



DECEMBER 2022

GUIDING COMMUNITIES
WITH A BIG PICTURE
APPROACH THAT
FOCUSES ON EQUITY,
INCLUSION, AND
BROADER DIVERSE
PERSPECTIVES IN
DECISION-MAKING

communities of *excellence*²⁰²⁶

Welcome to an Overview of 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.



VISION

High-performing, vibrant communities.

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.

CORE PURPOSE

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

MISSION

Improve the quality of life for our nation's residents by assisting communities in implementing the Baldrige-based Communities of Excellence Framework.

Communities of Excellence 2026 (COE 2026) is a 501(c)(3) nonprofit organization that hosts a learning collaborative of communities across the country, trains communities in the Communities of Excellence Framework, adapted from the Baldrige Framework, and provides opportunities for communities to work together, share successes, challenges, ideas, and best practices, and learn from each other on their performance excellence journey.

Dreams Imagined Are Being Realized and Expanded

What we imagined might happen with the launch of Communities of Excellence 2026 is starting to come true. Leaders in communities are coming together across multiple sector and geo-political boundaries, and they are finding the Baldrige-adapted Communities of Excellence Framework to be an effective guide and catalyst in their collaboration efforts.

The first few years provided greater understanding of the unique characteristics of communities compared to entities that have a clear chain of command. The success found early on is now fueling several even bigger dreams for the work carried out through Communities of Excellence 2026. You will read in the following pages about the five big and audacious goals that our Board of Directors approved in 2022. Ensuring the Framework's criteria related to diversity, equity, inclusion, accessibility, and environmental caretaking is brought to the forefront of conversations and strategic considerations is an overarching priority. In this case statement, you'll learn more about the big news of "community" being authorized by U.S. Congress as the seventh category of the Malcom Baldrige Quality Award. Finally, you can peruse the updated stories of progress being made in several communities that are involved in our three-phase National Learning Collaborative.

We remain committed to this bold dream as we approach America's 250th birthday in 2026. We are looking ahead to what life can be like for our children and great-great-great-grandchildren and taking action today to ensure our American society of people, communities, counties, and states continue to be united and well-positioned to thrive for many years to come. Thank you for your interest and support as we look forward and learn together with you how to best develop Communities of Excellence across our great nation.

Onward and upward,
Lowell Kruse and Richard Norling, Co-Founders




Five Big Goals Shaping Our Strategic Areas of Concentration

- #1 Communities of Excellence is sought out by communities and organizations as the collective center of knowledge, expertise, instruction, and wisdom related to community performance excellence with the capacity to spread to communities nationally and internationally, resulting in sustainable and significant improvement to key measures of community performance.
- #2 Organizations and leaders in all sectors adopt Baldrige-based tools and practices, including the Communities of Excellence Framework, and collaborate across sectors to lead high-performing organizations and communities.
- #3 The Baldrige Enterprise is an energized, integrated, high-performing public-private partnership recognized for its leadership and standing in performance excellence, and passion for improving America.
- #4 The Department of Commerce and the National Institute of Standards and Technology (NIST) partner with the Baldrige Enterprise to adopt Baldrige-based tools and practices, including the Communities of Excellence Framework, as the means to transform community performance.
- #5 The President of the United States and cabinet members endorse the Baldrige Enterprise and Baldrige-based tools and practices, including the Communities of Excellence Framework, as the means to transform organizational and community performance. Propelled by this endorsement, all governmental agencies (federal, state, county, and local) are encouraged and incentivized to adopt Baldrige-based tools and practices within their agencies and assist with implementation in communities.

STRATEGIC AREAS OF CONCENTRATION

- ◆ Actively support an energized, high-performing Baldrige Enterprise
- ◆ Increase capability and capacity to support communities
- ◆ Become the Center for Community Performance Excellence Resources and Knowledge





Envision what our country could be like if people with many different perspectives, experiences, and dreams could agree to work together on the priorities they share while also respecting the pursuit of their individual goals.

Imagine...

... a time when leaders – elected, appointed, and volunteer – within a community decide and act together to:

- **Listen** to the full range of stakeholders to better understand the community's assets, needs, and dreams,
- **Identify** challenges that are shared by a majority or all,
- **Define** a shared community vision ,
- **Prioritize** what to work on first,
- **Access** trusted data to **gain** a deeper understanding of their priorities,
- **Plan** how to best (re)allocate resources of people, time, finances, and energy through alignment, engagement, and mobilization,
- **Implement** difference-making strategies,
- **Monitor** progress by tracking output activities and outcome impacts,
- Openly **communicate** the progress to the full range of community stakeholders, and
- **Decide together** what is working, what is not, and what to do next to continually **pursue** their shared vision while also **progressing** in their areas of interest.

This endless cycle is how high performing organizations succeed in meeting their goals.

We believe this asset-building systems approach is how high performing communities can also succeed in goal attainment to improve their economic vitality, educational attainment, health and well-being, and overall quality of life.

An Urgent Need for Systems Thinking and Decision Support

When it comes to making meaningful change in communities, it is the leaders and stakeholders of each community who must take ownership. The declining indicators of the overall health, wealth, and wellbeing of the majority of American citizens are due to systemic problems. These challenges are primarily created by the culture, habits, and systems of communities and their regulating entities.

Improving our communities requires investments of all kinds. Public and private investors are trying to help by pouring trillions of dollars and countless hours each year into projects and programs intended to strengthen American rankings. Yet, many U.S. communities are still struggling to provide adequate health care, education, economic opportunity, and a thriving quality of life for their residents, as well as prepare for natural, environmental, financial, or other disasters. The problems continue to exist because of a lack of connection between all of these investments.

There is no systematic approach familiar to and used by all entities within communities that ensures federal, state, local, and private sector efforts are aligned and integrated to maximize their benefit and impact.

When operating in silos and merely treating symptoms, as is often the case, community investors run the risk of limited impact, unnecessary duplication, and conflicting efforts. To ensure better outcomes, all community sectors need to have a seat at the planning table, understand their role in improvement efforts, and work together on shared priorities to coordinate resources and activities that address root causes and achieve measurable results.

We need to build stronger communities of connection, courage, creativity, character, and collaboration using a big picture approach that focuses on equity, inclusion, and broader perspectives in decision-making.

“For us COE 2026 has created a renewed energy in the community. There are a lot of important efforts and initiatives, but many of them are very fragmented. **This process is helping us shape all of the well-intended ideas and give them structure; something we see that people are hungry for.** Having the structure of the COE 2026 Framework has allowed for alignment and synergy, and for results to be driven in a faster, more efficient manner. It's going to allow us to realize results that we once thought were aspirational.”

—Angela Brandt, Toledo, Ohio



What is Being Done to Address the Issues

A few examples of investments by public and private entities in improving health, wealth, and wellbeing indicators in the U.S.:

- In 2021, the United States spent 18.3 percent of its gross domestic product (GDP), on health expenditures—the highest percentage in the world compared to the next closest, Germany at 12.8%, and the lowest, Denmark at .8%.⁵
- America invested \$795 billion in local, state, and federal money on its K-12 public schools for the 2019-2020 school year. That number doesn't include the additional investments made in early childhood and postsecondary education, as well as, job training and vocational training.⁶
- Examples of federal direct or indirect support for entrepreneurship, business growth, and economic development include 2.8 billion in FY2018 for the Small Business Administration, hundreds of millions in support of manufacturing, and \$116 billion in federal R&D for FY2017.
 - Due to poor health, education, and economic opportunities in communities across the nation, the federal government spends over \$600 billion dollars annually on programs such as food stamps, unemployment insurance, child nutrition programs, and others.
 - In addition, thousands of other public and private organizations are applying a wide variety of programs such as the Centers for Disease Control and Prevention's HI-5 program, the National Institute of Advanced Technology's [NIAT] Community Resilience Program, the Department of Housing and Urban Development's community block grant programs, the National Trust for Historic Preservation's Main Street America, WealthWorks, Strategic Doing, FSG's Collective Impact, the Internal Revenue Service opportunity zones, the Department of Agriculture's Rural Development Innovation Center's Rural Economic Development Innovation [REDI] initiative, the Aspen Institute's Community Strategies Group, and many more.

Why is our work urgent?

Declining health, wealth, and well-being indicators in the U.S.:

- **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.¹
- **Deteriorating public health** – Life expectancy of Americans is now below the OECD (Organization for Economic Development and Cooperation) average and the U.S. has the highest prevalence of obesity in the developed world.²
- **Inequalities in economic opportunity** – 40-45 million Americans live in poverty³ and smaller cities, towns and rural areas are particularly suffering, with average annual incomes about \$54,000 less than larger metropolitan areas.⁴

¹ <https://news.stanford.edu/2016/04/29/local-education-inequities-across-u-s-revealed-new-stanford-data-set/>

² <https://www.cdc.gov/nchs/data/hus/hus17.pdf>

³ <https://www.census.gov/content/census/en/library/publications/2018/demo/p60-263.html>

⁴ <https://www.federalreserve.gov/newsevents/speech/brainard20170926a.htm>

⁵ <https://www.statista.com/statistics/268826/health-a-expenditures-gdp-percentage-in-oecd-countries/>

⁶ <https://www.edweek.org/policy-politics/what-america-spends-on-k-12-the-latest-federal-snapshot/2022/05>



The Value Added by Communities of Excellence 2026 to Communities

We are educating leaders who want to improve quality of life in their communities. To do so, they are learning they must shift mindsets, change partnership processes, and transform their culture for the better by capitalizing on their assets and opportunities. They are seeing how beneficial it is to bring all sectors together to talk and acknowledge their interconnectivity as a community system.

The Communities of Excellence Framework provides a proven systematic approach familiar to six sector categories (manufacturing, health care, education, government, small business, and nonprofit) within communities that ensures all silo-specific and special interest efforts are aligned with each other and integrated through common language and processes to maximize their benefit and impact.

The greatest advantage of engaging in Communities of Excellence 2026 is evident by looking inside the hearts and minds of the community leaders involved.

If you had this power of insight, you would witness...

- ✓ More awareness and consideration of the bigger picture and more regard for systems than sector silos,
- ✓ Ah-hah moments recognizing interconnectedness,
- ✓ Decision-making processes respectfully weighing multiple and diverse perspectives along with reliable data,
- ✓ Confidence growing,
- ✓ Satisfaction of knowing the right things to do to get desired results,
- ✓ Relief in knowing individual leaders are not alone in their vision and desire for excellence.
- ✓ A sense of pride for the positive aspects of community.
- ✓ A better understanding of what the root cause of challenges are and the collaborative spirit to take appropriate action.
- ✓ The small habits of negative mindsets, self-talk, and attitudes shifting to more helpful word choices and behaviors that are changing the minds and choices of others, and
- ✓ Conversations about activities and short-term projects moving to processes and long-term outcomes.



All of the community development efforts, investments, and projects being pursued and used in communities are encompassed in the **overarching journey to community performance excellence**. Some communities prioritize access to health care, and some are working on education and workforce development as a root indicator of prosperity. Some are uplifting a need for social justice and fair and equitable access to housing, high-speed Internet access, clean water, and affordable utilities. Still, others are addressing the need for an entrepreneurial ecosystem that better supports innovation and connects their economic opportunity to national and global markets.


Every community is unique in its needs. Therefore the strategic programs and projects they implement will be different. Yet, every community finding value in adopting the Communities of Excellence Framework and practicing true collaboration is finding that the inclusion of as many diverse voices as possible in a coordinated, organized, empowered, and aligned synchronous manner are making progress toward the vision they agreed upon together.

Of course, as with any continuous system, there are direct and indirect tangible products and projects serving as outputs and short-, mid-, and long-term outcomes. These are what can be seen as proof of the value of the Communities of Excellence Framework:

- **Community vision, mission, and values statements are formed and followed,**
- **A comprehensive community profile is a snapshot document created outlining what is known about a community's current realities,**
- **New or improved leadership structures, work systems, and communications efforts are planned and implemented,**
- **Connections to other communities are established by leaders sharing and learning across both the perceived and real borders of organizations and maps, and**
- **Coaching, outside assessments and feedback, progress reporting, recognition, and awards are all a part of the experience.**

“From my perspective, [COE 2026] is the only way that a community can truly have the right dialogue to advance as a complete community. If you really want sustainability and change and something to be proud of...I personally think [COE 2026] is the only structure that can really advance that conversation in a meaningful way.”

—Kim Halfhill, Excelsior Springs, MO



The entire process of learning and working within the framework is a catalyst and effectiveness measuring tool for all of the opportunities that broaden resident engagement around meaningful purposes and helpful projects.

A New Approach Based on Proven Principles and Promising Practices

CONCEPTION

In 2010, two former healthcare CEOs, whose organizations won the Malcolm Baldrige National Quality Award under their leadership, brainstormed ways to confront systemic problems that are eroding the fabric of our society, including inequitable access to education, seismic shifts in the nation's and world's economy, and escalating costs of health care, with no improvement in outcomes. They discussed their belief that a systems-based approach built on the same principles of performance excellence that created significant and sustained improvements in performance, quality, and cost savings in their former organizations could also address today's concerns about community performance.

Their vision led to more conversations with Baldrige representatives and government, business, university, and foundation experts from coast to coast. By 2012, a steering committee began to adapt the Baldrige Excellence Framework for use by communities. COE 2026, named in honor of the United States' upcoming 250th anniversary, was established to test the founders' hypothesis through a nationwide pilot.

HYPOTHESIS

That a framework proved to drive performance excellence in companies and organizations (the Baldrige Excellence Framework) can be adapted to achieve performance excellence in communities and improve the quality of life for all Americans.



High performance and improved results necessitate a practical framework for collaboration across all sectors of the economy, well-defined criteria, community-driven goals and objectives, and a system of accountability that involves independent evaluation, measures, benchmarks, feedback, and alignment.



The Communities of Excellence Framework is an advanced, comprehensive, systems approach to leading and managing communities. It enables improved outcomes in the essential areas of community life, such as educational attainment, economic vitality, health status, and safety.



The Communities of Excellence Framework is a guide for positive, comprehensive, and productive collaborative planning and action throughout a geographical area. The framework promotes an inclusive approach to solving community challenges and values diversity of all types through meaningful dialogue and collaboration.

Congress Authorizes Community as the Newest and 7th Category of the Malcolm Baldrige National Quality Award

What is the Malcolm Baldrige National Quality Award (MBNQA)?

The Malcolm Baldrige National Quality Award (MBNQA) is a presidential-level award that is presented to businesses and other organizations that demonstrate the highest levels of quality and performance excellence. Congress created the Award Program in 1987 to:

- Identify and recognize role-model businesses,
- Establish criteria for evaluating improvement efforts, and
- Disseminate and share best practices.

Following expansion by Congress, awards are now presented in six different categories: Manufacturing, Service company, Small business, Education, Healthcare, and Nonprofit/Government. Community will be the 7th category.

Why do new Baldrige Award categories require congressional approval?

The award program and award categories were established by Congress in The Malcolm Baldrige National Quality Improvement Act of 1987. The bill also set forth the process for expanding the award categories.

What does authorization of this new award category mean for communities?

Authorization of a new award category for communities is a critical step towards enabling communities across the country to be able to apply for the Malcolm Baldrige National Quality Award, receive a detailed feedback report on their strengths and opportunities, and possibly earn presidential-level recognition for their efforts to improve the performance of their community. More importantly, the MBNQA allows for the identification of role model communities and the sharing of best practices from these communities across the United States and around the world.



Since 2013, Communities of Excellence 2026 (COE) has brought communities across the nation together to participate in a pilot program using the evidence-based Baldrige Framework. The proven and successful approach can be applied across community sectors to improve the experience of living, learning, working, and playing in communities across America. Recently, with the President's signature, Community is now the 7th Category of the Malcolm Baldrige National Quality Award! Check out the news release on our website at

www.communitiesofexcellence2026.org.



Background on The Baldrige Performance Excellence Program

The Baldrige Program is a highly leveraged public-private partnership created by Congress in 1987 to help improve America's ability to compete in the global economy by solving the quality crisis of the 1980s. The legislation mandated a three-pronged mission of:

- Establishing a nationally recognized and accepted framework of quality and performance excellence (the Baldrige Criteria),
- Managing a Presidential recognition for role-model organizations that perform very well against the criteria (the Baldrige Award),
- Fostering the understanding and use of the framework and sharing the best practices from role-model organizations to improve performance and sustainability,

Numerous studies and data analyses confirmed that organizations that adopted Baldrige significantly outperformed competitors and peers, resulting in greater efficiency, higher margins, improved customer and workforce satisfaction, faster growth, and much higher stock valuation. Within the last decade, 124 organizations landing in six categories have earned the national Baldrige Award. Tens of thousands have benefitted from applying to state, regional, and sector-specific programs.¹




How does COE fit within the Baldrige Enterprise?

The Baldrige Enterprise consists of five, independent, mutually supporting entities. Together they form the most unique and successful Public-Private Partnership in the U.S. Government. In addition to Communities of Excellence, the entities are:

- [The Baldrige Performance Excellence Program \(BPEP\)](#). BPEP is the “public partner” designed to recognize and improve performance of the nation’s businesses, health care organizations, educational systems, and non-profit organizations and government agencies through defining, recognizing, and fostering quality and performance excellence,
- [The Foundation for the Malcolm Baldrige National Quality Award, Inc.](#), also known as the Baldrige Foundation, was created as the private partner to the Baldrige Performance Excellence Program in 1988. Its mission is to ensure the long-term financial viability of the Baldrige Program and to support organizational performance excellence throughout the United States and the world,
- [The Alliance for Performance Excellence](#), a nonprofit national network that aims to enhance the success and sustainability of 28 state, local and sector Baldrige-based programs. Alliance members cover all 50 states and provide Baldrige-based assessments, recognition, and other offerings,
- [The American Society for Quality \(ASQ\)](#), which assists in the administration of the award program under a contract with NIST. Headquartered in Milwaukee, Wisconsin. ASQ champions people passionate about quality in more than 150 countries.

¹ <https://www.nist.gov/baldrige/how-baldrige-works/about-baldrige/baldrige-impacts>




Community leaders are finding the Communities of Excellence Framework helpful for seeing, believing, and doing more to maximize their potential.

A Process of Discovery

Over the first decade of our organization, we have worked with a diverse group of experts and practitioners – some of whom were familiar with Baldrige, and some of whom were novices to the idea of integrated management and systems thinking. Together, we have discovered how to convert the Baldrige Framework, which applies well to entities that have an organizational structure of hierarchy and accountability, to the community environment where the same overarching structure does not exist. Communities do not have a chief executive officer.

The result is a new version of the framework.



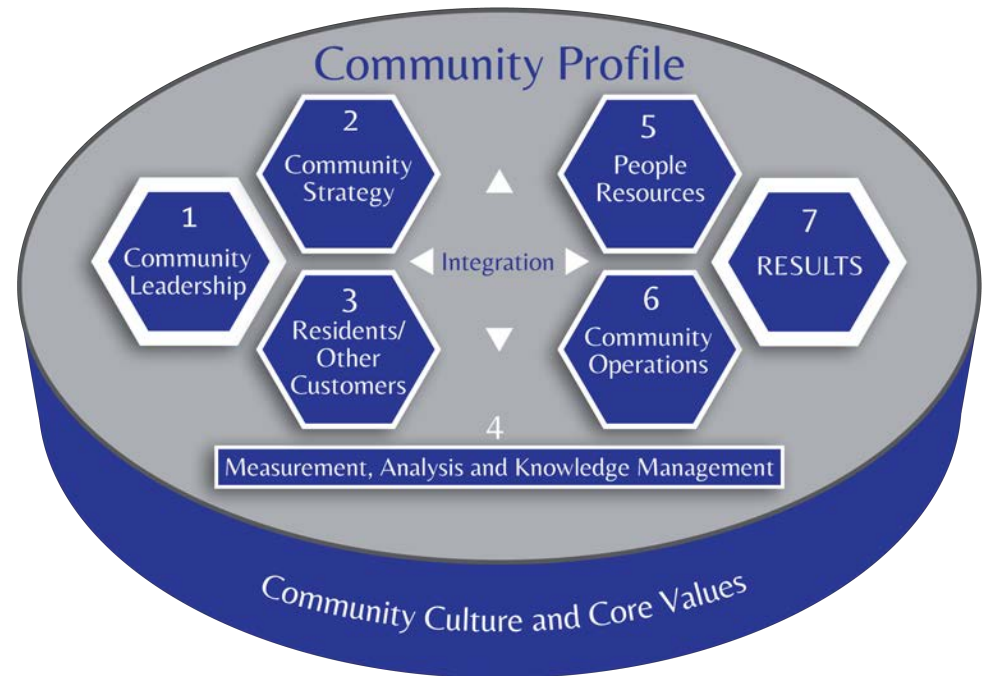
“We’re causing a wave without even realizing it. As we’re moving through our discussions with people, they know our background already and the purpose. **What makes COE 2026 different is the leadership education, and that’s the basis for any change you want to make.”**

—Nina Plata, Kings County, California

Applying Proven Principles to Community:

- Encourages collaboration across sectors,
- Aligns people, processes, and plans,
- Identifies and pursues community-driven goals,
- Evaluates progress, and
- Instills a culture of leadership and responsibility across generations.

communities of excellence²⁰²⁶ 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 7.2022

Creating a System for Aligning Attitudes and Behaviors with Goals

Pilot Community Experience

Communities are inherently diverse and complex; therefore, we have learned through our pilot that a systems approach is the best way to address community-wide challenges and opportunities for improvement to realize shared hopes and dreams.

A systems approach to change communities involves seeing, believing, and acting. It requires:

1) Knowing the current story—Looking at the elements, interconnections, and wider purposes of systems.

- ✓ The Framework helps communities assess their performance, leadership, and areas most in need of measurable improvement and innovation, with a particular focus on education, employment, health, and safety.

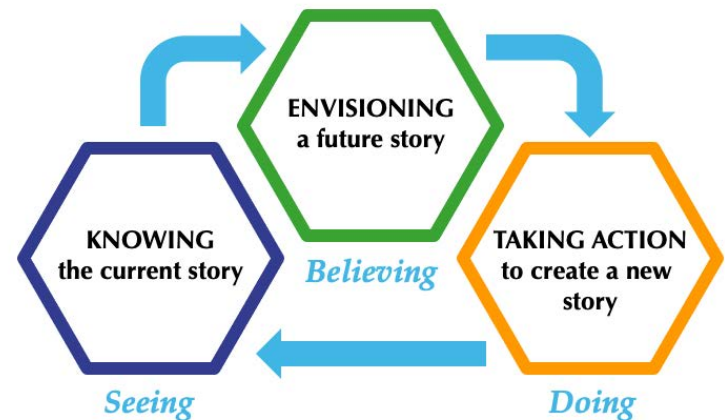
2) Envisioning a future story—Understanding and trusting the data to guide decision-making and determining a shared vision and priorities.

- ✓ The Framework guides dynamic dialogue through a common language that harnesses the best of the community's collective past, respects the people today, and responsibly pursues the opportunities for improving tomorrow.

3) Taking action to create a new story— Investing time and resources to learn and shift habits that are, when combined, the continuously improving system of “how things are done around here” in communities,

- ✓ The Framework supports community residents and their leaders in developing and empowering their skills, knowledge, and leadership so that continuous improvement becomes internalized, sustainable, and ingrained in the community's culture.

A Systems Approach in Communities



“[We are] excited about the process...and energy. Everyone is believing that change can happen...not only believing, but seeing it happen.”

—Linda Place, Albany, Missouri

Defining the Community Performance Excellence Journey

Community

1. **A defined geographic area.**
2. **A group of people living in the same place or having a particular characteristic in common.**
3. **A feeling of fellowship with others, as a result of sharing common attitudes, interests, and goals.**

The word “community” can be defined in several ways that either promote inclusivity or polarization. For our work, a community is a group of people who not only decide to live or work near each other but also set up and share resources that become their systems or “way things get done.”

They proactively interact to establish shared infrastructure such as utilities, roads, and facilities as well as systems for policy setting, peacekeeping, leadership elections, educating all ages, faith following, recreating and entertaining, celebrating, disease preventing and treating, caring, and more. The Communities of Excellence Framework is a guide for positive, comprehensive, and productive collaborative planning and action throughout a geographical area of a diverse group of people who are residents and visitors of a city, trade area, county, or region.

Performance

The action or process of carrying out or accomplishing an action, task, or function.

Performance is how the work gets done. We define it as, “Outputs and their outcomes obtained from programs, services, processes, residents, and other customers that permit you to evaluate and compare your community’s results to performance projections, standards, past results, goals, and other communities’ results.”

Excellence

The state of being very good or outstanding.

Excellence, in the beginning, is aspirational, a FRAME OF MIND, a feeling, a desired state. It is a “forever and infinite continuous improvement JOURNEY. It requires preparation, capacity building, perseverance, patience, collaboration, inclusiveness, trust, and support. Systems thinking, leadership, and behavior leads to a CULTURE OF EXCELLENCE. It either starts with or leads to a vision or drive to “be the best of the best” and “all that you can be.” Pursuers will seek out promising practices and benchmark their results against the best. It requires a commitment and focus on intergenerational involvement and learning to assure long-term sustainability and reaching MAXIMUM POTENTIAL.

Journey

A passage from one place to another.

“My dad was an English major, and if you’ve read the book about him or heard me speak about him before, you know that the English language was really important to him. So, I’m going to start by defining the word “journey.” The word brings to mind improvement, change, evolution. The dictionary also offers a synonym for journey - the word pilgrimage - and I’m sure that’s what it feels like a lot of the time – a spiritual end, preceded by a long frickin’ walk. In modern English, a journey refers to a trip without regard to the amount of time it takes.

I’m sure you can relate.”

– Molly Baldrige, daughter of Malcom Baldrige

Helping Community Leaders Envision a New Way of Working

Communities of Excellence 2026 provides training, mentoring, research, and access to a growing network of urban, rural, and regional communities for the sharing of promising and best practices and resources.

✓ Through the Communities of Excellence Framework and the COE 2026 National Learning Collaborative, leaders from all sectors of the economy within diverse communities have discovered and developed innovative solutions that are systematically changing their communities' trajectories.

✓ As a **decision support system**, the Communities of Excellence Framework encourages:

- **Leadership development in systems thinking,**
- **Management-by-fact decision-making,**
- **Collaborative efforts toward a shared vision, and**
- **Adoption of a common “community” language to document processes for capturing promising and best practices.**



✓ The Framework is based on the following core values, beliefs and behaviors that we believe are found in high-performing communities:

- **Community Systems Perspective**
- **Visionary Community Leadership**
- **Resident- and Customer-Focused Excellence**
- **Valuing People**
- **Community Learning**
- **Agility and Resilience**
- **Focus on Success and Innovation**
- **Management by Fact**
- **Mutual Societal Responsibility**
- **Ethics and Transparency**
- **Delivering Value and Results**

In sum, the Framework helps the region's leadership and community partners collectively assess their performance, leadership, and where improvements and innovations are most needed to get positive and measurable results.

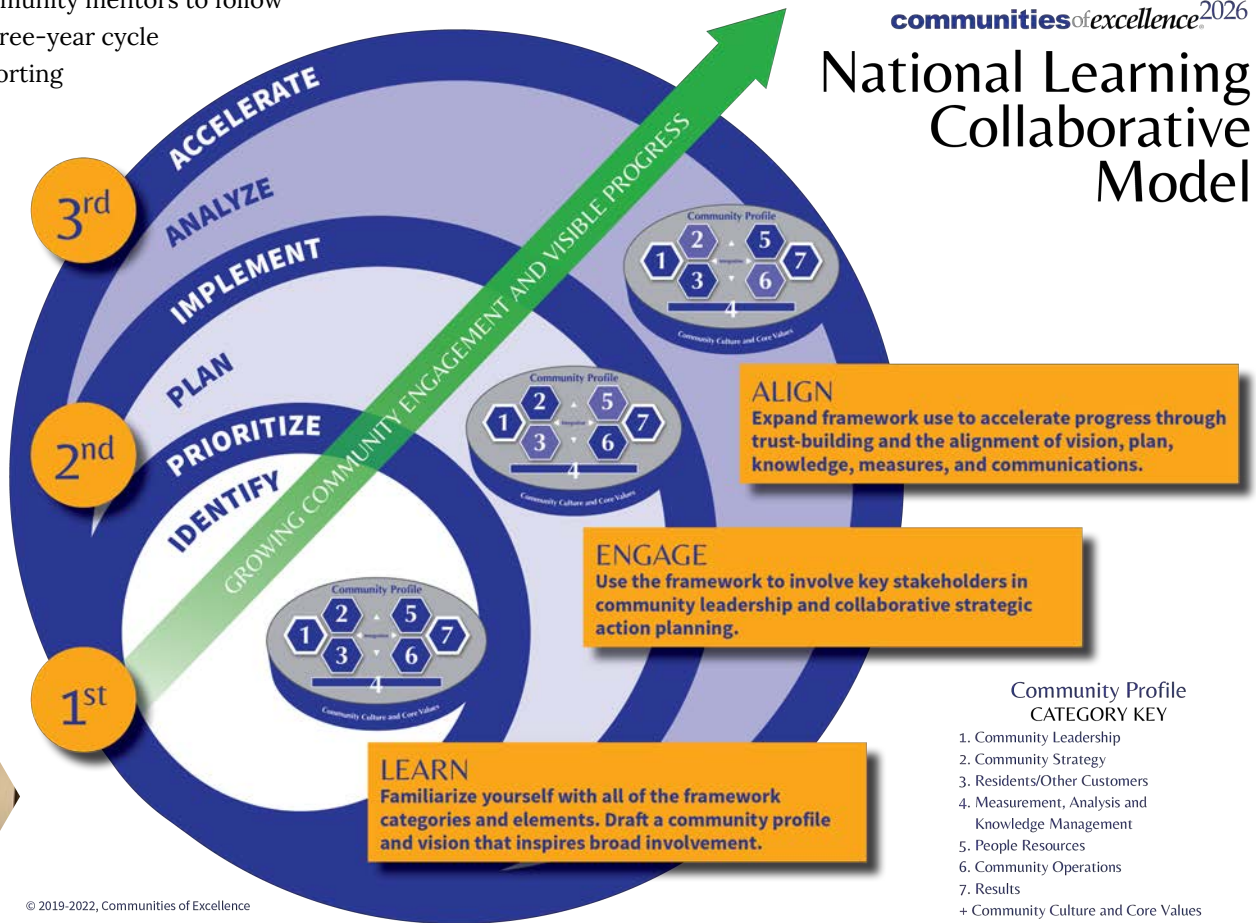


“[COE 2026] has given us hope. There are a lot of great things happening. People are willing to work together.”

—Steve Wenger, Northwest Missouri Rural Region

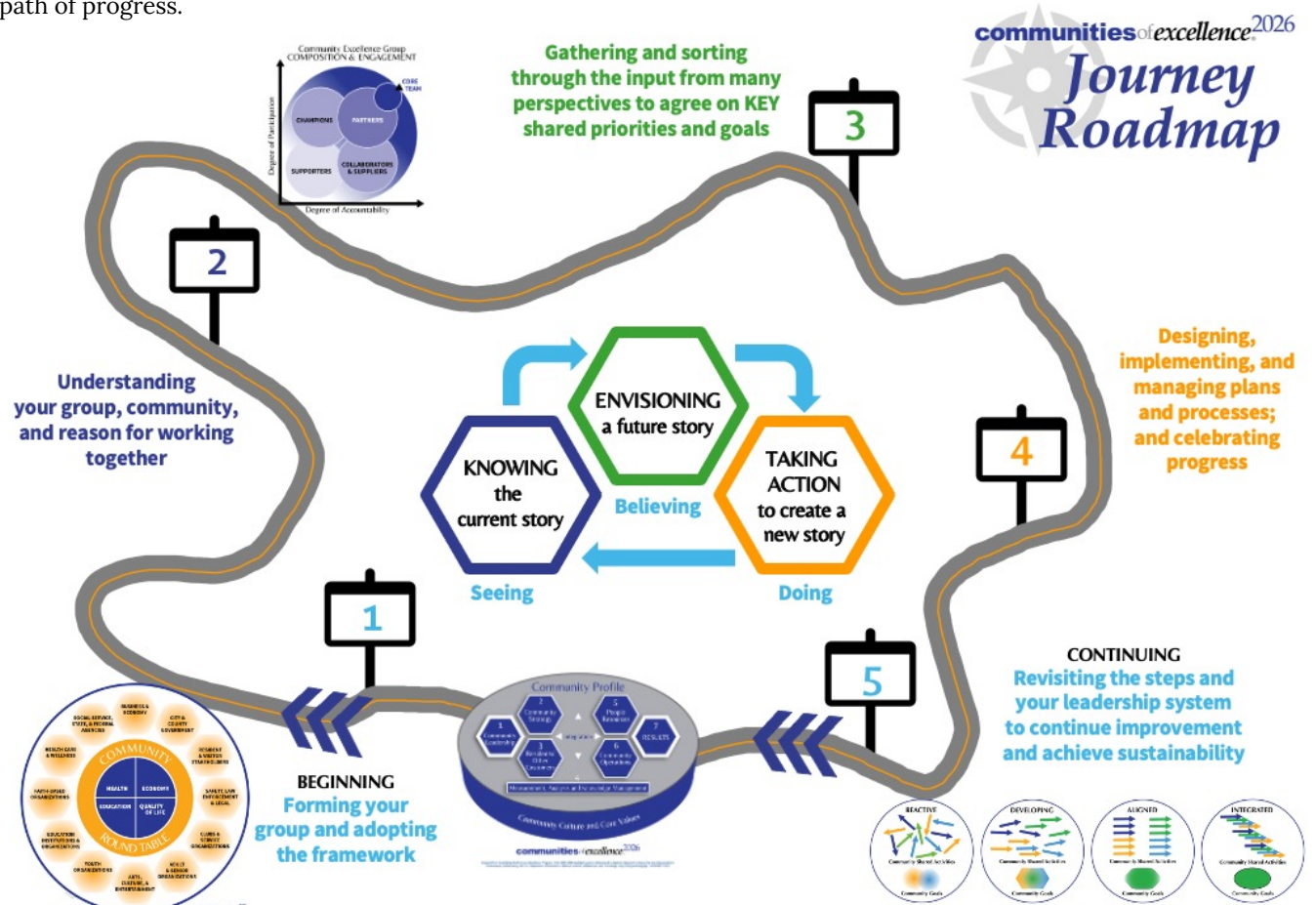
Supporting Community Leaders from Envisioning to Implementation

Now in its sixth year of development, the COE 2026 National Learning Collaborative is providing a progressive model for participants and volunteer faculty and community mentors to follow as they move through a three-year cycle of discovery. We are supporting the growth of community engagement and visible progress in rural and urban communities across the country. In addition to the 3-year collaborative, there are also ongoing opportunities for the first three cohorts to learn and connect through the COE 2026 alumni network.



Guiding Community Excellence Groups through a Journey

In response to requests for a visual tool that helps set expectations and communicate the general experience of leaders participating in community excellence groups, we launched this first version of a roadmap for the journey. It acknowledges five milestones and both the challenges and excitement of traveling a long and winding road. Sticking to the process is what keeps everyone on the right path of progress.



Encouraging Diverse and Inclusive Conversations to Accelerate Community Collaboration

Creating a comprehensive Community Profile is a foundational element of the Communities of Excellence Framework. It is built upon each year as more information is gathered through a continuous cycle of learning, collaborating, and measuring success. The more sectors and interest areas of a community included and engaged in conversations, planning, and action, the better chance a community has to positively align and leverage limited resources in a way that helps them attain their mutual goals.



A community is a set of systems that must function together to achieve optimal performance. Everyone matters.

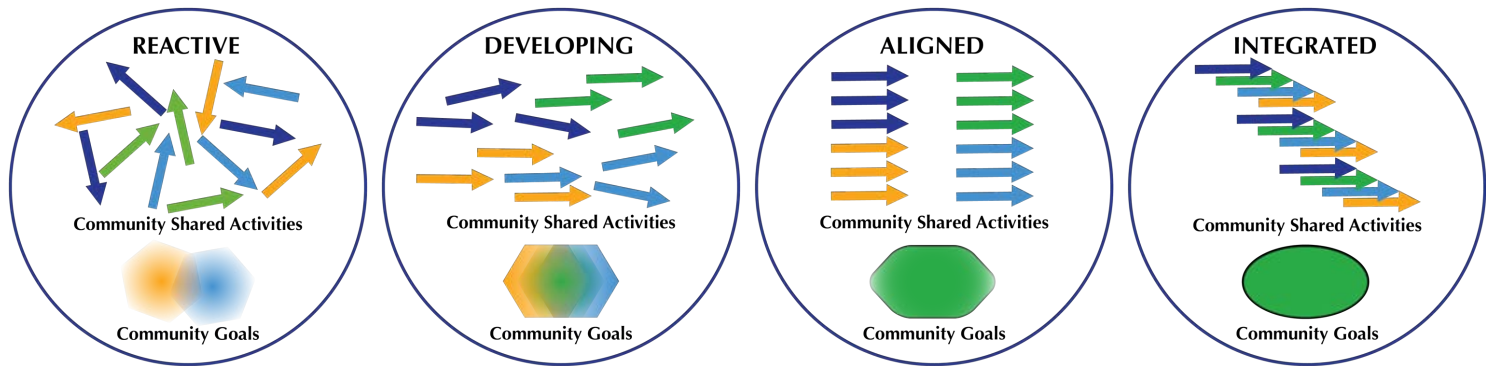


Moving from Reactive Activities to Results-Oriented Processes

The Communities of Excellence Framework helps leaders see a path to more positive results on their community performance excellence journey. With the coaching and feedback of experienced integrated management professionals along with peers in other pilot communities, leaders learn to recognize and value the attitudes and behaviors that can help their community reach their vision.

Community operations can be characterized on a spectrum from being reactive to an aligned role model by understanding how

all of the sectors within the community work together. Those that tend to focus on activities and short-term projects without clearly defined goals are typically working in many different directions in a response mode. Investments are made, and work gets done, but the impact desired falls short of expectations. Alternatively, those that align their activities – while still respecting each others' independence – through the implementation of repeatable processes for decision-making and follow-through towards clearly defined shared goals tend to yield better results.



“We are getting out of our traditional thinking and seeing things happen across organizations. I give credit to this approach for that. We’re busy working on the priorities we identified.”

– Josh McKim, Maryville, Northwest Missouri Rural Region

First Decade of Results Show Promise for Widespread Impact

More than a decade after that first brainstorm of our co-founders, we celebrate in 2022:

- ✓ **32 communities** at varying lengths of time ranging from 7,500 to 2.8 million people representing a combined **population of 14.2 million** whose leaders have been involved in our three-year National Learning Collaborative and Alumni Network. Current enrollment includes 25 communities. With these communities, our message has reached **over 800 organizations** representing all sectors of the economy.
- ✓ Our first three cohorts have graduated from this learning cycle to enter their next-level of practical experience and growth as COE 2026 alumni participants. The leaders in this group have learned and worked together for four-five years sharing successes, challenges, ideas, and their best practices discovered on their community performance excellence journeys.
- ✓ Our evolution – New special sessions on various leadership and community development topics, a new Roadmap Matrix to crosswalk the Framework with a Community Excellence Group’s experience, and Common Scorecard of community baseline data were added in 2022.
- ✓ In partnership with the Alliance for Performance Excellence and their Baldrige Fall Conference, our annual conference has grown from 46 attendees in 2017 to 80 in 2019, and 102 online in 2020. Online fatigue from the COVID-19 pandemic impacted attendance with only 88 for our 2021 virtual gathering with some opting to wait for the in-person COE-only event for Spring 2022 with 58 participants. We were delighted to gather 86 participants for the Fall 2022 conference.
- ✓ In 2022, 14 communities submitted applications for our COE Assessment and Recognition Program. Five of those applications responded to the entire Communities of Excellence Criteria, which is currently our top-level assessment opportunity. Both San Diego South Region and West Kendall, Florida earned the silver level recognition and Kanawha County, West Virginia Earned the bronze level of recognition.
- ✓ "Community" was authorized by U.S. Congress as the seventh category of the Malcolm Baldrige Quality Award.
- ✓ A dedicated team of staff and volunteers including 9 professional faculty volunteers and 15 mentors make the Communities of Excellence 2026 National Learning Collaborative possible, and 66 volunteer examiners review applications for our Assessment and Recognition Program.



Continued on next page

✓ As an advocate of performance excellence, COE continues to welcome independent evaluations of our programs. The University of San Diego's Nonprofit Institute, JUPER Communications, and George Washington University have reported evidence that participating communities:

- Are satisfied with and appreciate their COE's experience
- Identify important key issues for their community and are developing action plans; some are starting to be implemented with success
- Are identifying and strengthening backbone organizations while holding partners accountable
- Benefit from learning with and from other communities
- Transfer learning, tools, and techniques back to their communities, thereby reaching countless others in communities through this ripple effect
- Build trust and a network of diverse relationships that did not previously exist
- Increase their cross-sector inclusion, engagement, and collaboration

While the growing success of our organization is exciting, it is the progress that we see in the communities in our Learning Collaborative that truly deserves recognition. Following is a map and a full list of the communities involved.

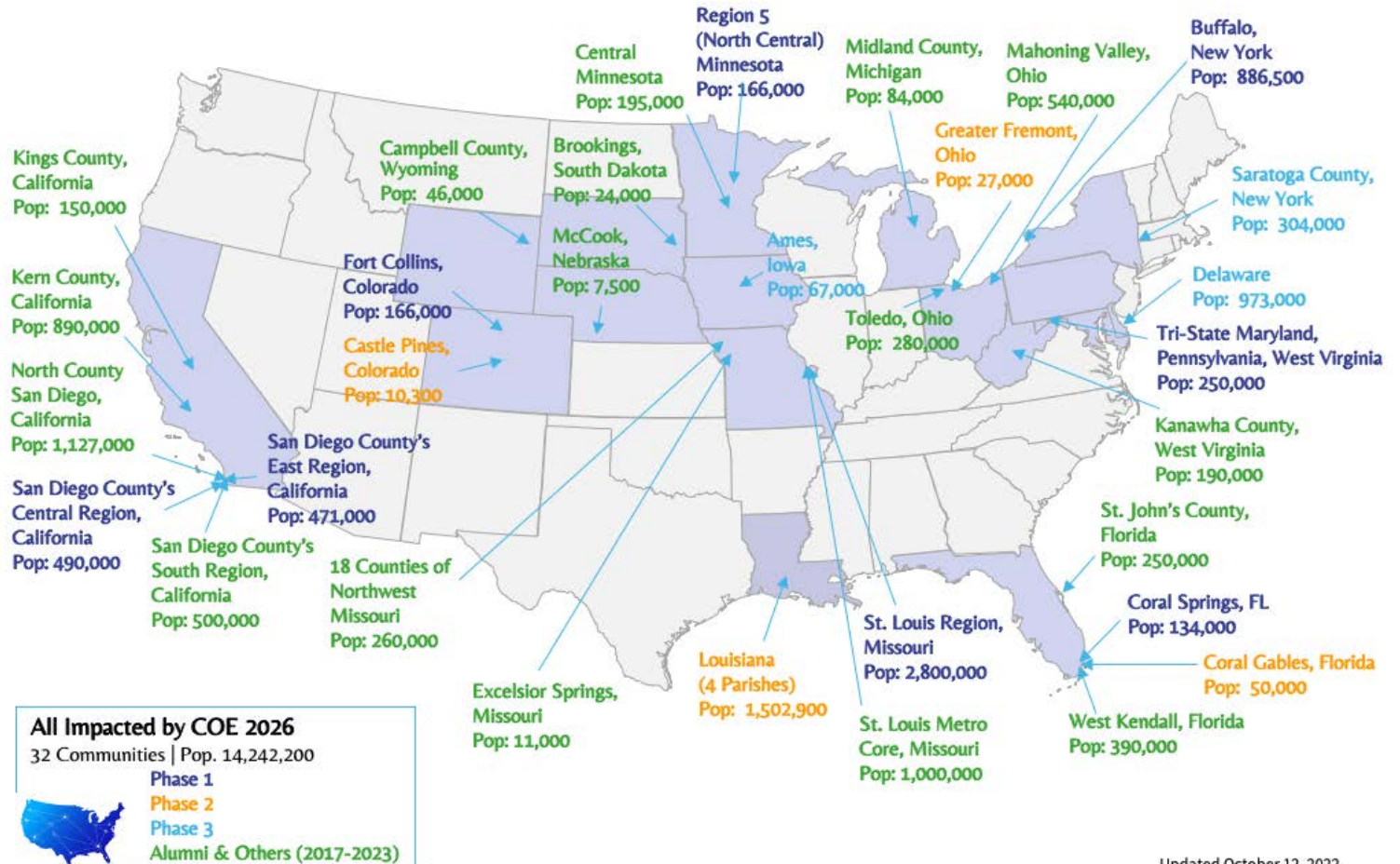


“Now that community has been authorized as the seventh category of the Malcolm Baldrige National Quality Award designated by Congress and coordinated through the U.S. Department of Commerce’s [DOC] National Institute of Standards and Technology [NIST] we look forward to the next steps of making the award a reality and elevating the importance of improving community performance.”

—Stephanie Norling, COE 2026 Executive Director

Communities Impacted through Our Pilot Since 2017: Examples of the Communities of Excellence Framework in Action

communities of excellence²⁰²⁶



Updated October 12, 2022

Communities Currently Participating Large and Small are Benefitting from the Communities of Excellence Framework

As of December 2022, there are 25 communities with populations ranging from 7,500 to 2.8 million engaged in COE 2026 that have formally adopted the framework as a way to coordinate community improvement efforts across sectors. At this point, there is a waiting list of communities interested in our National Learning Collaborative. Following is information about each of our current participants:

Ames, Iowa

Population: 67,000
Convening organization: Mary Greeley Medical Center
Partner sectors: Health care, nonprofit, business, and government

Buffalo, New York

Population: 886,500
Convening organization: Kaleida Health
Partner sectors: Health care, nonprofit

Castle Pines, Colorado

Population: 10,360
Convening organization: City of Castle Pines
Partner sectors: Government, business

Central Minnesota Region

Population: 195,000
Convening organization: CentraCare Health
Partner sectors: Business, education, health care, nonprofit

Coral Gables, Florida

Population: 50,000
Convening organization: Doctor's Hospital/Coral Gables Chamber of Commerce
Partner sectors: Health care, business, government, nonprofit

Coral Springs, Florida

Population: 134,000
Convening organization: City of Coral Springs
Partner sectors: Under development

Delaware

Population: 973,000
Convening organization: State Division of Libraries
Partner sectors: Government, nonprofit, education

Excelsior Springs, Missouri

(Thrive! Excelsior)
Population: 11,000
Convening organization: City of Excelsior Springs
Partner sectors: Education, government, health care, nonprofit, business

Larimer County, Colorado

Population: 166,000
Convening organization: City of Fort Collins
Partner sectors: Under development

Greater Fremont, Ohio

Population: 16,000
Convening organization: ProMedica Memorial Hospital
Partner sectors: Health care, government

Kanawha County, West Virginia

(Kanawha Coalition for Community Health Improvement)
Population: 190,000
Convening organization: Charleston Area Medical Center
Partner sectors: Business, education, government, health care, nonprofit



Louisiana

(4 Parishes)

Population: 1,502,900

Convening organization: Louisiana Organ Procurement Agency

Partner sectors: Healthcare, nonprofit

McCook, Nebraska

Population: 7,500

Convening organization: Community Hospital

Partner sectors: Business, education, faith community, health care

Midland County, Michigan

Population: 84,000

Convening Organization: Midland Area Community Foundation

Partner sectors: Business and nonprofit

Northwest Missouri Rural Region

(Maximize NWMO)

Population: 260,000

Convening organization: Community Foundation of Northwest Missouri

Partner sectors: Business, education, health care, nonprofit, government

Region 5 (North Central) Minnesota

Population: 166,000

Convening organization: Sourcewell

Partner sectors: Nonprofit, education, and government

Saratoga County, New York

Population: 304,000

Convening organization: Saratoga Hospital/Public Health Department

Partner sectors: Government, health care, nonprofit

St. Louis Region, Missouri

Population: 2.8 million

Convening organization: United Way of Greater St Louis

Partner sectors: Business, government, health care, nonprofit, and faith

San Diego County's Central Region, California

(Live Well San Diego)

Population: 490,000

Convening organization: Health & Human Services Agency,

County of San Diego

Partner sectors: Business, education, government, health care, nonprofit

San Diego County's East Region, California

(Live Well San Diego)

Population: 471,000

Convening organization: Health & Human Services Agency,

County of San Diego

Partner sectors: Business, education, government, health care, nonprofit

San Diego County's North Regions, California

(Live Well San Diego)

Population: 1,127,000

Convening organization: Health & Human Services Agency,

County of San Diego

Partner sectors: Business, education, government, health care, nonprofit

San Diego County's South Region, California

(Live Well San Diego)

Population: 500,000

Convening organization: Health & Human Services Agency,

County of San Diego

Partner sectors: Business, education, government, health care, nonprofit

Toledo, Ohio

Population: 280,000

Convening organization: ProMedica

Partner sectors: Business, education, government, health care, nonprofit

Tri-State Maryland, Pennsylvania, West Virginia

Population: 250,000

Convening organization: Frostburg State University

Partner sectors: Business, education, health care, nonprofit, government

West Kendall, Florida

(Healthy West Kendall Coalition)

Population: 390,000

Convening organization: West Kendall Baptist Hospital

Partner sectors: Business, education, faith community, government, health care, nonprofit



The Systems Approach is an Asset at Any Time

Excelsior Springs, Missouri

Excelsior Springs, once a hot spot dating back to the late 1800s for mineral water springs frequented by the nation's rich and famous locals alike, now serves a zip code of 17,000 people. The community borders the northeast corner of the Metro Kansas City, Missouri area, which means that many of its residents commute out of the zip code to earn and spend their money. That fact gives local leaders a set of challenges including maintaining infrastructure, attracting businesses, and communicating that local opportunities exist for work, play, education, medical services, and commerce. A strong sense of pride in the community is what underlies the community excellence group of leaders in Excelsior Springs.

"We are proud of our town's heritage and eager to meet the challenges that the future will bring. Our Thrive Excelsior mission is 'bringing together old and new to make Excelsior Springs a place that matters,'" said Molly McGovern, city manager. "No matter how you found your way to Excelsior Springs, we want to be your favorite place to live, work, learn, and play."

Responding to the data that highlighted challenges with housing, chronic disease, access to nutritional food options, and economic stability, the Thrive Excelsior group with the City serving as its backbone, is building on its advantages of location, heritage, and affordable retail properties with incredible historical architecture.

"Communities don't have a CEO," said McGovern. "There are all these organizations performing and working within the same footprint, but there's no one in charge." Participating in Communities of Excellence is causing the community to bring leaders from different sectors together to address needs. It is also giving them a system for organizing their roles and work.

communities of excellence²⁰²⁶
Assessment & Recognition
SILVER LEVEL
2021



"The networks, communication channels, and relationships established throughout COE work over the first five years are proving extremely beneficial to community leaders. We have aligned efforts across the community, established priorities, and have a common strategic planning process. Our shared processes or 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

Using Data to Engage More Partners in Improving Health

West Kendall, Florida

Healthy West Kendall, an initiative with several team members from West Kendall Baptist Hospital serving as its backbone, went from having a small board that had launched a Healthy Hub data tracking process to being a much larger communitywide initiative that encompasses not only health and quality of life, but also safety, education, and economic vitality. "COE allowed us to take our programs and communication efforts to the next level. We now have over 200 business and public partners involved," said Cristina Brito, director of Healthy West Kendall. She shared that using data has always been important, however, the COE Framework along with annual feedback through the annual Assessment & Recognition program has helped them stay focused and remember what is important while looking back and ahead for learning. The stories they gather from residents, other customers, and stakeholders validate their robust list of projects in "a very personal way."

Katy Wilhelm, supervisor of health Promotion and Strategic Partnership for Healthy West Kendall, said that being a part of COE and sharing with partners that community has now authorized as the seventh category of the Baldrige award has helped start conversations rather than starting from scratch. It is motivating to know we are playing in the same sandbox with other high caliber communities."

Really looking at and analyzing results for effectiveness beyond simply reporting out program activity has helped the partners involved make different and better decisions regarding:

- The placement location of new signs and crosswalks based on foot traffic patterns crossing dangerous roadways,
- Determining the content for their "Brain Bag" initiative educating new parents on infant brain development,
- Enrolling as the first unincorporated community in AARP's Network for Age-Friendly States and Communities,
- Launching a swim safety campaign to decrease drowning deaths,
- Forming an economic council to launch a buy local campaign,
- Serving a student body of more than 5,000 with a school pantry stocked with food, apparel, hygiene and toiletry items, and
- Several other projects.

"Our vision is 'To be a blueprint for healthy and thriving community.' Looking at our community through the lens of education, economic vitality, safety and quality of life is a shift in approach that has allowed us to tap into key stakeholders and create a sustainable initiative."

—Michelle Mejia, West Kendall, Florida



Inclusivity Improves Response to Urgent Needs

San Diego County, South Region, California

With a vast network of partners involved and five years of building relationships building through the steps of community collaboration and performance improvement provided by the COE Framework, San Diego South Region has excelled at responding to the COVID-19 global pandemic as well as several targeted resident-focused programs. Throughout the last few years, as each wave of challenge was presented, the organized and empowered team of Live Well San Diego, the community excellence group serving the area, rose to the occasion with a focus on quality, speed, and inclusivity as their underpinnings. Programs of note beyond COVID vaccinations and education include providing workplace and financial literacy training and internships leading to jobs for at risk youth; providing smoking cessation education to students, parents, and governments bringing awareness to vaping and connections to prevention and cessation resources; and blood pressure checks and heart disease prevention information through their “Love Your Heart” initiative checking nearly 31,000 residents over the last three years.

Since embarking on the COE journey five years ago, San Diego South Region has made great strides in refining their strategic planning processes, developing action plans, and implementing difference-making projects in the areas of chronic disease prevention, economic vitality, and education. A key element of the group’s success is the onboarding, relationship-building, and ongoing communication efforts with hundreds of partner organizations. They are all about including many voices!

Public and private partners alike are participating with the many benefits of:

- Networking and information sharing,
- Opportunities to expand their corporate social responsibility initiatives,
- Fulfilling a personal sense of responsibility and ethical duty, and in some cases, a requirement by law to reinvest in their community.



“Building off our prior history and success allows 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, San Diego County, South Region, California

Engaging Residents in a More Meaningful Way

Kanawha County, West Virginia

“The Kanawha Coalition for Community Health Improvement, which serves as the backbone organization for our Communities of Excellence work, conducts our community’s Community Health Needs Assessment (CHNA) every three years. Whereas past assessments compelled us to address mostly topics around wellness promotion and chronic disease prevention, our newly redesigned process has resulted in priorities that take into account the Social Determinants of Health,” said Judy Crabtree.

Recently, transportation for eligible passengers based upon criteria established by the Americans with Disabilities Act as well as those who are 55 years and older has been a priority that several members of the Coalition have problem solved through this process.

As a long-standing collaboration effort, the COE Framework has led the Kanawha Coalition for Community Health to improve their performance and outcomes. A key area of success has been the 500% increase the number of resident opinions and 150% increase in expert input listened to in their decision-making process. Crabtree said, “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 now 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. 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.”

“We have discovered new methods to connect and communicate with residents, important stakeholders, and other consumer groups as we have followed the COE Framework. We are continually re-evaluating the best ways to interact with each group in the context of the ongoing COVID-19 pandemic.”

—Orlando Craighead, Kanawha County, West Virginia



BRONZE LEVEL
2022

Bringing People Together is the Critical First Win, Following Through with Aligned Processes and Action is Second

McCook, Nebraska

The Southwest Nebraska hub of McCook may only have 7,700 residents, but it serves a market of more than 30,000 people for retail, healthcare, and other services. If that number still sounds small, consider that McCook's closest larger communities are 75 miles or more away. The leaders of this rural area have a big responsibility to provide the full range of services that their people need without being able to lean on neighboring metropolitans to fill too many of their gaps. Yet, like most communities of any size and location, McCook's community excellence group has learned that coming together across perceived and real boundaries of competition can be a challenge.

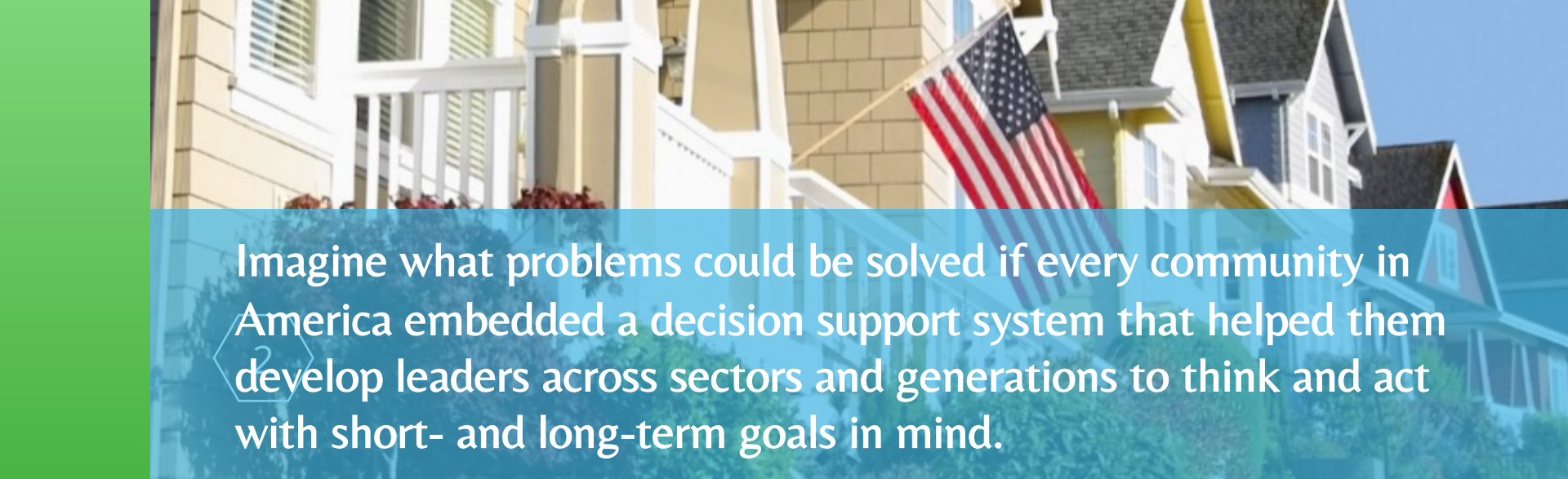
In their annual application for evaluative feedback and recognition, the leadership team shared, "The difference today [after applying the COE Framework] is that we are talking about some of the needs and gaps that may have never been discussed in other cross agency discussions. Eliminating what may have been perceived as barriers of even coming together for discussions is a huge win for our city. Now after several years of applying the COE Framework we have some good initial wins for action plans with early adopters that have given us good visibility with the public, and most importantly, to other community leaders that have now taken an interest in the momentum we have created."

McCook's initiative has been successful at engaging more than 40 community leaders with different perspectives around four key pillars. Their mission statement is to enhance the quality of life by creating a collaborative community that focuses on education, family, economic vitality, and health. Their values of excellence, inclusiveness and diversity, and collaboration have guided their initial members representing the hospital, economic development, chamber of commerce, agriculture and University of Nebraska-Lincoln Extension to expand to the schools, regional public health departments, community foundation, local banks, industry, churches, government, retail, and the media.

"At Community Hospital we are 'Leading the region to a healthier future' with our mission. We've been able to get together with community partners through the Communities of Excellence Journey over the past few years to work on things that don't affect the hospital directly, but they affect our community greatly."

—Karen Kliment Thompson, Community Hospital Vice President for Ancillary Services, McCook, Nebraska





Imagine what problems could be solved if every community in America embedded a decision support system that helped them develop leaders across sectors and generations to think and act with short- and long-term goals in mind.

Investing in Our Children's and Grandchildren's America

Like our engaged communities who are pursuing excellence, we are on a journey to ensure that COE 2026 is relevant, meaningful, and impactful for communities working to make our world a better place.

This vision will only be attained through the investment of many private and public partners at local, regional, state, and national levels.

Please join us in leveraging our collective resources.

**We are our best selves
when we work together!**

“We should be building stronger communities, not just stronger programs.”

– Paul Schmitz, author of *Everyone Leads: Building Leadership from the Community Up*

The Future of America's Communities Depends on a Continuous Investment in Leadership, Diverse Stakeholder Engagement, and Performance Excellence

Initial funding allowed us to plant the seeds for significant and systemic changes by working with the leadership of 32 communities in some capacity throughout the United States as of December 2022. We are helping one community at a time, make progress in the complex work of improving their economic vitality, health, education, and quality of life in America.

However, the disparities and inequities that exist in our country are too urgent, and the Age of Acceleration¹ that our entire globe finds ourselves living in calls for leadership development and systems thinking – like that offered through Communities of Excellence 2026 – on a much broader scale.

We are dedicated to continuing our mission of helping each unique community assess and address its systemic challenges and optimize its opportunities towards maximum potential. We now know we are on the right path and believe communities of all sizes can benefit from our underlying decision support system.

With deeper investment in our organization's current strategic objectives of:

- Providing systems leadership and culture training and support to communities,
- Developing a database of community performance excellence promising and best practices, and
- Coaching communities with the tools necessary for data-informed decision-making.

We are confident that we can contribute to creating a more equitable society, sustain the vitality of democracy, and promote American opportunity by helping our country's communities help themselves.

**Learn more about getting involved in
Communities of Excellence 2026.**

Visit: www.coe2026.org

Email: snorling@communitiesofexcellence2026.org

Call: 619.719.1045

Stephanie Norling,

COE 2026 Executive Director

¹ Friedman, T. L. (2016). *Thank You for Being Late: An Optimist's Guide to Thriving in the Age of Accelerations*. New York: Farrar, Straus and Giroux.

Innovative Leaders of Communities of Excellence 2026

2022-2023 COE 2026 Board of Directors - VOLUNTEERS

Lowell C. Kruse, MHA

Co-Founder and Chair; Senior Fellow, Mosaic Life Care Foundation (formerly Heartland Foundation), St. Joseph, Missouri

Richard A. Norling, MHA

Co-Founder and Vice-Chair; Senior Fellow, Institute for Healthcare Improvement, San Diego, California

Benjamin Anderson, MBA, MHCDS

Vice President, Rural Health and Hospitals, Colorado Hospital Association Denver, Colorado

Darin Atteberry, ICMA-CM/AICP

Market President, SVP Government Affairs and Strategic Partnerships, Elevations Credit Union, Fort Collins, Colorado

Angela Brandt

President, ProMedica Senior Care, Toledo, Ohio

Tommy Gonzalez

City Manager, El Paso, Texas

Javier Hernández-Lichtl

Chief Executive Officer, Doctors Hospital & Miami Orthopedics & Sports Medicine Institute, Coral Gables, Florida

Karin Johnson, MHA

Former Kruse Scholar, Minneapolis, Minnesota

Brian Lassiter

President, Performance Excellence Network, Minneapolis, Minnesota

Sandra Potthoff, PhD

Professor and Department Head (Retired), Department of Health Policy and Management, University of South Florida College of Public Health; Emeritus Associate Professor, Division of Health Policy and Management, University of Minnesota

Richard J. Umbdenstock, FACHE

President Emeritus, American Hospital Association, Spokane, Washington

Robert Fangmeyer, Ex-Officio Member

Director, Baldrige Performance Excellence Program at NIST Gaithersburg, Maryland

COE 2026 Staff

Stephanie Norling, MBA

2022-2023 COE 2026 Faculty - VOLUNTEERS

Manuel Castañeda

Community Performance Excellence Instructor, County of San Diego Health and Human Services Agency, San Diego, California

Gary Floss

Adjunct Professor, University of St. Thomas, St. Paul, Minnesota

Jamie Ambrosi

General Business Specialist, Baldrige Performance Excellence Program, Gaithersburg, Maryland

Christel Gollnick

Founder and President, JUPER Communications, Trimble, Missouri

Kim Halfhill

Principal, KH Consulting, Excelsior Springs, Missouri

Harry Hertz, PhD

Director Emeritus, Baldrige Performance Excellence Program, Gaithersburg, Maryland

Brian Lassiter

President, Performance Excellence Network, Minneapolis, Minnesota

Sandra Potthoff, PhD

Professor and Department Head (Retired), Department of Health Policy and Management, University of South Florida College of Public Health; Emeritus Associate Professor, Division of Health Policy and Management, University of Minnesota

Theron Post

Executive Director, Performance Excellence Northwest (PENW)

Insightful Mentors Serving Our Pilot Communities

COE 2026 Community Mentors for 2022-2023

Manuel G. Castañeda

Community Performance Excellence Instructor, County of San Diego Health and Human Services Agency

Mentor Community: Coral Gables, Florida; San Diego Central Region; San Diego East Region, California

Gary Floss

Retired Quality Executive, Adjunct Professor, University of St. Thomas

Mentor Community: Central Minnesota Region

Christel Gollnick

Founder and President, JUPER Communications

Mentor Communities: Ames, Iowa

Kim Halfhill

Principal, KH Consulting

Mentor Community: Castle Pines, Colorado; Tri-State Maryland, Pennsylvania, and West Virginia

Margot Hoffman, PhD

President and CEO, The Partnership for Excellence

Mentor Community: Kanawha County, West Virginia

Pam Jensen

Principal, Proven Results, LLC

Mentor Community: Greater Fremont, Ohio

Laura Kinney

Vice Chair, Board of Directors and Operations, Partners in Performance Excellence

Mentor Community: Buffalo, New York

Lowell Kruse

Chair and Co-Founder, Communities of Excellence 2026

Mentor Community: Delaware

Brian Lassiter

President, Performance Excellence Network

Mentor Communities: Excelsior Springs, Missouri; Coral Springs, Florida

Jeff Lucas

Director, Be Safe Performance Improvement, University of Virginia Health System

Mentor Community: Louisiana

Geri Markley

Executive Director, Michigan Performance Excellence

Mentor Community: Midland County, Michigan

Liz Menzer

Executive Director, Wisconsin Center for Performance Excellence

Mentor Community: St. Louis Region, Missouri

Stephanie Norling

Executive Director, Communities of Excellence 2026

Mentor Community: Delaware; San Diego South Region, California

Theron Post

Executive Director, Performance Excellence Northwest (PENW)

Mentor Community: Saratoga County, New York; Larimer County, Colorado

Sandra Potthoff, PhD

Professor and Department Head (Retired), Department of Health Policy and Management, University of South Florida College of Public Health; Emeritus Associate Professor, Division of Health Policy and Management, University of Minnesota

Mentor Community: Northwest Missouri Rural Region; Region 5 Minnesota

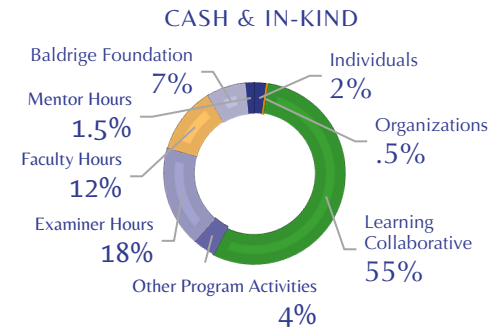
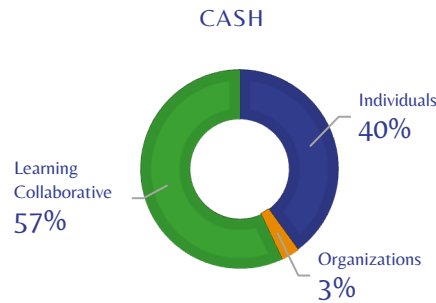


Leveraging Investments and Collective Intellect for Impact

Fiscal Year 2023 Annual Report

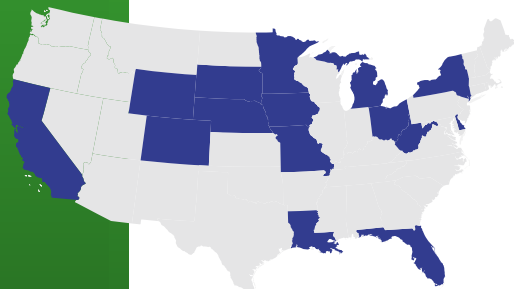
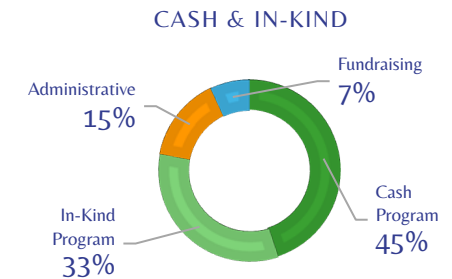
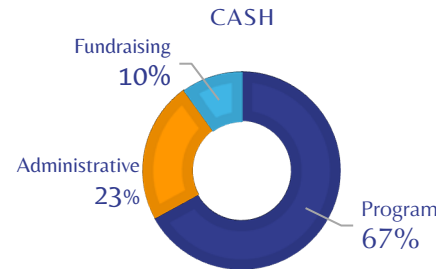
REVENUE

● Donations: Individuals	7,925	
● Donations: Organizations	1,506	
● Earned: Learning Collaborative	250,184	
● Earned: Other Program Activities	19,686	
Total Cash Income		\$279,301
● In-Kind: Examiner Hours	82,900	
● In-Kind: Faculty Hours	54,000	
● In-Kind: Baldrige Foundation	33,085	
● In-Kind: Mentor Hours	4,000	
Total In-Kind Contributions		\$173,985
TOTAL REVENUE		\$453,286



INVESTMENT

● Program: Learning Collaborative	195,068	
● Administrative	67,119	
● Fundraising	29,544	
Total Cash Expenses		\$291,731
● In-Kind: Learning Collaborative	140,900	
Total In-Kind Contributions		\$140,900
TOTAL INVESTMENT		\$432,631



Communities of Excellence 2026 (COE 2026) is a 501(c)(3) nonprofit organization that hosts a learning collaborative of communities across the country, trains communities in the Communities of Excellence Framework, adapted from the Baldrige Framework, and provides opportunities for communities to work together, share successes, challenges, ideas, and best practices, and learn from each other on their performance excellence journey. The organization has only one full-time paid employee and is otherwise operated with the generous contributions of many professionals across the nation. There are 32 communities with populations ranging from 7,500 to 2.8 million in 17 states impacted by COE 2026 and 25 communities currently involved in the National Learning Collaborative.

communities of *excellence*²⁰²⁶

www.coe2026.org