TOOLS FOR ACTION SERIES

A RESOURCE GUIDE FOR DESIGNING A COMMUNITY INDICATOR PROJECT

A REPORT BY SPARC BC
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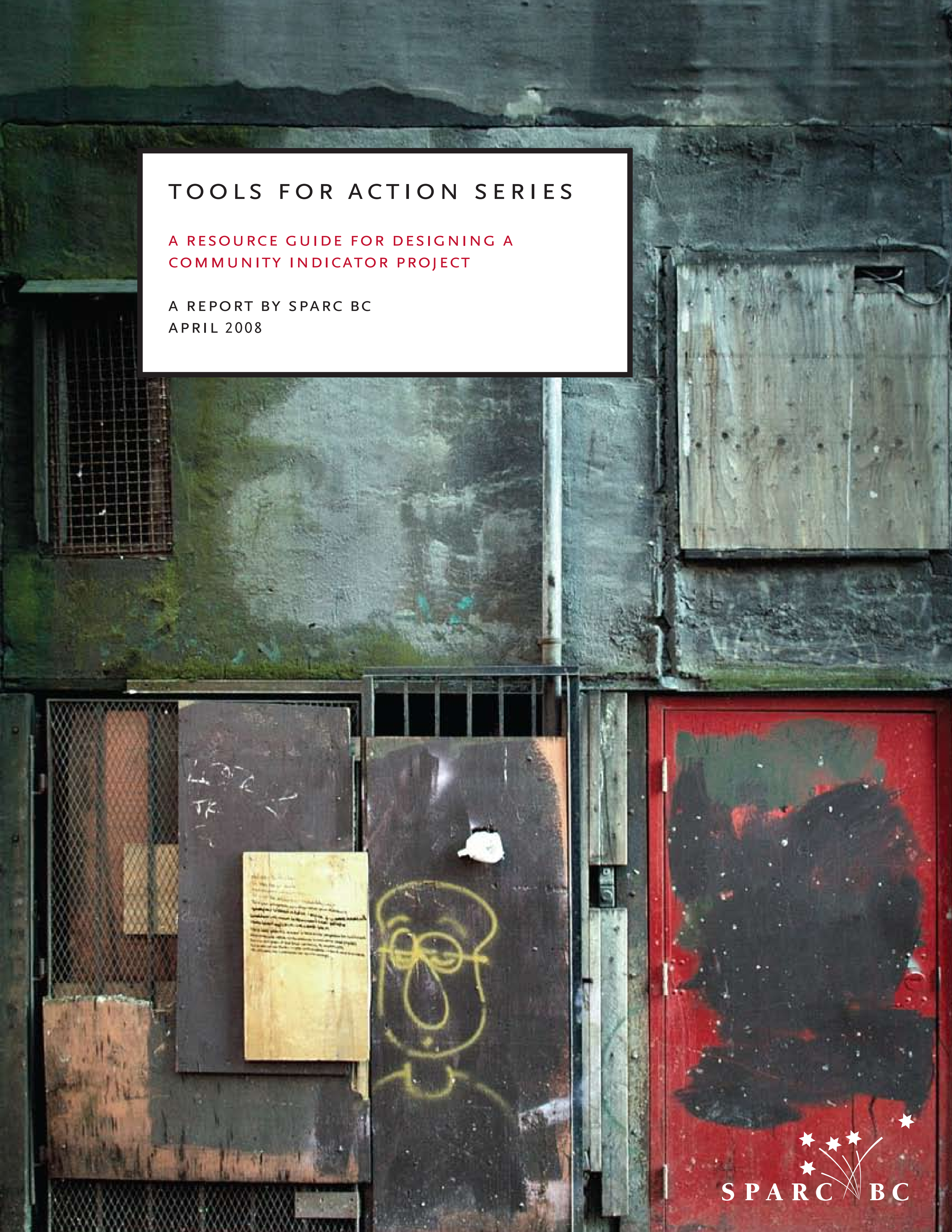

SPARC BC

TOOLS FOR ACTION SERIES
A RESOURCE GUIDE FOR DESIGNING A
COMMUNITY INDICATOR PROJECT (CIP)

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A RESOURCE GUIDE FOR DESIGNING A COMMUNITY INDICATOR PROJECT (CIP)

ACKNOWLEDGEMENTS: SPARC BC WOULD LIKE TO THANK DR. ALEX MICHALOS OF THE INSTITUTE FOR SOCIAL RESEARCH AND EVALUATION AT THE UNIVERSITY OF NORTHERN BRITISH COLUMBIA FOR ALLOWING THE REPRODUCTION OF HIS LIST OF INDICATOR CRITERIA AND CRITICAL ISSUES RELATED TO COMMUNITY INDICATOR WORK.

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FINALLY, SPARC BC WOULD LIKE TO THANK THE *VANCOUVER FOUNDATION* FOR THEIR GENEROUS SUPPORT FOR THIS PROJECT.

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Introduction

Over the past few years, SPARC BC has engaged in a wide range of projects involving indicators. In an effort to consolidate what we have learned and share it with you, we have created the *Tools for Action Series.* The *Tools for Action Series* consists of two publications.

In *Tools for Action: An assessment of the impact of CIPs on community capital in BC,* we report on our research project that examined the strengths and weaknesses of CIPs as they relate to select aspects of community capital in BC communities.

The document that you are reading is entitled *Tools for Action: A resource guide for designing a community indicator project (CIP).* In this publication we address questions about how to design and implement a CIP in your community, especially a CIP that is linked to the development of local action strategies.

So what is a CIP? As a generic term, a CIP is a type of community-based knowledge production project that engages community members and leaders in an inclusive and democratic process of developing a set of indicators that reflect important aspects of community life.

CIPs are indicator projects that are designed by and for people who live in the same geographic area. They involve the public in the process of formulating indicators and seek to engage them in local action strategies. CIPs are diverse in terms of content and methodology, with specific projects being tailored to the particular interests, needs, and concerns of the community or region in question. They share in common a reporting function that aims to integrate diverse data sets from multiple fields of human activity and the natural environment for the purpose of creating a holistic picture of the state of community life.

Ideally, the result of a CIP is strengthened social capital in the host community, as well as a report and supporting media (TV, radio, newspaper, etc.) that showcases salient features of the state of community life. The data contained in CIP reports are typically used to inform policy choices, to educate and engage citizens, to legitimate new action programs, as well as to serve as a mechanism for measuring government accountability.

The rich knowledge base informing CIP work can make it difficult to decide on where to start thinking about the suitability of a CIP for your community. In this resource guide, we have attempted to assist you in your effort to learn about CIP work and decide whether or not it is right for you and your community.

Outline and learning objectives

In *Tools for Action: A resource guide for designing a CIP*, we provide a brief introduction to key concepts related to CIPs, as well as one general methodological approach for designing and implementing a local CIP. Each section begins with an overview of the feature content in each section.

In the first section, we offer a series of short discussions that attempt to define part of the history, current day rationale and other key considerations relevant to CIP work. In the second section, we provide a step-by-step overview of an eleven step approach to creating a local CIP. The end of our discussion of each phase includes a description of the outputs that need to be achieved before moving to the next phase of work. The third section is the appendices, which consist of a range of related resources that were selected to assist you in your effort to create a local CIP.

The content and structure of this resource guide have been subordinated to three learning objectives. By reading this resource guide, you will:

- Acquire introductory knowledge of the historical development of CIPs and contemporary concepts used to discuss CIP work;
- Gain understanding of one methodological approach to CIP work;
- Develop an awareness of CIP related resources on line and in text.

A series of discussions about indicators and CIPs

Overview: In this secion, we provide several short discussions on different aspects of CIP work. We start by addressing the question: What are indicators? An overview of some historical developments of indicators of progress is provided next, which is followed by a brief discussion of how the public is involved in CIPs. We also address questions about the advantages and challenges of conducting a one-time CIP versus a CIP that is maintained over time. Finally, the question about setting targets as part of a CIP is addressed, as well as the question about the limitations of CIPs in general.

What are indicators?

Indicators are measurements (i.e. statistics) that tell us about the present state of something that is important. Indicators are usually subjective or objective. Subjective indicators can be explained as representations of community member's perception of themselves, some aspect of their community and the relationships between the two. The concept of subjective well being (SWB) has been proven to be a reliable and valid way of organizing research on subjective aspects of community life.[1] Objective indicators, on the other hand, are the quantitative facts of community life (i.e. local economic growth, the number and size of sidewalks, etc.) Objective and subjective indicators are equally important because they both provide pieces to our understanding of the overall state of community life.

Jim Frankish, etal., in their survey of 121 indicator projects in Canada, identified over 7000 different indicators.[2] Although particular indicator types varied across indicator projects, they identified ten general domains of community life that were commonly used to organize sets of indicators. The top ten domains of community life include: (1) community safety and security; (2) employment/unemployment; (3) public services; (4) economic disparity; (5) educational attainment/school quality; (6) air quality; (7) transportation/automobile dominance; (8) morbidity/disability measures; (9) wasted production and reduction; and, (10) health-promoting behaviors.

What are some historical developments in the discourse on indicators of 'progress'?

What is progress? How is progress measured? For who is progress measured? For many people, progress is either a forward or onward movement towards an objective or goal. Although most people can agree that progress involves movement, there is wide spread disagreement about the 'goal' toward which such movement should be directed.

Around the world and in our own backyards, we can observe moments of advocacy for, resistance against, and indifference toward competing versions of the goals of progress, as well as how movement toward such goals should be measured. Regardless of where one's interpretation of progress falls on the ideological spectrum, the conception and measurement of progress will remain a potent force that guides public thought and behavior in our ever changing world. In this brief discussion, we provide an overview of some of the developments of indicators of progress in an effort to provide a backdrop to present day efforts to improve how we conceive and measure progress in our world.

Historically, measures of progress have been conceived in narrow economic terms.[3] Internationally accepted and standardized monetary measures date back to the First World War when the Gross Domestic Product (GDP) was first developed. As a response to the limits of the GDP and other master economic measures, there have been many attempts to conceive and measure progress in terms that include non-economic variables.

Building on the general public discontent with the limits of economic measures of progress, socialists and feminists have argued that such measures fail to account for other important aspects of life, such as the unpaid work of stay-at-home mothers and the subjective well being of citizens. Consequently, social indicators and quality-of-life indicators emerged as supplementary and sometimes conflicting measures of change in the early part of the 1950s and 1960s.[4]

Although non-monetary measures sought by socialists and feminists date as early as 1929, they did not gain popularity with government until the 1970s when the US Bureau of the Census began producing the Social Indicator Reports.[5] These early social accounting projects were national in scope and concerned with: (1) defining and collecting social information for policymakers; (2) using social information to establish social goals that would enable policymakers to set targets in specific areas such as health, employment, education, and crime; (3) institutionalizing periodic social reports; and, (4) structuring information, both economic and non-economic, qualitative and non-qualitative, in some form of a social systems accounting model.[6]

The rise of conservative policies under the Thatcher, Regan and Mulroney governments in the 1980s slowed this initial work on developing comprehensive measures of progress. The policies of the above governments were generally subordinated to the logic of measures of financial costs and benefits, relying heavily on the master measures (GDP, etc.) to build domestic and foreign policy. The emergence of the sustainable development discourse through the 1987 report of the World Commission on Environment and Development (Brundtland Commission), and the sister report *Our Common Future* marked a departure from the limited policy frameworks of the aforementioned governments and, at least partly, reinvigorated the project to diversify how we define and measure progress.

The 1990s stood as a period of time in which some of the most forceful pronouncements about the limits of economic measures were articulated. Mike Salvaris remarks that by the late 1990s "the backlash against the more extreme forms of economic rationalism, and increasing support for 'triple bottom line' policy making and reporting, had again begun to create a favourable climate for a more holistic approach to community indicators."[7] Groups of researchers, citizens and politicians throughout the 1990s made significant gains in popularizing the notion of a whole system approach to thinking about progress; a movement which assumes that we already know that researching individual parts of the 'system' in isolation of one another will produce only part of the picture. It follows that the more of the picture we can see, the better equipped we are to work together for improving our shared worlds, especially the lives of those people who are being mistreated as well as the non-renewable resources that are being depleted.

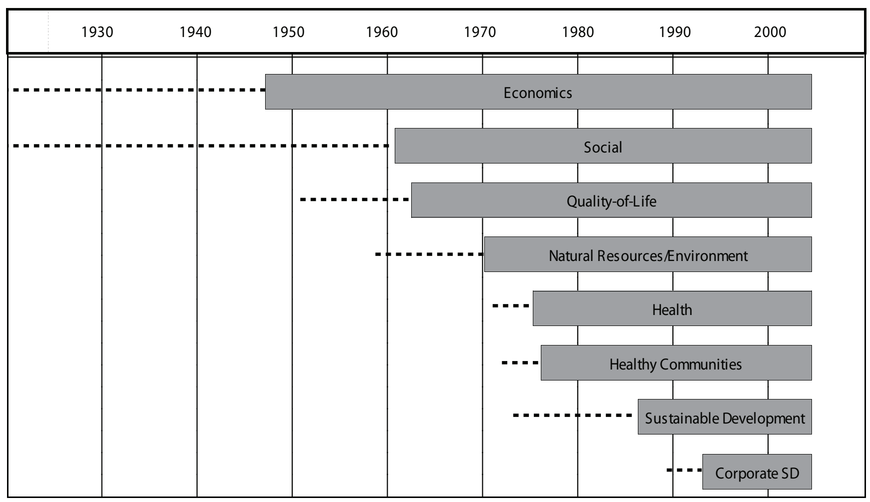
The case for a holistic conception of progress and corresponding indicators of change was succinctly articulated by the United Nations Development Program (UNDP) in the following statement:

> Human advance is conditioned by our conception of progress ... [It is time to end] the mis-measure of human progress by economic growth alone. The paradigm shift in favour of sustainable human development is still in the making. But more and more policy makers in many countries are reaching the unavoidable conclusion that, to be valuable and legitimate, development progress—both nationally and internationally—must be people centred, equitably distributed, and environmentally and socially sustainable.[8]

The idea of 'sustainable human development' as articulate by the UNDP has been influential not only in the social and environmental worlds, but has also taken a central position in certain circles of the business world. In the mid-late 1990s, several business minded professionals worked to bring a comprehensive approach to doing business; an approach that looks to more than the economic bottom line. The book by John Elkington entitled *Cannibals with Forks: The Triple Bottom Line of 21st Century Business* provides several examples of the business arguments for a more comprehensive approach to defining and measuring progress in the business worlds – an approach that advocates for profit-making, corporate social responsibility and environmental sustainability.[9]

The historical starting points of the above efforts to define and measure 'progress' (specifically the bodies of literature describing such efforts) are summarized below by Anthony Hodge. As per the above overview, we can see how one movement toward defining progress in terms of a given set of indicators of change paralleled the development of other such efforts.

Illustration of 20th Century Indicators Literature



Source: Anthony Hodge (2004) *Tracking progress toward sustainability.*[10]

The above illustration of general categories of indicator literature suggests that the indicator movement has diversified in the last 50 years. Governments, companies, as well as civil society organizations alike continue to explore the value of comprehensive conceptions and measures of progress. The ongoing shift away from accounting for purely economic determinants of progress is occurring, according to Paul Reed, because there is wide spread recognition that: (1) economic gain is an insufficient way of measuring progress; and, (2) we are experimenting with the project of shrinking the welfare state and its corollary - the devolution of responsibilities to subsidiary levels of government and other components of our social structure. This general shift toward comprehensive measures reflects what Reed calls a move away from *government*, toward *governance*, where the new political reality is shaped by the interface of community politics with governments.[11]

Can members of the public be involved in CIPs?

Despite the ongoing call to involve the public in indicator development, some indicator projects are strictly the brain child of a small group of 'experts' who shape all aspects of the project, from function, paradigm type, and indicator selection process. Such experts usually have advanced degrees and/or multiple years of research and policy work experience.

Although indicator project work continues to be mainly undertaken by experts, many indicator projects have at least one and sometimes many elements of public involvement. For example, in 2000 the Canadian Policy Research Network (CPRN) compiled a list of indicators for quality of life issues in Canada, as suggested by citizens. Categories for this list included the health care system, education, environment, social programs, economy, government, legal/justice system, general values, personal well-being, work, community and religion, seniors and children, families and friends, information/media, infrastructure/transit, cultural pursuits, diversity multiculturalism, and quality of life in general.[12]

The CPRN example stands within the general trend toward increased input by civil society regarding issues and decisions that affect their lives. In moving away from a model where only experts determine what should be counted, current indicator projects also address who determines what is being counted and why. This shift also represents what David Sawicki and William Craig are calling the democratization of data.[13] These authors consider the co-creation of data by community members and organizations as being an important element of democracy.

Moreover, the democratization of data contributes to what Sherri Torjman and Eric Leviten-Reid identify as being an important element of how communities learn. These authors differentiate between information and knowledge, where information cannot really be considered knowledge until it is digested and then applied to local issues and/or assets in the community.[14] To ensure that information is translated into knowledge and understood by the community, these authors recommend using appropriate vehicles of delivering the information to the community, recognizing learning as a two-way process, linking information and action, and sharing information in a clear, relevant, and accessible manner.[15]

How community members learn about indicators and how to use indicators to mobilize stakeholders for local action depends on the inclusiveness of the learning sessions and priority setting meetings. Where efforts are made to remove barriers to accessing the process of local indicator development, diverse community members are more able to shape what counts in their community and how it should be counted.

What are the advantages and challenges with 'one-time' CIPs compared to 'ongoing' CIPs?

CIPs are typically completed as a one-time project or become an ongoing initiative, whereby the selected indicators are tracked over time, usually every two years. For many small communities, sustaining CIPs has proven quite difficult and so they have opted for a one time CIP instead of the ongoing initiative. In their work on the Castlegar Well Being Assessment, Derek Murphy and Louise Christian conducted a useful analysis of arguments in favor and against both ongoing monitoring and one-time assessments.

With respect to the option of an ongoing CIP, Murphy and Christian noted several arguments in favor of this option, including the fact that regular assessment and data collection improves analysis and understanding of trends. Moreover, they noted that the ongoing CIP provides a mechanism for keeping stakeholders accountable to the community while increasing community understanding of local issues. Arguments against an ongoing CIP included the fact that they require significant resources to maintain and can detract from other important action-oriented needs in the community. In regards to a one-time CIP, the arguments in favor include not being obligated to data collection and updating in the future, presumably leaving more resources and time for more 'action-oriented' community projects. The arguments against a one-time CIP are the fact that one-time assessments do not make good use of the data collected since it is not compared over time and thereby can not highlight any significant changes – some of which may be attributable to community action. This in turn limits the long term impact and value of the initiative.

Should target setting be a part of a CIP?

In *A Guide to Community Quality of Life Assessments*, Marian Chambers of Jacksonville Community Council Inc. (JCCI) explains that a target is a number that expresses the community's aspirations for a certain future date for that particular indicator. She advocates for the use of targets since they allow observers of a community's quality of life to be able not only to watch the trends but also to evaluate their movement in relation to these fixed targets. This can be particularly interesting since it will offer another kind of comparison using data about your community.

It is also important to note that the task of setting targets should only be undertaken as part of an ongoing CIP – not a one-time CIP. Moreover, targets should not be set in the first few years of a CIP. In fact, JCCI did not begin to set targets until the sixth publication of their quality of life assessment report. Nevertheless, when you and your community are in a position to set targets, it is a worthwhile exercise; however, one that will require significantly more resources. Similar to selecting indicators, targets should be set by community members and decisions should be made using consensus. As chambers notes: "The trick [is] to establish an acceptable balance between desirability and feasibility for each [target], while perhaps stretching a bit toward the desirable so as to sustain people's idealism about improving the community."[16]

What are some limitations of CIPs?

Key lessons about indicator projects and community indicator sets relate to the limit of what can be reasonably expected of indicators and the process of creating them. The limits of indicator work are well captured in the following excerpt from the work of Besleme and Mullin:

> As the development and use of community indicator sets continue, it is important to remind ourselves and one another what indicators can and cannot do. Indicators do not substitute for action, and they also should not be expected to cause change in and of themselves. Indicators are simply measurements showing time-series data that reflect trends in community conditions. In the process of their development, indicators do serve to stimulate community visioning and unite different interests, but they cannot single-handedly bring about change. Indicators are nothing more, nor should they be anything less, than the information base for a larger advocacy and action strategy that utilizes existing resources in a community.[17]

Where there are limitations to be found, there are lessons to be learned. The following lessons come from a study by Besleme, Maser, and Silverstein that examined the well-known Quality of Life indicator project in Jacksonville, Florida, and the Quality of Life assessment in the Truckee Meadows. In this study the authors identify five basic lessons for indicator projects:

1. Process itself leads to outcomes, especially when consensus decision-making is used;
2. Citizen participation is key in both government-driven and community-based projects;
3. Goals must be clearly defined and redefined as the project progresses;
4. Moving indicators into action requires planning implementation strategies from the outset;
5. Political outcomes are important, especially considering public credibility and community self-determination.[18]

In light of these lessons, we have attempted to develop a general methodological approach to CIP work that can be amended to fit a range of community contexts in British Columbia. The following section explains our proposed method.

A method for designing and implementing a CIP

Overview: In this section, we provide a description of a general methodological approach to CIP work. We have divided our methodology into eleven phases of work, many of which include several sub-activities. This section offers discussions of each phase of proposed work and includes summaries of the outputs at the end of each phase of work.

Preliminary notes on our CIP method

Every community is different and will require a unique process to develop and sustain a CIP. In this resource guide, we outline a generic method for creating a CIP that aims to engage diverse community stakeholders in a common task to develop indicators that reflect their values using consensus decision-making processes.

Our proposed method encourages a multi-sided approach to developing measures of the sustainability and quality of life in your community because we believe that such a measure can help your community nurture and build on its greatest strengths, as well as address apparent weaknesses.

Our method adopts an on-going and action-oriented approach to CIP work, which means linking your CIP work to planning and action, as well as sustainable monitoring of changes in your community every couple of years.

It is a method that assumes little knowledge and experience in CIP work. The method we describe below does not take into consideration the development of targets as part of a CIP. We have limited our proposed method to consider only indicator development and community visioning wherever applicable.

Our proposed method for creating and sustaining a CIP was developed by borrowing and synthesizing a range of best practices in the field of indicator work from initiatives in Canada and the US. The project methods that inform our approach to CIP work include:

- Genuine Progress Index Atlantic (Nova Scotia, Canada)
- Quality of Life Challenge (Victoria, British Columbia, Canada)
- Quality of Life Progress Assessment (Jacksonville, Florida, USA)
- Regional Vancouver Urban Observatory Sustainability Indicator Project (Vancouver, British Columbia, Canada).

The general steps outlined in the sections below are intended to assist you and your community design and participate in an enjoyable and challenging educational experience by which you will learn with others how to assess the sustainability and quality of life in your community for the purpose of improving it today and for the children who will one day inherit it.

Each of the eleven phases includes a discussion of specific activities that need to be complete prior to moving ahead to the next phase of work. Each phase of work ends with a text box that identifies the particular outputs resultant from the activities in question. We speak only in terms of outputs (i.e. the product of the work in question) not outcomes (i.e. the measurable impacts of the products of work) because naming specific outcomes will depend on what you want your CIP to achieve.

The first nine phases aim to guide the development of indicators, while the tenth and eleventh phase encourage you to think about using your CIP to mobilize your community for action on issues. Our discussion about mobilization offers one possible way to use your CIP to generate local change strategies; however, the specific means that you use and the scope of your change strategies will largely depend on what other initiatives are underway in your community and the amount of resources at your disposal. In order to assist you think and work through the phases of our proposed method, we have created an overview of activities, which summarizes each phase of work and the steps within each phase, including an approximate timeline. Each phase and step are explained in order on the following page.

Overview of CIP activities and timeline

Phase	Timeline
Phase one: Convene key stakeholders and assess your readiness for a CIP • Step one: Convene a working group to discuss a CIP for your community • Step two: Hold a feasibility meeting	September
Phase two: Choose sponsoring organization, identify funding sources, write proposal and secure funding	September - October
Phase three: Establish steering committee and answer preliminary questions • Step one: Develop Terms of Reference • Step two: Develop responses to preliminary questions	October - November
Phase four: Conduct background research • Step one: Conduct literature review and key stakeholder interviews • Step two: Develop responses to preliminary questions	November - December
Phase five: Develop handbooks for facilitators, recruit and train facilitators of study groups	December
Phase six: Deliver workshop for developing your CIP framework	January
Phase seven: Select indicators • Step one: facilitate five study group meetings • Step two: Study groups present to the steering committee • Step three: Achieve consensus on indicator selection	January - March
Phase eight: Collect and analyze data	March - April
Phase nine: Produce and promote the research report and public report	April - May
Phase ten: Beyond indicators: A workshop to mobilize your community for action	June
Phase eleven: Taking action and planning for future updates	June - ?

Phase one: Convene key stakeholders and assess your readiness for a CIP

The first phase of work involves establishing a working group who are interested in discussing the appropriateness of a CIP for your community.

Step one: Convene a working group to discuss a CIP for your community

The shape that your CIP takes will depend on what else is going on in your community and what leaders in your community see as a useful purpose for a CIP. By hosting a preliminary discussion about a CIP for your community, you can easily gauge the local appetite for such an initiative.

As such, this first step involves convening a dedicated group of people who are passionate about generating local knowledge about the sustainability and quality of life in their community. Typically, the working group includes five to ten people who are interested in assessing the community's readiness for a CIP, and if so, are willing to create a vision for the project.

The working group should be diverse and include a combination of the following people: business person, elected official, farmer, representative from Aboriginal community, high school student, leader of faith community, media, public health professional, member of a social justice organization, instructor of statistics, etc. The working group should ensure that there is diverse representation at the table and identify any individuals that need to be on the working group with the required technical expertise and/or cultural background.

The working group should engage in honest discussions about the value of a CIP and determine whether or not a CIP would benefit the community at this stage of its development. A simple way of ensuring that your community is in a position to participate in a CIP is for the working group to assess the strengths, weaknesses, opportunities and threats (SWOT) in the community that could have relationship to a CIP. A basic SWOT analysis of the local environment as it relates to a CIP will allow the working group to make an informed decision about whether a CIP should be pursued.

The four questions that the working group should answer at its first meeting are as follows:

1. What valuable assets and resources do we have that can support a CIP? (a) as a community (b) as a working group
2. What skills, knowledge, attitudes that are integral to a CIP are absent in our working group and/or community?
3. What local or provincial opportunities do we know about that could compliment or support our CIP?
4. Are any of our weaknesses detrimental to our effort to complete a CIP?

If the SWOT analysis reveals that the current timing for a CIP is not good, then you should consider revisiting the idea at some other time. However, if your working group agrees to proceed, then the next step is to draft a 2-4 page discussion paper that explains the working group's ideas for a CIP and outlines the possible steps involved in the process.

The discussion paper should also provide a clear purpose for a CIP. Redefining Progress, a US-based NGO that specializes in community indicator work, suggest that a CIP can serve a wide range of purposes. The top purposes are as follows:

1. to raise public awareness and encourage dialogue leading to improved understanding about the complexity of community issues
2. to highlight when conditions are moving towards or away from desired trends
3. to provide local policy makers with current, credible and accessible information on issues at hand
4. to evaluate the community in relation to the goals that it has set for itself

Your discussion paper may talk about the function of a CIP in such terms or you can add to this list to reflect local interest and need.

Step two: Hold a feasibility meeting

Assuming you get past the first step, your discussion paper should be presented at a feasibility meeting with a larger group of stakeholders. Holding a feasibility meeting provides an opportunity for community leaders from all sectors to assess their readiness for a CIP. Such a meeting will also enable community leaders to share what projects are currently underway and what, if any, linkages could exist between a CIP and pre-existing projects and/or programs.

If you have already engaged community leaders in discussions about a CIP that have resulted in a strong sense of community support, a feasibility meeting may not be required. If your working group decides that a feasibility meeting is a useful exercise, then here are some possible questions that you may want to address in your feasibility meeting with other community leaders:

1. What is a CIP?
2. Would a CIP benefit our community? If so, how?
3. What other current or recent local initiatives are related to a CIP?
4. Who would be suitable partners for a CIP?

The outputs of this phase of work are threefold:

- Development of a working group of diverse community leaders
- Articulation of CIP ideas for your community to be shared with other local stakeholders
- Expressed support by diverse group of community leaders who are committed to supporting the development and sustainability of a CIP in your community

Phase two: Choose sponsoring organization, identify funding sources, write proposal and secure funding

Once you have the support of key stakeholders, as well as an articulation of the overarching purpose and process for your CIP, it is time to choose a sponsoring agency and funding organization. There are many options for a sponsoring organization, including a community social planning council, municipality, friendship centre, local college, etc. Ideally, you want to select an organization that has the capacity to sustain your CIP over the years.

In order for your CIP to have legitimacy in your community, it is important for you to choose a respected organization that is viewed as being able to work effectively and fairly across sectors and cultures in your community. Here are a few key considerations for you to keep in mind as you decide which organization should take the lead in your initiative.

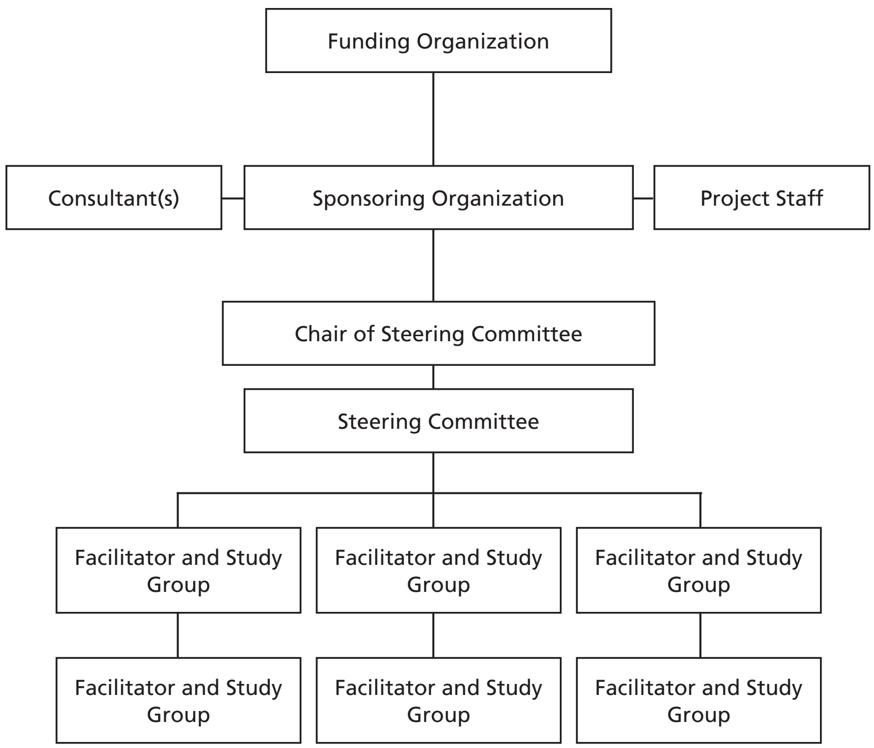
The organization should have the following characteristics:

1. a staff person who is skilled in research methods and analysis (or at least can hire and support such a staff person)
2. a history of positive work with volunteers (or the ability to partner with a volunteer organization)
3. respected by diverse groups in the community
4. capacity to commit a project coordinator and support staff to the CIP
5. organized according to a mission that is compatible with the stated purpose of your CIP

In addition to selecting the appropriate sponsoring organization, you will want to spend some time thinking through the organizational structure of your initiative. In most CIPs, the sponsoring organization is legally responsible for tasks related to the coordination of the project, administering the funds and providing the requisite staff support. The staff are accountable to the sponsoring organization and are responsible for convening meetings, writing meeting summaries, and compiling indicators as determined by the steering committee and study group.

The chair of the steering committee is responsible to the sponsoring organization and sometimes assumes many duties pertaining to the management of the project, including recruitment of members of the steering committee. Each facilitator and member of a study group will be responsible for articulating the elements of their domain of community life, developing indicators and presenting and defending their work to the steering committee. On the following page, we present a sample organizational chart that is based on the Jacksonville Community Council Inc. organizational structure for their quality of life reporting project.

Organizational Structure for CIP



To assist you think your way through the costs of a CIP in your community, we have listed potential budget items that you will want to consider as you develop your grant proposal.

Budget items to consider for a CIP

Budget Item	Total Activity Cost	Sources of funding
Staff Salaries • Administrative Assistant • Project Coordinator		
Facilities/Local Travel • Rent • Telephone • Office Supplies • Use of Equipment - computer, desk, photocopier etc.		
Advertising • Radio, television, newspaper, flyers, etc.		
Printing • Public report and research report (note that the public report will cost more if you want color gloss colour gloss copies). Also, go with eco-audit publishers wherever possible		
Venue for meetings and workshops		
Food for study groups and workshops		
Child-minding for participants of study groups		
Transportation allowance for out-of-town study group participants		
Honorarirum for elders participation in study groups		
Telephone Survey		
Consultant Fees (if applicable) • Write reports, facilitate workshops, train facilitators, etc.		
Total		

Once you are clear about the organizational structure of your CIP, your methodological approach and budget, you are in a position to write your proposal. The task of writing the proposal should be a collaborative exercise with the majority of the work undertaken by the sponsoring organization with guidance from the working group. The process that is outlined in this resource guide can serve as a starting point for developing the finer details of a 'fundable' CIP. A clearly written project proposal that is supported by diverse community leaders, and that is congruent with a funder's program objectives, should stand a strong chance of success. The following United Nations site, has a list of useful resources for writing grant proposals: http://www.un.org/depts/dhl/sflib/libmgnt/grantproposals.htm.

At the end of this second phase of work,
you should have the following pieces in place:

- A selected sponsoring organization
- An approved proposal for you CIP

Phase three: Establish steering committee and answer preliminary questions

With adequate financial resources and a sponsoring organization in place, the next phase involves establishing a steering committee and setting yourselves to the task of setting some contours for the project.

The establishment of your steering committee should be a relatively easy task since you will already have formed a working group during the preliminary steps of your CIP. You may need to request the participation of other key stakeholders in your community if you see gaps in representation. Remember that the steering committee should reflect the composition of your community.

You will want to have between 8-10 participants on your steering committee. The steering committee will require a chair, who will be responsible for ensuring that the project moves according to its stated objectives. The first responsibility of the chair of the committee is to develop some terms of reference.

Step one: Develop Terms of Reference

In order to ensure that the project runs smoothly, it is important to develop Terms of Reference for the committee so everyone understands the scope of their respective roles and responsibilities. The length of the term of the steering committee will depend on the duration of your CIP and whether it will be an ongoing monitoring initiative or a one time assessment.

Terms of Reference for the committee should include discussions about the following items:

- Membership
- Chairing
- Attendance
- Voting
- Minutes
- Quorum (number of members needed for an official meeting of the Committee)
- Meeting times

For more guidelines on running effective committees, see: Fishel, D., (2003), The Book of the Board: *Effective Governance for Non-Profit Organizations,* The Federation Press, Sydney.

Step two: Develop criteria for indicator selection and responses to critical issues

In addition to setting out its Terms of Reference, the steering committee will also have some early decisions that need to be made before conducting research and developing mandates for the study groups. Some of these early decisions will need to be addressed in all CIPs, while others may or may not be applicable. There are two tasks you will need to complete at this point in the project: first, to create a list of criteria for indicator selection; and second, to develop responses to critical issues inherent to all community indicator projects. The results of these tasks should inform the facilitator's handbook.

To get you started, we have provided a list of sample criteria for indicator selection. We have listed twelve criteria in total and invite you to select and amend this list to suit your needs. The list is a combination of several pre-existing lists of indicator selection criteria, including contributions from SPARC BC, Jacksonville Community Council, as well as professors Alex Michalos (University of Northern BC) and Virgina Maclaren (University of Toronto). We suggest that you select between 4-6 criteria for your study groups to use as they make decisions about their indicators.

1. *Meaningful*: Is the indicator understandable to the general public and relevant to the values, visions and concerns of the community in question?

2. *Politically unbiased:* Does the indicator have a clear relationship to a particular political campaign? If so, you may want to consider omitting the indicator since your CIP should be as apolitical as possible.

3. *Obtained through an open, transparent and consultative review process:* Has the indicator been discussed from multiple perspectives? Were adequate opportunities presented to participants to provide their input on the appropriateness of the indicator in question?

4. *Valid*: Is the indicator a valid measure of the quality of life in your community? The answer to this question will depend on the members of your study group. The validity of an indicator is largely a local phenomenon that hinges on the values of the community in question.

5. *Reliable:* As statistics of a kind, indicators need to be formulated in a systematic manner over time in order for them to be recognized as reliable. To determine whether an indicator is reliable, you will need to check the method by which the indicator is created and/or consult with an expert.

6. *Available now and over time:* Is the indicator collected on a regular basis? The indicator should be available on a regular basis if you are planning on monitoring your indicators over time.

7. *Relevant to local policy decisions* and the concerns of main target audiences: It is important to remember that your indicators should serve as planning tools and should be relevant to the policy decisions at play in your community. Moreover, your selected indicators should be relevant to target audiences who have a vested interest in the knowledge you are producing. Indicators that are too esoteric will likely not be taken up in policy development and planning initiatives.

8. *Contributes to the diversity of the set of indicators.*
Since there will be a limit to the number of indicators that will be selected, it is important to ensure that the set of indicators for a given area reach into diverse sub-themes so as to reflect the diversity of community life.

9. *Forward looking:* Does the indicator include a focus on long-term changes of community life? Indicators should not only express the state of areas of current concern but should also provide information on areas of community life that residents feel will be important in the future.

10. *Objective and/or subjective*: Your suite of indicators should include some objective and some subjective indicators because the lived experiences of community members are shaped by both forces. What type of balance between objective and subjective indicators is appropriate for your community? Should one ask recipients how they feel or what they think (subjective indicators) about how they or others are affected by actors' action, or is it enough to merely observe their behavior or other things that may be affected (objective indicators)?

11. *Positive and/or negative:* Most communities are perceived by residents as including some positive traits and some negative traits. Negative indicators seem to be easier to craft for some domains, which may create a biased assessment. What type of balance between positive and negative indicators is appropriate for your community?

12. *Comparable across jurisdictions and groups:* Although each community is unique, there are often parts of one community that can be compared to a different community. It is also possible to compare groups within communities. You may want to include one comparable indicator in each domain of community life. If so, you will want to make sure that the select indicator can be compared to the same indicator in other communities or with other groups in your community.

In addition to developing the criteria for indicator selection, the steering committee will also need to provide some direction to the project staff for the development of handbooks for the facilitators of the study groups. The content and scope of the handbooks can be informed by the responses of steering committee members to the list of critical issues outlined in the following paragraphs.

Dr. Alex Michalos has developed a useful array of critical issues that are addressed, explicitly or implicitly, by CIPs.[19] We have provided an amended version of Michalos' list of 21 critical issues below, which, similar to the original list, are not categorized or presented in any particular order of priority or importance. Some of the issues can be addressed from the beginning of the project while other issues will need to be addressed at a later point in time. Use the questions related to each critical issue to drive your preliminary discussions as a steering committee.

1. *Technical expertise:* What persons with technical expertise should be contacted and asked to participate in the project on an as-need basis?

2. *Individual wellbeing and group wellbeing:* How will your indicator project address the differences between the well being of individuals and the well being of groups of people? e.g., per capita incomes are inferred attributes applying to individuals, while unemployment rates are inferred attributes applying to groups.

3. *Spatial coordinates:* Across what distance should one consider, from neighborhoods to valleys or beyond? e.g., the best size to understand air pollution may be different from the best size to understand crime.

4. *Temporal coordinates:* Across what length of time should one look, from now into the future? e.g., the optimal duration to understand resource depletion may be different from the optimal duration to understand the impact of sanitation changes.

5. *Population composition:* How should the affected individuals and/or groups be characterized, if at all, in terms of sex, age, education, ethnic background, income and so on? e.g., analyses by language, sex, age, education, ethnic background, income, etc. may reveal or conceal different things.

6. *Domains of community life:* What is the optimal number of domains of community life? e.g., different domains like health, job, family life, housing, etc. give different views and suggest different agendas for action.

7. *Vision for domains of community life:* Should vision statements be created for each domain of community life?

8. *Input versus output indicators:* Should one measure only what one invests in actions, what comes out of the investments, or both? e.g., expenditures on teachers and school facilities may give a very different view of the quality of an education system from that based on student performance on standardized tests, and both may be very different from assessing whether the populace at large is becoming more literate, knowledgeable, educated and wise.

9. *Benefits and costs:* What particular kinds of benefits and costs should be counted? Different measures of value or worth yield different overall evaluations as well as different evaluations for different people, e.g., the market value of child care is far below the personal, social or human value of having children well cared for.

10. *Recipient populations:* Who should be included as a recipient for particular benefits and costs?

11. *Measurement scales:* What range of measurement scales should be considered in the process of selecting indicators? e.g., different measures of wellbeing provide different views of people's wellbeing and relate differently to other measures.

12. *Research personnel:* How will you make decisions about competing views of what counts as relevant community information? e.g., different stakeholders often have very different views about what is important to monitor and how to evaluate whatever is monitored.

13. *Report readers:* What should be the characteristics of the public report? e.g., different target audiences need different reporting media and/or formats.

14. *Aggregation function:* How will you aggregate the data that you have collected? e.g., once indicators are selected, they must be combined or aggregated somehow in order to get a coherent story of your community.

15. *Distributions:* How should central tendencies and variations be measured in diverse fields? e.g., because average figures can conceal extraordinary and perhaps unacceptable variation, choices must be made about appropriate representations of distributions.

16. *Distance impacts*: How will you handle the instances when community members travel to other communities for services? e.g., people living in one place may access facilities (hospitals, schools, theatres, museums, libraries) in many other places at varying distances from their place of residence.

17. *Causal relations*: How should one measure causal interactions in any particular array of phenomena? Prior to intervention, one must know what causes what (interaction effects), which requires relatively mainstream scientific research, which may not be

available yet. At a minimum, correlations among variables should be explored with a view to discovering possible evidence of dependence or independence, redundancy and double-counting.

18. *Discount rates*: How much should one discount costs and benefits delivered some time in the future compared to those delivered today?

19. *Confidence levels:* What levels of confidence should one equire to accept any particular claim or measure?

20. *Auditors:* Who should decide if any assessments are adequate or appropriate?

21. *Auditing criteria*: What criteria should be used to assess the adequacy of auditors' assessments, the adequacy of the procedures used for audits and even the adequacy of the answers to questions about any of the previous 20 issues?

At the end of phase three, the following pieces of work should be complete:

- Terms of References have been adopted by the steering committee
- A document summarizing the steering committee's selection of indicator criteria and any responses to questions related to critical issues

Phase four: Conduct background research

Assuming that you have the requisite money, institutional support, human resources and clarity around the relevant questions posed above, you are in a position to implement your CIP. The first phase of implementation falls to the project staff and involves conducting a systematic literature review of initiatives that are currently happening or have recently taken place in your community, as well as conducting key stakeholder interviews. The product of this work will inform the framework development workshop in phase six.

Step one: Conduct literature review and key stakeholder interviews

We suggest that a review and synthesis of previous research and community development work in your community be completed prior to the framework development workshop for your CIP. Literature to consider for your review should include: social plans, needs assessments, reports on social issues, the Official Community Plan, as well as any other documents from the City, Regional District, Provincial and/or Federal government that may be appropriate.

The literature review serves three purposes. First, the review will serve to identify and confirm existing priority areas in your community, as well as provide some background about the degree to which these areas have been researched and what data is available. Second, the review will seek to identify existing strategic planning capacity in the community, including existing committees and roundtables that focus on particular issues, as well as identifying key stakeholders who could participate in the study groups, either as facilitators or members. Third, the review can explore CIPs developed in other communities in BC, with the goal of identifying potentially valuable frameworks and data sets that might be useful in your community. SPARC BC has produced a complete list of indicator projects in BC that can be consulted.[20]

The project staff should also conduct a series of key stakeholder interviews. The interviews should explore current priority areas in your community, and seek to identify preliminary topics for discussion at the framework development workshop. When developing the research plan for interviewers, be sure to include diverse interviewers, including people from the business community, social development sector, environmental groups, religious groups, etc. The interviews will complement the literature review by providing current perspectives on your community's priority areas.

Once the project staff has conducted the literature review and key stakeholder interviews, a background report should be developed for the framework development workshop. The content of the background report should consist of a discussion of the purpose, process and outcomes of your CIP, general findings of the literature review and interviews, as well as a draft list of potential domains of community life that can be discussed at the workshop. The background report for the framework development workshop and related agenda should be sent to participants a few days before the workshop so as to give participants time to read and reflect on its content. The length of the report should not be longer than 10-20 pages at the most.

The outputs of phase four include:

- Background report for the framework development workshop that synthesizes the findings of the literature review and key stakeholders, as well as presents a set of proposed domains of community life for your CIP

Phase five: Develop facilitators handbook, recruit and train facilitators of study groups

In addition to creating the background report for the workshop, the project staff and the steering committee will recruit and train facilitators for the study groups. The handbooks are intended to guide the facilitators through the five meetings of the study groups, each of which are discussed in phase seven. The length of the handbooks will depend on how much background information you want to provide; however, it is best to keep it to the point - shoot for 20 pages or so.

The handbooks should include the following information:

- discussions of indicators and some examples from other communities
- overview of the process of your CIP
- guidelines for running each of the five study group meetings
- worksheets for selecting indicators
- reflective questions for each meeting
- related resources
- contact info of project staff

The project staff and the steering committee will recruit and train facilitators of the study groups. In some cases, members of the steering committee are also facilitators of the steering committees, which was the case in the JCCI Quality of Life reporting project. Although there are merits to this arrangement, it can be taxing for members of the steering committee and for this reason we suggest that you hire and train facilitators who do not also sit on the commitee.

We recommend training facilitators because it offers an opportunity to build your community's capacity by increasing the number of local people who have the skills and knowledge to engage in facilitation work.

In most CIPs, there are between seven to ten domains of community life. As such you will need a similar number of facilitators for your project. To be on the safe side, recruit ten facilitators and make the final selection after the framework development workshop.

Ideally, the facilitators should be engaged citizens and have at least an aptitude to facilitate group process. The facilitators should not require a lot of training. A full day should suffice, provided it is focused on the role of facilitators in the CIP project and some basic teachings on group facilitation and methods for reaching consensus. An overview of the handbook should also be part of the day of learning, as well as an overview of their role in the workshop to develop the framework for your CIP.

Phase five should conclude with the following outputs:

- Handbook for the facilitators of the study groups
- The recruitment and training of seven to ten facilitators

Phase six: Deliver workshop for developing your CIP framework

BC communities are pluralistic in terms of populations, values and institutions and, as such, any attempt to devise a categorical scheme for the domains of community life should be reflective of the multiple and various differences that are existent in a given community.

For this reason we recommend a place-based approach to developing a framework for your CIP opposed to the 'adopt-a-model' approach. We favor participatory consultation processes that ensure all participants are able to make contributions, and that all voices have, in some way, shaped the domains that will frame the development of indicators. See appendix 1 for a sample agenda for this first workshop. The framework development workshop should aim to serve four complementary purposes:

- to report on work to date and re-iterate the methodological approach being used to advance your CIP
- to present the findings of the literature review and the interviews
- to select domains of community life for your CIP
- to strike study groups for each selected domain of community life

The workshop should be attended by all members of the steering committee as well as other key stakeholders and community members who would be willing to contribute to the success of the CIP. You should invite a diverse representation of the community who are able to provide a strategic perspective on the information needs of the community. Early participation by diverse stakeholders in the development of the CIP framework can significantly improve community 'buy-in' for indicator monitoring initiatives, and ensure that the later stages of the project reflect community needs and goals.

In terms of the basic structure of the workshop, the first part of the workshop should include an explanation of the purpose, process and outcome of your CIP. Also in this first part, it is important to provide some successful examples of other CIPs in BC so participants can get a clear sense of why the project is happening. You should also provide any updates regarding sponsorship, support or staffing developments that relate to your initiative.

The second part of the workshop involves a review and discussion on the priority areas that were identified in the literature review and key stakeholder interviews. The workshop will build consensus for a set of domains of community life in which elements of each domain and related indicators will be developed by members of the study groups.

By domains of community life, we are referring to broad categories for defining community life, such as the economy, housing and homelessness, health, education, public safety, etc. By elements we are referring to the sub-themes of your selected domains, such as particular populations, human behaviors and/or feelings, as well as objects.

After the large group has reached consensus on the domains of community life, small groups should be formed around each area. Participants should brainstorm some possible sub-themes for each domain and should report out to the larger groups after their discussions.

The third part of the workshop involves inviting the participants in the small groups to serve as members of a study group for the given domain of community life. The term of service and expectations for participation should be outlined before the invitation is extended. The facilitators will be assigned to a group and will be responsible for taking names and setting up the first meeting for their respective group. Ideally, each study group will consist of 5-10 people.

It is probable that the intake of volunteer study group members will not be adequate to cover all domains of community life. As such, you may need to engage in some additional recruitment, which should seek to fill in any gaps in representation. Personal letters from community leaders may be a useful way to reach out to people who could participate in a study group.

Phase seven: Select indicators

In 2004, JCCI published a guide to help communities translate the JCCI approach to selecting indicators. The guide explains how to develop a system for enhancing community progress by monitoring community quality of life on an annual basis.[21] In this section, we have borrowed liberally from the JCCI manual to describe an effective way of selecting indicators with a diverse group of people.

This phase of your CIP will consist of three steps. The first step consists of five meetings among the different study groups, each of which will work toward articulating a vision for the domain of community life (if applicable) as well as a few indicators that reflect the key elements in the given domain. The second step involves the study groups presenting their set of indicators to the steering committee. The third step involves two rounds of voting on the proposed indicators and a final large group exercise to reach consensus on the final set of indicators.

Step one: Facilitate five study group meetings

The work of the study groups should not be too laborious. The study groups should complete their work in five meetings. Each meeting should have clear objectives with guiding questions, all of which should be laid out in the facilitator handbook. We have developed the following sections for the purpose of helping you create the content for the facilitator's handbook. Each of the meetings are described below.

Study group meeting one

There are three pieces of work to be completed in meeting one. The first step for the study groups is to set the ground rules for their working relationship and to clarify the objectives of the group. The second step is to engage in systems thinking in relation to the given domain of community life.

We recommend that all study groups use 'systems-thinking' to understand their domain of community life. Engaging in systems-thinking is an important step that all study groups should take before jumping into indicator selection because it will empower participants to better understand the parts and dynamics at play in their domain of community life. Systems-thinking is an interactive intellectual exercise that aims to create an abstract representation of the multiple and various parts of a domain of community life. The first and second meetings will involve tasks related to systems thinking. In this first meeting study groups should seek to develop a series of lists that can inform the development of a systems map. The following questions can be used to guide the discussion about what should be included in the system map for each study group's domain of community life.

1. What are the programs, formal and informal activities relevant to your domain of community life?

2. What are the relevant population groups related to your domain of community life?

3. What are the local non-profit organizations, government agencies and businesses that are relevant to your domain of community life?

4. Who are the individuals that are relevant to your domain of community life? (i.e. Mayor, program directors, school principal, etc.)

5. What are the community norms that are relevant to your domain of community life? (i.e. community norms are 'below the surface' of your system and include the assumptions, beliefs, attitudes, intentions and values that shape the behaviour of the actors in the system.)

6. What are the regulations (i.e. policies, procedures, and routines) and decision making bodies (i.e. city council, chambers of commerce, collaborative planning tables, etc.) that are relevant to your domain of community life?

7. What community capital is relvant to your domain of community life? Consider the following six forms of community capital to guide your thinking:

- Human capital is the knowledge, skill, competencies and other attributes embodied in individuals that facilitate the creation of personal, social and environmental well-being.

- Social capital refers to the relationships between people that promote knowledge exchange, trust and collaboration for the purpose of local consensus-oriented action.

- Economic capital consists of the resources (i.e. money) that are used to ahieve security in a person's material life.

- Physical capital is the stock material resources such as equipment, buildings, machinery and other infrastructure that can be used to produce a flow of future income for community members.

- Cultural capital can be defined as a myriad of personal and inter-personal activities or events, artisitc expressions, as well as objects that represent different traditions and values.

- Natural capital refers to any stock of environmental assets that yields a flow of valuable goods and services into the future. Professor Mark Roseland of Simon Fraser Univeristy has divided natural capital into three categories: (a) non-renewable resources, such as minerals and fossil fuels; (b) the finite capacity of natural systems to produce 'renewable resources' such as food crops, forestry products and water supplies; and (c) the capacity of natural systems to absorb our emissions and pollutants without side effects.

At the end of answering these questions, you will have several lists that can be used to inform the development of your systems map for your domain of community life. In preparation for meeting two, each of the items should be transcribed onto pieces of paper that can be used by group members to construct their systems map. The pieces of paper should be movable so that study group participants can play around with possible configurations for their map. For more details on systems thinking, see Peter Checkland's book entitled: *Systems Thinking, Systems Practice.*

Study group meeting two

In this second meeting, your study group will complete three tasks that build on the information that you developed in the first meeting. In order to help you work toward formulating indicators, we propose two objectives for meeting number two.

1. To map interactions in your domain of community life: This involves using the information from the first meeting to create a graphic image of the parts of the domain in question and the relationship between the parts. The result of this step is usually called a systems map or a mind map.

2. To identify points of convergence in the systems map for your domain

3. To develop a draft vision statement for the domain in question

We recommend that you use sticky notes and large pieces of paper for this purpose since it will allow you to experiment with different configurations.

There is no 'right' way to design your systems map - only a way that works best for you and your group. Your systems map should strike a balance between being complex enough to capture the nuance at play in your system but simple enough for you to use in your thinking about indicators.

As a good example of a simple systems map, see the systems map on food production by Mary Connors, which is featured along with other good examples of systems maps on the University Illinois Urbana Champaign website. http://classes.aces.uiuc.edu/ACES100/Mind/c-m4.html.

After developing your systems map for your domain, you are well positioned to locate points of convergence that link together several other parts of your system. You should be able to identify the specific points of convergence by answering this question: What parts or processes in your systems map are linked to several other parts or processes of your system? Good indicators typically have relationships to points of convergence in a system and serve as a window into the general health of the system in question.

Once you have identified these points of convergence, you can brainstorm the characteristics of your group's vision for your selected domain. The facilitator will take these statements and draft a vision statement for meeting three.

Study group meeting three

The third meeting should be centered on reviewing and accepting the work from meeting two and brainstorming indicators. In order to bring all study group members onto the same page, the facilitator should develop a table in an excel document that lists the proposed indicators. The checklist should include the criteria for selecting indicators, as well as possible sources for the data. The checklist should include the following information:

- Name of domain of community life
- Elements related to domain
- Indicator related to each element
- Criteria for selection
- Data sources

Using the checklist, members of the study group should evaluate each indicator according to the criteria. The indicators that meet the most criteria should be the ones that are researched in more detail. The end of meeting three should conclude with an exercise to select a short list of indicators. Each member of the study group should be assigned one indicator and should collect any information that the group identifies.

It is important to remember that the 'wish list' of indicators that are developed during this meeting will need to be translated into a set that can be defended in purely technical terms. It is likely that your study group will not have all of the requisite expertise to make decisions about all selected indicators. As such, it may be useful for a member of the study group to get in touch with a resource person who is knowledgeable about data related to the domain of community life in question. The project staff will be able to help in this regard since they will have a list of volunteer technical advisors.

Key questions to be answered in meeting two:

- What indicators reflect the key elements or convergence points in your system map?
- Which indicators have data sources and which do not?
- What technical experts need to be consulted regarding your set of indicators?

Study group meeting four

In the fourth meeting, members of the study group provide any updates pertaining to the indicator that they had been assigned in meeting three.

The verbal reports of the study group members on their indicator and any insights provided by the technical advisor will serve as the background to another round of discussions about the remaining indicators. If the study group concludes that some of their indicators are critical to measuring the quality of life in their community but there is no data available, the study group should consider crafting some possible survey questions that would allow them to collect data through a telephone survey. Moreover, the study group needs to make sure that the method of calculation is clearly defined, which could involve determining what figure will be used for each indicator (i.e. the total number during the year or at a representative time).

Additionally, the study group will also need to clarify the year for which the data will be collected. Again, the type of year will depend on the nature of the indicator in question (i.e. calendar year, fiscal year, school year, etc.)

Key questions to be answered in meeting three:

- Can our indicators be defended in technical terms?
- Is the method of calculation clearly defined for each indicator?
- Are all of our indicators clearly explained and in compliance with the selection criteria?
- What survey question can we ask that will give us information about our selected indicators for which no data source exists?

Study group meeting five

By this time, the study group will have developed a set of five to eight indicators, including a set of survey questions wherever applicable. The purpose of the final meeting is to run the indicators through the criteria once more and firm up any language in the survey questions.

The study group should also spend some time sorting out who will present the indicators to the steering committee and how the information will be presented, including the order in which the indicators are presented.

Key questions to be addressed at meeting four:

- Who will present the outcomes of our study group to the steering committee?
- Who will prepare the presentation?
- How should the material be presented?

The outputs of the study group meetings include:

- Definition of domain of community life and rationale for its importance
- Creation of systems map for domain of community life
- Set of indicators for given domain of community life and survey questions if applicable
- Identification of person to present to the steering committee

Step two: Study groups present to the steering committee

Once the five study group meetings are complete, the steering committee will need to hear from each study group. The steering committee should hear from two study groups per meeting, which means hosting three-five meetings. The job of the steering committee is to ask probing questions and ensure that the selected indicators harmonize with its domain and meet the criteria set out at the beginning of the project.

Step three: Achieve consensus on indicator selection

The third step in phase seven involves empowering everyone involved in the project to make a collective decision about the final suite of indicators. Although there are many different ways that you can achieve consensus as a large group, the method used by JCCI is an advisable way to go since it has proven effective. The techniques used by JCCI involved a two ballot process whereby the preparation of an initial ballot was created and sent to all members of the study groups three weeks prior to the final meeting between the steering committee and the study groups.

Although the content of the ballot will depend on the number of indicators that the steering committee has assigned to the project, the ballot should list all selected domains of community life and the 5-8 indicators selected for each domain. The ballots will be mailed out to all study group members and members of the steering committee. In each domain, participants indicate their first, second and third choices for indicators and mail in their ballot in advance of the final meeting.

At the final meeting, each study group should be given a few minutes to present their indicators and provide their rationale for making their selection and address the results of the preliminary ballot.

After the first round of voting has been discussed, a final round of voting will be conducted. The results should be analyzed during the meeting and presented to all participants, who will be asked to consent to the final outcome. From here, the project staff take the outcome and get to work on producing the final reports and planning for the community mobilization workshop.

Phase eight: Collect and analyze data

Once participants have agreed to the indicators, the task of researching the data begins. This job is the responsibility of the project staff from the sponsoring organization or a consultant. The task of collecting and analyzing the data will take some time to complete since the set of indicators are likely scattered across many data sources, and in some cases may not exists.

It is important that all of the tasks of the researcher(s) are systematically documented so that the final product is supported with a clear explanation of the methodological approach that was employed. Also, documentation of the work will leave a paper trail for others to follow in future years.

The type of technical research tasks will depend on the nature of the indicators that need to be researched. However, it is likely that the research project staff will either need to research existing data sources or produce new data.

In terms of researching existing data sources, the research team will likely need to consider two general sources of data. The first is unpublished data from social service agencies, businesses, arts groups, government agencies, boards of realtors, school boards, etc. In order to build the trust of the people from whom you are requesting data, it is a good idea to spend some time talking with them to explain the importance of their data to the community and how it will fit into your indicator monitoring initiative. We also recommend that you get the figures in writing and not take the numbers by word of mouth. This will assure a greater degree of credibility to your figures.

The second place to look for data is in official published reports, either by non-government organizations and government. Be cautious of changes to how data is collected from one year to the next and be sure to take careful notes of any changes in methodology from one year to the next. Sometimes, changes in methods of calculating figures will mean that trend analysis is not possible.

Since you will be working with a diverse set of data, you will likely find some gaps between the data you need and the data that is available. Assuming that the gaps are small (i.e. a year of missed data collection), you can continue to use the indicator and indicate n/a in the table where the data is required. Any gaps should be clearly explained. If the data has and continues to not be created, then you will need to either drop the indicator or create new data.

Where there is a need to perform calculations with the data you have collected, it is important that all calculations are clearly explained in the appendices of the technical research report. If you have questions about formulas, we advise you to contact one of the voluntary technical advisors for assistance.

In terms of producing new data, a community survey is usually the simplest and most cost effective way to go. However, it is important to note that since surveys are concerned with 'top-of-mind' answers to questions, they can fail to capture the 'deeper' views held by community members. As such, you may want to consider using other means of data collection in conjunction with your community survey. Film and other types of collective art projects can be powerful ways of capturing dimensions of the perceptions of community members that a survey instrument can not. As part of their CIP, the Clayoquot Biosphere Trust created the Photovoice Project to collect the views of youth in outlying communities of their region. See their site: http://www.clayoquotbiosphere.org

The final step is to circulate the findings to experts for review. Again, the list of volunteer technical advisors can assist in this regard.

By the end of the eighth phase of work,
you will have the following results:

- A final set of indicators for each domain of community life
- A documented research methodology for each indicator
- Technical notes related to any calculations for specific indicators
- Complete review by technical experts

Phase nine: Produce and promote the research report and public report

You should produce two reports: a research report and a public report. The research report will be technical in nature and provide details about method and data sources that will not be of interest to the general public. The research report does not need to be as visually appealing as the public report. The research report should include all of the same information as the public report but should be more focussed on the technical aspects of the project, including but not limited to the following: the description and vision of the given domain, the specific definition of the indicators; figures for all years available in tabular form; figures in graphic form; the target, if you have one; description of the method of calculation; identification of the source of data; and a listing of explanations, caveats; an appendix that features complete details on the survey methods, etc.

The public report should be easy to read and visually appealing, which can include colourful visual outputs for each indicator and related pictures of scenes from your community. In addition to having an engaging format, it should include the following: basic information about your CIP, descriptions and visions of each domain of community life and related indicators; and, if applicable, analysis of trends whenever possible. The report should not include any plans for action or extensive discussions about what is being done to address local problem areas.

The public report should serve several functions, including: to draw attention to priority areas so resources can be strategically located; to raise public awareness about select areas of community life; to feature areas of success; to inform the planning processes of public non-profit and private institutions; to stimulate local interest in contributing to the solutions of community problems, etc.

Once the reports have been developed, you are in position to create a distribution plan. To help you in this regard, we have re-produced Redefining Progress' seven ways of promoting your public report:

1. If your project is part of a larger effort, make a presentation to the group of stakeholders and participants

2. Provide copies of the report to all members of a local government council, and meet with them to discuss the most urgent issues highlighted by the indicators

3. Ask members of your participatory process to carry the message of the indicators back to their constituency group

4. Meet with the editorial board of the local newspaper to highlight key findings and urge them to write about them – in many cities the newspaper has run a series related to the report, focusing on one domain a day

5. Speak to local service clubs, business associations, schools religious groups and others about the report and the priorities for action

6. Write articles for local newsletters and other publications

7. Appear on local radio and TV talk shows

The ideal outcomes of your distribution of the reports will be increased awareness among the public about the sustainability and quality of life in their community. Other common outcomes include, use of the report by program directors in government and non-government agencies. Also planners, journalists, and researchers will likely use the report in their analyses of local issues. Teachers can use the report in their class room, especially in social studies courses at the high school level. Moreover, boards of directors, elected officials and other community leaders may use the report to inform their strategic planning.

The products of phase nine are:

- A research and public report that outlines the work of your CIP
- A distribution plan for promoting the public report

Phase ten: Beyond indicators: A workshop to mobilize your community for action

As the development and use of CIPs continue, it is important to remember that indicators do not substitute for planning and action. Moreover, indicators should not be expected to cause change in and of themselves – they are only data after all.

Although it is true that the development of an indicator monitoring initiative such as the one described above will serve to stimulate community visioning and goal setting, the selection of indicators is only the beginning of a local change effort. As such, it is important to not get too stuck on creating the perfect set of indicators and instead to ensure that you have adequate time and money for follow up action planning. Keep in mind that indicators should serve only as the requisite knowledge base for the development of action strategies.

There are many possible directions that you can take once you have created and distributed your indicator report. One logical step is to use your CIP framework and indicators to engage stakeholders in an action planning process. Such a process will require support from the sponsoring organization and should aim to stimulate action in each domain of community life.

The first step in such a process is to create what we call an Action by Citizens Together (ACT) Coalition, which should be comprised of a number of task forces equivalent to the number of domains of community life in your CIP framework. The development of the ACT Coalition is an outgrowth of the work of the study groups and should be an appealing option for those people who like to take action that is informed by evidence. The ACT Coalition should be governed by the same steering committee as the CIP and should be given a set of overarching objectives by the steering committee at the action planning workshop, which is discussed below.

We suggest that the ACT Coalition is established at an action planning workshop, which follows the release of the reports. In preparation for this workshop, the project team will need to produce some background information sheets about the importance of linking the local CIP to action, as well as the rational and governance structure for the ACT Coalition, including a description of the scope of responsibility and time commitment required of participants working on the task forces. The specifics of who will lead each task force, the specific working objectives of each task force, as well as the next steps of each group and the ACT Coalition as whole will be determined at the action planning workshop. As such, the purpose of the workshop is three fold.

First, the workshop should recap the CIP and any developments that have extended from it. Also, in this first part of the workshop, the rationale and the overarching objectives for the operation of the ACT Coalition are discussed. In order to ensure that this workshop is clearly linked to your CIP, produce large printouts of each domain of community life and the selected indicators for each area. These should be posted around the room for people to peruse at the beginning of the workshop.

The second purpose of the workshop is to develop task forces for each domain of community life. The formation of these task forces will ideally include participants from the process of developing the indicators as well as some new faces. These task forces will engage in facilitated dialogue about assets available for the area in question, as well as possible action strategies that can either work to improve a poor situation or support positive conditions.

The task forces will need to identify a lead organization that is willing to adopt the task force so it has the organizational and network support it needs to engage in action planning. It is also possible that a task force is absorbed by another pre-existing committee that adopts a few new folks and broadens its mandate to include the action work related to the CIP; however, this is not always advisable since the work related to the CIP can easily get lost.

The task force should also brainstorm the assets and issues related to the indicators in their domain of community life, possible action strategies and specific initiatives that would have a positive impact in their area of activity. The outcome of this brainstorm session should provide adequate background information for the task force to articulate a set of operating objectives that are congruent with the overarching objectives for the ACT Coalition. The task force discussions should conclude with a clear set of operating objectives, ideas for next steps and a contact list of people who are committed to the work.

For a good example of an organization that has used a task force structure to link their indicator work to action, see the Quality of Life CHALLENGE website for the BC's Capital Region: www.qolchallenge.ca

It is possible that a full scale task force structure linked to each domain of community life is not possible in your community. If this is the case, then you may consider prioritizing the domains of community life and assigning lead organizations to take responsibility for developing collaborative strategies for action. Linking assessment to action was undertaken by the Castlegar Social Planning Council (CSPC). Out of their assessment of community well being, they identified three areas for which they could take a lead role. The three areas for action are outlined below. For more details, see their website: http://castlegarspc.org

1. Access to Local Health and Wellness Care (includes financial access): The role of CSPC would be to facilitate:

   a) Planning: identification of barriers and gaps in services, and articulation of realistic initiatives to improve access (includes development of a service inventory)

   b) Community education related to the results of the planning initiative;

   c) Advocacy around issues arising from planning process.

2. Promoting Activity Levels of Local Residents (especially through pedestrian and non-motorized travel). The role of the CSPC will be twofold:

a) Facilitate a citizen advisory group to provide the City and interested parties with constructive input on how to make the city more pedestrian and bicycle friendly. The CSPC would work with the City to ensure coordination with City planning and the review of the Official Community Plan.

b) Sponsor a community campaign for active and healthy lifestyles (design and organize).

3. Community Education and Dialogue on Economic Development. The role of the CSPC would be capacity building by facilitating the organization of a community workshop on the specific economic development challenges and opportunities facing Castlegar (such as the retail sector, attracting young families, etc.)

At the end of phase ten, you should have:

- Established an ACT Coalition, as well as statements from each task force pertaining to their objectives
- Or, engaged in a collaborative decision making to determine who can take action where and to what degree

Phase eleven: Taking action and planning for future updates

Once the task forces are formed and have clear objectives, each group will engage in the development of strategies for action, as well as the development of collaborations with other organizations for implementing their strategies. There is relatively little for us to say about this part of the process since the strategies and corresponding actions will depend on the larger community context and available resources for the work.

Nevertheless, there are several key questions to keep in mind as you take action on the selected issues.

- Should a reporting scheme be set up for the task forces whereby they offer regular updates to the steering committee?

- What types of support do the task forces need in order to achieve their stated objectives?

- How will the work of the task forces be evaluated and how often?

- How will ongoing volunteer participation in the task forces be encouraged so as to avoid burnout?

- Is there a way to assess the impact of task force actions in relation to particular indicators?

In addition to supporting the work of the task forces and thinking of ways to sustain their contribution to improving community life, it is also important to keep an eye to the next iteration of your CIP report. As we mentioned in the introduction of this report, we recommend an ongoing approach to indicator work since trend data is more useful than a one-time snap shot of community life.

We suggest updating your report every two years and revisiting the domains of community life and indicators every three or four years. As dynamic entities, communities can change very quickly in some areas and stay the same in other areas for a very long time. The steering committee should be able to determine whether or not the domains and/or indicators should be revised to reflect changes in the community.

The task of updating the data is typically the job of the sponsoring organization; however, it is useful to involve volunteers with the requisite expertise to validate the accuracy of the updates. Every new report should include up-to-date data and trend analysis wherever possible. If you are at the stage where you are setting targets, then you should conduct comparative analyses between indicators and targets.

Appendices

There are three appendices in total. The first appendix is a sample agenda for the workshop to develop a framework for your CIP. The second appendix provides links to free or low cost project management tools, as well as links to survey instruments that you can use in your CIP. The third appendix consists of a glossary of terms.

Appendix One: Sample agenda for workshop to develop a CIP framework

10:00 **Introductions**

10:20 **Exploring Community Indicator Monitoring Projects: Frameworks, Data and Action**

- Provide an overview of the many sides of community indicator projects.

10:40 **Reviewing your CIP project to date**

11:00 **Identifying Domains of Community Life**

- Have a snack, walk the room, read the draft domains of community life and add your contribution by posting it on the wall.

11:30 **Selecting Domains of Community Life**

- Select the top domains of community life for the afternoon activities. Use the dotmocracy method to select priorities. The top domains of community life will be used to form small groups for the afternoon activities. A maximum of ten domains should be selected.

11:45 **Lunch**

12:45 **Defining Domains of Community Life**

- Participants organize into small groups according to their interest in a given domain of community life. Each small group will use the provided worksheet to develop some of the elements of their given domain.

1:45 **Report Out**

2:15 **Forming Study Groups**

- Once participants have had a chance to hear about each domain of community life in the CIP framework, they are invited to stay in their group or move to a group that relates more tightly to their interest.

2:30 **Getting to know one another**

- This final exercise invites participants to introduce themselves and why they are interested in their selected domain of community life. The facilitators will set the time for the group's first meeting.

3:00 **Next Steps**

Appendix Two: Resources for making your CIP a success

There are at least two types of resources that will make running your CIP easier: web based management tools and survey instruments from other CIPs. We have listed these below for your reference.

Free or low cost web based project management tools

Meeting Wizard: http://www.meetingwizard.com
Meeting Wizard is a free web based meeting manager

Base Camp: http://www.basecamphq.com
Base Camp is a low cost web-based project management software. It serves as an easy way to keep track of the multiple and various aspects of community–based projects involving many stakeholders.

High Rise: http://www.highrisehq.com
High Rise is created by the same makers as base camp, 37 signals. It is a low cost contact manager that helps you keep track of who you talked to, what was said, and what, if anything, you need to do next.

Google Docs: http://docs.google.com
Google Docs is a free web based word processor and spreadsheet, which allow you to share and collaborate on text based projects online.

Skype: http://www.skype.com
Skype is a free web based communication tool that allows you to call computer-to computer for free anywhere in the world.

Resources for designing surveys

There are many useful resources available online that can assist you develop a community survey. We have identified three resources that will make your work easier:

Genuine Progress Index Atlantic: http://www.gpiatlantic.org/publications

> There are several helpful resources on this site, including sample survey instruments. In particular see, Developing A Community Genuine Progress Index: Materials for Community Development Planners, 2000 and 2003.

Castlegar Social Planning Council: http://castlegarspc.org

> The Castlegar Social Planning Council has created an excellent community-based wellness assessment. The final research report includes a useful survey instrument with insightful analysis of each question. The final research report can be accessed in the CSPC web site or by placing a request to the council by email.

Survey Monkey: http://www.surveymonkey.com

> Survey Monkey is a low cost on line survey software that allows you to design a survey instrument and analyze the results.

Appendix Three: Glossary of terms

The following list of technical terms was developed by Mike Salvaris and his research team at the Institute of Social Research at the Swinburne University of Technology, Melbourne, Australia. The name of the report in which this list originally appeared is the Social Benchmarks and Indicators for Victoria, produced for the Department of Premier and Cabinet, December, 2000.

Benchmarks: The specific standards which 'operationalize' a goal and define its successful achievement. Benchmarks are of different kinds. Best practice benchmarks are based on achieving the standards established by the leading company or government for that particular activity. Normative benchmarks are desirable and specific standards set by experts or community opinion. Some examples are: achieving a level of literacy comparable to leading OECD countries (a best practice benchmark); having 90% of students passing an established literacy test (a normative benchmark); achieving the most efficient electricity generation process in Canada as measured by cost per unit and pollution per unit (best practice); reducing air-borne pollution over ten years to World Health Organization recommended levels; having an equal proportion of low income students graduate from university as high income students (normative).

Benchmarking: The process of: (1) setting benchmarks or standards for a particular activity or goal, often by comparison with an organization or state recognized as the best in its field; (2) identifying interim steps – targets – required to achieve the standards; and (3) selecting specific measures – indicators – to evaluate progress along the way.

Community indicators: Indicators developed through a community based process in which citizens determine the key areas of concern and set standards for improvements in their community over time. Community indicators don't just measure current conditions; they are designed to monitor progress in achieving goals. They can be measures of the progress of social, environmental or economic wellbeing.

Data: Individual measurements: facts, figures, statistics, surveys etc.: the 'raw material' from which indicators are developed and conclusions can be drawn.

Economic indicators: Statistical data or indices that measure an element of economic wellbeing or show significant trends in an economy. Examples include inflation rates, GDP, interest rates, investment and productivity growth, labour costs.

Environmental indicators: Physical, chemical, biological or socioeconomic measures that evaluate the condition of key elements of a complex ecosystem or an environmental issue.

Goals: The broad policy objectives of a particular set of organizational or government activities or for the organization or government as a whole. For example: to increase literacy; to ensure that the supply of electricity is cheap, reliable and accessible to Victorian households; to reduce pollution in rivers; to make Victoria an inclusive and compassionate society.

Index: A weighted combination of two or more indicators, designed to summarise a broad trend. For example, the US Social Health Index combines figures for child poverty, teen suicide, unemployment, homicides etc. to measure changes in overall social health.

Indicators: A measurement that tells us about the present state of something that is important. At the most general level, indicators can tell us about progress or wellbeing for whole nations, or the status or condition of a social, economic or environmental problem, issue or system; and at the most specific 'micro' level, about whether the annual goal of a government program or a small business has been achieved. An indicator can be a statistic expressed in dollars, physical measurements or quantitative terms: for example, percentage of average class sizes, percentage of poor families, levels of state debt as a percentage of gross state product, number of houses in public housing stock as a percentage of total homes, percentage change in the number of violent crimes per 100,000 people. An indicator can be more general or subjective: for example, perceived happiness or customer satisfaction.

Key indicator: A primary indicator that by itself provides a picture of a large component of community wellbeing: for example: GDP (economic activity); income equality ratios (equity and fairness); air pollution (environmental wellbeing and health).

Leading indicator: An indicator which, when it changes, is likely to cause other changes in the system it is part of: for example, an increase in housing construction often brings an upturn in the economy.

Milestones: A series of events that mark significant stages in achieving a particular plan or longer-term goal.

Outcomes: The results of the outputs, programs or activities aimed to achieve particularobjectives. For example: an increase in literacy levels among specific age groups; supplying electricity to all homes in the state at a reasonable rate; clean rivers; an increase in the proportion of university graduates from low income backgrounds.

Outputs: A particular or identifiable service or good that has been produced as a result of government activity. For example: teaching programs in schools; the supply of electricity to homes; state programs to clean up rivers; scholarships or state support for low income students; home advisory services; criminal investigations.

Performance indicators: Measures used to determine whether an organization has met its planned goal. These can relate to the financial aspects of its activities, how well it has executed its plans, or the effectiveness of a particular program. They are distinct from other indicators which measure the wellbeing of the community for which these goals were developed. A key performance indicator is normally one of a small number of indicators that measure the achievement of those goals agreed beforehand as the most important for the organization.

Plan: A detailed and documented method for the achievement of specified goals. Planning involves deciding on goals, objectives, benchmarks and indicators and selecting the best strategy or programs to achieve the goals, determining and allocating the resources required and ensuring that the plan is communicated to all concerned. Plans may relate to specific entities, such as corporate plans, or a particular subject, such as financial plans.

Policies: A principle or course of action adopted by an organization, the means adopted to achieve an overall strategy.

Progress: Can be defined as either a forward or onward movement towards an objective or goal or, more broadly, as a gradual improvement in the wellbeing of people or communities.

Quality of life: The overall level of wellbeing and fulfillment that people enjoy from a combination of their social, economic and community environment and their physical andmaterial conditions.

Social indicators: Statistical measures that represent an element of some significant social phenomenon. Indicators can either be measures of broad issues (such as the percentage of the population in poverty) or narrow issues (such as the participation rate in voluntary organizations in small communities).

Standard of living: The level of physical and material conditions attained by specific people, including such factors as health, income, education and housing.

Strategy: A plan of action or policy aimed to achieve predetermined goals and objectives, and usually formulated within the bounds prescribed by resource availability, capabilities, risks and opportunities.

Sustainable development: 'Development which meets the needs of the present without endangering the ability of future generations to meet their own needs' (UN, Our Common Future, 1987).

Tactics: The specific or short-term process or scheme pursued to achieve a particular goal, strategy or longer-term plan.

Targets: Targets define the specific objectives or results necessary to reach a particular goal or benchmark within a specified time frame. Just as benchmarks operationalize goals, targets operationalize benchmarks. For example: a targeted 10% increase in literacy levels among workers from non-English speaking backgrounds (NESB) during a twelve month period, as part of a five year benchmark of 30%; the elimination of brown-outs in electricity supply over a twelve month period; the elimination of a particular algae or pollutant in the state's rivers within five years; increasing the proportion of people with low income backgrounds who go to tertiary education in a particular time frame.

Vision: A vision is a desirable or ideal end state, an ambitious aspiration, that may or may not be attainable but is worth striving for and directing energy and strategic planning towards. At the broadest level, a vision might be 'A fair, sustainable and prosperous state'.

Wellbeing: The condition of being well, healthy or contented. Wellbeing can be assessed through a combination of objective and subjective measurements (i.e. in a person, both physical and mental health, and the development of skills and relationships).

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21. Chambers, 40.

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resources for social change

As SPARC BC's ongoing knowledge transfer initiative, Sprout resources are designed to facilitate learning about and the practice of community-based research methods and community development strategies.

Sprout is a symbol of growth and innovation and can be found on all SPARC BC resource guides and workbooks that have been developed for you to use with groups of committed people who care about community well being. By nature, Sprout resources are fusions of theory and practice — mixtures of big ideas and small steps for cultivating positive change in your community. Each year, we will add new publications to Sprout based on your input. Let us know what you would like to see in Sprout!

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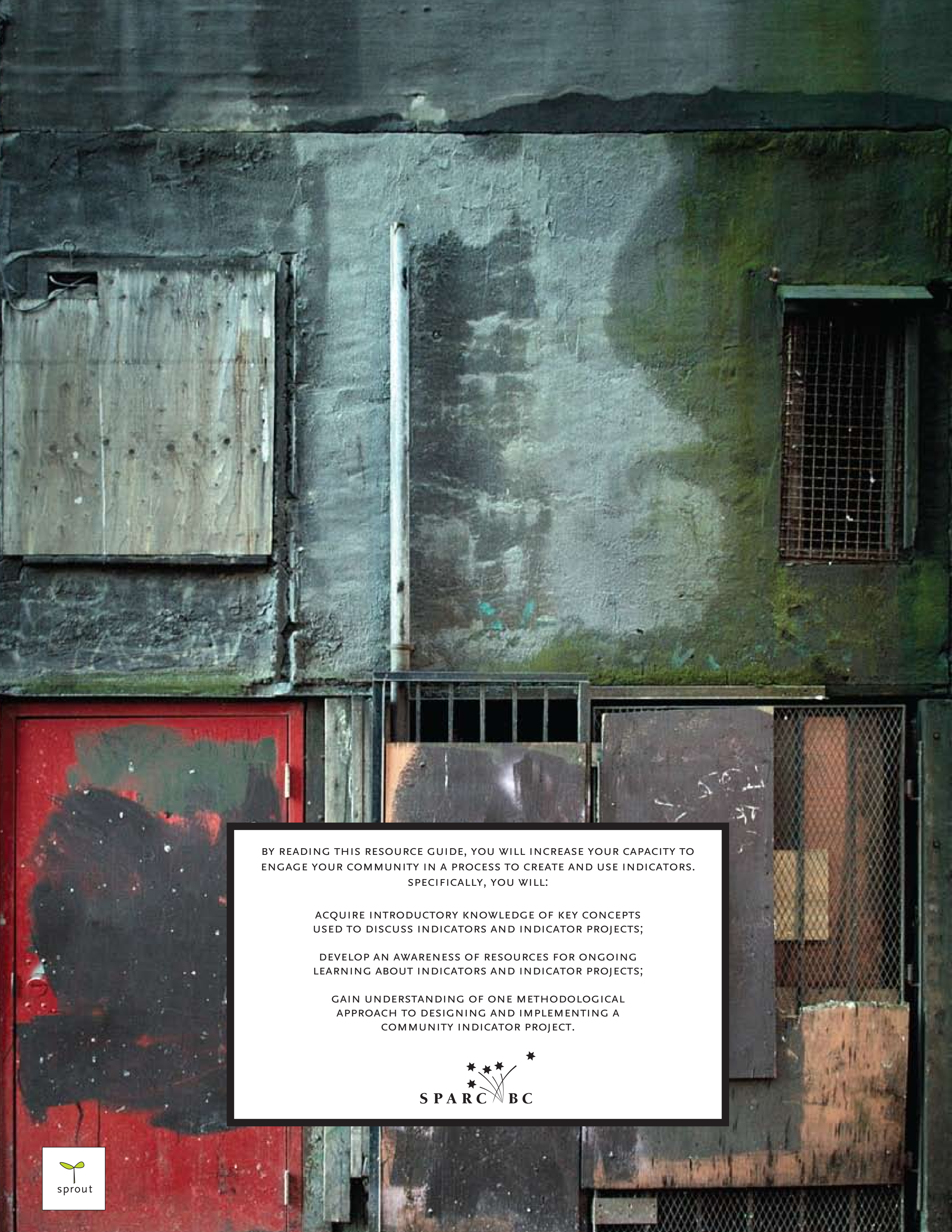

BY READING THIS RESOURCE GUIDE, YOU WILL INCREASE YOUR CAPACITY TO ENGAGE YOUR COMMUNITY IN A PROCESS TO CREATE AND USE INDICATORS. SPECIFICALLY, YOU WILL:

ACQUIRE INTRODUCTORY KNOWLEDGE OF KEY CONCEPTS USED TO DISCUSS INDICATORS AND INDICATOR PROJECTS;

DEVELOP AN AWARENESS OF RESOURCES FOR ONGOING LEARNING ABOUT INDICATORS AND INDICATOR PROJECTS;

GAIN UNDERSTANDING OF ONE METHODOLOGICAL APPROACH TO DESIGNING AND IMPLEMENTING A COMMUNITY INDICATOR PROJECT.

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