

Community of Excellence (Level 3) Examiner Key Information and Timeline

Applications for the Community of Excellence (Level 3) assessment and recognition will include responses to the Communities of Excellence criteria in their entirety, including the Community Profile and categories 1–7. In their responses to the process categories (1–6), applicants will detail the approach used, the extent of deployment, evidence of learning, and integration. In responding to category 7 (Results), applicants will report levels, trends, comparisons, and integration for all key results.

Estimated Time Commitment: 25-40 hours including 2 examiner training webinars and 2 video conferences

Key Dates

- May 15 – June 15th Examiner application period
- June 18 – Examiners are notified of acceptance, receive community assignment and logistics information
- July 8 at 11:00 am PT/2:00 pm ET – 1st Examiner Training Webinar (1 hour)
- July 15 at 11:00 am PT/2:00 pm ET – 2nd Examiner Training Webinar (1 hour)
- July 16 - Examiner team receives community application for review
- August 9 – 11 - Video conference with applicant community representative(s) (3 hours)
- August 12 – September 19 - Feedback is formulated by item leads; reviewed by backups; reviewed by all examiners
- September 20-24 - Consensus video conference with all examiners (4 hours)
- October 1– Updates to feedback are completed; reviewed by backups; finalized
- October 6 – Final feedback report sent to COE 2026
- October 15 – Final feedback report sent to community

Phase 1– Preparing to receive your community application: June 18 – July 15

1. Examiners are notified of community assignment and receive video conference scheduling instructions and logistics information (June 18)
2. 1st Examiner Training Webinar (July 8: 11 am PT/2 pm ET for 1 hour)
3. Examiners work on training homework assignment (July 8 – 15)
4. 2nd Examiner Training Webinar (July 15: 12:30 pm PT/3:30 pm ET for 1 hour)
5. Examiners review instructions and prepare for Independent Analysis (IA)

Phase 2 – Independent Analysis: July 16 – August 11

1. Receive the Application - Community applications, instructions, and templates are sent to examiners on July 16.
2. Prepare for Independent Analysis –
 - a) Read the Communities of Excellence Framework in its entirety. Read the notes for each item as well as the glossary of key terms.
 - b) Read the Community of Excellence application assigned including the glossary of abbreviations (if provided).
 - c) Use the box on page 1 of the Independent Analysis Template to note any preliminary themes or thoughts.
 - d) Receive Key Factors Worksheet from your team leader on June 23.
3. Conduct an Independent Analysis –Capture what you think you know about the applicant’s processes and results, and what more you need to know using the Analysis Review Worksheet on the Independent Analysis Template. Do the following for each item (1.1, 1.2, 2.1...etc.) Post by July 30.
 - a) Read the item in the COE Framework.
 - b) Choose 4–6 key factors for the item and write them in the appropriate box.
 - c) Analyze the application with an eye on key factors, framework questions, and ADLI or LeTCI.
 - d) On the Analysis Review Worksheet on the Independent Analysis Template, write down your observations for that item based on the key factors, framework questions, and ADLI or LeTCI. See the template for examples. (Do not select, write, or prioritize strengths and OFIs at this time.)
 - e) Based on your observations, write down potential questions for the applicant.
 - f) Complete independent analysis for all items by July 30.
 - g) Your team leader will then compile the final list of questions to send to applicant by August 4.
4. Receive item lead assignments from your team leader by August 4.
5. Participate in video conference with examiner team and applicant community representative(s) to discuss questions (August 9-11 for 3 hours).

Phase 3 – Feedback Formulation: August 12 – September 19

1. Feedback Formulation - Re-read the application and use the Feedback Template for your assigned items.
 - a) For the Community Profile (if assigned as lead), write up to 3 highlights and three considerations in total.
 - b) For each item assigned, write 1-6 findings, as appropriate for the amount of information in the application and the maturity level of the applicant. See the examples in categories 1, 2, 4, and 7 in the Feedback Template.
 - c) Complete by August 25.
2. Item backups complete review by August 30.
3. Item leads incorporate backup review comments by September 3.
4. All examiners review and comment all items by September 10.

5. Item leads revise feedback and prepare for consensus video conference by September 20.

Phase 4 – Consensus and Final Feedback: September 20 – October 6

1. Participate in consensus video conference. Item leads present proposed feedback for consensus. Team leader presents suggestions for key themes (September 20-24 for 4 hours).
2. Item leads complete revisions to feedback and backups review by October 1.
3. Team lead reviews feedback, compiles key themes, and finalizes the feedback report by October 6.