The Impact Pathway
Your Roadmap for Lasting Community Transformation

Real, lasting change doesn't happen by accident—it happens when passionate people come together with a shared purpose, the right tools, and clear processes. The Impact Pathway offers a step-by-step roadmap grounded in the Communities of Excellence Framework and built from real-world experience across diverse communities. Whether you're just getting started or ready to scale what works, this roadmap helps you move from ideas to action, and from action to impact.

The five-milestone Impact Journey supports community cross-sector teams in making measurable, sustainable progress toward systems-level change. Each milestone builds on the last, aligning people, data, and strategy to drive lasting improvements in quality of life.

Rooted in the Communities of Excellence Framework, the Pathway is grounded in systems thinking, cross-sector collaboration, and

The Five Milestones

- Systems Thinking
- Collaborative Leadership
- Continuous Learning
- Resident Voice
- Process Improvement
- Data Alignment and Shared Measurement

Milestone 5 — Sustain, Celebrate, and Scale What Works
Milestone 1 — Form Your Team and Set a Shared Direction
Milestone 4 — Act, Learn, and Adapt
Milestone 2 — Understand the Current State
Milestone 3 — Focus, Align, and Plan for Action

Improved Quality of Life through Systems-level Transformation

continuous improvement. It offers flexibility in pacing and support, meeting communities where they are while maintaining a clear arc of development.

The process is intentionally iterative—designed to build capacity over time and ensure that insights from early actions inform future planning, team development, and strategic refinement.

Together, the five milestones guide teams through every stage of the journey—from forming the right team and understanding the current landscape to taking action, learning, and sustaining what works. Explore each milestone of the journey below.

Milestone 1: Form Your Team and Set a Shared Direction

Three-month live virtual program with optional coaching.
Based on their readiness score, some already formed teams may move directly into Milestone Two.

What This Milestone is About:

This is the starting point for lasting, cross-sector collaboration. In this milestone, your team will come together around a shared purpose, begin building trust, and set a clear direction for your work. You'll identify who needs to be at the table, why this work matters, and how you'll move forward together. It's not about jumping into action, it's about laying the groundwork: forming

the right team, defining what success looks, using baseline data to drive decisions from the start, and getting aligned on your community's most pressing needs and opportunities.

Why This Milestone Matters:
Big change starts with the right team. This milestone gives your work a strong foundation by helping you build trust, align your purpose, and clarify how you'll work together. When cross-sector teams skip this step, they often struggle with confusion, turf issues, or misaligned priorities later on. A strong start sets the stage for lasting collaboration and real progress.

Key Deliverables:
- A cross-sector team that reflects your community's priorities and people.
- A team plan that covers your shared mission, vision, and values, each person's role and responsibilities, and how you'll communicate and make decisions.
- A strong case for change (your 'burning platform') and long-term goal statement that describes the change your team wants to create, with meaningful measures of progress.
- Results from the CollaborACTION Readiness Assessment and areas to improve.
- A digital scorecard showing baseline data about your community using our COE Common Community Scorecard.
- A short pitch deck to help you explain your work and bring others on board.
- *Optional but highly encouraged:* A Community Results Statement that summarizes the key results your team will focus on.

Milestone 2: Understand the Current State
Five-month live virtual program with optional coaching.

What This Milestone is About:
Now that your team is formed, it's time to take a deeper look at what's happening in your community by examining what's working, what's not, and why. You'll gather data, listen to residents, and bring together different perspectives to create a shared picture of your current state. This milestone is about replacing assumptions with understanding so that your team is grounded in reality before setting goals or choosing strategies.

Why This Milestone Matters:
Understanding your community's current state—through both data and lived experience—helps your team make better decisions together. This milestone ensures you're not working from assumptions or jumping into quick fixes. It builds a shared view of where your community is now, what's working, what isn't, and why that matters, especially for those who've been left out in the past.

Key Deliverables:
- A completed Community Profile used to align perspectives across the team.
- Refreshed mission, vision, and values statements that reflect what the team has learned and is committed to pursuing.

- Input from residents and stakeholders through focus groups, interviews, or surveys.
- Updated Community Scorecard with deeper analysis and additional measures aligned to your shared goals.
- A visual map and inventory that identifies key community assets, stakeholders, and networks relevant to your priority areas.
- A basic decision-making structure outlining how the team will communicate, collaborate, and make decisions moving forward.
- An understanding of systemic factors and root causes influencing key outcomes such as housing access or chronic diseases across different resident segments.

Milestone 3: Focus, Align, and Plan for Action

Three-month live virtual program with optional coaching.

What This Milestone is About:

With a shared understanding of your community's current state, it's time to make choices and plan your next steps. In this milestone, your team will prioritize the issues that matter most, set shared goals, and develop a realistic strategic plan. You'll define where to focus, how to coordinate across sectors, and how to manage change as a group all while embedding systems thinking in your strategy. It's all about turning insight into strategy, so your team can move forward with clarity and purpose.

Why This Milestone Matters:

Planning together keeps your work aligned, focused, and achievable. It's not just about making a to-do list, it's about setting goals that matter, identifying the roadblocks, and building a plan to get there together. This milestone ensures your team is equipped to manage cross-sector decision-making, navigate bias or conflict, and make lasting change.

Key Deliverables:
- Prioritized community needs or opportunities based on data and engagement.
- Shared, measurable community goals.
- A multi-year Community Strategic Plan that outlines goals, strategies, actions, roles, and timing.
- An updated community scorecard with refined goals, new measures, and improved alignment to the Strategic Plan.
- A working plan for how your team will stay coordinated that supports planning and execution.
- An alignment map showing how existing initiatives, partners, and resources connect to your goals.
- Updated pitch deck and shared vision messaging tools.

Milestone 4 – Take Action and Learn

Three-month live virtual program with optional coaching.

What This Milestone is About:

It's time to put your plan into action. In this milestone, your team will begin implementing selected strategies from your Community Strategic Plan. You'll test ideas, manage partnerships, and track your progress using your scorecard. It's also about learning as you go—adjusting your approach based on feedback, data, and what's working on the ground using time-tested process improvement methods.

Why This Milestone Matters:

Even the best plans hit bumps in the road. This milestone helps your team stay adaptive and focused as you move from planning to action. It creates space to reflect, learn, and improve so you can strengthen your strategies, build momentum, and stay aligned with your shared goals.

Key Deliverables:
- Implementation of early-stage strategies identified in your Community Strategic Plan.
- Progress updates and performance tracking using your community scorecard.
- Team reflections and learning sessions to identify what's working and what needs to change.
- Updates to roles, processes, or strategies based on early lessons learned.
- Documentation of key results and insights from initial implementation.
- Engagement with new partners or sectors as needed to support implementation.

Milestone 5 – Sustain, Celebrate, and Scale What Works
Three-month live virtual program with optional coaching.

What This Milestone is About:

As your work matures, it's time to think beyond the next project. This milestone is about strengthening what's working, sustaining momentum, and spreading your approach to other areas of the community. You'll refine your team's structure, embed your work into existing systems, and explore ways to expand your impact—without burning out or losing focus.

Why This Milestone Matters:

Long-term change requires staying power. This milestone helps your team think about what it takes to sustain progress—not just in funding, but in people, systems, and culture. It supports your team in sharing success stories, building ownership across sectors, and planning for the next phase of growth and learning.

Key Deliverables:
- A sustainability plan that addresses funding, partnerships, staffing, and integration with local systems.
- Plans for scaling, replicating, or adapting strategies to other priorities or neighborhoods.
- Final team self-assessment and reflection on progress, growth, and learning.
- Storytelling tools or case materials to share your results and engage others.

What's Included With Every Milestone:

Live Learning and Peer Exchange:

- Live, expert-led virtual sessions that include peer learning, facilitated discussions, and practical exercises for each milestone.
- Connections to other communities through our national network and milestone-based cohort groups.
- Monthly webinars on topics like storytelling, community engagement, systems thinking, and data-informed decision-making.

Tools and Resources:

- Access to our custom Learning Management System (LMS) with session recordings, downloadable resources, and milestone-specific guides.
- Ongoing access to our Online Resource Library, featuring tools, templates, and promising practices from other communities.

Data and Scorecard Access:

- Use of the COE Common Community Scorecard, which includes seven census tract–level indicators across health, education, economy, housing, built environment, natural environment, and social connection—available via a customizable digital platform for your community.

Community and Visibility:

- Opportunities for visibility and recognition at our Annual Conference, held this year on October 14–15, 2025, in Denver, Colorado.

Coaching Support

In addition to milestone programming, communities have the option to add customized coaching support. Our trained coaches provide expert guidance to help your team apply what you're learning, work through challenges, and accelerate progress. Coaching is tailored to your goals and can include support for:

- Team development and group dynamics.
- Applying the Communities of Excellence Framework.
- Interpreting and using community data.
- Strategic planning and execution.
- Strengthening cross-sector collaboration.
- Preparing for recognition and storytelling opportunities.

Coaching packages can be added to any milestone and are also included at higher tiers of our Community Engagement Packages. Whether you're looking for a few key sessions or sustained support over the year, our coaching options are designed to meet you where you are.

About the Communities of Excellence Framework

The Communities of Excellence Framework is our signature difference-maker—a proven guide rooted in the Baldrige Excellence Framework, adapted specifically for community transformation. It provides community cross-sector teams with a holistic, systems-based

approach to aligning people, data, and strategy across sectors. What makes the Framework unique is its ability to help communities:

- Think systemically about their challenges and opportunities.
- Engage cross-sector partners in a structured, collaborative way.
- Use data intentionally, from baseline measurement to tracking progress and equity gaps.
- Drive continuous improvement, embedding learning and adaptation into every phase of the journey.
- Align strategy, leadership, and resident voice to create meaningful, lasting change.

The Framework ensures that transformation efforts go beyond short-term projects—it builds the leadership capacity, systems thinking, and culture necessary for long-term, equitable results. Whether you're tackling housing, health, education, economic development, or other issues that matter to your community, the Framework provides a common language and structure to guide your efforts.

By embedding the Communities of Excellence Framework into the Impact Journey, we help teams not only take action—but take smarter, more sustainable, and more strategic action.

About the COE Common Community Scorecard

The COE Common Community Scorecard is a shared measurement tool designed to help communities track progress on outcomes that matter. It includes nationally available census tract–level data across seven domains: health, education, economy, housing, social connection, built environment, and natural environment. The digital platform allows for community-specific customization over time and benchmarking opportunities. Most importantly, it provides a common starting point and a shared language for cross-sector work.

Alumni Network: Continued Learning and Support

After completing Milestone 5, teams are invited to join our national COE Alumni Network—a space for continued learning, peer support, and shared progress. The Alumni Network includes monthly virtual alumni sessions with facilitated discussion and community spotlights as well as ongoing access to the LMS, resource library, and updated tools.

Next Steps and Pricing

Current pricing, milestone schedule, and package options are available at: https://communitiesofexcellence2026.org/what-we-do/impact-pathway/the-impact-pathway.html. We'll work with you to build a custom plan that aligns with your goals, timeline, and available resources. To request a quote or schedule a conversation, contact us at info@communitiesofexcellence2026.org or 619-719-1045.