

# THE RE GUIDE

Communities of Resilience & Excellence™

A proven playbook to improve  
the quality of life for people

**2025-2027**

“When you look at all the many problems in the world, and you wonder how you could possibly make a difference, how you would even choose between education and clean water, for example, the answer is you start at home. You start in your own community. You start in a manageable place where you can actually make a difference. And if your community is cohesive and well-run, you can make a much bigger difference more quickly than if it’s not managed well. People will always look to their hometown for help, for hope, for answers because bigger organizations, other organizations, the organizations that are in the first six categories [of the Malcolm Baldrige National Quality Award, including manufacturing, health care, government, education, business, and nonprofit] for example, they can’t offer the kind of holistic possibilities that communities can.”

—Molly Baldrige, daughter of Malcolm Baldrige, speaking at the celebration event of “community” being added as a category for the Malcolm Baldrige National Quality Award by U.S. Congress in the Fall of 2022



September 15, 2025

Dear Community Partners,

We are honored to share with you the next chapter in our journey: the launch of *The Communities of Resilience & Excellence (C.O.R.E.) Guide*.

For more than a decade, communities across the country have used our framework to align around shared priorities, strengthen collaboration, and improve quality of life. With this new Guide, we embrace a new name, a new look, and an even stronger call to action. C.O.R.E. reflects what we have learned from you, the leaders and residents working every day to build stronger futures. It builds on the foundation of performance excellence and elevates the essential qualities of resilience, belonging, and measurable results. It is not just a tool, it is a pathway for communities to work differently, focus on what matters most, and create lasting, positive impact.

Our vision is clear: *a network of thriving, resilient communities where every resident can live well and feel they belong*. This Guide was created to help make that vision real by sparking new conversations, strengthening collaboration, and guiding the work that leads to healthier people, stronger economies, and more connected communities.

Thank you for being part of this journey. Together, we can ensure that the next chapter in America's story is defined by communities that thrive—resilient, connected, and excellent at their core.

With optimism and gratitude,

A handwritten signature in blue ink, reading "Angela Brandt".

Angela Brandt  
Chair

A handwritten signature in blue ink, reading "Stephanie Norling".

Stephanie Norling  
President and CEO

PO Box 16304, San Diego, CA 92176

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# About The Communities of Resilience and Excellence [C.O.R.E.] Guide

Communities thrive when the individuals and organizations that lead and live within them —across health, education, housing, the economy, and beyond—work together to achieve better outcomes for all. Yet too often, these systems operate in silos, disconnected from one another and from the people they are meant to serve. The result is preventable hardship, persistent gaps in opportunity, inefficient use of resources, and stalled or inequitable progress.

But this is preventable. Communities don't have to accept fragmentation and underperformance as the norm. When people come together across sectors, include residents, and align around a shared purpose with a proven approach, real change is possible.

The C.O.R.E. Guide (formerly the Communities of Excellence Framework) gives communities the structure and support to work differently, focus on what matters most, and build the systems needed to improve quality of life—for everyone.

Designed as a tool for systems change, The C.O.R.E. Guide helps local leaders and residents break down silos, align around shared priorities, measure what matters, and drive lasting improvements. It's not a checklist. It's a journey—grounded in collaboration, learning, and action—that supports communities in organizing for impact, building inclusive leadership, and strengthening the connections that make real progress possible. By impact, we mean the lasting, measurable difference in people's lives and community conditions that results from aligned, sustained action across systems. It goes beyond activities and short-term outcomes to reflect improvements in quality of life—healthier people, stronger economies, more connected communities, and more resilient systems.

The C.O.R.E. Guide has been used by communities across the country for more than a decade— from rural regions to urban neighborhoods. It's rooted on the tested principles of the Baldrige Excellence Framework, adapted to reflect the complexity of community life. And it's been shaped by lived experience—by communities navigating uncertainty, addressing disparities, and building systems that work better for everyone.

The guide calls on leaders—both formal and informal—to create systems that focus on equity, resilience, and results. And it's built for those who believe communities not only *can* work better—but *must*, for those who live in them, and for generations to come.

## Community and the Core Group

This guide recognizes that *community* can mean different things to different people. While communities are often defined by geography (*communities of place*), they can also be shaped by shared professions (*communities of practice*), cultural identity or affiliation (*communities of affiliation*), common interests, or virtual engagement.

The C.O.R.E Guide primarily focuses on communities of place—neighborhoods, towns, cities, or regions—while acknowledging the critical role that other forms of community play in shaping outcomes and driving change.

Within a geographic community, it is not realistic—or necessary—to involve every individual or organization in every decision or process. That’s why the guide introduces the term *core group*: a cross-sector group of individuals and organizations that come together to lead and coordinate performance improvement efforts.

Unlike traditional organizations, communities lack a central chain of command. This guide asks how your *core group* will lead in a way that reflects and includes your community’s key sectors and segments. This means engaging residents, community members, and those who serve the community, including individuals who may or may not hold formal leadership positions but bring lived experience, deep relationships, and insight that are essential to authentic, lasting change.

## Commitment to Quality of Life

Quality of life reflects the overall conditions that enable residents to live healthy, stable, and meaningful lives. In The C.O.R.E. Guide, this commitment to improve quality of life is defined through seven core, interconnected aspects of communities of place: health, natural environment, education, social connections, economy, built environment, and housing. These elements shape daily experience and long-term opportunity—and when one system falters, the effects ripple outward.

This guiding principle shifts the focus from isolated programs to the broader systems and conditions that influence outcomes for individuals and communities. It recognizes that true excellence is not achieved by any one sector alone, but through shared responsibility, aligned action, and sustained investment in what matters most to residents and other stakeholders.

When communities actively work to improve quality of life, they foster well-being, strengthen civic and economic vitality, and lay the foundation for long-term, inclusive prosperity.

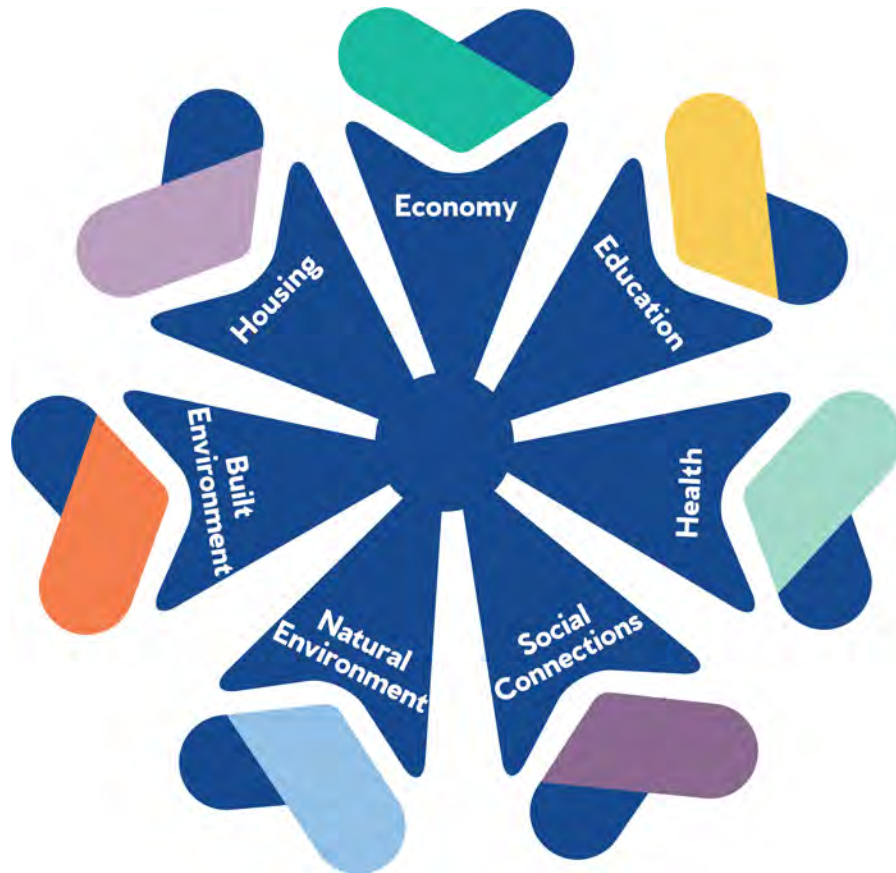
Each of the seven aspects below reflects a key dimension of quality of life. While every community will define and measure these differently, they serve as a shared foundation for collaborative action:

- **Economy:** The availability of good jobs, financial security, local business development, and equitable access to economic opportunity.
- **Education:** Access to opportunities for learning from early childhood through adulthood. This includes quality, inclusion, attainment, equity, and alignment with workforce and community needs.
- **Health:** The physical, mental, and social well-being of individuals and populations—including access to care, prevention, equity, and overall quality of health outcomes.
- **Social Connections:** The strength of relationships, trust, belonging, and civic engagement among residents. These bonds are vital to resilience, inclusion, and collaboration—and they also shape collective outlook, shared efficacy, and the belief that communities can create a better future together.
- **Natural Environment:** The condition and sustainability of air, water, land, and ecosystems—as well as access to nature, green spaces, and resilience to environmental threats.
- **Built Environment:** The physical infrastructure of a community—including transportation, broadband, parks, and public spaces—and how accessible, safe, and well-designed it is.
- **Housing:** Safe, stable, and affordable places to live, connected to opportunity, services, and community life—meeting the diverse needs of individuals and families.

These aspects are not isolated. They interact and overlap in ways that either reinforce or undermine community well-being. The C.O.R.E. Guide supports communities in aligning across these systems to improve quality of life in lasting, equitable ways.

Communities of Resilience & Excellence

## SEVEN QUALITY OF LIFE CORE ASPECTS

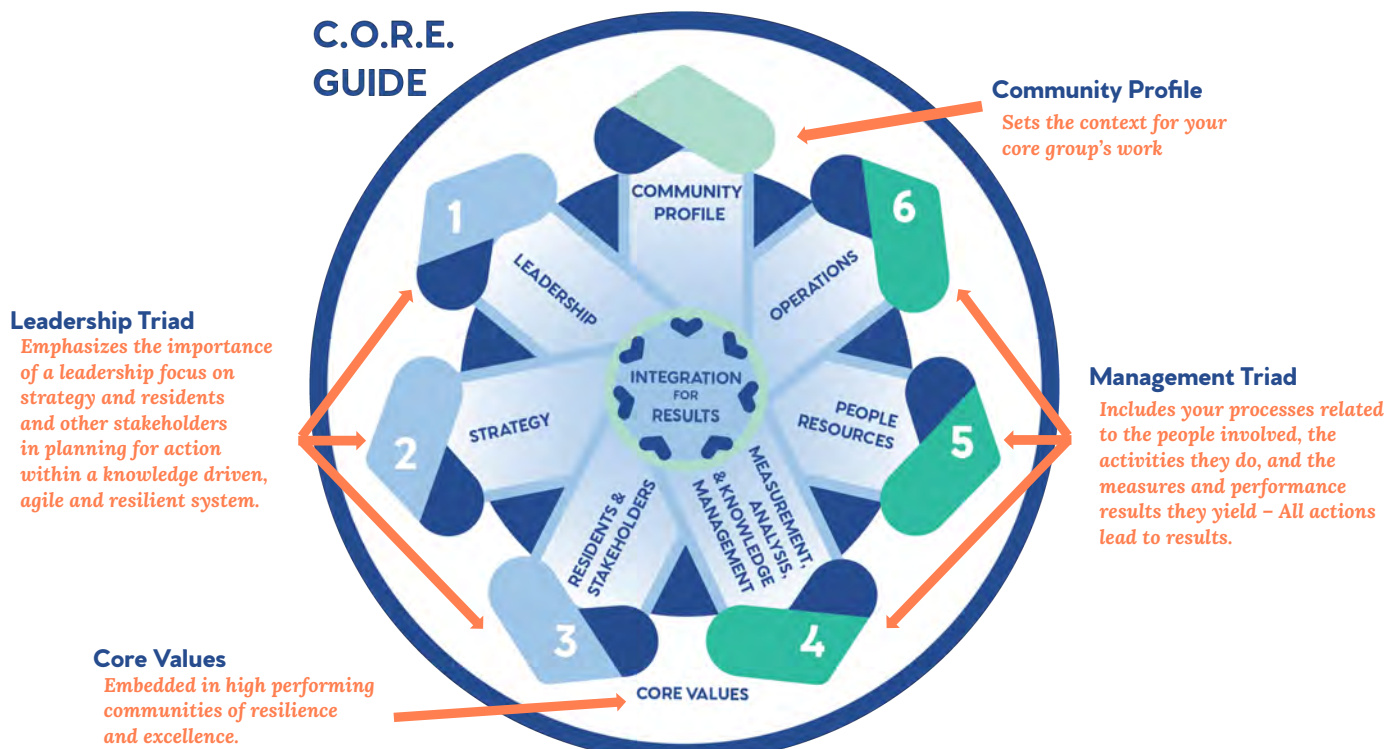


The seven quality of life core aspects in communities of place—health, natural environment, education, social connections, economy, built environment, and housing—are deeply interconnected. Together, they reflect the conditions that support well-being, opportunity, and resilience.

# How to Use The C.O.R.E. Guide

- 1<sup>st</sup> Become familiar with the Core Values.** These are described in detail on page 41 of this guide.
- 2<sup>nd</sup> Answer the Community Profile questions.** In the Community Profile, you define what is most relevant and important to your community's well-being and performance. Rather than prescribe how you should structure your core group's leadership, objectives, or action plans, or what your mission, goals, and measures should be, the guide asks you to make these decisions as a group. The Community Profile sets the context for your answers to the rest of the guide's questions. It can also serve as your first community assessment.
- 3<sup>rd</sup> Answer the questions in Categories 1–6.** Your answers to these questions are an assessment against the most important features of community resilience and excellence. The categories represent six critical aspects of performing as a community:

1. Leadership
2. Strategy
3. Residents and Other Stakeholders
4. Measurement, Analysis, and Knowledge Management
5. People Resources
6. Operations



© 2025, Communities of Resilience and Excellence, formerly Communities of Excellence 2026, adapted from the 2023-2024 Baldrige Excellence Framework: Proven Leadership and Management Practices for High Performance, Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology, <https://www.nist.gov/baldrige>.

Within each category, the criteria questions are arranged in three levels of increasing maturity:

1. The **establishing level** features the first larger bolded question of an item within a category. For Item 1.1 Core Group Leadership, the establishing level question is: “How do your leaders lead the core group?”
2. The **building level** features the bold questions within that item that cascade as the most important elements of the item.
3. The **excelling level** for each item contains detailed questions for further clarification of discussions and decisions. They are not bolded and listed after the building questions.



Each category consists of three items. The first two are process items (e.g., 1.1, 1.2) with most of the questions beginning with

“how.” In answering these questions, explain your key processes – the methods your core group uses and improves to do its work:

- **Approach:** How does your core group accomplish its work? How systematic are the key processes used?  
○ *How you do the things the group is doing?*
- **Deployment:** To what extent are these key processes used consistently throughout your core group?  
○ *Are you all doing it the same way?*
- **Learning:** Have you evaluated and improved your key processes? To what extent have improvements been shared within your core group?  
○ *How are you getting better?*
- **Integration:** How do your core group’s processes address its current and future needs, including the needs of the community’s key resident and other stakeholder segments? To what extent are processes harmonized across your core group to achieve key goals?  
○ *How is your community benefitting?*

## The Levels of the C.O.R.E. Guide’s Questions

Category

**1 Leadership**

The **Leadership** category asks how core group leaders’ personal actions guide and sustain your group. It also asks about your group’s governance system and how it fulfills its legal and ethical responsibilities.

Item

**1.1 Core Group Leadership**

**How do your leaders lead the core group?**

**Establishing**

*Most central question*

**a. MISSION, VISION, and VALUES**

**(1) Establishing MISSION, VISION, and VALUES**

**How do the leaders of your core group set and DEPLOY its MISSION, VISION, and VALUES?**

**Building**

*Most important elements of the item*

HOW do your leaders DEPLOY the MISSION, VISION, and VALUES through your LEADERSHIP SYSTEM to the individuals, organizations, and groups involved; to KEY PARTNERS and COLLABORATORS; and, to residents and other STAKEHOLDERS, as appropriate?

**Excelling**

*Individual questions on the details*

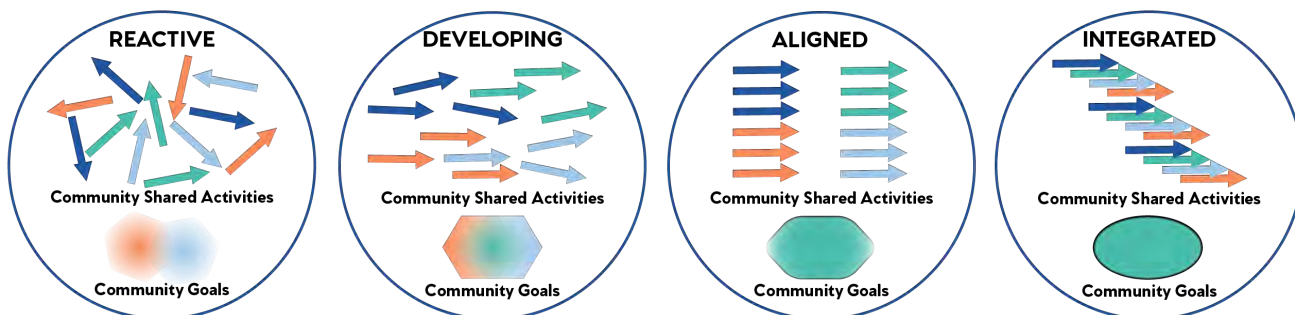
HOW do leaders’ personal actions reflect a commitment to those VALUES?



For third item in each category, report on the results that are the most important to your community and your core group. Results are the outputs and outcomes your community and core group achieve:

- **Levels:** What are your community’s and your core group’s current results?  
○ *How are you doing?*
- **Trends:** Are the results improving, staying the same, or getting worse?  
○ *How have you been doing over time?*
- **Comparisons:** How do your key results compare with those of similar communities, other communities and competitors, or with benchmarks?  
○ *How are others doing?*
- **Importance:** Is your core group tracking results that are important to your community, its key segments, and your core group? Is it using the results in decision making?  
○ *Who cares?*

**4<sup>th</sup> Evaluate your responses based on the Steps Toward High Performance.** On page 39, read the descriptors in the right column and assign one of the steps (Reactive, Developing, Aligned, or Integrated) based on a holistic assessment of your processes and results. Then look at the next higher descriptor to see what you might improve.



**5<sup>th</sup> Prioritize your actions.** Start by identifying and celebrating your community's strengths—then build on them. Recognizing what's working well not only boosts momentum but also creates a foundation for broader improvement. Share those successes openly to inspire engagement and accelerate progress.

Next, focus on the most critical opportunities for improvement. No community can do everything at once. Think about what is most important for your community at this time and decide what to work on first. Develop a clear action plan, implement it with discipline, and track your progress over time.

# What's Next?

## **Attend the Communities of Resilience & Excellence Annual Conference**

Learn promising practices from communities that have adopted the C.O.R.E. Guide, and network with colleagues from across the country.

## **Join The Impact Pathway**

Our primary learning and action program, the Impact Pathway supports cross-sector teams in applying the C.O.R.E. Guide to real priorities in their communities. It's structured around five strategic milestones, with tools, coaching, and peer learning to help teams make meaningful progress—at their own pace.

## **Explore Our Engagement Program**

Want to bring the C.O.R.E. Guide to your community in a way that's tailored to your needs and readiness? Our Engagement Program offers flexible options to get started, build momentum, and strengthen your team—whether you're just beginning or ready to deepen your work.

## **Take Advantage of Your Local Alliance for Performance Excellence Program**

Learn more about quality tools and organizational performance excellence through your local Alliance Program. More opportunities for learning, benchmarking, and other resources are available.

## **Apply to the Assessment and Recognition Program**

Receive structured, actionable feedback through a formal assessment against the questions in the C.O.R.E. Guide. Experienced reviewers provide insights you can use right away to advance your efforts.

## **Stay Connected with C.O.R.E.**

Not ready to dive in yet? Start by subscribing to our newsletter, joining an upcoming webinar, or signing up for updates. You'll hear real stories from community leaders, get practical tips, and stay in the know about new opportunities and tools.

## **Contact Communities of Resilience & Excellence**

Have questions about our programs, events, and opportunities? We'll connect you with details on learning programs, community coaching, and ways to engage with other community leaders.

**Visit [www.connectwithcore.org](http://www.connectwithcore.org)**

# Community Criteria for Performance Excellence

## P Community Profile

The **Community Profile** is where you start. It helps you identify gaps in key information and focus on key community requirements and results. It sets the context and allows you to address unique aspects of your community in your responses to questions in Categories 1–6.

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### P.1 Community Description

#### What are your community's key characteristics?

##### a. Community Environment

###### (1) Community Definition and IDENTITY

What geographic area defines your community?

What are your community's population and growth data compared with that of other communities locally, regionally, or nationally?

What demographic changes are occurring in your community that you need to consider?

What is your COMMUNITY IDENTITY?

###### (2) Community OFFERINGS

What are your community's KEY OFFERINGS to its resident and other STAKEHOLDER groups [see P.1a(3)] in QUALITY OF LIFE (health, natural environment, education, social connections, the economy, built environment, and housing?)

What is the relative importance of these OFFERINGS?

What major facilities, infrastructure, and resources (e.g., technology, housing, transportation, workforce development resources, education resources, natural resources) support your community's KEY OFFERINGS?

What recent changes has the community experienced in its needs for these assets?

###### (3) Residents and Other STAKEHOLDERS

What are your community's KEY resident groups?

What are the KEY SEGMENTS of these groups, as appropriate?

What are the KEY requirements and expectations of these KEY SEGMENTS?

What are your community's KEY STAKEHOLDER groups?

What are the KEY SEGMENTS of these groups, as appropriate?

What are the KEY requirements and expectations of these KEY SEGMENTS?

#### (4) People Resources

What KEY individuals, organizations, groups, and SEGMENTS are involved in delivering your community's KEY OFFERINGS?

#### (5) Regulatory Environment

What are the KEY regulations that impact the provision of your community's KEY OFFERINGS and your core group?

#### NOTES

**P.1a(1).** Include a map that shows the community described in this profile.

**P.1a(1).** Your community identity should be reflected in your core group strategy (Category 2) and its performance measurement (Category 4).

**P.1a(2).** In the C.O.R.E. Guide, quality of life is defined through the seven interconnected aspects that shape daily life in communities of place: health, natural environment, education, social connections, economy, built environment, and housing (See description on page 4-5). These aspects provide a shared foundation for identifying priorities and measuring progress across sectors. Throughout the guide, references to "quality of life" reflect this definition.

**P.1a(3).** Residents and other stakeholders are the individuals who use or receive the offerings you describe in P.1a(2).

**P.1a(3).** Your listening methods in Item 3.1 should consider all key resident and other stakeholder segments. They should consider the inclusion of all key groups within your community, its diversity (e.g., 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, and perspectives), and equity among groups within your community.

**P.1a(3).** A requirement is something that is necessary or demanded, whereas an expectation is something that is desired or hoped for. The requirements or expectations of your resident and other stakeholder groups might be related to any of the quality of life aspects. Determination of what constitutes a requirement versus an expectation may vary by community. Some resident and other stakeholder segments may not have the same levels of accessibility and resources as others to make their requirements and expectations known.

**P.1a(4).** People resources are the individuals, organizations, and groups that deliver your community's offerings. They include the individuals who serve as volunteers, supporters, and champions, and organizations and groups that offer programs and services to the community. People resources may include both formal and informal leaders, elected and appointed officials, and public and private sector organizations.

**P.1a(5).** Most communities operate in a complex regulatory environment. Key regulations should focus on those that aid or constrain your community in delivering its key offerings as described in P.1a(2) and those that are relevant to your community resilience and excellence efforts.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## b. Core Group

### (1) MISSION, VISION, VALUES, and CULTURE

What are your core group's stated MISSION, VISION, and VALUES?

What are the defining characteristics of the group's CULTURE?

### (2) Composition

What KEY individuals, organizations, and groups [see P.1a(4)] are involved in your core group?

What are the KEY drivers that engage them in achieving your group's MISSION and VISION?

What are the group's CORE COMPETENCIES, and what is their relationship to its MISSION and VISION?

Who serves as the BACKBONE ORGANIZATION, if your group includes one?

### (3) LEADERSHIP SYSTEM

What LEADERSHIP SYSTEM does your core group use to lead its community RESILIENCE and EXCELLENCE efforts?

### (4) PARTNERS and COLLABORATORS

What KEY PARTNERS and COLLABORATORS support your core group?

### (5) PERFORMANCE Improvement SYSTEM

What KEY tools and methods are used as part of your core group's PERFORMANCE improvement SYSTEM?

## NOTES

**P.1b(1).** This question addresses the “why” of your core group's existence. If your core group has a stated purpose as well as a mission, you should include both in your response. In some core group's, purpose refers to the fundamental reason that the core group exists. Its role is to inspire the core group and guide its setting of mission, vision, and values.

In some communities, the core group proposes or adopts a mission, a vision, and values as a first step. Your community might eventually choose to adopt them.

Your group's values are part of your culture. Other characteristics of your culture include shared beliefs and norms that contribute to the uniqueness of the environment within your core group.

**P.1b(2, 3).** Communities of Resilience and Excellence has identified the following key functions generally found in the structures and leadership systems adopted by core groups. The names of these functions vary by community and together comprise your core group:

- A **backbone organization's** primary role is to manage logistics, such as setting up meetings and locations and providing administrative support. It might also assist the governance and leadership groups in building a strong community presence for the core group and might provide some financial resources. In some cases, a core group might have more than one backbone organization distribute, share, and/or coordinate tasks.
- A **governance or oversight group or council** that serves an advisory function.
- A **leadership council** that sets the core group's strategy, direction, and focus. It might also participate in the initial recruitment, appointment, and orientation of new governance and task group members; monitor the effectiveness of task groups; and help secure additional individuals, organizations, and groups when needed.
- One or more **task groups** who carry out the core group's strategy, including establishing the community's baseline of performance, establishing goals, measuring progress, and defining practices for sustainability. They determine action plans and identify the individuals, organizations, and groups necessary to achieve those action plans. The task groups are accountable to the leadership council.

The structure might also include a community coach who acts as a guide and facilitator in support of all the functions above. This person may be from outside the core group. Regional initiatives may consider using more levels than single community initiatives.

## NOTES

**P.1b(3).** This question asks for the “what” of your core group’s leadership system (its participants, structures, and mechanisms). The questions in Category 1 ask “how” the system functions. See also the definition of leadership system in the glossary.

**P.1b(5).** The terms partner and collaborator are used to distinguish two types of relationships between your core group and other entities (see the Glossary). The terminology you use may be different. In your response, you should use your own terminology.

Partners are key organizations or individuals who are working (often formally) with your core group but are not members of the leadership council. They might help to achieve a common goal, improve performance, and accomplish your mission and vision. A partner may be an organization that is actively engaged in deploying your group’s strategy or in support processes but is not an official member of your governance or oversight group or task groups. They might also provide workers, knowledge, technical assistance, or funding for an initiative. Examples could be partnering with the mayor’s office on a youth initiative and/or a public health department on a smoking cessation program.

Collaborators are organizations or individuals outside your core group who cooperate to support a particular activity, event, or initiative or who cooperate intermittently when their short-term goals are aligned with or are the same as yours. Examples could be collaborating with a neighboring community to host a job fair and/or a zoning official to pass a new ordinance.

**P.1b(6).** This question is intended to set an overall context for your approach to performance improvement. The approach you use should be related to your group’s needs. Approaches compatible with the systems approach provided by the C.O.R.E. Guide include Lean and Plan-Do-Study/Check-Act (PDSA/PDCA) or Define, Measure, Analyze, Improve, and Control (DMAIC). Compatible community frameworks include the Community Capital Framework, Collective Impact, Healthy Communities, Community Visioning, and others.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## P.2 Community Situation

### What is your community's strategic situation?

#### a. Competitive Environment

##### (1) Competitive Position

With regard to its KEY OFFERINGS [See P.1a(2)], what is your community's competitive position relative to similar or nearby communities?

What other communities provide similar OFFERINGS?

What differentiates your community's KEY OFFERINGS from theirs?

##### (2) Community Changes

What KEY changes, if any, are affecting your community's competitive situation, including changes that create opportunities for collaboration and INNOVATION for your core group, as appropriate?

##### (3) Comparative Data

What KEY sources of comparative and competitive data about your community and core group are available?

What limitations, if any, affect your ability to obtain or use these sources to guide your work and make decisions?

#### b. Strategic Context

##### (1) CHALLENGES, THREATS, ADVANTAGES, and OPPORTUNITIES

What are your community's KEY STRATEGIC CHALLENGES, THREATS, ADVANTAGES, and OPPORTUNITIES?

How do they relate to your core group's MISSION and VISION?

#### NOTES

**P.2a(1).** Key competitors might include other communities that seek to attract potential residents, other stakeholders, and resources also sought by your community. Key competitors might also include other communities that provide similar or competing offerings.

**P.2a(2).** Key changes affecting your competitive position might include shifts in demographics, resident or stakeholder preference, or legislative policy.

**P.2a(3).** Comparative data and information may be local, regional, or national and are obtained by benchmarking and by seeking competitive comparisons. Benchmarking is identifying processes and results that represent best practices and performance for similar activities, inside or outside your community. Competitive comparisons relate your community's performance to that of communities with similar programs and services. While comparisons may be difficult to obtain for all metrics, they are critical to assessing the performance of your key results. This is particularly true when doing something that may be unique or on the leading edge. Comparisons put performance in perspective.

**P.2b.** Strategic challenges, threats, advantages, and opportunities might relate to the Seven Quality of Life Core Aspects. They might involve demographic shifts, natural resources, geography, climate, research institutions, history, educational opportunities in the community, labor shortages or abundances, affordable housing, transportation, and access to technology, gain or loss of businesses or attractions, changes in policy or political leadership, and changes in reputation, among others. Strategic advantages may include the community's core competencies.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

# 1 Leadership

The **Leadership** category asks how core group leaders' personal actions guide and sustain your group. It also asks about your group's governance system and how it fulfills its legal and ethical responsibilities.

## 1.1 Core Group Leadership

### How do your leaders lead the core group?

#### a. MISSION, VISION, and VALUES

##### (1) Establishing MISSION, VISION, and VALUES

**How do the leaders of your core group set and DEPLOY its MISSION, VISION, and VALUES?**

HOW do your leaders DEPLOY the MISSION, VISION, and VALUES through your LEADERSHIP SYSTEM to the individuals, organizations, and groups involved; to KEY PARTNERS and COLLABORATORS; and, to residents and other STAKEHOLDERS, as appropriate?

How do leaders' personal actions reflect a commitment to those VALUES?

##### (2) Promoting Legal and ETHICAL BEHAVIOR

**How do your leaders' personal actions demonstrate their commitment to legal and ETHICAL BEHAVIOR?**

How do leaders promote an environment that requires it?

#### b. Communication

**How do your leaders communicate with and engage your core group, KEY resident and other STAKEHOLDER groups, and other KEY COMMUNITY LEADERS and groups?**

How do they

- support frank, respectful, two-way communication;
- encourage, collect, and respond to input and feedback;
- communicate RESULTS of core group PERFORMANCE, KEY decisions, and needs for change;
- promote language access, support ACCESSIBILITY, and interact in culturally responsive ways; and,
- take a direct role in motivating the core group toward HIGH PERFORMANCE and a focus on residents and other STAKEHOLDERS?

#### NOTES

**1.1a(1).** Your core group's mission and vision should set the context for the strategic opportunities, strategic objectives, and action plans you describe in P.2b and items 2.1 and 2.2.

*Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.*

## c. Focus on PERFORMANCE

### (1) Creating an Environment for Success

**How do your leaders' actions create an environment for community success now and in the future?**

How do they

- create and reinforce a CULTURE that VALUES and fosters RESIDENT AND OTHER STAKEHOLDER ENGAGEMENT and the ENGAGEMENT of the individuals, organizations, and groups involved, as well as safety, DIVERSITY, EQUITY, INCLUSION, and ACCESSIBILITY;
- cultivate AGILITY and RESILIENCE, accountability, LEARNING for individuals and the group, INNOVATION, and INTELLIGENT RISK taking; and,
- participate in SUCCESSION planning and the development of future core group leaders?

### (2) Creating a Focus on Action

**How do your leaders create a shared focus on action to achieve the core group's MISSION and VISION?**

How do they

- create a focus on action that will improve the group's PERFORMANCE and work toward achieving its VISION;
- set expectations for the group's PERFORMANCE, include a focus on creating and balancing VALUE for residents and other STAKEHOLDERS;
- consider DIVERSITY, EQUITY, INCLUSION, and ACCESSIBILITY;
- identify needed actions; and,
- demonstrate personal accountability for the group's actions?

## NOTES

**1.1c(1).** Safety should include physical, psychological, emotional, and social considerations.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## 1.2 Governance

### How does your core group govern itself?

#### a. Core Group GOVERNANCE

##### (1) GOVERNANCE SYSTEM

###### How does your core group ensure responsible GOVERNANCE?

How does your GOVERNANCE SYSTEM review and achieve

- accountability for leaders' actions;
- fiscal accountability;
- transparency in operations; and,
- protection of STAKEHOLDER interests?

##### (2) PERFORMANCE Evaluation

###### How does your core group evaluate the PERFORMANCE of its leaders and its GOVERNANCE SYSTEM?

How do leaders use these PERFORMANCE evaluations to advance their development and improve the EFFECTIVENESS of leaders and the LEADERSHIP SYSTEM, as appropriate?

##### (3) Core Group PERFORMANCE

###### How does your GOVERNANCE group review the core group's PERFORMANCE?

How does your GOVERNANCE group review progress on STRATEGIC OBJECTIVES and ACTION PLANS?

#### b. Legal and ETHICAL BEHAVIOR

##### (1) Legal and Regulatory Compliance

###### How do you address current and anticipated public concerns with the core group's programs and services?

How do you

- address any adverse societal impacts of your shared programs and services, including harming and/or placing additional burdens on KEY SEGMENTS of your residents and other STAKEHOLDERS;
- anticipate public concerns with your future programs and services; and,
- prepare for these impacts and concerns proactively?

How do you meet and surpass regulatory and legal requirements for your core group's programs and services?

What are your KEY compliance MEASURES and GOALS?

#### NOTES

**1.2a(2).** The evaluation of leaders' performance might be informed by peer reviews and formal or informal feedback and surveys of individuals involved in your group, as well as the voice and agency of all key stakeholders.

**1.2a(3).** This question refers to the review of your key performance measures identified in 4.1a as well as your associated results reported in Categories 1-6.

**1.2b(1).** Your core group's programs and services are defined in 3.1c.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## (2) ETHICAL BEHAVIOR

### **How do you require and foster ETHICAL BEHAVIOR in all interactions?**

What are your KEY PROCESSES and MEASURES or INDICATORS for requiring and fostering ETHICAL BEHAVIOR throughout your core group and in interactions with individuals, organizations, groups, residents, other STAKEHOLDERS, PARTNERS, and COLLABORATORS?

How do you monitor and respond to breaches of ETHICAL BEHAVIOR?

### **c. Support of Community Organizations and Groups**

**How do you actively support and strengthen the PERFORMANCE of the community organizations and groups involved in delivering your community's KEY OFFERINGS?**

## **1.3 Leadership and Governance Results**

**What are your core group's leadership and governance results?**

### **a. Communication and ENGAGEMENT**

**What are your RESULTS for your core group leaders' communication and ENGAGEMENT with the core group, KEY resident and other STAKEHOLDER groups, and other KEY COMMUNITY LEADERS and groups?**

### **b. GOVERNANCE**

**What are your RESULTS for GOVERNANCE accountability?**

### **c. Legal and Regulatory Compliance and ETHICAL BEHAVIOR**

**What are your RESULTS for legal and regulatory compliance and ETHICAL BEHAVIOR?**

## NOTES

**1.2b(2).** Measures or indicators of ethical behavior might include instances of unethical conduct or compliance breaches and responses to them, survey results showing perceptions of the core group's ethics, and results of ethics reviews. Measures or indicators of ethical behavior might also include evidence that policies, training, and monitoring are in place for conflicts of interest; protection and use of sensitive data, information, and knowledge; and proper use of funds.

*Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.*

## 2 Strategy

The **Strategy** category asks how your core group develops strategic objectives and action plans, implements them, changes them if circumstances require, and measures progress.

### NOTES

**2.** The C.O.R.E. Guide encourages a community perspective on strategy. In this view, the core group develops and carries out its strategy as a unified whole, with various community groups, resident and other stakeholder groups, and other individuals and groups aligned and collaborating. Strategy development might involve key community leaders and groups, residents, other stakeholders, and any others who will be affected by your core group's strategy.

### 2.1 Strategy Development

#### How does your core group develop its strategy?

##### a. Strategy Development PROCESS

###### (1) Strategic Planning PROCESS

###### How do you conduct your strategic planning?

What are your short- and longer-term planning horizons?

How does your strategic planning PROCESS address the potential need for change, prioritization of change initiatives, and AGILITY and RESILIENCE?

###### (2) Strategy Considerations

###### How do you collect and analyze relevant data and information for your strategic planning PROCESS?

How do you consider the following KEY elements and risks as part of your core group's strategy:

- Your community's CHALLENGES, THREATS, ADVANTAGES, and OPPORTUNITIES;
- Community RESILIENCE, including potential changes in your community and external environment;
- Potential blind spots in your information and data;
- Existing community needs assessments that address QUALITY OF LIFE;
- Differences in outcomes and experiences among KEY SEGMENTS of your resident and STAKEHOLDER groups; and,
- Your group's ability to execute the strategic plan?

### NOTES

**2.1a(1).** You may use any planning methodology that supports strategic thinking, community input, and alignment across your objectives and action plans. The framework does not require a specific tool—what matters is that your approach supports inclusive decision-making, future orientation, and measurable results.

**2.1a(2).** Your community environment refers to the information in P.1a and P.2a. Your strategy should consider root causes of community performance issues. Blind spots may indicate unintentional bias that can cause gaps in your understanding of your community and the strategic challenges it faces, or of neighboring communities. Blind spots may arise from an incomplete understanding of the diverse backgrounds and characteristics, knowledge, skills, and motivation of individuals, organizations, and groups within the community. Your group's ability to execute the strategic plan should address your ability to mobilize the necessary resources and knowledge to execute the strategic plan as well as your ability to execute contingency plans or, to shift strategy and execute new or changed plans.

### (3) STRATEGIC OPPORTUNITIES and INTELLIGENT RISKS

#### **How do you identify STRATEGIC OPPORTUNITIES and stimulate INNOVATION?**

How do you decide which STRATEGIC OPPORTUNITIES are INTELLIGENT RISKS to pursue?

### (4) Collaboration and CORE COMPETENCIES

#### **In your strategy development, HOW do you decide which KEY PROCESSES will be accomplished by your core group and which by your external PARTNERS and COLLABORATORS?**

How do those considerations take into account your STRATEGIC OBJECTIVES, resources both inside and outside the core group, your current and future CORE COMPETENCIES, and the CORE COMPETENCIES of potential PARTNERS and COLLABORATORS?

## b. STRATEGIC OBJECTIVES

### (1) KEY STRATEGIC OBJECTIVES

#### **What are your KEY STRATEGIC OBJECTIVES and timetable for achieving them?**

What are your most important GOALS for these STRATEGIC OBJECTIVES?

What are the KEY MEASURES used to assess progress towards these GOALS?

What KEY changes, if any, are planned in your programs and services, resident and other STAKEHOLDER groups, PARTNERS, COLLABORATORS, and operations?

### (2) Considerations

#### **How do your STRATEGIC OBJECTIVES achieve balance among varying and competing community needs?**

How do your STRATEGIC OBJECTIVES

- address your community's STRATEGIC CHALLENGES and THREATS, and leverage your CORE COMPETENCIES, STRATEGIC ADVANTAGES, and OPPORTUNITIES;
- balance short- and longer-term planning horizons;
- consider and balance the needs of all KEY STAKEHOLDERS; and,
- address the impact of your strategies on KEY SEGMENTS of your resident and other STAKEHOLDER groups?

## NOTES

**2.1a(4).** This question asks about the work done internally by your core group and the work done by external resources (partners and collaborators) referenced in P.1b(4).

**2.1b(1).** Strategic objectives should focus on the strategic challenges, threats, advantages, and opportunities in P.2b(1)—those that are most important to the community's ongoing success.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## 2.2 Strategy Implementation

### How does your core group implement its strategy?

#### NOTES

**2.2.** The development and deployment of your strategy and action plans are closely linked to other categories and items. The following are examples of key linkages:

- Item 1.1: How your leaders set and communicate the direction of your core group.
- Category 3: How you gather knowledge about residents and other stakeholders as input to your strategy and action plans, and to use in deploying action plans.
- Category 4: How you measure and analyze data and manage knowledge to support key information needs, support strategy development, provide an effective basis for performance measurements, and track progress on achieving strategic objectives.
- Category 5: How you meet your core group's needs for individuals, organizations, and groups; determine needs; and implement changes to these resources as a result of action plans.
- Category 6: How you address changes to your work processes resulting from action plans.

#### a. ACTION PLAN Development and DEPLOYMENT

##### (1) ACTION PLANS

###### How do you develop your ACTION PLANS?

What are your KEY short- and longer-term ACTION PLANS?

How do you ensure that they align with your STRATEGIC OBJECTIVES?

##### (2) ACTION PLAN Implementation

###### How do you DEPLOY your ACTION PLANS?

HOW do you DEPLOY your ACTION PLANS to individuals, organizations, and groups involved and to KEY PARTNERS and COLLABORATORS, as appropriate, to ensure that you achieve your KEY STRATEGIC OBJECTIVES?

How do you ensure that you can sustain the KEY outcomes of your ACTION PLANS?

##### (3) Resource Allocation

###### How do you ensure that financial and other resources are available to support the achievement of your ACTION PLANS?

How do you allocate these resources to support the plans?

How do you manage the risks associated with the plans to ensure your financial viability?

##### (4) People Resource Plans

###### What are your KEY plans for individuals, organizations, and groups to support your STRATEGIC OBJECTIVES and ACTION PLANS?

How do the plans address any potential changes in CAPABILITY and capacity needs?

How do you consider DIVERSITY, EQUITY, INCLUSION, and ACCESSIBILITY in developing these plans?

#### NOTES

**2.2a(1).** Action plans should derive from strategic objectives and involve the key segments of your resident and other stakeholder groups. These plans include those for programs and services that your core group undertakes to improve quality of life.

**2.2a(2).** Action plans draw on the resources and community assets available, regardless of where they are formally based. You might deploy action plans through organizations in the community and/or through community task groups that are not “owned” by any one organization.

**2.2a(3).** Communities may need to allocate or reallocate resources across organizations, or seek the involvement of additional groups or organizations, to ensure the success of action plans and achieve the desired outcomes.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## **(5) PERFORMANCE MEASURES**

**What KEY PERFORMANCE MEASURES or INDICATORS do you use to track the achievement and EFFECTIVENESS of your ACTION PLANS?**

## **(6) PERFORMANCE PROJECTIONS**

**For these KEY PERFORMANCE MEASURE or INDICATORS, what are your PERFORMANCE PROJECTIONS for your short- and longer-term planning horizons?**

### **b. ACTION PLAN Modification**

**How do you establish and implement modified ACTION PLANS if circumstances require a shift in plans and rapid execution of new plans?**

## **2.3 Strategy Results**

**What are your core group's strategy results?**

### **a. QUALITY OF LIFE**

**What are the RESULTS for the community's QUALITY OF LIFE?**

### **b. Achievement**

**What are your RESULTS for the achievement of your core group's strategy and ACTION PLANS?**

## **NOTES**

**2.2a(5).** The measures you use to track the achievement of action plans should align with your goals and objectives and relate to the results you report in Item 2.3.

**2.3a.** The results you report in response to 2.3a should align with the community offerings you describe in P.1a(2). Results should focus on outcomes that are related to those offerings – whether they are directly or indirectly related to quality of life – and that the core group is trying to influence. See description of quality of life on page 4 or definition on page 48.

**2.3b.** The results you report in response to 2.3b should align with the key measures for your goals and objectives in 2.1b(1) and action plans in 2.2a(5).

*Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.*

## 3 Residents and Other Stakeholders

The **Residents and Other Stakeholders** category asks how your core group engages residents and other stakeholders for ongoing success, including how your core group listens to them, determines programs and services to meet their needs, builds long-term relationships with them, and enhances their experience.

### NOTES

**3.** The C.O.R.E. Guide views residents in two ways: as users of the core group's programs and services—Category 3; and as resources to be engaged in doing the work of the core group—Category 5. See the note to P.1a(3) for a description of residents and other stakeholders.

### NOTES

### 3.1 Stakeholder Expectations

**How does your core group listen to residents and other stakeholders and determine programs and services to meet their needs?**

#### a. Listening to Residents and Other STAKEHOLDERS

##### (1) Current Residents and Other STAKEHOLDERS

**How do you listen to, interact with, and observe residents and other STAKEHOLDERS to obtain actionable information?**

How do your listening methods vary for different resident and other STAKEHOLDER groups and SEGMENTS?

How do you seek immediate and actionable feedback from residents and other STAKEHOLDERS on the quality of the core group's programs and services?

##### (2) Potential and Former Residents and Other STAKEHOLDERS

**How do you listen to potential residents and other STAKEHOLDERS to obtain actionable data and information?**

How do you listen to former residents and other STAKEHOLDERS, and neighboring communities' residents and other STAKEHOLDERS, to obtain actionable information?

**3.1a(1).** Methods for listening to residents and other stakeholders might include surveys, town halls, focus groups, and social media and web-based technologies (including monitoring comments on social media outlets you moderate and on those you do not control). Your methods should include how you listen to historically marginalized groups, including how you encourage them to share their needs, how you ensure culturally competent and safe spaces, how you incorporate principles of language justice, and how you validate resident and other stakeholder input and feedback.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## b. Resident and Other STAKEHOLDER SEGMENTATION

### (1) Resident and Other STAKEHOLDER SEGMENTATION

#### How do you determine resident and other STAKEHOLDER groups?

How do you

- use information on residents, other STAKEHOLDERS, and community OFFERINGS to identify current and anticipate future resident and other STAKEHOLDER groups; and,
- determine which resident and other STAKEHOLDER groups to emphasize in your programs and services?

## c. Programs and Services

### (1) Programs and Services

#### What are your core group's programs and services?

### (2) KEY Requirements

#### What are the KEY requirements of your programs and services?

### (3) Determination of Needs, Requirements, and Expectations

#### How do determine resident and other STAKEHOLDER needs, requirements, and expectations for programs and services?

How do you ensure your programs and services are culturally appropriate and responsive, and advance DIVERSITY, EQUITY, INCLUSION and ACCESSIBILITY?

### (4) Design

#### How do you design your programs and services?

### (5) Management

#### How do you manage your programs and services to ensure EFFECTIVENESS and EFFICIENCY?

### (6) Improvement

#### How do you improve your programs and services?

## NOTES

**3.1c.** Questions about how you design, manage, and improve your key processes are in Item 6.1.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## 3.2 Stakeholder Engagement

**How does your core group build relationships and enhance resident and other stakeholder experience?**

### a. Resident and Other STAKEHOLDER Relationships and Support

#### (1) Relationship Management

**How do you build and manage relationships with residents and other STAKEHOLDERS?**

How do you

- build a resident and other STAKEHOLDER-focused CULTURE;
- manage and enhance your group's brand; and,
- meet residents' and other STAKEHOLDER requirements, build their trust, and exceed their expectations?

#### (2) Access and Support

**How do you enable residents and other STAKEHOLDERS to interact with you, seek information, and obtain support regarding your core group's programs and services?**

How do your KEY resident and other STAKEHOLDER support and communication mechanisms vary for different resident and other STAKEHOLDER groups, as appropriate?

How do you

- determine your residents' and other STAKEHOLDERS' KEY support requirements and expectations; and,
- DEPLOY these requirements to all people and PROCESSES involved in delivering your programs and services?

#### (3) Complaint Management

**How do you manage residents' and other STAKEHOLDERS' complaints?**

How do you

- resolve complaints promptly and EFFECTIVELY and recover your residents' and other STAKEHOLDERS' confidence;
- analyze complaints and use this information to make the necessary changes to prevent future complaints; and,
- protect the individuals making complaints against retaliation?

#### (4) Fair Treatment

**How do your resident and other STAKEHOLDER relationship and support PROCESSES promote and ensure fair treatment for your different resident and other STAKEHOLDER groups?**

*Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.*

**b. Determination of STAKEHOLDER Satisfaction, Dissatisfaction, and ENGAGEMENT**

**How do you determine resident and other STAKEHOLDER satisfaction, dissatisfaction, and ENGAGEMENT with your core group?**

How do your determination methods differ among your resident and other STAKEHOLDER groups?

How do you take action on the RESULTS of satisfaction, dissatisfaction, and ENGAGEMENT determination methods?

How do you obtain information on residents' and other STAKEHOLDERS' satisfaction with your core group relative to that of residents and other STAKEHOLDERS in other communities?

**3.3 Stakeholder-Focused Results**

**What are your core group's resident and other stakeholder-focused results?**

**a. Satisfaction and Dissatisfaction**

**What are your RESULTS for resident and other STAKEHOLDER satisfaction and dissatisfaction with your core group's programs and services, and overall efforts?**

**b. ENGAGEMENT**

**What are your RESULTS for RESIDENT AND OTHER STAKEHOLDER ENGAGEMENT regarding your core group's programs and services, and other efforts?**

**NOTES**

**3.3.** Results for resident and other stakeholder satisfaction, dissatisfaction, and engagement should relate to the groups you identify in P.1a(3) and to the listening and determination methods you describe in Item 3.1.

*Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.*

## 4 Measurement, Analysis, and Knowledge Management

The **Measurement, Analysis, and Knowledge Management** category asks how your core group measures, analyzes, reviews, and improves its performance and how you manage your information and collective knowledge assets.

### 4.1 Measurement, Analysis, Review, and Improvement of Community Performance

**How does your core group measure, analyze, review, and improve community performance?**

#### NOTES

**4.1.** The questions in this item are closely linked to other guide items. Your performance measurement, analysis, and review system should include measures for your leadership (Category 1), strategy (Category 2), residents and other stakeholders (Category 3), people resources (Category 5), and operations (Category 6). Your answers should consider measures for each of the key segments of your community identified in P.1a(3).

#### a. PERFORMANCE Measurement

##### (1) PERFORMANCE MEASURES

**How do you track data and information on your programs and services and their impact on overall community PERFORMANCE?**

How do you

- select, collect, align, and integrate data and information to use in tracking your core group's PERFORMANCE;
- track progress on achieving your STRATEGIC OBJECTIVES and ACTION PLANS;
- track overall community PERFORMANCE in QUALITY OF LIFE, as appropriate;
- modify or adjust your MEASURES to provide timely data to address unexpected changes; and,
- collect information in a culturally sensitive manner?

What are your KEY core group PERFORMANCE MEASURES, including KEY short- and longer-term budgetary and other financial MEASURES?

##### (2) Comparative Data

**How do you select comparative data and information to support fact-based decision making?**

#### NOTES

**4.1a(1).** The first two bulleted points ask about the core group. Results should be reported in 2.3b. The third point asks about key community outcomes tracked by your core group. These results should relate to the key community offerings described in P.1a(2) and should be reported in 2.3a.

**4.1a(1).** Modifying or adjusting your measures to provide timely data to address unexpected changes may involve adopting different performance measures or adjusting the intervals between measurements. These modifications might be necessary to respond to changes in the political or societal environment, disasters and emergencies, innovations, or new offerings from other communities.

**4.1a(2).** See P.2a(3)

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## b. PERFORMANCE ANALYSIS, Review, and Improvement

### (1) ANALYSIS and Review

#### **How do you analyze and review your core group's PERFORMANCE and capabilities?**

How do you use your KEY PERFORMANCE MEASURES, as well as comparative data, in these reviews?

What ANALYSES do you perform to support these reviews and the validity of your findings?

How do your group and its leaders use these reviews to

- assess the group's success, CORE COMPETENCIES, financial health, and progress on achieving your STRATEGIC OBJECTIVES and ACTION PLANS; and,
- respond rapidly to changing needs and challenges in your community?

How do you project the future PERFORMANCE of your core group?

How do you use findings from PERFORMANCE reviews and KEY comparative data in your projections?

### (2) Continuous Improvement and INNOVATION

#### **How do you use the findings from your PERFORMANCE reviews to identify priorities for continuous improvement and opportunities for INNOVATION?**

## NOTES

**4.1b.** Communities may use any structured approach to review performance and identify improvement opportunities. This might include dashboards, benchmarking, strategy maps, or other tools that support data-informed decision-making. Performance analysis should examine trends, comparisons, cause-effect relationships, and correlations—and be used to support performance reviews, determine root causes, and set priorities for resource use and transformative change. Analyses should draw on all relevant data sources, including program and service performance, resident and stakeholder feedback, financial and operational data, and community comparisons. They may also be informed by internal or external Baldrige-based assessments. The process should be forward-looking, data-informed, and inclusive of key voices.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## 4.2 Information and Knowledge Management

### How does your core group manage its knowledge assets?

#### NOTES

**4.2.** Community knowledge is a community asset. Some of this knowledge resides within specific organizations, and some resides across organizations. Managing and sharing this knowledge provides a common basis for planning and action within your core group. Consider how emerging technologies, including AI (artificial intelligence), are used to gather, interpret, and apply knowledge across your community systems.

#### a. Data and Information

##### (1) Quality

**How do you verify and ensure the quality of community data and information that are relevant to your core group's programs and services?**

How do you ensure the accuracy and validity, integrity and reliability, and currency of data and information?

How do you ensure that your data and information are culturally sensitive and avoid bias?

##### (2) Availability

**How do you ensure the availability of data and information?**

How do you make needed data and information available in a user-friendly format and timely manner to your individuals, organizations, groups, PARTNERS, COLLABORATORS, residents, and other STAKEHOLDERS, as appropriate?

How do you ensure that your data and information are culturally sensitive and avoid bias?

##### (3) Cybersecurity

**How do you secure sensitive or privileged data and information, information technology assets, and internet-enabled SYSTEMS?**

#### NOTES

**4.2a(3).** Managing cybersecurity includes protecting against the loss of sensitive information about individuals, residents, other stakeholders, organizations, and groups, including partners and collaborators; protecting assets, including intellectual property; and protecting against the financial, legal, and reputational aspects of breaches.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## b. Core Group Knowledge

### (1) Knowledge Management

#### **How do you build and manage the KNOWLEDGE ASSETS relevant to your programs and services?**

How do you

- collect and transfer knowledge among your residents and other STAKEHOLDERS, as well as the individuals, organizations, and groups involved in your core group to inform and support your strategy and operations;
- analyze data and information from different sources to build core group and community knowledge; and,
- embed LEARNING in the way your core group operates?

### (2) Best Practices

#### **How do you identify and share your core group's best practices?**

How do you determine best practices from within your core group and external sources?

How do you implement them across your core group and your community and with KEY PARTNERS and COLLABORATORS, as appropriate?

How do you share best practices with your community and other communities, as appropriate?

## c. Pursuit of INNOVATION

### (1) Opportunities

#### **How do you determine which opportunities for INNOVATION to pursue?**

How do you

- make financial and other resources available to pursue these opportunities;
- DEPLOY these opportunities, as appropriate, to your residents and other STAKEHOLDERS and to KEY PARTNERS and COLLABORATORS; and,
- decide to discontinue pursuing these opportunities when appropriate?

## NOTES

**4.2b(1).** Embedding learning in the way your core group operates means that learning (1) is a part of your regular work; (2) results in solving problems at their source; (3) is focused on building and sharing knowledge throughout your group; (4) is driven by opportunities to bring about significant, meaningful change and to innovate; and (5) enables agile and sustainable processes.

**4.2c.** Your process for pursuing potential innovations should carefully evaluate all opportunities, including those identified in your strategic planning process (2.1a); your resident and other stakeholder listening (3.1a); your program and service determination [3.1b(2)]; your comparative data [4.1a(2)]; your performance reviews (4.1b); your knowledge management system [4.2b(1)]; and by your residents and other stakeholders. Your assessment should consider which opportunities are intelligent risks worth pursuing and should balance the need for thoughtful assessment with the importance of implementing the innovations in a timely manner.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## 5 People Resources

The **People Resources** category asks how your core group addresses the capability and capacity of its members and provides a group climate to support high performance. The category also asks how your group engages, manages, and develops your members to utilize their full potential in alignment with the group's overall work needs.

### NOTES

5. The C.O.R.E. Guide views residents in two ways: as users of the core group's programs and services—Category 3; and as resources to be engaged in doing the work of the core group—Category 5. See the note to P.1a(3) for a description of residents and other stakeholders.

### 5.1 Core Group Environment

**How does your core group build an effective and supportive environment for the people who do its work?**

#### a. Core Group CAPABILITY and CAPACITY

##### (1) CAPABILITY and CAPACITY Needs

**How do you assess your core group's CAPABILITY and CAPACITY needs for individuals, organizations, and groups to accomplish your short- and longer-term work?**

##### (2) People Resources

**How do you attract and retain new individuals, organizations, and groups for your core group?**

**How do you attract and retain the new individuals, organizations, and groups for your task groups that you need to accomplish your MISSION, achieve your VISION, reach your STRATEGIC OBJECTIVES, and provide your programs and services?**

How do you

- ensure that your task groups represent the diverse backgrounds, characteristics, ideas, CULTURES, and thinking of your community; and,
- ensure the INCLUSION of new individuals, organizations, and groups to enhance or complement your task group's CULTURE?

##### (3) Change Management

**How do you prepare your individuals, organizations, and groups for changes in your core group's structure and work?**

### NOTES

**5.1a.** Capability and capacity decisions for your core group are closely linked to your mission, vision, strategy, and programs and services:

- Your mission and vision are the basis for determining what you want to accomplish (your strategy).
- The programs and services you offer (through the group or through partners and collaborators) should align with your strategic objectives.
- The individuals, organizations, groups, and segments you involve should align with the requirements of your programs and services.

**5.1a(2).** Your core group should include the various sectors in your community as well as groups affected by the issues you choose to address, groups that work with those affected, and members of existing community partnerships, as appropriate. It should also reflect the diversity within your community.

#### (4) Work Accomplishment

##### **How do you coordinate your individuals, organizations, and groups?**

How do you decide which individuals, organizations, and groups to involve in the various components of your core group and its LEADERSHIP SYSTEM?

HOW do you ensure DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY in your coordination?

#### NOTES

**5.1a(4).** A decision facing core groups is determining which individuals, organizations, and groups to involve at the governance level, as leadership council members, as task group members, as partners and collaborators, or in other roles. In addition to diversity, equity, inclusion, and accessibility you might consider the needs of your programs and services; the interests of individuals, organizations, and groups; or a combination of these factors.

Coordination may include providing your core group's programs and services, capitalizing on your core group's core competencies, and reinforcing a focus on your vision and strategy, among others.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## 5.2 Core Group Engagement

**How does your core group engage individuals, organizations, and groups to achieve its strategic objectives?**

### NOTES

**5.2.** Engagement is the extent of people's emotional and intellectual commitment to accomplishing your work, mission, and vision. It does not refer to their engagement as stakeholders (Category 3).

### a. Assessment of ENGAGEMENT

#### (1) Drivers of ENGAGEMENT

**How do you determine the KEY drivers of individuals', organizations', and groups' ENGAGEMENT in delivering the core group's programs and services?**

How do you determine these drivers for different individuals, organizations, and groups?

#### (2) Assessment of ENGAGEMENT

**How do you assess ENGAGEMENT in delivering your core group's programs and services?**

What assessment methods and MEASURES do you use to determine the satisfaction, dissatisfaction, and ENGAGEMENT of your individuals, organizations, and groups?

How do these methods and MEASURES differ across SEGMENTS?

### b. Core Group CULTURE

**How do you foster a CULTURE that is characterized by open two-way communication, HIGH PERFORMANCE, and ENGAGEMENT in the core group's MISSION and VISION?**

How do you

- reinforce your core group's CULTURE?
- ensure that it supports your MISSION, VISION, AND VALUES;
- recognize accomplishments;
- promote AGENCY;
- promote DIVERSITY, EQUITY, INCLUSION, and ACCESSIBILITY; and
- benefit from the diverse ideas, CULTURES, and thinking of the individuals involved in your group?

### NOTES

**5.2a(1).** Drivers of engagement [identified in P.1b(2)] refer to the drivers of commitments, both emotional and intellectual, to accomplishing the core group's work, mission, and vision.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## c. **PERFORMANCE Management and Development**

### (1) **PERFORMANCE Management**

How does your **PERFORMANCE management SYSTEM** for your individuals, organizations, and groups support **HIGH PERFORMANCE**, accountability, **INTELLIGENT RISK**, and **ENGAGEMENT**?

### (2) **People Development**

How do you support the personal development of individuals in **ALIGNMENT** with the community's needs?

### (3) **Succession Planning**

How do you carry out succession planning for leadership and other **KEY** positions in your core group?

### (4) **EQUITY and INCLUSION**

How do you ensure that **PERFORMANCE management**, individual development, and succession planning promote **EQUITY and INCLUSION** for different groups and **SEGMENTS**?

## 5.3 **People Resource Results**

What are your core group's people resource results?

### a. **CAPABILITY and CAPACITY**

What are your **CAPABILITY and CAPACITY RESULTS** for your individuals, organizations, and groups?

### b. **ENGAGEMENT and Retention**

What are your **RESULTS for YOUR INDIVIDUALS', ORGANIZATIONS', AND GROUPS'** **ENGAGEMENT AND RETENTION**?

### c. **Development**

What are your **RESULTS** for the development of your core group's individuals, organizations, and groups?

## NOTES

5.3. Results reported in this item should reflect the diversity of your individuals, organizations, and groups.

Terms in **SMALL CAPS** are defined in the Glossary of Key Terms starting on page 45.

## 6 Operations

The **Operations** category asks how your core group designs, manages, and improves its programs and services and processes, ensures operational effectiveness to deliver value to residents and other stakeholders and achieve ongoing success, and supports community resilience and safety.

### 6.1 Core Group Processes

#### How does your core group design, manage, and improve its key processes?

##### NOTES

**6.1.** This is the core work of your core group: design, managing, and improving what you do to advance community outcomes

Your design of processes should consider your strategic objectives referenced in 2.2 and your residents and other stakeholder requirements and expectations, and programs and services referenced in 3.1.

##### a. KEY PROCESSES

##### (1) KEY PROCESSES

**What are your KEY PROCESSES?**

##### (2) KEY Requirements

**What are your KEY requirements of your KEY PROCESSES?**

##### (3) Determination of KEY Requirements

**How do you determine the KEY requirements for your KEY PROCESSES?**

##### (4) Design

**How do you design your KEY PROCESSES to meet these requirements?**

##### (5) Management

**How do you manage your KEY PROCESSES to ensure EFFECTIVENESS, EFFICIENCY, and other requirements of your core group's operations?**

##### (6) Improvement

**How do you improve your KEY PROCESSES?**

##### NOTES

**6.1a(1).** Your core group's key processes are its most important value-creation processes. They are carried out by the individuals, organizations, and groups involved in the core group and produce value for resident and other stakeholder groups. They are the processes that enable the delivery of your programs and services to residents and other stakeholders. They might include processes for strategic planning, capturing voice-of-the-resident and community data, stakeholder communication and engagement, and leadership onboarding and succession planning.

**6.1a(5).** You should use the measures you identified in 4.1 for your programs and services to assess their overall effectiveness, efficiency, and any other requirements your core group determines.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.

## 6.2 Operational Continuity

### How does your core group ensure operational continuity and support your community's safety and resilience?

#### a. Resourcing

How do you ensure you have adequate resources to support your operations, including continuity of operations?

#### b. Safety, RESILIENCE, and Risk Management

##### (1) Safety

**How does your core group participate in community efforts to provide a safe environment for residents and other STAKEHOLDERS?**

How do you consider the safety concerns of KEY SEGMENTS of your resident and other STAKEHOLDER groups?

##### (2) RESILIENCE

**How does your core group participate in community efforts to ensure community RESILIENCE?**

How does your core group help prepare for and respond to adverse events, and recover from them when they occur?

How does your core group consider the different impacts of adverse events on the KEY SEGMENTS of your residents and other STAKEHOLDER groups?

##### (3) Risk Management

**What is your core group's overall APPROACH to risk management?**

#### NOTES

**6.2a.** Here, resources refer specifically to operational resources such as staffing, technology, facilities, and infrastructure that are needed for continuity of operations. This is distinct from 2.2a(3) which asks about how resources are prioritized and distributed to support strategic objectives and action plans.

**6.2b.** These questions ask about your community as a whole. Although responsibility for community safety and resilience does not lie with your core group, the group should align and integrate its efforts with the community's approaches in these areas.

**6.2b(1).** Your core group should consider physical, psychological, emotional, and social safety.

**6.2b(2).** Community resilience is the ability of a community to prepare for anticipated adverse events, adapt to changing conditions, withstand and recover rapidly from disruptions, and grow from the experience (see the National Institute of Standards and Technology's Community Resilience Planning Guide: <https://www.nist.gov/topics/community-resilience/planning-guide>). Adverse events might be related to disruptions from weather, environmental changes, infrastructure failures, cyberattacks, community health emergencies, and technological accidents, among others. The extent to which your community prepares for adverse events will depend on its environment and its sensitivity to disruptions.

## 6.3 Operations Results

**What are your core group's operational results?**

### a. Programs, Services, and KEY PROCESSES

**What are your core group's programs, services, and KEY PROCESSES RESULTS?**

### b. Operational Continuity

**What are your core group's operational continuity RESULTS?**

### c. Financial

**What are your core group's financial RESULTS?**

#### NOTES

**6.3b.** This question refers to your core group's resources, resiliency, safety, and risk management efforts.

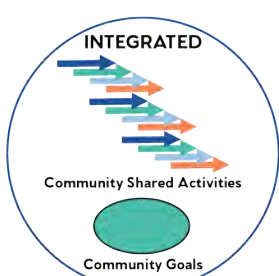
**6.3c.** Examples of financial results might be budgetary results for the group and its programs and services, return on investment, and the community savings that result from programs and services, such as reduction in resources required for public services due to more efficient delivery, reduced health care costs, and jobs created. Results may also include in-kind donations such as people, services, and facilities.

Terms in SMALL CAPS are defined in the Glossary of Key Terms starting on page 45.



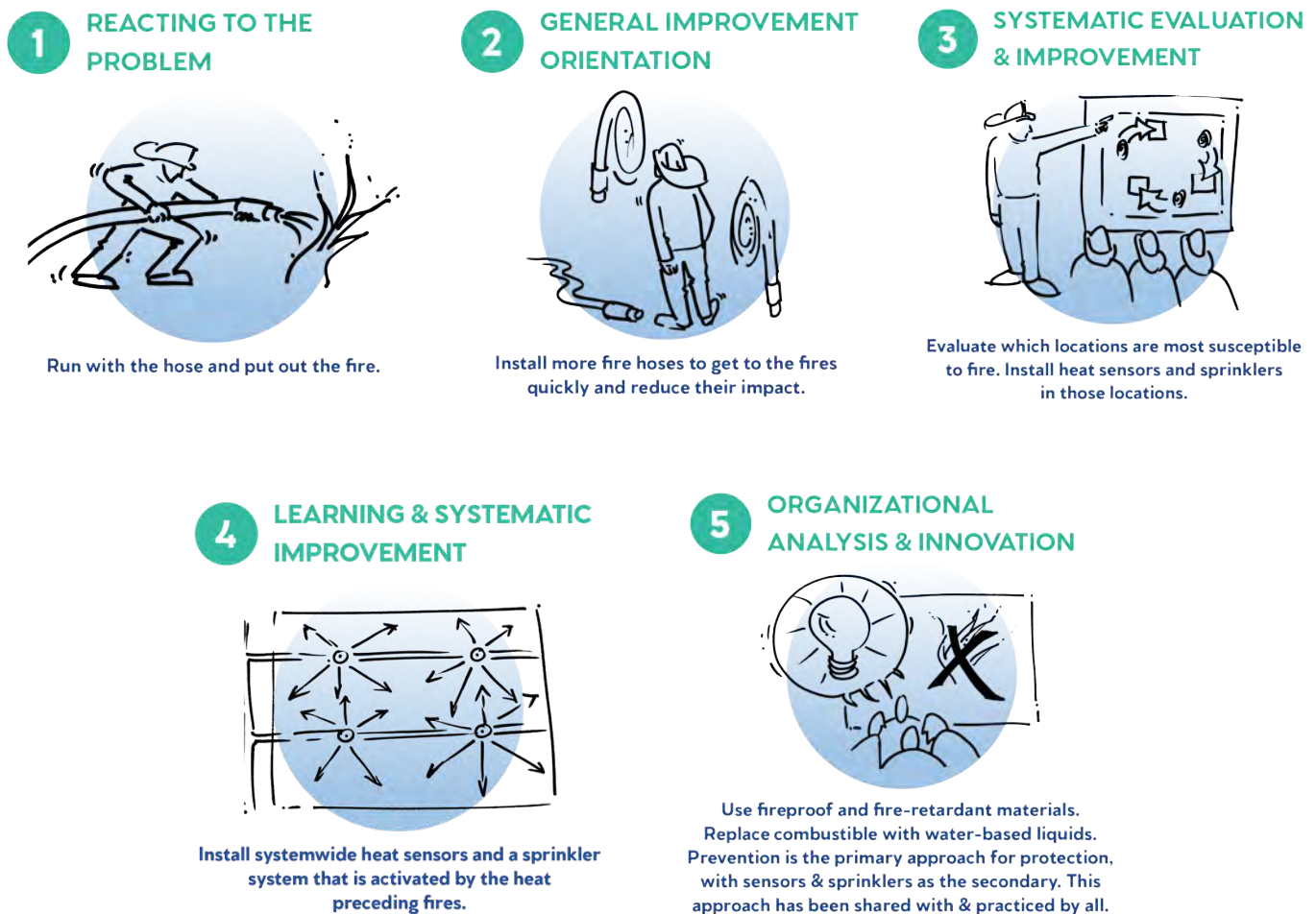
# Steps Toward High Community Performance

Read the descriptors in the right column and assign one of the steps below based on a holistic assessment of your performance. Then look at the next higher descriptor to see what you might improve. These steps represent a condensed version of the more comprehensive assessment rubric that is part of the Communities of Resilience and Excellence Assessment and Recognition Program criteria.

| STEPS                                                                               | DESCRIPTOR                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | <p>Core group operations are characterized by activities rather than by processes, and they are largely responsive to immediate needs or problems. Goals are poorly defined and results that are important to the community and/or core group's ongoing success are missing, not used, or randomly reported.</p>                                                                                                                                                                                                                                                                                                                                                    |
|   | <p>The core group is beginning to carry out shared operations with repeatable processes, evaluation, and improvement, and there is some early coordination among parts of the community. Strategy and quantitative goals are being defined. Results that are important to the community and/or core group's ongoing success are reported, tracked over time, and improving.</p>                                                                                                                                                                                                                                                                                     |
|  | <p>Core group operations are characterized by repeatable processes that are regularly evaluated for improvement. Learnings are shared, and there is coordination among parts of the community. Processes address key strategies and goals. Results that are important to the community and/or core group's ongoing success are trending in the right direction and doing well relative to competitors or other relevant communities.</p>                                                                                                                                                                                                                            |
|  | <p>Core group operations are characterized by repeatable processes that are regularly evaluated for change and improvement in collaboration with other affected parts of the community. The core group seeks and achieves efficiencies through analysis, innovation, and the sharing of information and knowledge. Processes and measures track progress on key strategic and operational goals. The full array of results important to the community and/or core group's ongoing success are reported and trended over time, including improved indicators for all community population segments and indicating top performance relative to other communities.</p> |

# An Analogy for Learning: From Fighting Fires to Innovation

Learning is essential to high performance in core groups and the communities they support. Effective, well-deployed learning systems can help a core group and its community improve from the early stages of reacting to problems and challenges to the highest levels of communitywide innovation, attitudes, and skills related to agility, resilience, and overall improvement. Below is an example pathway of learning and progress towards high community performance using the challenge of fighting destructive fires as an analogy.



See “Community Learning” on page 42 under Core Values for additional information.  
Adapted by Communities of Resilience and Excellence, formerly Communities of Excellence 2026, from the Baldrige Performance Excellence Program. 2019–2020 Baldrige Excellence Framework: Proven Leadership and Management Practices for High Performance. Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology. <https://www.nist.gov/baldrige>.

# Core Values

These beliefs and behaviors are embedded in high-performing communities. They are the foundation of community performance excellence and the results-oriented framework that creates a basis for action, feedback, and sustainability.

- **Community Systems Perspective**
- **Visionary Community Leadership**
- **Resident- and Stakeholder-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**



## Community Systems Perspective

A community systems perspective means viewing your community as more than just the sum of its individual parts. A community of resilience and excellence views itself as a unified whole, with the various sectors, community groups, resident groups, and stakeholders working together as a system. When your community takes a systems perspective, there is a shared focus on strategic directions and on residents and other stakeholders.



## Visionary Community Leadership

Your community's formal and informal leaders should set a vision for the community, create a focus on residents and other stakeholders, demonstrate clear and visible community values and ethics, and set high expectations for the individuals and groups in the community.



## Resident- and Stakeholder-Focused Excellence

Residents and other stakeholders are the ultimate judges and beneficiaries of a high-performing community. Therefore, a resilient and excellent community has deep knowledge of their needs and priorities. Their engagement is based on your ongoing ability to serve their needs and build relationships with them.

Besides being stakeholders, residents are also resources to be engaged in doing the work of the community and the core group.



## Valuing People

A successful community values all individuals who have a stake in the community, including residents, other stakeholders, the individuals who do the community's and the core group's work, and other individuals affected by the community's actions. Valuing people means committing to their engagement, development, and well-being, and depends on their having opportunities to learn.

Focusing on Diversity, Equity, Inclusion, and Accessibility (DEIA) is critical for communities aspiring to resilience and excellence. By drawing on diverse perspectives, experiences, and talents, communities foster innovation, adaptability, and more effective solutions. At the same time, addressing systemic barriers and expanding equitable opportunity ensures that all individuals can succeed and thrive.

In inclusive communities, people feel valued, respected, and empowered to contribute their skills and talents. Prioritizing accessibility makes full participation possible for people of all abilities, removing barriers and affirming fairness. Together, these commitments strengthen community well-being, resilience, and cohesion—enabling communities to benefit from the full engagement of all their members.



## Community Learning

Community learning is about striving for excellence. Community learning includes both continuous improvement of existing approaches, adoption of best practices and innovations, and significant change or innovation, leading to new goals, approaches, program, services, and community offerings. In community learning, the core group builds on current successful efforts by benchmarking the successful efforts of other community groups across the country. Learning needs to be embedded in the way your core group operates. This means that learning

- (1) is a regular part of daily work;
- (2) results in solving problems at their source (root cause);
- (3) is focused on building and sharing knowledge throughout your community and core group; and,
- (4) is driven by opportunities to effect significant, meaningful change to innovate.

Sources for learning include individual, organization, and group ideas, research and development, resident and other stakeholders' input, best-practice sharing, other communities' performance, and benchmarking.



## Agility and Resilience

Communities of resilience and excellence strive to act quickly, move nimbly, and achieve flexibility in operations. They identify and rapidly address challenges and opportunities while recognizing the importance of allowing all interested parties to contribute.

Community resilience is the ability of a community to prepare for anticipated hazards, adapt to changing conditions, and withstand, recover rapidly, and bounce forward after disruptions. Disruptive events are occurring more frequently, triggered by economic upheaval or stress, major weather or health events, social or societal demands, or innovative technologies. For a community to be resilient, it must cultivate the agility to anticipate opportunities and threats, adapt strategy to changing circumstances, and promote a culture of mutual trust.



## Focus on Success and Innovation

Ensuring your community's success now and in the future requires understanding the short- and longer- term factors that affect your community. Longer-term factors—how will this decision affect our children's children? —are key criteria for decisions that affect the community. Recognizing the importance of helping grow the next generation of residents to assume formal and informal community leadership positions, communities of resilience and excellence place special emphasis on ensuring that all their children have equal opportunity and support to grow into productive, engaged community residents. The pursuit of community success requires the agility to modify plans, processes, and relationships whenever circumstances warrant.

A focus on success also includes a focus on innovation. Innovation means making meaningful discontinuous or breakthrough change to improve your community's quality of life, operational processes, and mode of operation, with the purpose of creating new value for residents and other stakeholders. Innovation requires a supportive environment, a process for identifying strategic opportunities, and the pursuit of opportunities that are intelligent risks.



## Management by Fact

Management by fact requires your core group to measure and analyze your community's performance on key indicators related to resident groups, community engagement, community processes, and information sharing, as well as your core group's programs and services. Key indicators should derive from your community's needs and strategic objectives. Analysis of your community's performance should support community alignment and decision making.



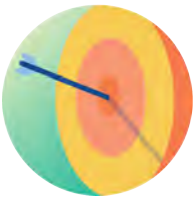
## Mutual Societal Responsibility

Your community's leaders should recognize the value of the businesses, organizations, and community groups that operate in your community. A community of resilience and excellence works to engage and align these groups' efforts toward societal well-being to achieve maximum impact and mutual benefit for a community's residents and the businesses, organizations, and groups based there. Core group leaders should be role models for valuing and promoting the well-being of your community.



## Ethics and Transparency

Community leaders should demonstrate ethical behavior and transparency in all community interactions. Formal and Informal leaders of your core group should be role models for the community's ethical principles, deserving of trust by their community. Transparency is characterized by consistently candid, open, two-way communication by community leaders and by the sharing of clear and accurate information that avoids misunderstanding and ensures accountability to all groups, including historically marginalized groups.



## Delivering Value and Results

By delivering value to community groups, residents, and other stakeholders, your core group contributes to the improved quality of life of your whole community. Your community's performance results need to balance value for your key stakeholders. Thus, results need to include process results, resident and other stakeholder results, people results, leadership results, and strategy results, all with the objective of improving your community's performance.

# Glossary of Key Terms

The terms below are those in small caps in The Communities of Resilience and Excellence [C.O.R.E.] Guide, as well as terms in the assessment rubric.

**ACCESSIBILITY.** The practice of providing information and activities and creating environments that are usable for as many people as possible. Considerations of accessibility include affordability, convenience, availability, accommodation, and acceptability. Accessibility as a discipline, focuses on how people with varying abilities access or benefit from your core group's programs and services.

**ACTION PLANS.** Specific actions that your core group takes to reach its short- and longer-term strategic objectives. These plans specify the resources committed to and the time horizons for accomplishing plans. *See also* STRATEGIC OBJECTIVES.

**AGENCY.** The degree to which an individual can make decisions about their life.

**AGILITY.** A capacity for rapid change and flexibility in operations. Agility may be needed to respond to emergencies or address changes in your environment, to take advantage of an immediate opportunity, and/or to address a strategic challenge. *See also* RESILIENCE.

**ALIGNMENT.** A state of consistency among plans, processes, information, resource decisions, capability and capacity, actions, measures, results, and analyses that support key core group goals. *See also* INTEGRATION.

**ANALYSIS.** The examination of data and information to provide a basis for effective decision making. Analysis often involves determining cause-effect relationships.

**APPROACH.** The methods your core group uses to carry out its processes.

**BACKBONE ORGANIZATIONS.** One or more organizations that support the core group, serving as neutral facilitator(s) for the community excellence effort. Its /their primary purpose is to provide a structured environment for stakeholders to convene, develop strategy, and accomplish goals.

**BENCHMARKS.** Processes and results that represent the best practices and best performance levels for similar activities or initiatives, inside or outside your community.

**CAPABILITY.** Your core group's ability to carry out its programs and services through the skills, abilities, and competencies of its people resources.

**CAPACITY.** Sufficient staffing levels to carry out your core group's programs and services.

**COLLABORATORS.** Organizations or individuals outside your core group who cooperate with the group to support a particular activity, event, or initiative or who cooperate intermittently when their short-term goals are aligned with or are the same as yours. *See also* PARTNERS.

**COMMUNITY IDENTITY.** The characteristics, conditions, customs, traditions, history, and beliefs that help distinguish your community from others. Identity might arise from, for example, a shared history, shared stories or events, challenges faced by the community, its diversity, languages spoken, or other characteristics that make your community unique.

**COMMUNITY LEADERS.** The people who guide your community and its performance improvement effort. They include formal or informal officially or unofficially designated individuals who guide or direct your community or segments within your community.

**COMMUNITY PERFORMANCE EXCELLENCE.**

An integrated approach to community performance management that results in (1) delivery of ever-improving value to residents and other stakeholders, contributing to ongoing community success; (2) improvement of your community's overall effectiveness and capabilities; and (3) learning for the community and for people resources.

**CORE COMPETENCIES.** Your core group's areas of greatest expertise or strength; those strategically important capabilities that are central to fulfilling your community's mission or that provide an advantage in its environment.

**CULTURE.** The shared beliefs, norms, and values that characterize your community and are demonstrated within your community.

**DEPLOYMENT.** The extent to which your core group applies an approach throughout its programs, services, and processes.

**DIVERSITY.** Personal differences and lived experiences among community members that enrich the community environment. These differences are based on many attributes, such as race, religion, color, gender, gender identity, physical presentation, national origin, language, mental or physical ability, citizenship, tribal affiliation, sexual orientation, age and generation, education, socioeconomic status, geographic origin, and skill characteristics, as well as ideas, thinking, learning styles, academic disciplines, and perspectives. Recognizing the value of diversity involves acknowledging that this range of differences enhances the overall community atmosphere.

**EFFECTIVE.** How well a process or a measure addresses its intended purpose.

**EFFICIENT.** Achieving intended results while minimizing waste of time, effort, or resources.

**ENGAGEMENT.** The extent of people's emotional and intellectual commitment to accomplishing your core group's work, mission, and vision.

**EQUITY.** Freedom from systemic bias or favoritism. Equity is demonstrated by both short- and long-term performance results that are the same across meaningful socio-economic groups and segments, particularly across racial/ethnic groups. These performance results include data and information about opportunity, accessibility, justice, inclusion, quality, fairness, outcomes, impacts, repair, and restoration. Pursuing and achieving equity involves providing everyone with what is required to achieve success, understanding that some benefits may need to be provided to certain groups more than other groups until disparities are eliminated.

**ETHICAL BEHAVIOR.** The actions your core group takes to ensure that all its decisions, actions, and stakeholder interactions conform to its moral and professional principles of conduct. These principles should support all applicable laws and regulations and are the foundation for your group's culture and values.

**EXCELLENCE.** See also community performance excellence.

**GOALS.** Future conditions or performance levels that your core group intends or desires to attain. See also performance projections.

**GOVERNANCE.** The shared system of management and controls exercised in the stewardship of your core group and its resources.

**HIGH PERFORMANCE.** High levels of overall performance, including quality, productivity, equity, and innovation rate.

**HOW.** The systems and processes that your core group uses to achieve its mission requirements.

**INCLUSION.** Authentic interactions that create a welcoming environment helping people feel like they are part of a group. Interactions could include those between people, or between people and objects such as technology, building design and layout, and printed materials. Inclusive behaviors are effective when they generate a sense of belonging in the participants.

**INNOVATION(S).** Making meaningful change to improve your community's health, educational status, economic vitality, housing, and other aspects of quality of life, operational processes, and mode of operation, with the purpose to increase value for residents and other stakeholders. (The framework uses the term *innovation* as a process/activity and the term *innovations* to refer to the outcomes.) Innovations are discontinuous or breakthrough improvements.

**INTEGRATION.** The harmonization of plans, processes, information, resource decisions, capability and capacity, actions, results, measures, and analyses to support key core group goals. See *also* ALIGNMENT.

**INTELLIGENT RISKS.** Opportunities for which the potential short- or long-term gain or benefit outweighs the potential harm or loss to your community if you do not explore them (sometimes referred to as a calculated risk). Taking intelligent risks requires a tolerance for failure and an expectation that innovations are not achieved by initiating only successful endeavors.

**KEY.** Major or most important; critical to achieving your intended outcome.

**KNOWLEDGE ASSETS.** Your core group's accumulated intellectual resources; the knowledge possessed by your core group and its people resources in the form of information, ideas, learning, understanding, memory, insights, cognitive and technical skills, and capabilities.

**LEADERSHIP SYSTEM.** The way leadership is exercised, formally and informally. It includes structures and mechanisms for making decisions; ensuring two-way communication; selecting and developing leaders; and reinforcing values, ethical behavior, directions, and performance expectations.

**LEARNING.** New knowledge or skills acquired and implemented through evaluation, study, experience, and innovation. Learning can occur at the individual, core group, or community level.

**LEVELS.** Numerical information that places or positions your community's or your core group's results, performance, and outcomes on a meaningful measurement scale.

**MARGINALIZED.** Refers to people who were - or are - placed in a position of having little or no importance, influence, or power in society.

**MEASURES AND INDICATORS.** Numerical information that quantifies the input, output, and performance dimensions of processes, programs, projects, services, and the overall community or core group (outcomes).

**MISSION.** Your core group's overall purpose. The mission answers the question, "What is your community attempting to accomplish?"

**OFFERINGS.** The features of your community that it is known for; that attract residents and other stakeholders, or both. Examples are good health care, world-class higher education, tourist attractions, a positive business environment, vibrant/livable neighborhoods, strong ethnic heritage(s), theater and arts, and natural resources.

**PARTNERS.** Key organizations or individuals who are working in concert with your core group to achieve a common goal, improve performance, and accomplish your core group's mission and vision. Typically, partnerships are formal arrangements. See *also* COLLABORATORS.

**PERFORMANCE.** Outputs and their outcomes obtained from programs, services, processes, residents and other stakeholders, and strategies that permit you to evaluate and compare your community's and your core group's results to performance projections, standards, past results, goals, and other communities' results.

**PERFORMANCE PROJECTIONS.** Estimates of future performance. Projections could be based on past performance, rates of improvement, and/or assumptions about future internal changes and innovations. See *also* GOALS.

**PROCESS.** Linked activities with the purpose of producing a program or service for a resident or other stakeholder (user) group.

**PROCESSES.** Your core group's most important internal value-creation processes. They might include processes for designing and implementing shared programs and services and for resident and other stakeholder support.

**QUALITY OF LIFE.** The standard of health, comfort, and happiness experienced by an individual or group. It is often determined using data and information about physical and mental health, education, employment and income, social relationships, safety and security, housing and living conditions, leisure and recreation, environment, and overall life satisfaction. Your core group should examine outcomes related to health, natural environment, education, social connections, economy, built environment, and housing. See *also* Commitment to QUALITY OF LIFE on page 4.

**RESIDENT AND OTHER STAKEHOLDER ENGAGEMENT.** Your residents' and other stakeholders' investment in or commitment to your community and core group's brand and offerings.

**RESILIENCE.** A community's ability to anticipate, prepare for, and recover from disasters, emergencies, and other disruptions. Resilient communities are able to survive, adapt, innovate, and thrive in response to disruptions. Resilience requires agility throughout the community.

**RESULTS.** Outputs and outcomes achieved by your community or core group.

**SEGMENT.** A part of your community's base of residents, other stakeholders, community offerings, or people resources. Your residents and other stakeholders should be segmented by key protected classes appropriate to your federal, state, and your community improvement efforts. At a minimum, your segments should include race/color, religion, sex, national origin, age, disability, and genetic information. The U.S. Equal Employment Opportunity Commission references these protected classes, as does the U.S. Department of Housing and Urban Development, the U.S. Department of Health and Human Services, the U.S. Department of Justice, and more.

**STAKEHOLDERS.** All groups that are or might be affected by your community's actions and success. These include, but are not limited to, residents, organizations, employers and employees, visitors and tourists, and surrounding communities and regions, as well as partners and collaborators. Stakeholders include recipients of your community offerings.

**STRATEGIC ADVANTAGES.** Those community benefits and assets that exert a decisive influence on your community's likelihood of future success. These advantages are frequently sources of current and future success relative to other communities.

**STRATEGIC CHALLENGES.** Those pressures that exert a decisive influence on your community's likelihood of future success. These challenges are frequently driven by your community's anticipated competitive position in the future relative to other communities and might be driven by political and cultural realities.

**STRATEGIC OBJECTIVES.** The aims or responses that your core group articulates to address major change or improvement, competitiveness or social issues, and strategic community advantages. See *also* ACTION PLANS.

**STRATEGIC OPPORTUNITIES.** Prospects for new or changed programs, services, processes, business models (including strategic alliances), or stakeholders. They arise from outside-the-box thinking, brainstorming, capitalizing on serendipity, research and innovation processes, nonlinear extrapolation of current conditions, and other approaches to imagining a different future.

**SYSTEM.** A set of interrelated leadership and management elements used to integrate approaches, establish policies and objectives, and manage processes to achieve those objectives.

**SYSTEMATIC.** Well-ordered, repeatable, and exhibiting the use of data and information so that learning is possible.

**THREATS.** External factors that could do harm to your community. This could include anything from natural disasters to a global pandemic, adverse legislation, or a change in the competitive landscape.

**TRENDS.** Numerical information that shows the direction and rate of change of your community's or core group's results or the consistency of its performance over time.

**VALUES.** The guiding principles and behaviors that embody how your core group and its people are expected to operate.

**VISION.** Your core group's desired future state.

**VOICE OF THE STAKEHOLDER.** Your core group's process for capturing resident and other stakeholder-related information.

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