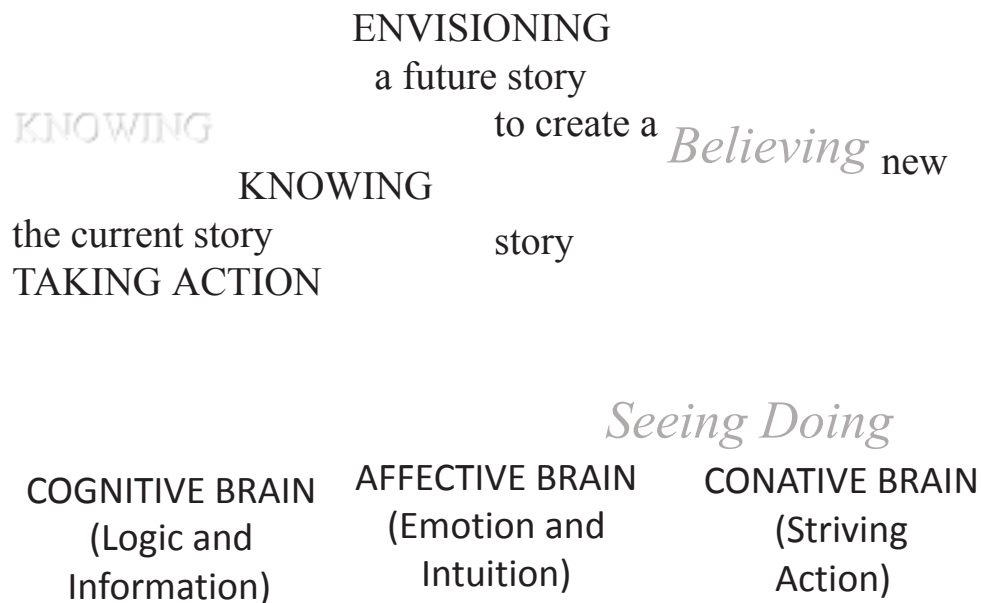
Starting from conversations focused on strengths that can be built upon versus a spirit of unhelpful

criticism is an especially helpful mindset. Starting with attention to assets instead of deficit and fear balances the essential role of facts in cognitive (logic and information-based) decision-making with the affective (emotional and intuitive) dreams that feed strategic visioning as well as the conative (striving action) for implementation of plans (Kolbe, 2021) (Figure 6.).

**Figure 6: Three Stages Mirror the Three Mental Functions of Humans**

communities of excellence 2026

ENVISIONING
a future story
KNOWING   to create a *Believing* new
KNOWING
the current story   story
TAKING ACTION

Seeing Doing

COGNITIVE BRAIN   AFFECTIVE BRAIN   CONATIVE BRAIN
(Logic and   (Emotion and   (Striving
Information)   Intuition)   Action)

At its simplest and highest level, COE's approach is described as seeing, believing, doing, and then repeating the cycle. It is a human-centered design mirroring the way human brains operate. Too often, people jump to emotions of overwhelming hopelessness by focusing only on negative realities such as rises in obesity, a decline in population, troubled economies, and crumbling infrastructure as examples. They forget or fail to acknowledge all their strategic advantages, existing assets, and incremental progress. Both the negative and positive facts are essential for driving a sense of urgency to transform outcomes (Kotter, 2012). Leaders involved in these efforts benefit from having a guiding framework that helps them first understand their community situation or story, including many diverse perspectives in envisioning a new and improved story; and take action together to make their strategic plans a reality. One of the elements that set the COE Framework apart from the many other public and private investments made to help communities over the past couple of decades is the focus on sustainability and moving away from reacting to solve surface

problems to developing closer relationships, aligned efforts, and integrating resources where it makes the most sense (Figure 7.).

Figure 7: Assessing Processes and Progress to Meaningful and Measurable Long-Term Outcomes
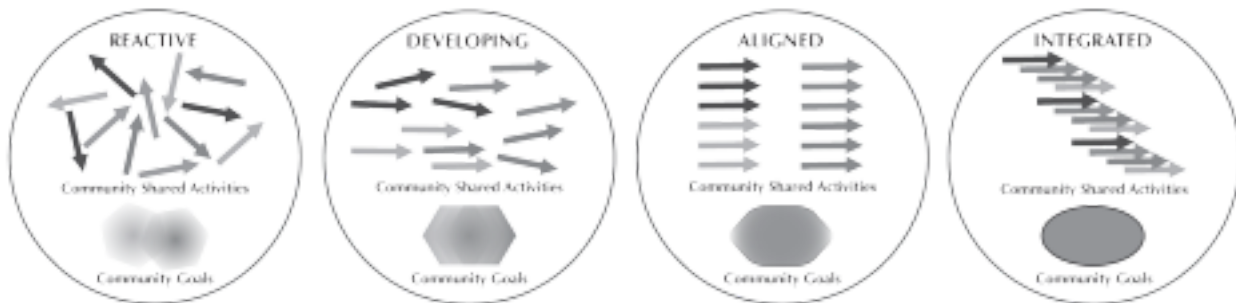
The guiding questions focus collaborative leaders on documenting their decisions and actions in a way that motivates them to keep an eye on the big picture. They help identify and address the key opportunities for improvement and celebrate the progress of wins along their journey. The COE   Framework supports a continuous cycle of considering and engaging the community's residents and other customers/stakeholders instead of focusing only on stand-alone or short-term projects and the siloed agendas of specific sectors and individuals.

> "We developed big audacious goals of where we think we'll be over time. We also developed specific initiatives where we either created additional senses of urgency, additional collaboration, or where we're better together. Of these, universal Pre-K [education] has been implemented in our city, and we're really proud of that. We have not made sustainable progress in infant mortality, although ProMedica continues to do a better job in that. Achieving national ranking as a vibrant art community is in process. We're trying to achieve that objective right now. We did bring several programs to support local tech startups and small business and minority owned businesses. It is definitely a journey.
>
> Social Justice and Reform is the sixth pillar we added. While we spoke about diversity, equity, and inclusion among our pillars, we did not feel our efforts called that out in the way that we feel it needed to be honored in the City of Toledo. When we are thinking about education   and a socio-economically depressed areas, are we really thinking about… 'opportunity   is not equal to talent that's distributed.' Not everyone has the same opportunity for the resources that are available. So, we created that as a call to action within our community.

I'm proud to say that Communities of Excellence is on the strategic plan for the City of

Toledo, it is on the strategic plan for ProMedica, it is on the strategic plan for our regional   growth partners, and several other companies that have been at this conversation for a long period of time." –*Angela Brandt, President, ProMedica Senior Care, Toledo, Ohio*

Over the past four years, additional COE faculty members with experience gained while working in communities have been welcomed to the team. They bring the practical application insight of what is working and what is not that is needed in COE's groundbreaking program. Mentors have been recruited for each participating community to serve as coaches, objective sounding boards, and sources of encouragement throughout the process of adopting the COE Framework. Evaluators have also been secured to review communities' applications for objective feedback and recognition. The Framework itself, and approach to covering its elements in the curriculum, have also been updated several times. The organization has modeled the way (Kouzes and Posner, 2012) for others by listening and learning from participant feedback compiled each year gathered for COE's performance improvement. The most recent program evaluation revealed:

● 100 percent of the participants either strongly agreed or agreed that COE 2026's National Learning Collaborative's content is relevant to their community collaboration work. One survey respondent said, "It brought us together."

● Nearly all indicated that new knowledge is being learned throughout the experience.

● Applying the learning takes time, yet many participants state that they see the benefits of systems-thinking and the Framework's values in their daily personal and professional lives and their community interactions.

● 93 percent said the Framework is a useful approach to support continuous improvement for community collaboration efforts – a benefit they haven't experienced in applying other models – listing the major benefits as:

⸎ Helping community excellence groups develop a common language across different sectors,

⸎ Fostering cross-sector collaboration by "shaping the discussions without the need for 'control'" by any one entity or individual;

⸎ Building a systems approach that focuses efforts on achieving outcomes beyond just planning for them.

A summary of what the faculty feels participants can accomplish as they apply the systems leadership principles of the COE Framework over time include:

- Higher rates of community engagement,

- Measurable outcomes across many sectors,

- Ability to anticipate issues in advance,

- Build resiliency and become less reactive and more proactive,

- Make better decisions by managing by fact, and

- Improve communication that builds stronger and more trusting relationships critical to success.

Key performance indicators in the early stages are as simple as tracking how many people are showing up consistently, how many sectors are represented in conversations and data gathering, and how many voices are participating in surveys and listening session. These process indicators reflect the necessary resources (inputs) and activity (outputs) that must preface short-, mid-, and long-term outcomes.

Conclusion

Throughout its first decade of serving communities, COE's leaders have learned that when it comes to making meaningful change in communities, each community's leaders and key stakeholders must first take ownership and trust the process. They must look to each other and include as many of their residents and other customers as possible to find new and better answers to legacy and systemic problems. To be successful once they have shown up to collaborate, they need guidance, mentorship, and coaching that allows them to thoughtfully and systematically make progress through the interconnected complexity of their community. The systems leadership and integrated management approach inspired by Baldrige and translated into inclusive community language developed by COE is helping to build stronger communities of connection, courage, creativity, and character. It is an innovative approach that is helping leaders think differently about the potential of their communities and value all people and assets. Communities of Excellence 2026 is bringing the light of hope to community leaders who have dedicated themselves to improving the places they live, learn, work, and play.

Key Takeaways

● The interconnected nature of the innovative Baldrige-adapted Communities of Excellence Framework's criteria categories helps community excellence groups better understand themselves as a whole through answering questions of why, who, what, and how related to their collaborative efforts.

● Being inclusive of diverse perspectives in a community context helps community excellence groups solve challenges and cross traditional boundaries towards progress over time.

● The COE Framework can be applied in communities of all sizes and locations to build innovative thinking skills, systems leadership, and more inclusive cultures.

● Considering the strengths and perspectives of many voices helps communities address root causes of problems and more wisely use resources.

● COVID-19 has proven how valuable the cross-sector relationships that are encouraged within the COE Framework are to communities facing shared challenges that need innovative solutions.

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