CPRN RCRPP

A Sampling of Community- and Citizen-driven
Quality of Life/Societal Indicator Projects

Background Paper prepared for
Canadian Policy Research Networks

by

Barbara Legowski
Ottawa

March 7, 2000

Table of Contents

Foreword

While there is much activity on quality of life indicators in Canada, there is no initiative underway of a national scope that seeks input from citizens.

CPRN is seeking to fill that void. It is leading and working with a Steering Committee representing a broad cross-section of organizations interested in developing a set of national indicators to track Canada's progress in quality of life, through a citizen engagement process. Our goal is to create a prototype set of national indicators, which reflects the range of issues that truly matter to citizens. The indicators will also help to create a common language for dialogue across the public, private and voluntary sectors, and thus lead to a more balanced debate on public priorities across social, economic, environmental, and other dimensions.

The inspiration for the project came from a Leaders' Forum convened by the Public Policy Forum in June 1999. This was the third in a series of meetings dedicated to building greater collaboration between the voluntary sector and business and the voluntary sector and governments. The leaders concluded in June that they needed a "common language" to gauge the progress of society; CPRN undertook to launch this project.

This paper, one of two background papers commissioned to launch the project and shape the design of the research, reports on 21 citizen-and community-driven quality of life indicator initiatives which have taken place in the past 10 years in cities like Calgary, Edmonton, Winnipeg, Toronto, and Hamilton-Wentworth, and in other cities. The author has profiled their purpose and outcomes and identified lessons learned about constructing indicators, design and project concepts. For those projects that actively involved citizens, she also describes the role of citizens and experts, the mechanisms used to gather citizen input and the lessons learned about the process of citizen engagement. The result is an informative portrait of the experiences of others that have asked citizens what matters for quality of life and a solid foundation for the work we hope to do in the months ahead.

I want to thank Barbara Legowski for her careful and comprehensive report, as well as members of the Steering Committee who are making an invaluable contribution in shaping this project.

Judith Maxwell

Executive Summary

The Canadian Policy Research Networks (CPRN) is considering a project titled *Quality of Life (QOL)/Societal Indicators Project (SIP): Designing a Report Card for Canadians to Measure Quality of Life in Canada, Its Cities, Provinces and Territories.* Its objective would be to identify, through a citizen engagement process of national scope, a prototype set of indicators to track Canada's progress on the elements of quality of life most relevant to citizens. "Citizens" in this case are individuals who represent only themselves, as distinguished from official community leaders, organizational representatives, government officials and "experts" in any field relevant to a QOL project.

This report presents the results of a survey of 21 quality of life/societal indicators projects. The projects are for the most part well known examples of quality of life and societal indicator initiatives. Fourteen of the projects involved citizens. This past work on QOL initiatives will inform the CPRN process of developing a prototype set of indicators.

The survey questions applicable to all the projects were:

- purpose/context/funding of the initiative
- project outputs – visions, values and indicators
- outcomes – how the indicators are being used
- and lessons learned about:

  - ➢ constructing indicators
  - ➢ project design, and
  - ➢ project concepts

For projects that involved citizens, additional questions were:

- the roles of experts and citizens
- mechanisms through which citizen input was gathered and the number of participants
- how citizens continue to be involved
- lessons learned about the process of citizen engagement

Because of the wide variety of findings, we developed categories and classifications to facilitate the review and analysis, and to stimulate discussion. We organized the sample projects from a functional and contextual perspective into four categories:

- six are self-identified quality of life/societal indicator projects
- four apply a sustainable development approach
- nine broaden the conventional accountability framework that emphasizes economic performance, and
- two ascribe to a determinants of health paradigm.

The vision and values articulated in the projects are similar despite the variety of their purposes and contexts.

For projects that involved citizens, the emphasis is on balancing and linking activities across three key sectors: economy, environment and society. In contrast, projects in our sample that did not involve citizens are dominated by economic issues and indicators.

Another interesting difference between the project frameworks that involved citizens and those that did not is found in language. Economic indicators are more technical in the projects that did not involve citizens compared to those that did. In addition, projects that involved citizens included subjective indicators based on surveys – for example, public satisfaction ratings for availability of a college education, or perception of personal financial situation.

Most projects surveyed were funded either through public (government) institutions or by non-profit non-governmental organizations, although some funding also came from the private sector. Volunteer time was a significant resource for all the projects that involved citizens.

Citizens and experts

In projects that involved citizens, experts play active roles. They may first draft values, preferences or visions to which citizens are asked to respond; they also translate "wish lists" of indicators into technically sound elements that can be measured, all the while respecting the intent of the citizens who developed the original list.

Citizens are typically involved in responding to proposed values, preferences and visions and can proceed to selection and priorization of indicators. In strongly volunteer-based initiatives, once indicator frameworks are developed, citizen involvement can range from data research, gathering and analysis, enhancement of indicator frameworks, report writing, to indicator stewardship. A clear ongoing role for citizens is in the updating of the values, visions and indicators as the projects mature.

All citizen-involved projects in our sample share several similar mechanisms for collecting citizen input. They typically began by disseminating printed information to the formal media and to networks of locally-based community organizations and venues – for example, health centres, community centres, schools, seniors' residences and places of worship. Subsequently, common mechanisms for collecting citizen input were town hall meetings, focus groups, public hearings, and individual feedback opportunities such as response booklets, calls for submission of written responses and interactive web sites.

Achievements noted by the projects that involved citizens include:

- citizen and community animation

- awareness raising of personal, neighbourhood and community values, issues and concerns

- individual and community empowerment to monitor progress, voice opinions and engage in debate, and

- improvement in community choices and responses to issues

Virtually all projects resulted in consideration of data availability, identification of data gaps, examination of data sources and data collection methods, the development of new routines for data collection and harmonization of data sets.

Impacts on policy

Projects launched and maintained outside formal institutions where policies are made and resources assigned tend to serve as monitoring, information and advocacy tools. Depending on the credibility of the processes of development and the values framework underpinning the initiative, the project outputs may gain the recognition of institutions that control policy and resources. In contrast, projects undertaken within institutions that control policy and resources, as well as being information tools, can actively direct policies and programs and monitor results for feedback purposes.

A key theme to arise from our sample is *balance* throughout the process, from vision through to indicators. This includes: balancing citizen input with that of experts, seeking participation from a diverse cross-section of a population to balance the viewpoints of the so-called "connected" with those of the "unconnected"; balancing the concerns and intentions of project funders, citizen participants and experts in indicator selection; balancing positive with negative measures and presenting both subjective and objective findings; and balancing the security of institutionalizing a project for the longer term with the integrity of the processes and results of citizen input. All these forms of balances add to a project's credibility and hence its potential influence on decision makers and public debate.

Key success factors

Key success factors are first, effective communication with the public, using the media to sponsor outreach programs and giving high profile to strong leaders and champions; and second, a secure infrastructure and non-partisan governance. These issues need to be resolved early in a project's course of development.

Finally, in collecting the sample of projects for our review, it became clear that there are numerous quality of life or similar projects underway or being planned in Canada and abroad, many of which are relying on citizen input. People involved in our sampled projects and in these other projects are potential resources to CPRN. As well, a formal literature search would likely produce more lessons or "how to" information regarding how best to involve citizens in quality of life projects.

Acknowledgments

1. Introduction

While the 1990s witnessed a revival of interest in social indicators in Canada and abroad, and particularly at the community level, there is no existing or contemplated project in Canada, national in scope, that seeks to balance input from citizens with that of experts and leaders from public, private and the not-for-profit/voluntary sectors. As Redefining Progress (1997: 8) notes, "[i]n community indicator work, 'doing it right' means striking a balance between the participatory and the technical."

The Canadian Policy Research Networks (CPRN) is responding to this gap, and to the call for such a project from the voluntary and private sectors and the federal government. It wants to launch the *Quality of Life (QOL)/Societal Indicators Project (SIP): Designing a report card for Canadians to measure quality of life in Canada, its cities, provinces and territories.* The project's objective would be to identify, through a citizen engagement process, a prototype set of indicators to track Canada's progress on the elements of quality of life most relevant to citizens.

This report presents the results of a survey of 21 quality of life/societal indicators projects that will inform the QOL/SIP of CPRN. The projects selected are for the most part well known examples of quality of life and societal indicator initiatives.

The survey questions applicable to all the projects were:

- purpose/context/funding of the initiative
- project outputs – visions, values and indicators
- outcomes – how the indicators are being used
- and lessons learned about:
    - ➢ constructing indicators
    - ➢ project design, and
    - ➢ project concepts

For projects that involved citizens, additional questions were:

- the role of experts and citizens
- mechanisms through which citizen input was gathered and the number of participants
- how citizens continue to be involved
- lessons learned about the process of citizen engagement

2. Results of the CPRN sampling

The responses to the survey questions fall into two main bodies: in narrative format, the consolidated findings for each question; and tables of outputs (project visions, values and indicators). To facilitate review and analysis of the large volume of outputs, they are disassociated from their respective projects, categorized and summarized in the tables in the main

body of the report. Project-specific indicator frameworks are set out in Appendix A; and Appendix B contains project-specific answers to each question.

Because CPRN is considering the feasibility of a national citizen-based QOL initiative, the report emphasizes the lessons learned and issues raised in the sampled projects that directly involved citizens. "Citizens" in this case are individuals who represent only themselves, as distinguished from official community leaders, organizational representatives, government officials and "experts" in any field relevant to a QOL project.

3. Methodology

The Internet, key informant interviews and previously collected literature were the main information sources for the survey. Even though no formal literature review is included in the sampling, some key documents are referenced throughout this report to enrich the findings.

The sampling's objective was to collect information about citizen-based QOL initiatives. However, a number of initiatives that did not directly involve citizens (as defined in section 2 above) but gathered input from a number of external sources are also included. These are relatively high profile and, in this case, warrant review more to gain an understanding of and to contrast their results with the citizen-based projects than to study the processes they employed.

There are also two so-called hybrid projects, both categorized as involving citizens: the Newfoundland Strategic Social Plan, which itself did not seek citizen input but whose indicator framework was strongly influenced by one developed beforehand as a result of extensive community consultations undertaken by a Social Policy Advisory Committee; and the Federation of Canadian Municipalities QOL project where not all of the 16 participating municipalities sought citizen input.

The projects varied in the level or perspective that the QOL indicators represented, that is, they ranged from the community level to the municipality or region, to the province or the state, and to the nation. Of the 21 initiatives surveyed, 15 involved citizens, including the 2 hybrid projects. All projects in the sample are listed below.

	Citizens involved	**Citizens not involved**
Community level	Two Community of Life Projects: South Riverdale and Lawrence Heights of Toronto	
Municipal level	Hamilton-Wentworth Vision	
	Plan Winnipeg 2020 Vision	
	Sustainable Calgary	

Edmonton 2005

Taking Toronto's Vital Signs

Quality of Life in Jacksonville (Florida)

Sustainable Seattle

Provincial or state level	Florida Commission on Government Accountability to the People	Genuine Progress Index (GPI) Atlantic (Nova Scotia)
	Minnesota Milestones	Quality of Life in Ontario
	Oregon Shines and Oregon Benchmarks	BC Regional Socio-economic Statistical Profiles
	Newfoundland and Labrador Strategic Social Plan and the Community Accounts Project	Alberta's Measuring Up
National level	Canadian Institute for Health Information National Population Health Indicators	Canadian Council on Social Development Personal Security Index
	A Strategy for Sustainable Development for the United Kingdom	Conference Board of Canada: Performance and Potential
	Federation of Canadian Municipalities QOL Reporting System	

4. Findings

Findings are presented in three blocks:

➢ Except for project outputs and lessons learned, findings are summarized in narrative format in sections 4.1 to 4.3, 4.5 and 4.6. References to specific projects are made as required.

➢ Section 4.4 contains the project outputs. They are summarized into categories or themes in table format to allow review of the prevalence of certain values, visions and indicators at a glance. The relationship between individual project visions, values, goals and indicators is presented in Appendix A.

➢ Because the survey emphasizes lessons learned, these are presented in detail, by sub-topic, in section 4.7 and references are made to specific projects as needed.

Because some of the projects in our sample did not involve citizens, not all seven points of analysis could be applied to each project; for example, the citizens' role and their continued involvement are irrelevant to these initiatives. As well, not all projects were at the same stage of development. Some have been in existence for a number of years and are in a relatively mature or steady state, with many experiences and lessons to relate. There is more than one version of their indicators and reports. Other projects have completed only one cycle with the release of one set of indicators and measures. Still others have only completed a first phase of consultations and have not yet developed or confirmed their indicators. Bearing in mind these differences, we drew what findings we could from each project. Where relevant, in order to increase the comparative value of our findings, we segregated them into projects that involved citizens and those that did not.

4.1   Purpose/context/funding of initiatives

Sharpe (1999) names three purposes for social indicators: 1) monitoring change over time in a broad range of social phenomena; 2) social reporting for public enlightenment; and 3) forecasting trends in social conditions and turning points. Redefining Progress (1997) suggests three different primary types of community indicator efforts, even though these may overlap: public education, policy background, and performance evaluation.

McCracken and Scott (1998) adopt a point of view that combines purpose and context and identify three reasons for the resurgence of interest in social indicators in the 1990s: 1) decision makers embracing evidence-based decision making, or outcome measures, to understand how well existing policies and programs are meeting objectives, and determining what should be pursued in the future; 2) the public becoming increasingly skeptical of government, demanding greater accountability; and 3) the voluntary sector and various advocacy movements in Canada embracing social indicators as a means of monitoring social progress while governments restructure welfare state programs.

In examining the stated purposes of our sample projects, virtually all of them could have either Sharpe's or the Redefining Progress purposes attributed to them. Most have similar indicators. However, those involved in some of the initiatives would not necessarily self-identify with the quality of life/social indicators label. To acknowledge the differences in our sample, we turned more to McCracken and Scott's descriptions of purpose combined with context and developed four categories to organize the purposes/contexts of our sampled projects, as follows:

- self-identified quality of life/societal indicator projects
- those applying a sustainable development approach
- those broadening the conventional accountability framework, and
- those ascribing to a determinants of health paradigm.

There is clearly an overlap across our categories. As stated in Shookner (1999: 7), "[q]uality of life provides a conceptual framework for the interdependence of social, health, economic and environmental conditions in communities that is consistent with concepts of sustainable human

development and determinants of health." While acknowledging the overlap, the following rationales were used to justify our four categories. For one, Redefining Progress (1997) makes a notable distinction between "sustainability" and "quality of life" indicators, which we have taken to apply at a higher level, that is, to project purposes and contexts – sustainability is generally focused on the long-term causal linkages between systems, emphasizing environmental issues, whereas quality of life tends to focus on factors affecting current living standards and has a more personal perspective. For example, one QOL project in our sample simply asked participants "How good is your life for you?"

Our third category captures initiatives with accountability frameworks that go beyond the conventional emphasis on economic performance. Some are specifically designed as alternatives to calling for more work in monitoring social progress by measuring the difference programs and services have made in people's lives, and by reporting the findings back to citizens.

Our final category includes the projects that were developed in the specific context of population health and its determinants (even though, as noted above, these may be considered a subset of sustainable development projects). Thus our categories attempt to respect the, albeit subtle, differences in the contexts and purposes of our sample of projects. Our intent is to organize the projects to assist in our analyses of findings.

In Table 1, each project is located into one of the four categories. In section 4.5, How the indicators are being used, we elaborate on the relationship between purpose and application of indicators.

Table 1: A categorization of purposes and contexts for the sampled projects

Surveyed projects	Purposes and contexts
Federation of Canadian Municipalities QOL Reporting System Quality of Life in Ontario Canadian Council on Social Development Personal Security Index Taking Toronto's Vital Signs Quality of Life in Jacksonville (Florida) Plan Winnipeg 2020 Vision	These are self-identified *quality of life/societal indicator* projects.
Hamilton-Wentworth Vision 2020 Sustainable Calgary Sustainable Seattle A Strategy for Sustainable Development for the United Kingdom	Adopting *a sustainable development approach* by addressing social, economic and environmental aspects, these are (community) indicator projects with indicators taken to represent quality of life.
Edmonton 2005 Alberta's Measuring Up Minnesota Milestones Oregon Shines and Oregon Benchmarks Florida Commission on Government Accountability to the People Genuine Progress Index (GPI) Atlantic (Nova Scotia) Conference Board of Canada: Performance and Potential Newfoundland and Labrador Strategic Social Plan and the Community Accounts Project BC Regional Socio-economic Statistical Profiles	The projects *broaden accountability and information frameworks* by including quality of life/social indicators. Some have been designed as alternatives to the conventional measures of progress dominated by economic performance information.
Two Community Quality of Life Projects South Riverdale and Lawrence Heights of Toronto Canadian Institute for Health Information National Population Health Indicators Project	The projects identified community and regional *determinants of health*.

A variety of funding sources supported the QOL projects surveyed (e.g., private sector businesses and organizations, local non-profit organizations, the local foundation community, municipal, regional, provincial/state and national governments). Most projects surveyed were funded through public institutions or by non-profit non-governmental organizations. Volunteer time was another significant resource for all the projects involving citizens.

4.2   Role of experts and citizens

4.2.1   Experts

In projects that involved citizens, the typical role for experts was within an iterative process, where they may have first drafted values, preferences or visions to which citizens were asked to respond. At citizen meetings, they were often leaders or facilitators. Based on citizens' responses to their proposals, experts would adjust their drafts and continue in a similar manner to deal with indicators. The experts may or may not have been volunteers. Depending on the quality and strength of citizen input, the influence of experts can be significant in that they may be able to set the agenda or the tone in determining what are community values, preferences and visions.

In the case of the two Toronto community projects, South Riverdale and Lawrence Heights, the research experts were committed to a collaborative or participatory research design by which control was shared with the communities in order to gain an understanding of the community through the eyes of its members. The experts worked closely with the communities, citizen engagement sessions were prolonged and in-depth, and all findings were triangulated with participants.

A key role of experts in the projects studied was as part of technical advisory panels or groups. Experts can translate a "wish list" of indicators into technically sound elements that can be measured, all the while respecting the intent of the citizens who developed the original list.

4.2.2   Citizens

Citizens are typically called upon to respond to material drafted by experts or by better informed citizens. Citizens begin by responding to proposed values, preferences and visions and proceed to selection and priorization of indicators. If a composite index of indicators is the desired project output, citizens can be asked to assign weights to the component indicators. Other roles are described in section 4.6, which deals with citizens' continued involvement.

In strongly volunteer-based initiatives, once indicator frameworks were developed, citizen involvement ranged from data research, gathering and analysis to enhancement of indicator frameworks; to report writing; and to indicator stewardship – in other words, being responsible for maintaining an indicator.

4.3 Mechanisms through which citizen input was gathered and the number of participants

4.3.1 Mechanisms

All citizen-involved projects shared several similar mechanisms for collecting citizen input. They typically began by disseminating printed information to the formal media and to networks of locally-based community organizations and venues (e.g., health centres, community centres, schools, seniors' residences and places of worship).

Subsequently, common mechanisms for collecting citizen input were town hall meetings, focus groups, public hearings, and individual feedback opportunities such as response booklets, calls for submission of written responses and interactive web sites. The City of Winnipeg held a large public forum where people used voting technology to assign priorities to areas of concern.

The more grass roots the perspective being sought in the project, the more intimate the citizen involvement. The South Riverdale and Lawrence Heights projects recruited citizens to undertake discussion groups with their peers using materials and direction provided by the research experts. These projects, along with the Hamilton-Wentworth and Sustainable Calgary initiatives, also sought input from citizens often excluded from community engagement processes – for example, single mothers, youth, disabled people, immigrants and non-English-speaking people. Project leaders approached local community groups involved with these people to solicit their input or, in the case of Sustainable Calgary, targeted workshops and public forums were and are being organized.

Emphasizing its commitment to involving citizens, the Hamilton-Wentworth project had community participation goals regarding education, citizen input and quality of the input. Sustainable Calgary has set a target for the numbers of citizens to be involved in the development of its second report.

4.3.2 Numbers of participants

Some longstanding projects (for example, in Minnesota and Oregon) have gone through more than one cycle of determining vision, values and indicators, with citizens involved in each round. Their participant numbers are relatively high as a result. Other projects (such as in the United Kingdom) that have high participation rates are the result of concerted widespread engagement processes. For these reasons, the numbers are not comparable from one initiative to the next, rather they are presented as one descriptor of an individual project.

The following numbers represent the total volunteer participation over the life of a project, including citizens, experts, and community and organization leaders. Written submissions are counted as well. Most figures are approximate.

Project	Numbers of participants
Two Community Quality of Life Projects: South Riverdale and Lawrence Heights of Toronto	284
Hamilton-Wentworth Vision 2020	1,000
Plan Winnipeg 2020 Vision	315
Sustainable Calgary	300
Edmonton 2005	1,354
Taking Toronto's Vital Signs	700
Quality of Life in Jacksonville (Florida)	250
Sustainable Seattle	n/a
Florida Commission on Government Accountability to the People	375
Minnesota Milestones	thousands
Oregon Shines and Oregon Benchmarks	5,000
The Social Policy Advisory Committee consultation informing the Newfoundland and Labrador Strategic Social Plan	2,185
A Strategy for Sustainable Development for the United Kingdom	over 6,000

4.4   Project results – visions, themes and indicators

Using conventional terminology and speaking very generally, project results or outputs were the visions, values, goals, objectives and indicators developed with or without citizen input. Understandably, projects did not use the same degrees of results breakdown nor the same terminology for each level of breakdown. For example, some projects applied the usual number of tiers (visions, values, goals, objectives and indicators) while others had fewer, for example, only goals, objectives and indicators. Still others used unconventional terminology. For example, instead of using vision or values, they refer to "hopes for the future." To assist our presentation and analysis of outputs, we created categories to segregate findings and grouped a number of different terms.

Section 4.4.1 contains the summary of project visions and values. In sections 4.4.2 and 4.4.3, summaries of goals and issues, and indicators, respectively, are divided into tables that separate the findings by projects that involved citizens and those that did not. The benefit derived from

collapsing and consolidating the project outputs was that it provided a means of organizing a relatively large number of sometimes diverse findings. To trace the guiding influence of specific domains of interest identified by citizens to the visions, values, goals and indicators they selected, the reader is referred to the project-specific frameworks in Appendix A.

The summaries presented below are not intended as definitive classifications of findings but as an attempt to organize the wide variety of project outputs found. Other interpretations can be made.

4.4.1   A summary of visions and values

For visions and values, we assumed as being equivalent terms such as principles, the basics of living, areas of concern, key questions and hopes for the future. With respect to the categorization of these outputs, we viewed the inherently close relationship between purposes and vision statements as an argument for grouping the visions and values according to the four categories for project purposes used in section 4.1 (self-identified QOL/SI projects; those applying a sustainable development approach; the broadened accountability frameworks; and those identifying determinants of health). Not all projects in our sample stated visions and values. Those that did are presented in Tables 2 and 3.

Table 2: A summary of visions and values for projects that involved citizens

Project purpose/ context	Visions and values
Self-identified quality of life/societal indicator projects.	**Taking Toronto's Vital Signs** The condition of the city depends on interdependent/interconnected social, economic, environmental and cultural elements. The general public, including institutional and corporate stakeholders, as well as community groups, have the ability, given the opportunity, to think through and express what it is that makes Toronto a good place to live, work and put down roots.
	Quality of Life in Jacksonville (Florida) To make the citizens of Jacksonville, Florida, more aware of important aspects of our quality of life, so that we can celebrate the positive as well as work on areas that need improvement.
	Plan Winnipeg 2020 Vision That Winnipeg be a healthy and vibrant city that places its highest priority on the quality of life for all its citizens.
	Federation of Canadian Municipalities QOL Reporting System The issues and concerns that affect the life of the community are becoming the basis of municipal planning and action. Although other governments are responsible for many of the policies that influence the quality of life, municipal government is in a unique position to assess the performance of those policies, to identify beneficial outcomes as well as problems, and to work with communities and other governments to develop solutions.
Sustainable development approaches	**Hamilton-Wentworth Vision 2020** Integrate the concept of sustainable development into the decision making of individuals, community groups and government agencies by building an ethic of sustainability in all of our citizens.
	Sustainable Calgary Generate long-term health and vitality for all.
	Sustainable Seattle To protect and improve our area's long-term health and vitality by applying sustainability to the links between economic prosperity, environmental vitality and social equity.
	A Strategy for Sustainable Development for the United Kingdom Ensuring a better quality of life for everyone, now and for generations to come. To do this we need ways to achieve economic, social and environmental objectives at the same time, and consider the longer term implications of decisions.
Broadening accountability frameworks	**Minnesota Milestones** Minnesota will be a community of people who respect and care for one another. Our economic activity will create wealth and provide a good standard of living for all our people. Our citizens will be good thinkers, creative, always learning, with the skills to compete internationally. We will protect and enjoy the natural world. Our government will be responsive, effective and close to the people.

Table 2: A summary of visions and values for projects that involved citizens (cont'd)

Project purpose/ context	Visions and values
	Oregon Shines and Oregon Benchmarks Prosperous Oregon that excels in all spheres of life. Oregon will have a high-wage economy and a superior quality of life. It will be a place where all families and individuals can prosper. Oregon will balance the demands of a vital economy with demands inherent to healthy ecosystems.
	Newfoundland and Labrador Strategic Social Plan and the **Community Accounts Project** The vision of Newfoundland and Labrador is of a healthy, educated, distinctive, self-reliant and prosperous people living in vibrant, supportive communities within sustainable regions.

Table 3: A summary of visions and values for projects that did not involve citizens

Project purpose/ context	Visions and values
Self-identified quality of life/societal indicator projects.	**Canadian Council on Social Development Personal Security Index** The basics of living are whether Canadians have enough money to get by; whether their physical lives are threatened; and whether they have the means to cope with adversity.
Broadening accountability frameworks	**Genuine Progress Index (GPI) Atlantic (Nova Scotia)** To switch the emphasis from quantitative growth to a notion of qualitative development or progress to get a truer picture of Nova Scotia's social well-being and prosperity and to determine whether progress is sustainable.
	Alberta's Measuring Up Promoting prosperity, preserving Albertan traditions, and helping people be self reliant, capable and caring.
	Conference Board of Canada: Performance and Potential A high and sustainable quality of life.

4.4.2   A summary of goals and issues

In summarizing the goals and issues in our project sample (Tables 4 and 5), we took as equivalent terms such as components, areas of concern, objectives and focus areas. We then disassociated these from their respective projects and grouped them into a set of domains (shown below) to which the projects' goals and issues appeared to be referring. Again, we developed them as a means of organizing our findings and they are not intended to direct the domains of interest for the CPRN QOL framework prototype being planned.

- people, the individual, families
- the community including diversity
- the natural environment
- the urban environment
- health
- physical security
- education
- economic security including employment, skills, livelihood and time use
- culture and leisure
- social services
- government

Table 4: A summary of goals and issues for projects involving citizens

Goals and issues	Domain
Meeting basic needs and achievement of self-reliance Families will provide a stable, supportive environment for their children Children will not live in poverty All children will be healthy and start school ready to learn Coping and managing	People, the individual, families
Community well-being and capacity building Healthy community Future of the community Community development Coordinated local action, expenditures and funding of community-based sector Mobility Effective partnerships Living A city with vitality Diversity Safe, friendly and caring communities Relating Helping Participating Civic engagement Concerns of residents Communities involved in planning and delivery Planning Social environment	Community
Preserving natural areas and corridors Wildlife Restoration and maintenance of ecosystems supporting a diversity of plants and wildlife Conservation of natural resources, bearing in mind future generations Climate change Environmental quality Improving water resource quality Water, air and earth quality improvement Improving air quality Reducing and managing waste Consuming less energy	Natural environment
Land use Orderly development Physical and housing environments Decent, safe, affordable housing Convenient access and mobility Transport Changing our mode of transportation Getting around	Urban environment

Table 4: A summary of goals and issues for projects involving citizens (cont'd)

Goals and issues	Domain
Personal health and well-being Knowledge and good health Reduced social and health problems	Health
Learning Excellence in basic and challenging academic skills and knowledge	Education
Safety and security Crime Public safety	Physical security
Employment Working Employment and income A reasonable standard of living Earning Economic prosperity Sustainable, strong economic growth Economic growth Qualified labour force Asset investment Labour market supportive of social and economic development Educated and trained workforce permitting state-based economic leadership Rural and urban areas, and small cities as economically viable places to live and work Local economy Agriculture and the rural economy Employment generation in private and community-based sectors	Economic security
Arts and heritage Culture/recreation Enjoyment of natural resources Playing	Culture and leisure
Social support Support for people in need towards independent living Improved quality and access of services Accessing amenities The future of services Communities involved in planning and delivery Coordinated local action, expenditures and funding of community-based sector	Social services
Government and politics Elected representation Good municipal government Participation in government and politics Cost efficient government with services designed to meet needs Supportive urban infrastructure Integrated, evidence-based policy development Consistency between policy and delivery Effective policy monitoring and evaluation	Government

Table 5: A summary of goals and issues for projects that did not involve citizens

Goals and issues	Domain
Independence Supportive families Safe and well cared for children	People, the individual, families
Health of community Positive living conditions Community stress Compassionate communities Community participation	Community
Quality of the environment Safe, high quality physical environment Investing in natural capital Investing in environmental conservation and degradation Intergenerational equity Intragenerational equity Applying ecological footprint analysis	Natural environment
Quality of housing	Urban environment
Health security Health status Healthy and educated people Access to health services Level of health choices Health conditions/opportunities for healthy development Appropriate, affordable and accessible health services	Health
Physical safety Personal safety Community safety Safe for living and raising families Safe places to live	Physical security
Excellent schools, colleges, universities, training institutions Students will excel Lifelong learning	Education
Capitalization on research by businesses Increased exports Skilled and productive workforce Employment opportunities Prosperity High income per capita Livelihood security Economic security for all citizens Financial vulnerability Community affordability Personal resources Adequacy of income Quality of employment Positive working conditions Fair and safe work environment Safe places to work	Economic security
Opportunity for the enjoyment of natural, historical and cultural resources	Culture and leisure

Goals and issues	Domain
Population resources Safety net Basic support and protection for those in need Level of supports fostering independence	Social services
Financially stable, open and accountable government Provincial strength and interprovincial cooperation	Government

4.4.3 A summary of indicators

While Tables 6 to 27 contain over 300 indicators, the sampled projects contained a greater number of indicators in total. Duplicates or near duplicates were excluded and no attempt was made to determine the prevalence of certain common indicators. To this extent, the tables should be viewed as containing a good representative sample of the indicators found.

The indicators are categorized in some of the tables whereas other tables simply represent a list of findings.

Table 6: People, the individual and family indicators in projects involving citizens

	Indicators
Families	Percentage of parents satisfied with the quality of child care their children receive Abused or neglected children per 1,000 children Teen pregnancy rate Runaways reported by the police Elders in poverty
Children	Percentage of children living in households below the national poverty line Percentage of school children approved for free or reduced price school meals

Table 7: Community indicators in projects involving citizens

	Indicators
Demographics	Migration rate Change in population
Inclusiveness	Visible minorities employed by the city Percentage of people surveyed who report racism to be a local problem Annual number of reported bias crimes Percentage of teachers who are African American, American Indian, Asian or Pacific Islander or Hispanic Employment rate of people who have work disabilities Number of counties with public transit serving people with disabilities Racial harmony
Community wellness	Annual circulation and community center visits per capita Annual shelter occupancy rate
Volunteerism	Annual number of applicants referred by the volunteer center Percentage of people who volunteer at least 50 hours of time per year Percentage of adults who volunteer for community activities
Sense of belonging	Percentage of population participating in saying hello, visiting and socializing, in Neighbourhood Watch, helping neighbours Percentage of people who say they feel part of the community Percentage of people who do not have two or more people to call upon in the event of a crisis Percentage of people who feel they can rely on another person in their community for help

Table 8: Natural environment indicators in projects involving citizens

	Indicators
Natural areas and corridors	Amount of significant natural areas protected Stream health measured by B-IB Index Percentage of native plant species that are healthy Percentage of wild salmon and steelhead population in key sub-basins that are at target levels Percentage of lakes that have adult loons Christmas bird species count Measure of wild bird populations Rare and imperiled species
Improving land quality	Percentage of cropland eroding above tolerance levels
Improving water quality	Total loading of nitrogen and phosphorous into the harbour Number of "All beaches open for swimming days" Stream water quality index Percentage of ground water meeting drinking water quality Percentage of monitored lakes and rivers fit for swimming and aquatic life Percentage of ground water supply affected by nitrate Fecal coliform count
Improving air quality	Carbon monoxide and coarse particle matter measurement Sulfur dioxide concentration in the air Annual number of respiratory illness hospital visits per year Carbon dioxide emissions as percentage of 1990 emissions Vehicle miles traveled per person Emission measurements of sulfur dioxide, nitrogen oxides and carbon monoxide Emission measurement of greenhouse gases Number of days that air pollution exceeds moderate levels Percentage of days with air quality rated as good
Reducing and managing waste	Pounds of solid waste per capita generated, recycled, disposed Total residential waste generated annually Percentage of municipal solid waste land filled or incinerated per capita Tons of solid waste per person Kilos of domestic waste per person
Conservation	Percentage of energy supplied from renewable sources Gallons of water used per person each day Average litres of water consumed per capita per day Annual consumption of gasoline, electricity and natural gas Vehicle miles traveled and fuel consumption Per capita residential electricity consumption Average annual energy use per person Barrels of oil per capita per year Waste water reuse
Local food production	Acres with agricultural zoning Change in number of certified organic farms

Table 9: Urban environment indicators in projects involving citizens

	Indicators
Land use	Number of new housing starts in the downtown core New homes built on previously developed land
Housing	Percentage of households paying more than 35 percent of their income for housing Home ownership as a percentage of housing units Percent market price is above affordable housing cost Percentage of renters who can afford a typical starter home Homes judged unfit to live in Percentage of people with sewage disposal that does not meet government standards Affordable housing
Traffic and mobility	Percentage of people who commute to and from work during peak hours by means other than a single occupancy vehicle Percentage of workers who report commuting time of 25 minutes or less Public satisfaction with roads and highways
Public transportation	Percentage of trips taken to work using public transit Annual transit ridership per capita

Table 10: Health indicators in projects involving citizens

Infant mortality rate
Low birth weight babies as a percentage
Percentage of 2-year-olds adequately immunized
Childhood asthma hospitalization rates
Annual percentage of new HIV cases with an early diagnosis
Hospitalization rates for falls by persons 65+
Mortality due to heart disease
Suicide rate
Life expectancy
Years of potential life lost before age 65
Expected years of healthy life
Percentage of people with health insurance
Percentage of adults who smoke
Pregnancy rate among 10-17-year-olds
Percentage of babies whose mothers received early prenatal care
Percentage of adults whose self-perceived health status is very good or excellent
Immunizations
STDs
AIDS
Deaths from heart disease
Deaths from cancer
Deaths from preventable cancer
Health insurance
Personal health expenditures relative to economic productivity

Table 11: Physical security indicators in projects involving citizens

Percentage of students who carry weapons
Annual number of juvenile arrests
Annual number of reported crimes
Number of violent crimes reported annually
Number of serious property crimes reported annually
Level of crime
Robbery rate
Rate of (self-defined) criminal victimization – personal and property
Percentage of people who report feeling safe walking alone at night in their neighbourhood
Percentage of people who feel safe in their communities
Percentage of paroled offenders convicted of a new felony within three years of initial release
Percentage of counties that have completed a strategic cooperative policing arrangement
Percentage of counties with the capability to respond to an emergency, and to assist communities to recover fully from the effects
Cyclists injured by motor vehicles
Violent crime
Non-violent crime
Juvenile arrests
Juvenile delinquency
Fear for safety
Domestic violence
Driving under the influence
Public satisfaction with law enforcement

Table 12: Education indicators in projects involving citizens

Elementary school skills
Eighth grade basic skills
Percentages of high school students who graduate on time
College entrance scores
Teaching staff diversity compared to student diversity
Number of students per art teachers in public schools
Percentage of adults with intermediate literacy skills
Percentage of adults with a baccalaureate degree
Percentage of adults who have completed high school or equivalent
Annual high school completion rates by ethnicity
Qualifications at age 19
Percentage of people who use computers
Need for remediation
Satisfaction with public schools
Satisfaction with availability of a college education

Table 13: Economic security indicators in projects involving citizens

	Indicators
Employment	Proportion of people of working age who work
	Unemployment rate
	Percentage of adults who want to work full time who actually work full time
	Change in labour force activity
	Employment insurance incidence
	Participation in the labour force
	Employment rate of working age population
	Net job growth
	Rate of post high school education and training
	Rate of job placement after two year college graduation
	Percentage of people with some college education
	(State) jobs per capita relative to (country)
Income	Percentage of people in the middle income range
	Percentage of workers at a job paying wages of 150 percent or more of the poverty level – for a family of four
	Hours required to meet basic needs at minimum wage
	Family income compared to national median
	Percentage of people with income below the national poverty level
	Personal income per capita
	Average husband/wife family income
	Percentage of people with incomes 100 percent below the national poverty level
	Perception of financial situation
Economic viability and capacity	Number of counties in the region with net population loss
	Number of counties where business start-ups exceed business closures
	Annual change in assessors' average market value of homesteads in the area
	Annual real growth in gross state product
	National rank in new companies
	National rank in traded sector strength
	GDP
	Industry research and development expenditures as a percent of gross state product
	National rank in venture capital investments
	Investment in public, business and private assets
	Energy efficiency of the economy: ratio of gross state product to energy consumed
Agriculture and the rural economy	Loss of agricultural area due to official plan amendments
	Percentage of agricultural land in 1970 still preserved for agricultural use

Table 14: Culture and leisure indicators in projects involving citizens

Gardening: annual number of community garden plots made available by the city government
Acres of land in region's parks, forests and wildlife refuges
Miles of recreational trails
Acres of state owned parks per 1,000 people
Leisure time: percentage of workers putting in over 50 hours a week
Percentage of people using city parks at least twice a month
National rank in per capita state arts funding
Financial support of arts per capita
Number of visits annually to historic sites, arts venues and museums
Annual change in the number of arts organizations
Annual change in arts attendance

Table 15: Social services indicators in projects involving citizens

In-home help for older people
Percentage of welfare households with an adult working
Annual number of household visits to food shelters
Annual number of people per night using homeless shelters and the number turned away
Percentage of seniors living independently
Percentage of people with lasting disabilities who work
Percentage of people with lasting disabilities living in households with incomes below the national poverty level
Percentage of people without health insurance
Number of people who are homeless on any given night
Percentage of court-ordered child support paid to families
Public satisfaction with social services

Table 16: Government indicators in projects involving citizens

Percentage of adults registered to vote and percentage of adults voting
Percentage of people who rate the quality of local government leadership as "good" or "excellent"
Percentage of people satisfied with the amount and quality of state and local services
State and local government taxes and fees as a percentage of personal income
Public trust in state and federal government
Public rating of local government

Table 17: People, the individual and family indicators in projects NOT involving citizens

	Indicators
Families	Percentage of lone-parent families Percentage of families that are low income
Children	Children in crisis care School readiness
Individuals	Crisis calls Personal and business bankruptcies Homelessness

Table 18: Community indicators in projects NOT involving citizens

Age structure Population growth Net migration Ethnic identity Family structure Voter turnout Charitable donations United Way contributions Daily newspaper circulation

Table 19: Natural environment indicators in projects NOT involving citizens

Hours of moderate/poor air quality Tons diverted from landfill through blue box recycling Environmental spills Recycling: kg per resident per year

Table 20: Urban environment indicators in projects NOT involving citizens

Median income compared with median house cost Rental affordability: percent of renters paying 30 percent or more of income for rent Median rental as percent of median income Substandard dwellings: percent of houses needing major repair Residential property tax revenues per resident Real estate sales per resident

Table 21: Health indicators in projects NOT involving citizens

Low birth weight babies
Infant mortality rate
Perinatal deaths
Births to mothers under age 18
Teen births per 1,000 women
Health conditions: overweight; arthritis; diabetes; chronic pain; depression; food and waterborne diseases
Incidence of injuries
Injury hospitalizations
New cancer cases
Deaths: cancer deaths; respiratory deaths; suicide; unintentional injury deaths; pertussis deaths; AIDS deaths
Life expectancy at birth
Premature mortality
Potential years of life lost through natural causes or suicide/homicide or accidents
Inequalities in life expectancy
Annual number of hospital discharges
Work hours lost to illness or disability
Functional health
Activity limitation
Health status
Health level self-assessment
Stress level self-assessment
Self-esteem
Health behaviours: smoking rate; regular heavy drinking; physical activity; breastfeeding
Elderly waiting for placement in longer term care facilities
Annual rating of the health care system by Canadians
Accessibility: influenza immunization; mammography screening; PAP smears; childhood immunizations
Canadians' level of confidence in access to health services
Health system appropriateness: vaginal birth after caesarean; caesarean sections; breast conserving surgery
Health system effectiveness: quitting smoking; low birth weight; pertussis; measles; TB; HIV; chlamydia, etc.
Health system efficiency: surgical day cases rates; may not require hospitalization; percentage alternative level of care days; expected compared to actual stays
Private spending on health as a percent of disposable income

Table 22: Physical security indicators in projects NOT involving citizens

Crime rates
Annual property crime rates
Property crimes per 100,000 residents
Annual rate of aggravated assaults
Annual rate of attempted murders
Annual rate of homicide
Annual rate of sexual assault
Violent crimes per 100,000 residents
Injuries and poisonings per 100,000 residents
Young offender charges per 100,000 residents
Youth crime rate
Percentage of households feeling safe, moderately safe or not safe from violent crime in their neighbourhoods
Percentage of households feeling safe, moderately safe or not safe from property crime in their neighbourhood

Table 23: Education indicators in projects NOT involving citizens

School attendance for population aged 15-24 years
High school and postsecondary graduation
Educational attainment
Literacy and numeracy levels

Table 24: Economic security indicators in projects NOT involving citizens

	Indicators
Employment	Unemployment rate
	Long-term youth unemployment
	Long-term unemployment
	Number of people working
	Number of full-year, full-time jobs
	Fear of job loss
	Confidence in employability
	Youth unemployment rate
	Unemployment rate by literacy skill type and level
	Literacy skills: adequate, inadequate or good
	International comparison of companies investing sufficiently in in-company training
	Standardized unemployment rate
	Labour force replacement ratios
	Job growth
	Skill development
	Education levels

Table 24: Economic security indicators in projects NOT involving citizens (cont'd)

	Indicators
Income	Low-income rate Income inequality Median hourly wage by gender and age Average employment income Average family income per family type Family income distribution Employment as a percentage of all income Per capita government flows: income taxes, transfer payments Debt as a percent of disposable income Canadians' assessment of savings Disposable income Poverty: aggregate income deficiency Self-assessment of income adequacy Poverty rates after taxes and transfers
Community affordability	Community affordability measures 1 and 2 (undefined) Patterns of change in family incomes Public transportation: cost as percentage of minimum wage Government transfer income by source
Economic viability and capacity	GDP per capita Manufacturing labour productivity growth rate GDP Adoption of new technologies Infrastructure capacity Cost of government Taxation load Provincial credit rating Net debt Export trade Research and development intensity Higher education expenditure on research and development Number of researchers and university graduates involved in research and development External patent applications per 10,000 labour force Labour productivity growth rate Manufacturing labour cost and productivity growth rates Dollar value of labour productivity Machinery and equipment investment
Population resources	Population age groups Population growth Immigrants and visible minority populations Migration: internal and external
Workplace	Decision latitude at work Workplace climate

Table 25: Culture and leisure indicators in projects NOT involving citizens

Heritage appreciation

Table 26: Social services indicators in projects NOT involving citizens

Social assistance beneficiaries
Children in care
Social housing waiting lists
Federal and provincial government deficit
Federal and provincial government debt as a percent of GDP
Public spending on social policy programming by major program area in selected years
Total public spending on social policy programs as percent of GDP
Confidence in the safety net
Adequacy of the safety net: annual rates of unemployed covered by Employment Insurance (EI); EI benefits as percent of average weekly earnings

Table 27: Government indicators in projects NOT involving citizens

Intergovernmental relations

4.5   Outcomes

Outcomes are of two types. One set of outcomes we have called impacts, these being related to the processes of framework development. The other set refers to how the indicators are being used. The ideal outcome for the latter is that decision makers are informed and influenced by the indicator findings to the extent that they take action that will ultimately have a positive effect on a particular situation that is measurable by an indicator.

Section 4.5.1 contains a summary of project impacts. Some are limited to the projects that involved citizens while section 4.5.2 includes findings from both the projects that involved citizens and those that did not.

4.5.1   Impacts of indicator projects

For projects involving citizens, we have compiled the following list of impacts relating solely to citizen engagement processes:

- citizen and community animation

- raised awareness of personal, neighbourhood and community values, issues and concerns

- individual and community empowerment to monitor progress, voice opinions and engage in debate

- improvement in community choices and responses to issues

Not all of these projects would have consistently achieved the impacts or they may have had partial success.

Another key impact of indicator projects is the need for reliable and valid data. Projects have resulted in consideration of data availability, identification of data gaps, examination of data sources and data collection methods, the development of new routines for data collection and harmonization of data sets.

Another impact of community- and neighbourhood-level projects in particular is the identification of values or concerns with corresponding indicators, which may not surface at higher levels. For example, a city may focus on job growth, housing starts and road construction, whereas a neighbourhood may be concerned about sprawl, traffic congestion and a dying downtown.

Indicators developed at one level (for example, by a state) are being used by cities and counties as templates for their own indicator projects. In both Oregon and Minnesota, local governments are developing their own performance reporting systems, not only for their own purposes but also to allow comparisons to state level benchmarks and for reporting.

4.5.2   *How indicators are being used*

There is a relationship between the purpose and context of indicator development and how indicators are being used. Social indicator or QOL projects launched and maintained outside the locus of control where policies are made and resources assigned may be limited to being monitoring, information and advocacy tools. This is particularly true for community- and neighbourhood-level projects. Their recognition or uptake by institutions that control policy and resources is dependent on the credibility of the project and whether the values framework underpinning the project corresponds to that of the institution. As an example, Sustainable Calgary is a grass roots initiative, driven by volunteers wanting a framework for monitoring progress that respects sustainable development. The project processes leading to its first report were sufficiently credible and inclusive, and the report sufficiently insightful, that one of the City of Calgary standing policy committees recommended that Sustainable Calgary be invited to participate in the city's indicator initiatives. As well, the project's report is being used in the curriculum of several courses at the University of Calgary.

Projects undertaken within structures or institutions that control policy and resources, as well as being information tools, can actively direct policies and programs and monitor results for feedback purposes. For example, the indicator projects of Alberta, Oregon, Minnesota and

Florida State have produced tools used in the context of demonstrating accountability for public spending. On the other hand, the Florida State project on Government Accountability to the People (GAP) is a particularly interesting example of a state legislature's response to calls from the community and private sector for more evidence of accountability for its resource allocation. It funded GAP, but when the findings were not in its favour, it withdrew support.

Indicators are also being used to demonstrate how cross-sectoral linkages of policies and programs can influence indicator results. For example, certain Oregon Benchmarks motivated the state Department of Human Resources to launch a community partnership initiative coordinating welfare with public health and other state functions. In the reports of Sustainable Calgary and Sustainable Seattle (after which Calgary is modeled), key linkages are explained for each indicator. For example, the 1998 Sustainable Seattle report shows a slight upswing in employment concentration. The linkages section for that indicator warns that employment concentration increases the potential for economic shocks when industries slow down, with shocks leading to lay-offs and reduced consumer spending that can increase poverty, homelessness and crime rates.

4.6   How citizens continue to be involved

Once an indicator framework was confirmed in a project that involved citizens, in some cases they became ambassadors for their projects, reaching out to people and communities that were not involved in the original processes to gather input for the next edition of indicators. Citizens have also been called upon to take local action in support of implementing strategies that will have a positive influence on indicators over which a local community or neighbourhood has control. The Sustainable Calgary project, for one, calls upon citizens to support local initiatives felt to be important to them and to educate themselves about issues, linkages and trade-offs consistent with sustainable living.

Citizens have a clear, ongoing role in updating values, visions and indicators.

4.7   Issues raised and lessons learned

While the detailed findings are outlined below, a recurring overall challenge among the citizen-involved projects was maintaining a balance of input. Because individuals, groups and organizations have differing value sets and circumstances from which they judge what is good and not good in their lives, communities and countries, it is relatively easy for discussions of quality of life to become polarized, if not dominated, by special interests. Our sample of citizen-involved projects found that in the interval between the start of a project and the point where indicators are decided upon, balancing representation and differing viewpoints becomes imperative to ensure project inclusiveness and, hence, credibility. Truly citizen-involved projects either reflect community diversity or actually have representatives from a diverse set of interests.

Different techniques for striking balances were demonstrated across project structures and processes. Beginning with governance, since governing bodies potentially set the direction and

tone for an initiative and in themselves are an indicator of the inclusiveness of a project, setting and maintaining balanced representation between funders and citizens or organizations was an issue. As well, balanced representation was sought from among the variety of citizens or community organizations. In the case of Hamilton-Wentworth, the applicant screening process weighed in favour of selecting thoughtful and interested citizens to make up a task force over consideration of special interests. The task force then developed and was guided by a shared vision. On the other hand, the Taking Toronto's Vital Signs initiative struck and maintained a balance of representation on its task force by deliberately inviting diverse interest groups and initially not setting a vision statement in order to keep the groups at the table.

When selecting indicators, seeking a balance was often difficult as the views of funders, citizens and experts can differ significantly as to what the priorities are in any area of concern. Balance remains an issue when selecting both sectors and indicators. For example, a sustainable development project can emphasize the environment and its indicators whereas a more balanced approach would include more social and health indicators.

Below are the details of the issues raised and lessons learned and they are grouped around the process of engagement; constructing indicators; conceptual issues; and project design. By far most of the findings stem from the QOL initiatives sampled. However, general studies of societal indicator projects also provide valuable insights into issues and lessons. These are included in this section of the report to enrich the overall findings.

4.7.1   The process of engagement

1.   If a project is to emphasize citizen involvement, measurable goals can be set for the citizen engagement process itself. For example, Sustainable Calgary has set a target of 2,000 citizens to be involved in preparing its second community indicators report. Below are objectives set by Hamilton-Wentworth for its Vision 2020 project:

   ➢   education – inform the public of basic principles of the project; inform the public of the project processes and inputs; communicate information generated by citizen participants back to the public;

   ➢   citizen input – gather varying perceptions of quality of life to identify issues; gather a wide range of perspectives on basic values and goals ;

   ➢   quality of input – gather input from a diverse cross-section of people.

2.   Building community ownership and sustaining commitment can be time consuming and labor intensive. They can become particularly burdensome if dependent on volunteer leaders and organizations.

3.   Citizen participation rates can be disappointing. Resources need to be spent in promoting the project up front and in encouraging participation. Champions of the cause are

invaluable. The Plan Winnipeg 2020 Vision project blamed a lower than expected citizen turnout on a lack of visible political support during the critical citizen involvement phase.

4.   The diversity of participants or, in other words, the inclusiveness of the citizen engagement in a QOL project adds credibility to the initiative. However, establishing and maintaining diversity among participants requires extra energy and a proactive approach. Otherwise, the citizens who typically become involved are from a relatively narrow demographic band of society. As an example, Sustainable Calgary is increasing participation for its second report through workshops and presentations that target groups who were not involved in the first report. These are conducted in work sites and common gathering places. For the Toronto community health centre projects, community members trained to conduct interviews sought out so-called "unconnected" or marginalized fellow members in unconventional locations, such as shops and laundromats.

5.   Resource materials to assist volunteers in guiding and training other volunteers are valuable assets to citizen involvement processes. Also valuable are discussion guides and response booklets to stimulate debate among citizen groups. For the fullest participation, materials must be in multiple languages. The approach is limited by a requirement for literacy skills.

6.   Distilling large amounts of citizen-generated information can be difficult. Consensus-based processes for identifying priorities for visions or goals that maintain a diversity of citizen input can be very time consuming. Citizens, or at least the forum leaders, may need training in consensus-building.

7.   "... an insistence on achieving a consensus of stakeholders or citizens usually produces a set of indicators that do little to challenge prevailing practices... [r]ather than focusing exclusively on issues of procedural justice (ensuring that all groups are represented at stakeholder meetings), it would be useful for indicator projects to make substantive justice a priority ... widespread participation may not be the best 'indicator' of whether an indicator project is really democratic."[1]

8.   If citizens are required to research and write material, skills training may be required. Likewise, if citizens are required to assign priorities to values and goals, and particularly to identify indicators, they may require technical expertise or discipline-specific background to complete the task. Especially for indicator selection, some knowledge of data sources, access, quality and collection mechanisms is felt to be helpful.

---

[1] Cobb, Clifford W. and Craig Rixford (1998), *Lessons Learned from the History of Social Indicators,* San Francisco: Redefining Progress. P. 22.

9.   The public needs to be informed of the expected course of events/milestones and mandate of the project to avoid unnecessary criticism due to misunderstanding. When Hamilton-Wentworth released its project's first vision statement, intending as planned only to gather responses to it, the media and the public criticized the release for not including directives for action.

10.   Media sponsors for specific outreach programs may increase citizen participation and buy-in to the project and its processes. The withdrawal of state legislative support for the Florida accountability project was partly blamed on insufficient media and public awareness and understanding of its mandate.

11.   Wider community ownership of the process and outcomes can be fostered by involving local businesses and community organizations as well as individual citizens. Participation is encouraged if people see a benefit for themselves and a relationship to their immediate community or neighbourhood.

12.   The process of indicator development involving citizens can be just as, if not, more important than the results or outputs. The Taking Toronto's Vital Signs project, which has yet to finalize a set of indicators, nonetheless already points to the success of the community animation achieved to date through the discussion and priorization of key areas of concern. As these can change over time, it is important to set up mechanisms for ongoing citizen engagement on a periodic basis, to review and validate visions, values and indicators.

13.   How to gather citizens' input on an ongoing basis as values, visions and issues change over time requires planning. An indicator report can be published every one to two years; indicators should be re-examined every two to five years; the vision should be revisited every five to 10 years.[2]

14.   A national level indicator project may be served by the collective experience of community projects that have already engaged citizens in values definition and indicator selection.

4.7.2   Constructing indicators

15.   Lessons learned from the Oregon Benchmarks project were:

> ➤ not too many indicators
> ➤ increase data accuracy
> ➤ set targets consistently

---

[2] Redefining Progress (1997), *The Community Indicators Handbook,* San Francisco. P. 10.

- ➢ make more data available at the local level
- ➢ regard benchmarking as the beginning of a process rather than an end
- ➢ integrate benchmarks into larger strategies for achieving desired results, including understanding of root causes of problems
- ➢ integrate benchmarks into budgeting
- ➢ create realistic alternatives for improving outcomes
- ➢ state government must take the lead in the effort to integrate benchmarks into day-to-day operations as an example to all government agencies, non-profit agencies and private organizations (the change agents)
- ➢ consider overarching goals as interconnected as opposed to independent

16. The indicator selection process and criteria must be transparent.

17. The interests and concerns of citizens, project funders and technical experts need to be balanced. Generally, experts are at the service of citizens and funders.

18. General indicator selection criteria can be:

- ➢ reflect something fundamental to a specific project objective
- ➢ have existing data or data that can be readily collected
- ➢ will show change over time or there are existing time-series data
- ➢ are easily understood by the public
- ➢ valid and reliable

19. Specific indicator selection criteria can be tailored to a project's purpose. For example, indicators for performance accountability should focus on results rather than resources expended (inputs) or activities undertaken.

20. The intended audience and application of QOL indicators determines what indicators will be selected per issue or value area. For example, a Chamber of Commerce may measure the vitality of the culture/arts scene by ticket sales whereas the culture and arts community may gauge vitality by the uptake of cultural and artistic interpretations by young people.

21. The decision to develop and report individual indicators versus an index requires thorough discussion ahead of project commencement. Examples of issues are: will the relative simplicity of an overall QOL index overcome the difficulties of disaggregating the index to examine the change in individual indicators; how difficult will it be to assign a common unit of measure to the variety of indicators contributing to an index; will the indicators comprising the index have equal or different weights; what is the likelihood of the set of indicators comprising the index remaining the same over time?

22. Quality of life should be based on measurement of both positive and negative elements. Indicators that show progress create momentum, excitement and buy-in. As well,

indicators should be both objective and subjective as the link between objective conditions and subjective perceptions can be paradoxical.[3] For example, people may be influenced by media to think that crime rates are escalating and that their personal safety is threatened whereas actual crime rates may be down. To this extent, subjective personal perceptions of quality of life do not necessarily equate to reality. Perceptions gathered through subjective participative processes may need to be contrasted with other sources of information.

23.   Individual quality of life is not necessarily equivalent to community quality of life. The latter focuses on systemic rather than individual issues.

24.   "[T]he scope and breadth of indicators are always limited at any point in time by what is in fact measurable."[4]

25.   How an indicator should be put together:[5]

   ➢   while there is need for a qualitative dimension to indicators, in the meantime as tools for measurement are developed, indicators should be quantitative with properties that include unambiguity, consistency and sensitivity
   ➢   be specific or focused i.e. measure what needs fixing or improving
   ➢   have clarity of definition to allow reproducible measurement
   ➢   be technically sound i.e. reliable, timely and well-documented
   ➢   be an important measure in its own right
   ➢   be relevant
   ➢   balance aggregation with specificity
   ➢   be capable of measuring different geographic areas and social groups
   ➢   forward looking
   ➢   be collected in a participatory fashion

---

[3] Sharpe, Andrew (1999), *A Survey of Indicators of Economic and Social Well-being*, Centre for the Study of Living Standards. P. 7.

[4] McCracken, Mike and Katherine Scott (1998), *Social and Economic Indicators: Underlying Assumptions, Purposes and Values,* Ottawa: Statistics Canada Symposium on Gender Equality Indicators: Public Concerns and Public Policies, March 1998. P. 111.

[5] Op cit. P. 123.

26.   Indicators that represent significant community concerns but for which technically sound measures do not yet exist can nonetheless remain as "indicators in progress" to respect the processes that identified the indicator.

27.   How to minimize the resources used to construct an indicator:[6]

   ➢   use an already available indicator or one that is easily measured from existing information

   ➢   choose a small number of priority indicators, i.e., "comprehensiveness may be the enemy of effectiveness."[7]

28.   Because reality is a complex set of events, it is rarely represented completely by a single indicator. It is better to consider multiple indicators for the same phenomenon.[8]

29.   Indicator selection can be difficult by virtue of differing perceptions of issues, for example, city versus rural, inner city versus suburban, and regional versus city.

30.   The linkages and interdependence between and among sectors and indicators are a key aspect of a QOL project to highlight. For example, education can affect health status.

4.7.3   Project design issues

31.   Hamilton-Wentworth identified the following as fundamental components to a successful indicator development process that involves citizens:

   ➢   high profile commitment to the process including assignment of adequate resources

---

[6] McCracken, Mike and Katherine Scott (1998), *Social and Economic Indicators: Underlying Assumptions, Purposes and Values,* Ottawa: Statistics Canada Symposium on Gender Equality Indicators: Public Concerns and Public Policies, March 1998. P. 124.

[7] Cobb, Clifford W. and Craig Rixford (1998), *Lessons Learned from the History of Social Indicators,* San Francisco: Redefining Progress. P. 18.

[8] Op cit. P. 20.

- ➢ clear purpose well communicated
- ➢ commitment to citizen empowerment
- ➢ patience to bring understanding to a common level among participants
- ➢ resource flexibility
- ➢ monitoring and feedback of results

32. If indicators are to be monitored for the longer term, secure infrastructure and non-partisan governance issues need to be resolved early in a project's course of development. As an example, the Oregon legislature created the Oregon Progress Board as the institutional "champion," or the long-term caretaker, for the *Oregon Benchmarks*. The Board is an organizing force for identifying key steps necessary to achieve the vision; it takes the strategic vision and action plan to the public for review; and it translated the strategies in *Oregon Shines* into measurable goals and benchmarks. Sustainable Calgary is considering the creation of an agency at arm's length from the city government as the means to institutionalizing the project. Hamilton-Wentworth is creating a non-profit agency to encourage more participation and local action to realize its Vision 2020.

33. A project's structure can determine the inclusiveness of participation. For example, Taking Toronto's Vital Signs deliberately avoided a vision statement and benchmarking in order to keep a diverse set of players at the table.

34. To encourage press coverage and to increase the chances of it being positive, a broad communication program in association with key media outlets needs to be developed before the project begins.

4.7.4 Concepts

35. "[T]he greatest power in public policy debates lies in being able to change the definition of a problem ... it is the power of indicators to alter the common understanding of a problem."[9]

---

[9] Cobb, Clifford W. and Craig Rixford (1998), *Lessons Learned from the History of Social Indicators,* San Francisco: Redefining Progress. P. 25.

36. To encourage action, indicators should not only tell of existing conditions but should add insight into the causes of the conditions.

37. Indicators are quantities that give insight to or approximate qualities. For example, the quality of health status cannot be measured directly, rather we can refer to incidence of certain diseases or the amount of exercise in which people are engaged.

38. An indicator, and particularly a composite index, may have more metaphorical than literal numeric value. In this sense, the Genuine Progress Index is an alternative to the GDP, both being metaphors for progress from differing perspectives.

39. While development of social and economic indicators is based on a positivist view of knowledge and knowledge use in policy, in fact every indicator starts with some world view. "[T]here is no such thing as a value-free indicator."[10]

40. Simple social marketing techniques can influence people's value sets and their senses of what constitutes quality of life. These may differ from those promoted in corporate marketing messages.

5. Analysis and discussion

Here we emphasize the project outputs and outcomes, and lessons learned. In some cases, we contrast the projects that involved citizens with those that did not.

Beginning with visions and values, we categorize them, along with project purposes, into four groups (section 4.1) in an attempt to respect the project differences – that is, to point out that they do not all self-identify as quality of life/societal indicator initiatives. Having applied these categories, we find that at the level of visions and values, the key similarity between projects is the stated acknowledgment that progress toward their respective goals depends on balancing and linking activities and outcomes across key sectors. These are often summarized as the economy, the environment and society.

For projects that involved citizens, the emphasis on the economy, the environment and society continues into their stated goals, issues and indicators. For the most part, projects that did not involve citizens are dominated by economic issues and indicators (except for the Canadian Institute for Health Information National Population Health Indicators Project, which emphasizes health status).

---

[10] Cobb, Clifford W. and Craig Rixford (1998), *Lessons Learned from the History of Social Indicators,* San Francisco: Redefining Progress. P. 17; McCracken, Mike and Katherine Scott (1998), *Social and Economic Indicators: Underlying Assumptions, Purposes and Values,* Ottawa: Statistics Canada Symposium on Gender Equality Indicators: Public Concerns and Public Policies, March 1998. P. 110.

An interesting difference between the project frameworks that involved citizens and those that did not is in language. For example, community issues for one citizen- involved project are expressed as "living," "relating" and "helping," whereas for projects that did not involve citizens, corresponding examples are "positive living conditions" and "community participation." Economic indicators, in particular, are more technical in the projects that did not involve citizens. Generally, the indicators reflect the specialty or expertise, or world-view, of the organization developing them. Organizations that typically rely on technical or scientifically-based information will reflect this preference in their indicators. Predictably, the Canadian Institute for Health Information Population Health framework contains the most detailed and technical health indicators in our sample. The challenge for indicator projects lies in presenting a balanced and holistic perspective on what determines quality of life.

Still in relation to indicators, some projects that involved citizens included subjective indicators based on surveys, for example, public satisfaction ratings for availability of a college education, or perception of personal financial situation.

As for lessons learned about citizen involvement, a key theme to arise from our sample is *balance*, applicable throughout the process of developing all the aspects of an indicator framework, from vision through to indicators. Mention is made of balancing citizen input with that of experts, and seeking participation from a diverse cross-section of a population to balance the viewpoints of the so-called "connected" with those of the "unconnected." With indicator selection, there is a need to balance the concerns and intentions of project funders, citizen participants and experts.

Within a list of indicators as such, reference is made to balancing positive with negative measures and presenting both subjective and objective findings. Balance is also cited as a consideration with respect to project governance, especially for projects that involve citizens. Here the security of institutionalizing a project for the longer term needs to be balanced with maintaining the integrity of the processes and results of citizen input. Balance in all the contexts described above is said to add to a project's credibility and hence its potential influence on decision makers.

Regarding project outcomes, that is, how indicator information is being used, these depend on the original intentions of the project and the degree to which a project's findings can influence the decision makers. A project's influence is dependent on its proximity to the decision makers who can have an impact on quality of life. For example, where government agencies funded and administered projects for the purpose of measuring their own performance and directing their policies and resource allocation, for the most part indicators are given serious consideration, with ongoing monitoring, reporting and feedback. For projects operating outside the locus of control, the indicators are used as advocacy and information tools for presenting a perspective on quality of life that may be an alternative or an add-on to what is in the mainstream.

A critical finding regarding citizen participation was that establishing and maintaining culturally, demographically and experientially diverse participants requires a proactive approach and

commitment. The process of indicator development can be as, if not more, important than the outputs. People need to see a direct benefit of their participation and it has to be relatively easy for them to become and stay involved as visions, values and indicators need review and validation as time passes. Also very important over the course of a project are the support of influential and high profile individuals, proper resourcing and effective communication of progress and results.

Finally, in collecting the sample of projects for our review, it became clear that there is a plethora of quality of life or similar projects underway or being planned in Canada and abroad, many of which are relying on citizen input. People involved in our sampled projects and other similar projects are potential resources to CPRN. As well, a formal literature search would likely produce more lessons or "how to" information regarding how best to involve citizens in quality of life projects.

Appendix A: Project-specific indicator frameworks

Community level – citizens involved

Two Community Quality of Life Projects in Metro Toronto

Categories	South Riverdale	Lawrence Heights
	Themes	
People	• caring community • diversity • elected representatives	• diversity • concerns of residents • coping and managing
Places	• urban environment • community services • the future of services	• physical and housing environments • accessing amenities • community services
Priorities (problems)	• environment • employment and income • coping and managing	• employment and income • service needs • future of the community

Municipal Level – citizens involved

Hamilton-Wentworth Vision 2020

Goal of the Sustainable Community Initiative	1995 Theme Areas	1998 Theme Areas
Integrate the concept of sustainable development into the decision making of individuals, community groups and government agencies by building an ethic of sustainability in all of our citizens. Sustainable development principles encompass: fulfillment of human needs; maintenance of ecological integrity; provision for self-determination; and achievement of equity in sharing of limited resources.	• natural area and corridor identification and protection (2 indicators) • improving the quality of water resources (4) • improving air quality (2) • reducing the amount of waste being produced and going to landfill (2) • reducing energy consumption (1) • creating a more compact and diverse urban form (2) • changing our mode of transportation (2) • ensuring good health for all and adequate social services (7) • empowering the community (2) • diversifying the local economy, providing appropriate training and supporting environmental companies (2) • supporting the local agricultural sector (3)	• natural areas and corridors (1 indicator) • improving the quality of water resources (4) • improving air quality (4) • reducing and managing waste (1) • consuming less energy (1) • land use in the urban area (1) • changing our mode of transportation (2) • personal health and well-being (7) • community well-being and capacity building (2) • local economy (1) • agriculture and the rural economy (1) • *NEW IN 1998* • arts and heritage (1) • safety and security (2) • education (2)

Plan Winnipeg 2020 Vision

Vision for Winnipeg	What Winnipeggers want
To be a healthy and vibrant city, which places its highest priority on quality of life for all its citizens.	• healthy communities (5 indicators) • good municipal government (6) • economic prosperity (5) • orderly development (3) • convenient access and mobility (5) • supportive urban infrastructure (4) • safety and security (5) • knowledge and good health (5) • environmental quality (4) • a city with vitality (6)

Sustainable Calgary

Ultimate goal	Questions to Calgarians	Indicator theme areas
Generate long-term health and vitality for all	• Are we doing enough to honour our responsibilities to others in the global community by reducing our impact on the earth? • Are we doing enough to ensure that Calgary is a clean, safe, beautiful and vital place to live for our children and for future generations? • Are we doing enough to ensure that there really is an "Alberta Advantage?"[11]	• economy (5 indicators) • health and education (5) • community (5) • natural environment (6) • resource use (3)

---

[11] "Alberta Advantage" is a concept promoted by the Alberta Government that tends to emphasize economic prosperity and economic indicators of success over other measures.

Edmonton 2005

What people want:	Five principles that should guide human service activity:
- a city that is clean, green and environmentally wise - safe, healthy, active communities that value children, youth, families and the elderly - a strong economy with enough jobs and no poverty - high quality health care and education, public transportation, plus recreational and cultural activities	- caring attitudes - making connections for life - becoming all we can - operating as if people matter - by, of and for the community - getting the help needed when it's needed - more than pennies from heaven

Taking Toronto's Vital Signs

Shared values	Ten areas of concern
That the condition of the city depends on interdependent health, social, economic, environmental and cultural elements. That the general public – as well as institutional and corporate stakeholders and community groups – have the ability to, if given the opportunity, think through and express what makes Toronto a good place to live, work and put down roots.	- earning - working - playing - living - learning - relating - getting around - participating - helping - planning

Quality of Life in Jacksonville (Florida)

Purpose	Major elements of quality of life (71 indicators)
To make the citizens of Jacksonville, Florida, more aware of important aspects of our quality of life, so that we can celebrate the positive as well as work on areas that need improvement.	- education - the economy - public safety - natural environment - health - social environment - government/politics - culture/recreation - mobility

Province and State Levels – citizens involved

Florida Commission on Government Accountability to the People (GAP Commission)

Areas of concern	Indicators
Families and communities	- quality of life - racial harmony - children in poverty - elders in poverty - affordable housing
Safety	- violent crime - non-violent crime - juvenile arrests - juvenile delinquency - fear for safety - child abuse and neglect - domestic violence - driving under the influence
Learning	- high school graduates - college graduates - adult literacy - Florida writing assessment - need for remediation - satisfaction with public schools - satisfaction with availability of a college education
Health	- life expectancy - infant mortality - low birth weight - immunizations - births to teenagers - sexually transmitted diseases - AIDS - deaths from heart disease - deaths from cancer - deaths from preventable cancer - health insurance - personal health care expenditures relative to economic productivity

Florida Commission on Government Accountability to the People (GAP Commission)
(cont'd)

Economy	- new jobs created - jobs per capita relative to the United States - unemployment rate relative to the United States - per capita income relative to the United States - average wage and salary relative to the United States - people in poverty - perception of financial situation
Environment	- air quality - surface water quality - rare and imperiled species - protected high quality natural areas - water consumption - waste water reuse - per capita water consumption - waste production - recycling
Government	- public trust in state and federal government - public rating of local government - public satisfaction with law enforcement - public satisfaction with social services - public satisfaction with highways and roads - public satisfaction with fresh water quality - voter turnout

Minnesota Milestones

Hopes for the future, a vision	Goals
Minnesota will be a community of people who respect and care for one another. Our economic activity will create wealth and provide a good standard of living for all our people. Our citizens will be good thinkers, creative, always learning, with the skills to compete internationally. We will protect and enjoy the natural world. Our government will be responsive, effective and close to the people.	People • Children will not live in poverty. (2 indicators) • Families will provide a stable, supportive environment for their children. (5) • All children will be healthy and start school ready to learn. (3) • Minnesotans will excel in basic and challenging academic skills and knowledge. (4) • Minnesotans will be healthy. (6) Community and Democracy • Communities will be safe, friendly and caring. (4) • People in need will receive support that helps them live as independently as they can. (5) • All people will be welcomed, respected and able to participate fully in Minnesota's communities and economy. (4) • People will participate in government and politics. (2) • Minnesota government will be cost-efficient, and services will be designed to meet the needs of the people who use them. (2) Economy • Minnesota will have sustainable, strong economic growth. (3) • The workforce will have the education and training to make the state a leader in the global economy. (3) • All Minnesotans will have the economic means to maintain a reasonable standard of living. (3) • All Minnesotans will have decent, safe and affordable housing. (2) • Rural areas, small cities and urban neighbourhoods throughout the state will be economically viable places for people to live and work. (6) Environment • Minnesotans will conserve natural resources to give future generations a healthy environment and a strong economy. (8) • Minnesotans will improve the quality of the air, water and earth. (4) • Minnesotans will restore and maintain healthy ecosystems that support diverse plants and wildlife. (2) • Minnesotans will have opportunities to enjoy the state's natural resources. (2)

Sustainable Seattle

Mission	Areas of concern
To protect and improve our area's long-term health and vitality by applying sustainability to the links between economic prosperity, environmental vitality and social equity.	Environment (7 indicators) Population and resources (7) Economy (10) Youth and education (8) Health and community (8)

Oregon Shines and Oregon Benchmarks

Vision	Oregon Shines Goals	Oregon Benchmark Categories
Prosperous Oregon that excels in all spheres of life. Oregon will have a high-wage economy and a superior quality of life. It will be a place where all families and individuals can prosper. Oregon will balance the demands of a vital economy with demands inherent to healthy ecosystems.	**1989** • a highly capable, self-reliant people • success in maintaining and improving [their] exceptional quality of life alongside a growing economy • attainment of a diversified, globally competitive economy that pays high wages **1998** • quality jobs for all Oregonians • safe, caring and engaged communities • healthy, sustainable surroundings	• Economic performance (21 indicators) • Education (11) • Civic engagement (10) • Social support (21) • Public safety (6) • Community development (9) • Environment (14)

Newfoundland and Labrador Strategic Social Plan and the Community Accounts Project

A – The Strategic Social Plan			
Vision	**Values**	**Goals**	**Objectives**
The vision of Newfoundland and Labrador is of a healthy, educated, distinctive, self-reliant and prosperous people living in vibrant, supportive communities within sustainable regions.	Self-reliance Collaboration Social justice Equity Fairness	Vibrant communities where people are actively involved.	Effective partnerships. Communities involved in planning and delivery. Coordinated local action, expenditures and funding of community-based sector. Coordinated regional infrastructure investment, consolidation of services and access standards for key services.
		Sustainable regions based on strategic investment in people.	Labour market that supports economic and social development. Employment generation in the private and community-based sectors. A qualified labour force.
		Self-reliant, healthy, educated citizens living in safe communities.	Improved access and quality of service. Citizens able to meet basic needs and achieve self-reliance. Reduced social and health problems.
		Integrated and evidence-based policies and programs.	Integrated, evidence-based policy development. Consistency between policy and delivery. Effective monitoring and evaluation.

Newfoundland and Labrador Strategic Social Plan and the Community Accounts Project
(cont'd)

B – The Community Accounts Project
Indicators (others still under development)

Income accounts and social accounts:
- self-reliance ratio
- social assistance incidence.

Prosperity accounts:
- personal income per capita
- average husband/wife family income.

Labour market accounts:
- change in labour force activity
- employment insurance incidence.

Health accounts:
- life expectancy
- self-assessed health status.

Demographic accounts:
- population change
- migration rate.

Education accounts:
- postsecondary completion rate
- adult literacy rate.

National Level – citizens involved

Federation of Canadian Municipalities QOL Reporting System (1999)

Vision of municipal government	The QOL Reporting System is a tool to:	The QOL measures:
The issues and concerns that affect the life of the community are becoming the basis of municipal planning and action. Although other governments are responsible for many of the policies that influence the quality of life, municipal government is in a unique position to assess the performance of those policies, to identify beneficial outcomes as well as problems, and to work with communities and other governments to develop solutions.	• identify and raise awareness of issues affecting quality of life in Canadian communities; • better target policies and resources aimed at improving quality of life; and • establish municipal governments as a strong and legitimate partner in public policy debate in Canada.	• population resources (5 measures) • community affordability (11) • quality of employment (11) • quality of housing (2) • community stress (7) • health of community (7) • community safety (4) • community participation (6)

A Strategy for Sustainable Development for the United Kingdom

Vision	Four strategy objectives:	Headline indicators:
"Ensuring a better quality of life for everyone, now and for generations to come. To do this we need ways to achieve economic, social and environmental objectives at the same time, and consider the longer term implications of decisions."	• social progress which recognizes the needs of everyone • effective protection of the environment • prudent use of natural resources • maintenance of high and stable levels of economic growth and employment	• economic growth – total output of the economy (GDP) • asset investment – total and social investment as a percentage of GDP • employment – proportion of people of working age who are in work • poverty – indicators of success in tackling poverty and social exclusion • health – expected years of healthy life • education and training – qualifications at age 19 • housing quality – homes judged unfit to live in • crime – level of crime • climate change – emissions of greenhouse gases • air pollution – days when air pollution is moderate or higher • transport – road traffic • water quality – rivers of good or fair quality • wildlife – populations of wild birds • land use – new homes built on previously developed land • waste – waste arisings and management

Provincial (Regional) Level – citizens not involved

Genuine Progress Index (GPI) Atlantic (Nova Scotia)

Vision/purpose	Values and goals	Indicator sets
New indicators of progress are urgently needed to guide our society ... The GPI is an important step in this direction. To switch the emphasis from quantitative growth to a notion of qualitative development or progress to get a truer picture of Nova Scotia's social well-being and prosperity and to determine whether progress is sustainable.	• security – physical safety, health, livelihood security • equity – inter-generational, intra-generational, geographic, the equity test (net overall benefit) • environmental quality – investing in natural capital, environmental conservation and degradation, ecological footprint analysis • other human and social values – freedom, knowledge, caring society	Time use • economic value of civic and voluntary work • economic value of unpaid housework and child care • costs of underemployment • value of leisure time Natural resources • soils and agriculture • forestry • fisheries • non-renewable subsoil assets Environment • greenhouse gas emissions • sustainable transportation • ecological footprint analysis • air and water quality Socio-economic • income distribution • debt, external borrowing and capital movements • valuations of durability • composite livelihood security index Social capital • health care • educational attainment • costs of crime • human freedom index

Quality of Life in Ontario

Areas of concern	Quality of life indicators
Social	• social assistance beneficiaries • children in care • social housing waiting lists
Economy	• number of unemployed • number working • bankruptcies
Health	• low birth weight babies • elderly waiting for placement in long-term care facilities • new cancer cases (new indicator in 1999, replacing suicide rates)
Environment	• hours of moderate/poor air quality • environmental spills • tonnes diverted from landfill by blue box recycling

Alberta's Measuring Up

Values	Goals	Indicators
PEOPLE Helping people to be self-reliant, capable and caring through: • a healthy society and accessible health care • basic support and protection for those in need • lifelong learning • excellent schools, colleges, universities and training institutes • supportive families and compassionate communities	Albertans will be healthy. Children will be well cared for and safe. Alberta students will excel. Albertans will be independent. Albertans not expected to support themselves fully will receive help.	Life expectancy at birth Health status Births to mothers under age 18 Educational attainment Literacy and numeracy levels Family income distribution
PROSPERITY Promoting prosperity for Alberta through: • a dynamic environment for growth in business, industry and jobs • a highly skilled and productive workforce • new ideas, innovation and research • an open and accountable government that lives within its means • an efficient system of roads, highways, utilities and public spaces	Alberta will have a prosperous economy. The workforce will be skilled and productive. Businesses will capitalize on research. Alberta will have a financially stable, open and accountable government. Alberta will have a fair and safe work environment. Alberta businesses will increase exports.	GDP Job growth Skill development Adoption of new technologies Infrastructure capacity Cost of government Taxation load Provincial credit rating Net debt Workplace climate Export trade

Values	Goals	Indicators
PRESERVATION Preserving the Alberta tradition of: • a safe society where justice prevails • a clean environment • strong values and culture • pride in Alberta and strength in Canada • strong communities	Alberta will be a safe place to live and raise families. Alberta's natural resources will be sustained. The high quality of Alberta's environment will be maintained. Albertans will have the opportunity to enjoy the province's natural, historical and cultural resources. Alberta will work with other governments and maintain its strong position in Canada.	Crime rate Resource sustainability Air quality Water quality Land quality Heritage appreciation Intergovernmental relations

BC Regional Socio-economic Statistical Profiles

Demographic profile indicators	Economic profile indicators	Social profile indicators
Age structure • population by age group • total dependency rate	Labour market • participation rates – males, females, total • full-year, full-time • self-employed • distribution by industrial sector • average employment income	Crime rates
Population growth	Unemployment • EI beneficiaries	Education • highest education completed of population >15 years • ratio of high school graduates to population >18 years • school attendance for population 15 to 24 • percent attending school full time
Migration • net migration rate for all ages • net migration rate by age group	Income • average family income – husband/wife families, lone parent • incidence of low-income families • per capita income • per capita government flows – personal income taxes, transfer payments, net taxes	Health • potential years of life lost – natural causes, suicide/homicide, accidents • infant mortality rate • teen birth rate
Ethnic identity • visible minorities • Aboriginal people • rest of population	Basic BC benefits • long-term caseload • single parent caseload • percent population < 65 • percent children recipients • percent young adult recipients	Alcohol consumption • per capita dollars spent • per capita alcohol consumption • percent distribution of litres sold – spirits, wine, beer/cider
Family structure • total families • families with no children at home • families with children at home • husband/wife families with children at home • lone parents • average number of children • percent unattached individuals		

National Level – citizens not involved

Canadian Council on Social Development Personal Security Index (1999)

The basics of living	Components of the PSI
• whether Canadians have enough money to get by • whether their physical lives are threatened • whether they have the means to cope with adversity	Economic security • adequacy of income (3 indicators) • employment security (3) • safety net (2) • financial vulnerability (2) Physical security • health status (4) • access to health services (2) • personal safety (4)

Conference Board of Canada: Performance and Potential (1999)

The ultimate goal – high and sustainable quality of life to be measured by:	The overall framework for analyzing Canada's performance and potential	The current framework for analyzing performance and potential
• high income per capita • employment opportunities • healthy and educated population • clean environment • safe places to live and work • economic security for all citizens	• physical capital • technology and innovation • human resources educated and healthy • natural resources and environment • social capital • productivity and cost performance • international performance • role of government	• economic performance (6 indicators) • labour market (6) • fiscal position (2) • innovation (6) • education and skills (8) • health and society (12)

Canadian Institute for Health Information (CIHI) National Population Health Indicators

F/P/T Advisory Committee on Population Health Key Strategic Directions	Sample indicators that may be supported	
Ensuring positive and supportive living and working conditions in all our communities. Ensuring a safe, high quality physical environment. Ensuring individuals have opportunities for healthy development and supports to make choices that enhance their health and foster their independence. Ensuring appropriate and affordable health services, accessible to all. Reducing preventable illness, injury and premature death.	**HEALTH STATUS**	
	Deaths • life expectancy • leading causes of death Health conditions • asthma • arthritis • depression • diabetes • chronic pain	Human function • disability days • activity limitation • Well-being • self-rated health • mastery • self-esteem
	NON-MEDICAL DETERMINANTS OF HEALTH	
	Health behaviours • tobacco • drugs • alcohol • physical activity • diet Living and working conditions • poverty • education • employment • housing • crime • decision latitude	Personal resources • early childhood development • social supports • life stresses Environmental factors • air • water quality • toxic exposures • ecologic integrity

Canadian Institute for Health Information (CIHI) National Population Health Indicators
(cont'd)

	HEALTH SYSTEM PERFORMANCE	
	Effectiveness • transplant survival • cancer survival • TB • HIV • measles • joint replacement • injury **Accessibility** • influenza immunization • mammography • Pap smears • wait times (cardiac) **Appropriateness** • C sections • rate of vaginal birth after C section	**Efficiency** • may not require hospitalization • percent alternative level of care • average length of stay • surgical day case rates **Acceptability** • patient satisfaction **Competence** **Continuity** **Safety** • hip fractures while in facility
	COMMUNITY AND HEALTH SYSTEM CHARACTERISTICS	
	• demographics • per capita expenditures • health personnel • hospital beds • volumes of services provided	

Appendix B: Project descriptions

Citizens involved

B1: Two Community Quality of Life Projects: South Riverdale and Lawrence Heights of Toronto

B2: Hamilton-Wentworth Vision 2020

B3: Plan Winnipeg 2020 Vision

B4: Sustainable Calgary

B5: Edmonton 2005

B6: Taking Toronto's Vital Signs

B7: Quality of Life in Jacksonville (Florida)

B8: Sustainable Seattle

B9: Florida Commission on Government Accountability to the People

B10: Minnesota Milestones

B11: Oregon Shines and Oregon Benchmarks

B12: Newfoundland and Labrador Strategic Social Plan and the Community Accounts Project

B13: A Strategy for Sustainable Development for the United Kingdom

B14: Federation of Canadian Municipalities QOL Reporting System

Citizens not involved

B15: Quality of Life in Ontario.

B16: Genuine Progress Index (GPI) Atlantic (Nova Scotia);

B17: Alberta's Measuring Up

B18: BC Regional Socio-economic Statistical Profiles

B19: Conference Board of Canada: Performance and Potential

B20: Canadian Council on Social Development Personal Security Index

B21: Canadian Institute for Health Information National Population Health Indicators

B1: Two Community Quality of Life Projects:
    South Riverdale and Lawrence Heights of Toronto

In September 1996, two community health centres, two public health departments, a mental health association, the local health planning agency and a local university came together to carry out two Community Quality of Life research projects. The Jessie Ball duPont Fund of Jacksonville, Florida, funded the 18-month initiative. The goal was to develop and implement a process by which community members could come to learn about the local factors that affect their health and well-being, as seen by the members themselves within a framework of individual functioning and well-being. The information was to form the basis for concerted community action to help preserve strengths and respond to needs. From the researchers' point of view, they were to acquire lay perceptions of social determinants of health. The approach was explicitly guided by emerging concepts of community-based health promotion and qualitative community-based research paradigms (in other words, a participatory, collaborative, action-oriented or interactive approach to social inquiry).

Mechanisms

The project took place in two Toronto communities: South Riverdale and Lawrence Heights. The focus was on seniors, teens, persons with a low income and newcomers to Canada, and in the Lawrence Heights project, also persons with disabilities. Through focus groups and open-ended interviews, community members were asked:

- What is it about your neighbourhood or community that makes life good for you and the people you care about?

- What is it about your neighbourhood and community that does not make life good for you and the people you care about?

- What are some of the things in the neighbourhood or community that help you cope or manage when you or your family has problems?

- What would you like to see in the neighbourhood or community that would help you cope or manage?

Community workers and local politicians were interviewed as well regarding community residents, agency mandates and community characteristics.

The project was a partnership of the South Riverdale and Lawrence Heights Community Health Centres and the University of Toronto. The project was assisted by the North York and Toronto Departments of Health, the Metropolitan Toronto District Health Council and the Canadian Mental Health Association's National Office. The North York Community House and the Somaliland Women's Organization were community collaborators. An Advisory Group was established consisting of all the community partners. The Group assisted in establishing contact

with community members through local agencies and organizations (e.g., health centres, community centres, schools, seniors' residences, churches, parent drop-ins and day care centres). In many cases, Group members made an initial presentation inviting people to participate; in other cases, agencies arranged the discussions. Community members were involved in developing the research questions. To reach people not connected with any local agency, community organization or group, community members connected with various local groups were trained to conduct interviews and collect information from so-called unconnected people in unconventional sites, such as shops and laundromats. Most participant discussions lasted from 45 to 60 minutes, moderated by the university members of the research team. Service providers and elected representatives were individually interviewed.

In Riverdale, a total of 14 community member groups involved 102 people. Of the 14 groups, there were two youth groups organized by a local community centre and one by a local public health worker; one seniors group organized by the health centre, one by the local community centre and one by a local housing residence; two new Canadian groups organized by the local adult education centre; and one by the health centre. Eleven Riverdale service providers and six elected representatives were individually interviewed.

In Lawrence Heights, 18 groups of community members involved 146 people. Local schools showed great interest and focus groups involved one group of grade 6 students; two with grade 8; two with grade 12; and one with African-Canadian students. The local community centre organized a youth group session with a total of seven groups. There were also three seniors groups organized with the help of the local recreation and community health centre; three adult groups of Somali men and women; two of Tamil men and women; and one each of Spanish- and Russian-speaking people, and single mothers. Twelve service providers and six elected representatives were individually interviewed.

The transcripts of interviews and discussions were provided to participants to verify that the meanings gleaned from sessions accurately reflected the views of participants. As well, data collected through different methods (focus groups, individual/key informant interviews, community interviews) and from multiple sources (community members, elected representatives and service providers) were triangulated to get agreement on themes (i.e., congruence).

Results

For each community, nine higher order themes were identified and organized into three categories: people, places and priorities (problems). Community reports were written for wide distribution; conclusion reports provided summaries; and findings reports provided extensive findings details. A "write-ups" document contained the narratives from each information gathering session. The findings were analyzed in relation to the prerequisites to health from the Ottawa Charter for Health Promotion (WHO, 1986) and a chapter in each report considered future community action in terms of concepts and guidelines for health promotion actions found in the Ottawa Charter.

Key results were the process that identified community strengths and needs; the validation of the process by carrying it out in two communities; and the production of a manual intended for other communities to assist them in carrying out their own Community Quality of Life projects. The experience is an example of operationalizing the process of assessing community quality of life as an essential component of community-based health promotion work. The themes identified – safety and security, access to amenities, and responsive agencies and governments – were consistent with many indicators in the urban quality literature.

Critical lessons learned were that with a research project or any social inquiry directed at a community, its members must develop a sense of ownership of the process and results and see a benefit to themselves in return for their involvement. To this extent, successful features of the research included having community people involved in the design and testing of research questions and allowing flexibility in the information collection (questions were kept broad, they did not lead the respondents, and interviews were relatively unstructured with respondents free to state whatever was important to them).

How indicators are being used

Indicators per se were not a product of the research, rather quality of life was linked to various services and aspects of the local environment. To this extent, the community health centres are now examining how to protect and promote what community members said they valued. For example, a key priority in Riverdale is land use along the neighbouring Lake Ontario lakeshore. In response, a community health centre staff person who has an urban planning background is liaising with city planners to raise their awareness of local concerns, intending to influence the direction of development.

How citizens continue to be involved

The health centres expect to revisit with citizens the issues that they identified. At the same time, they will present to local residents what they have done to address local concerns and will seek their input on what else to do.

B2: Hamilton-Wentworth Vision 2020

In the fall of 1989, the Region's senior management team decided that new mechanisms were needed to improve the coordination between municipal budget decisions and policy goals and objectives, for example, to guide the development of the capital budget. At the same time, the Region's official Plan and Economic Strategy needed comprehensive review with questions raised as to what directions or philosophies were to guide the update process. Linked to this was the recent election of a Regional Chair who had campaigned on a platform of addressing issues of environmental protection, the need for more affordable housing and opening up the decision-making processes of local government. The Region's Planning and Development Department, which was responsible for the official Plan and Economic Strategy, was mandated to identify a guiding philosophy for addressing the concerns and chose sustainable development as the appropriate philosophy. In June 1990, Regional Council created an 18-member citizen Task Force on Sustainable Development to be financed and resourced by the Region with a relatively flexible budget administered by project staff. The Group was mandated to explore with its fellow citizens the concept of sustainable development as a basis for review of all regional policy initiatives. The Task Force was assisted by a project team coordinator, a communications advisor and six part-time researchers. A technical advisory committee was also created to assist the Task Force in designing its public outreach programme. (One of the Task Force's six tasks was to establish a public outreach programme to increase awareness of the sustainable development concept and to act as a vehicle for feedback on potential goals, objectives and policies for the Region.)

Mechanisms

The citizens' Task Force comprised 18 members representing pre-identified community sectors: 2 from academia; 1 union representative; 1 from a resident association; 1 from a women's organization; 1 from a health organization; 2 from industry/commerce; 2 from environmental organizations; 1 from the development industry; 1 from arts/culture; 1 from small business; 1 from agriculture; 1 from real estate; and 3 from Regional Council (who resigned because of other duties halfway through the project). The people were selected from about 50 applicants by the Chair of the Task Force (a member of the Regional Council) and the project coordinator. A targeted process was used to select Task Force members, for example, if no suitable candidate volunteered to represent a sector, a targeted search effort was launched to identify and encourage desired representatives. Not included, although identified as a target sector, was education. Left out by mistake was a youth representative.

During the early stages of its mandate, the Task Force developed community participation goals:

> *Education* – to inform the general population of the basic principles of sustainable development and the purpose and mandate of the Task Force; to inform citizens of the range of Regional government activities including expenditures, investments, the official Regional Plan and the Economic Strategy; to communicate information generated by citizens through the project back to the general public;

Citizen input – To gather citizen concerns and perceptions regarding the quality of their environment and life that can be used to identify issues; to gather citizen perspectives on basic values and goals that can be used to develop a set of principles to guide the preparation of a Regional Vision Statement.

Quality – To reach out to groups in the population that are not normally part of the decision-making process, such as, children, youth, the disadvantaged, and the non-English-speaking community; to develop community awareness and support for the work of the Task Force that will result in long-term community support for the implementation of the Regional Vision Statement; to achieve meaningful citizen participation that provides good quality information to the Task Force and is an empowering exercise for citizens; to draw out those citizens who wish to be involved more deeply in the Task Force's work as members of issue working groups.

Over two and a half years, citizens were informed and involved through five avenues: a media campaign, individual feedback opportunities; community workshops, focus groups and community forums. The citizens Task Force met with approximately 1,000 citizens and developed a community vision called "Vision 2020: The Sustainable Region" with over 400 recommendations as to the kinds of decisions required by government, business, community groups and individuals for making the vision a reality. Public participation to develop the vision included: seven town hall meetings where approximately 160 citizens contributed their thoughts on which issues needed to be addressed and the values that should guide the Task Force's work; focus group discussions with 18 groups with a total of approximately 180 people normally overlooked in decision-making processes, such as people in emergency shelters, seniors and non-English-speaking people (organized by various community-based organizations approached by the Task Force); 8 citizen groups consisting of 35 people assigned to develop reports outlining visionary directions based on the principles of sustainable development in an assigned topic area (vision working groups); 8 citizens groups consisting of almost 75 people assigned to develop reports identifying the types of decisions and actions necessary to make a particular section of the vision into reality (implementation teams made up of volunteers from the Vision Working Groups and invited individuals from various organizations and government departments likely to take a lead role in moving the vision to reality); 3 all-day community forums where the public could comment on the vision working group and implementation team reports (the forum for the vision working groups' reports attracted 250 people and presentations from 18 community organizations; approximately 200 people attended a workshop to review the implementation team reports). With four summary documents of the community input, the Task Force drafted the first Vision 2020, which was distributed to every household in the Region with an invitation to respond. Over 50 submissions were made and discussed at a community meeting in March 1992 attended by 65 people, where 8 verbal presentations were made as well. In February 1993, the Task Force made a final presentation to Regional Council that ended its mandate and initiated the vision implementation. An estimated 300 people gathered to hear the Task Force's final report. The Task Force had delivered: Vision 2020 – The Sustainable Region; Directions for Creating a Sustainable Region; and Detailed Strategies and Actions for Creating a Sustainable Region.

Other activities over the two and a half years were a media campaign, newsletters distributed to every household, TV programs, staff seminars, open houses and exhibits in shopping malls.

In 1994, the indicators project began with the help of the Environmental Health Program at McMaster University and the International Council for Local Environment Initiatives. As a first step, the component areas of Vision 2020 were sorted into 11 themes, for example, water resources, livelihood, health. A total of 80 indicators were selected through a literature search. To gather community input to the indicators, a work book was developed that allowed citizens to choose their preferred indicators from the draft list of 80, and to identify their own. The books were distributed to groups and individuals who had expressed interest in the initiative and also, through media publicity, to the general public. Over 350 books were distributed and 12 workshops were held to assist people in completing them. About 110 were returned for analysis. Approximately 200 additional indicators were identified. The project team assessed these and made a final list of 29.

In 1998, a Vision 2020 Progress Team of 16 citizens and one Council member was established to lead an extensive review of the Vision 2020 strategies. In late 1998, it produced "Strategies for a Sustainable Community" contained within 14 themes. The Team was also tasked to evaluate alternative implementing mechanisms complete with a preferred structure to ensure long-term commitment to strategy implementation, continued and wide community involvement, and an evaluation process to continue to measure progress. The International Council for Local Environmental Initiatives and the Social Planning and Research Council (SPRC) of Hamilton-Wentworth were hired to develop implementation models for Vision 2020 based on international and local experiences. A Reference Group of community members representing diverse sectors of the community discussed a number of preferred models and eventually selected a multi-sectoral partnership model recommended by the SPRC, to be structured as an independent community-based, non-profit organization and called Action 2020.

In 1999, consultation with data providers, community organizations and other government institutions resulted in some changes to the Vision 2020 indicators report. The existing indicators were recategorized into the 14 theme areas detailed in the new Strategies document, some indicators were eliminated, others were added, and still others were reworked.

Results

The citizens Task Force delivered: Vision 2020 – The Sustainable Region; Directions for Creating a Sustainable Region; and Detailed Strategies and Actions for Creating a Sustainable Region. Actions taken were:

• Revision and development of long-range planning and policy documents beginning with a new Official Plan for Land-Use, followed by a new economic strategy, a Transportation Review and a Comprehensive Municipal Pollution Prevention Plan, all of which reflected some of the detailed recommendations made in the Vision 2020 reports.

- Mandating by Regional Council of a Staff Working Group on Sustainable Development, comprised of senior staff from all regional departments, to develop mechanisms for formally integrating the principles of sustainable development and the vision statement into the capital budget and departmental work programs development processes. The Staff Working Group created the "Sustainable Community Decision Making Guide," which was to direct all staff in the evaluation of all proposed and existing policies, programs and projects. The Working Group was also to revise procedures regarding: grant applications; interview and candidate selection for citizen advisory committees; tendering and purchasing policies; and internal auditing procedures.

- Specific projects, for example, the construction of a bicycle commuter network.

- Measuring the region's progress in relation to the Vision 2020 goals. Action lead to the development of three key components of a monitoring system: the Sustainable Community Indicator's Project, which produced a Sustainability Indicators and Annual Report Card with 29 indicators; the Annual Vision 2020 Sustainable Community Day designed for the community to discuss progress and future priorities; and an Implementation Review that summarizes according to the 400 detailed recommendations of Vision 2020 the major activities occurring in the community that complement the vision and contradict it with discussion of gaps in efforts to achieve the vision.

It took almost four years to develop and implement the three monitoring system components due to 1) community involvement in developing the indicators, and 2) under-resourcing. The Sustainable Community Indicators Project involved a research team of experts that developed an initial set of 60 potential indicators and a workbook where participants evaluated the proposed or new indicators according to a set of criteria: cost/ease of collection; credibility and validity; balance; and potential to effect change. The community consultations included focus groups, a youth seminar and special expert working groups. The public was not sensitive to the indicator selection criteria and, as a result, proposed over 200 other indicators to those developed by the experts. (Without having invested up front in educating average citizens about the nuances of indicators, the region questioned whether the resources supporting the original public indicator development process had been worthwhile.) At a minimum, the exercise pointed to the need for a clearly identified and communicated project mandate at the launch of an indicator development process that articulates the intended audience and application of the indicators. Citizens also need to understand that indicators must represent a balance of concerns. For example, those for Hamilton-Wentworth are to represent the economy, the environment, and social and health aspects of community life.

Since the first indicator development experience, the region is relying more on the involvement of experts and community groups with some knowledge in key indicator areas. For example, experts from McMaster University have volunteered to explore air quality issues in the city and to propose indicators that will give direction as to improvement.

In the spring of 1994, a new official plan called "Towards a Sustainable Region" was adopted by Regional Council making 100 of the 400 detailed Vision 2020 recommendations official Regional policy.

An evaluation of the Sustainable Community Initiative involved a telephone survey of 250 randomly selected households. Ten to 15 percent had an understanding of sustainability; personal behaviour change was not evaluated. An increasing number of newspaper articles are reporting on specific events or activities within the context of long-term sustainable development.

What worked well in the project can be summarized from two perspectives: that of regional government and that of citizens. Within regional government, the sustainable community concept has been embedded into the decision-making processes; staff have a heightened awareness of the need for balance between economic and environmental concerns; and individual departments are communicating and coordinating actions more among themselves. For citizens, the opportunities for participation took a variety of forms and participants could see how their contributions were being used and built upon through the process stages.

Lessons have been learned both from the initial project and from subsequent updating. For the initial project, more initiatives to increase community awareness and understanding should have been undertaken before starting the Task Force. Simple social marketing techniques to establish an ethic of sustainability (i.e., to influence people's value set) have to compete with larger marketing budgets of large local and global corporations whose values contradict sustainable community concepts. A significant error in the original project was the failure to successfully create a community stakeholder group to guide and facilitate implementation and build support in the community. For example, while several very large businesses and the Business Improvement Area Associations were and continue to financially support the project, the ongoing engagement of businesses is hard to achieve. This is now being addressed through the non-profit organization Action 2020, mandated for one to broaden community participation in activities that achieve Vision 2020.

Throughout the life of the project, there has been a requirement to balance the short-term performance needs of politicians with the longer term perspective inherent in sustainable development. While indicators have kept issues alive, they have also posed risks to political aspirations. The project's success in this balancing of interests and avoidance of polarization is evident from its ongoing regional government funding, with each new declaration of support reinforcing the project's credibility and security.

Also for the original project, a broader communication program in association with key media outlets (i.e., sponsorship of outreach programs) should have been developed before the community participation process began.

Regarding updating the strategic plan, the public process required citizens on the 1998 Progress Team to review the Vision 2020 strategies, but the people themselves lacked the technical expertise to assign priorities to the 14 themes and 212 strategies for implementation that they

developed in their Strategies document, despite some being evidently more important than others. The task now passes to the Action 2020 organization.

Key factors to a successful citizen-involved sustainable development strategy are:

- Commitment of senior regional government officials demonstrated, for one, by adequate funding

- Clear purpose

- Community empowerment to take direct responsibility for initiating and implementing projects

- Patience to allow the community to investigate and develop its own solutions as opposed to adopting those of experts

- Flexibility in financial and staffing resources to respond to changes as the process evolves

- Consensus across a variety of sectors

- Monitoring and reporting mechanisms to allow an annual review by the community of achievement of vision goals and priority setting for vision implementation.

How indicators are being used

Within regional government, the Staff Working Group on Sustainable Development developed the Sustainable Community Decision-Making Guide to assist regional government staff in the evaluation of all proposed and existing policies, programs and projects. As well, the Region's Official Plan was revised and renamed "Toward a Sustainable Region," approved by the Ontario Minister of Municipal Affairs.

The actions initiated by Regional Council to implement Vision 2020 were in the following areas: natural spaces; water and wetlands; transportation and air quality; energy and waste management; new economy; well-being and health; monitoring; and education, awareness and empowerment. In building community awareness, programs directed at children and youth have been developed in partnership with community organizations.

What citizens continue to be involved

To facilitate implementation of Vision 2020, a citizen's organization called "Citizens for a Sustainable Community" was created but has been unable to either attract new community attention/volunteers or facilitate implementation of any aspects of the vision.

Subsequently, in 1998, a new Progress Team, mandated to explore a new set of implementation strategies to reflect changes that have taken place within the community, recommended that a

community group be organized with responsibility for implementing that which only the community can implement. The Progress Team accepted an SPRC recommendation (mentioned above). Regional Council approved the proposals of this small group and allocated approximately $250,000 (as funds, secondments and space) for one year to support the new community non-profit group. The community group will have to look elsewhere for funding after the first year. An interim Board of Directors has been dealing with legal details and issues, including incorporation, in order for the entity to receive the regional government funding.

B3: Plan Winnipeg 2020 Vision

First adopted in 1986, Plan Winnipeg was a strategic development plan for the city dealing almost exclusively with land use and urban development issues. It was reviewed in 1991/92 and replaced by *Plan Winnipeg ...toward 2010* in 1993. Commencing in 1997, the city reviewed the 1993 Plan Winnipeg and at the same time decided to develop community indicators.

Mechanisms

The first phase in developing a first set of indicators was a collaborative effort between the Strategic Planning Division of the City of Winnipeg and the Measurement and Indicators Program of the International Institute for Sustainable Development (IISD). The city had the lead on the project and IISD provided support and expertise for indicator development. The effort produced a quality of life issue framework, which informed the City's process of developing indicators to complement a new Plan Winnipeg.

To develop a first sense of what quality of life means to Winnipeggers, the City of Winnipeg and the IISD invited about 40 umbrella groups to participate in a focus group, including neighbourhood communities, the business community, professional associations, unions, educational organizations, Aboriginal people's groups and NGOs. Criteria for selecting participants included the need to maintain gender equality and to include representatives from labour, public, private and civil society. A resulting 29 participants (including IISD and City of Winnipeg personnel) attended a day-long focus group meeting in late 1997 (20 participants represented specific interests in the city and were leaders in their respective organizations or groups). Participants had been provided with an information package containing a number of documents, including an issue paper on frameworks and indicators in the context of sustainable development reporting. Participants were asked to suggest and rank issues falling under four pre-determined quality of life sustainable development categories: urban environment, human made capital, community assets, and human well-being. Using breakout groups, the four categories were expanded to five (urban environment, urban economy, community assets, individual well-being, and community leadership and pride). Each was divided into a set of sub-categories (total of 22) and issues were assigned to each sub-category. This became the quality of life issue framework to inform the City's new Plan Winnipeg.

Having identified the preliminary components of quality of life, the project entered its second phase. Citizen consultation was sought through public advertising and a mail out to about 400 community organizations, inviting attendance at workshops to elaborate on the components and propose how to measure progress. About 160 people, mostly representing community organizations, attended 16 different workshops in November 1998. At the same time, an administrative working group made up of City of Winnipeg staff and provincial government people working in sustainability developed four broad categories to capture the components and issues identified: environment, economy, the community and the individual. With the new categorization and input from the workshops, public consultation was sought to attach priorities to the components and issues identified thus far. Another round of public advertising and letters

to community organizations resulted in about 100 participants attending a large public forum in December 1998 to utilize voting technology to set the priorities. Incorporating input from the forum resulted in the development of a set of 10 key components of quality of life in Winnipeg, with suggested indicators for each component. The next step was to validate this information with input from a broader audience. The draft was circulated to a large mailing list of approximately 500 individuals and groups for feedback. That input led to the creation of 10 vision descriptions and approximately 50 indicators that will form the basis for quality of life measurement in Winnipeg. These became one part of a draft Plan Winnipeg 2020 Vision (September 1999) with a second part being corresponding policy directions for the City Council. By this time, a new Council had appointed a steering committee for the new plan and a public hearing was held at which committee members received approximately 25 responses to the draft plan, all supportive of the document and affirming the consultation process. The plan is now being refined due to input from the hearing and based on a further 25 responses received since the hearing.

Results

Plan Winnipeg 2020 Vision contains not only a broad vision for the city but a "sub-vision" for each of the 10 components of quality of life, along with approximate indicators of progress per component that Winnipeggers will recognize.

The process responded to a strong desire for citizen participation in the city. The process built consensus among the participants and participants' input was evident in the resulting documentation.

How indicators are being used

The immediate outcome of the quality of life components is policy directions to the City Council intended to contribute significantly toward a higher quality of life for Winnipeggers.

The next phase will be to develop a true set of measures for each of the 10 components of quality of life and their corresponding indicators. The city is also undertaking a data assessment to identify and describe data to be used for the empirical analysis of quality of life issues, and to assess data availability across the framework. The long-term objective is to design programs to improve the quality and availability of harmonized data sets consistent with issues in quality of life. Data gaps will be identified, recommendations will be made to fill them and to increase the efficiency of existing information, measurement and reporting systems. The project has compiled a directory of data sources and contacts with the city, other organizations and in other levels of government.

How citizens continue to be involved

Citizens will be invited to respond to the actual indicators of quality of life currently being researched.

B4: Sustainable Calgary

Sustainable Calgary was formed in 1996 by 10 volunteers inspired by Sustainable Seattle and the community sustainability work of a local non-profit society called the Arusha Centre. The volunteers had experience in international, social and community development work and were concerned with the predominance of the narrow set of economic indicators used in city decision making. Over time, occasional funding and donations have come from a number of local agencies, from Environment Canada, Health Canada and CUSO. The goal of the Sustainable Calgary State of Our City is to develop and institutionalize a set of sustainability indicators and monitor them to track Calgary's long-term health and vitality.

Mechanisms

After a first set of two or three forums where the Seattle project was described, eight people volunteered to be involved in a Sustainable Calgary project. Beginning in March 1996, these volunteers dedicated a year to researching sustainability indicators and their potential to promote and encourage community-level actions and local sustainable development. The development process was intended as a citizen initiative with broad participation. (Initially the volunteers developed a database of participant characteristics to monitor the diversity of people involved, but the database was not maintained.)

In March 1997, an introductory workshop was held and attended by 85 citizens. Participants were invited to sign up for one of five think tank groups that were to identify over three months the appropriate indicators for each of five theme areas: economy, community, natural environment, resource use and health and education. Each think tank of between 8 and 15 people met three times to decide on what indicators should represent their area, using a set of four predetermined assessment criteria: ease of data availability; balance of indicator themes; ease of report writing; availability of a steward for the indicator – someone to gather data, monitor and research the indicator. In mid-1997, at a plenary workshop, each group presented their top 10 indicators. All participants then voted on the overall top 10 indicators. The project core group compiled the results of the voting and decided which indicators would be included in a first addition of the State of the City Report. Twenty-four indicators were selected across the five themes. The think tank participants were invited back for a project update and volunteer stewards were recruited for each indicator, to conduct some basic research on the indicator and identify key topic experts. Stewards were later oriented to their tasks. Indicator research was finalized by early 1998 and the first Sustainable Calgary State of Our City Report was created (1998). In total, more than 300 citizens volunteered over 4,000 hours over two years to the project.

Results

The Sustainable Calgary State of Our City Report (1998) was intended: to create a focal point for discussion of sustainability issues and to raise to a higher level the public debate; as an educational tool; to monitor issues, actions and policies; to provide a basis for action and influence policy, planning and community processes; and to demonstrate links among economic,

social and ecological sectors (indicators). The report challenges individuals to consider options for how they can contribute to greater local sustainability.

Indicator theme areas are:

- economy (5 indicators)
- health and education (5)
- community (5)
- natural environment (6)
- resource use (3)

Regarding lessons learned, Sustainable Calgary has found that continued high levels of diverse participation, particularly with marginalized people who typically do not self-select for citizen involvement projects, require a proactive approach, aggressive recruitment and making it easy for people and organizations to get involved. As well, since one of Sustainable Calgary's objectives is to institutionalize the indicator project, the integration of elected officials and key decision-making bodies into the project processes is imperative. A key finding was that as citizen participation increased, business and government interest increased.

How indicators are being used

The first report was presented to the policy committee of the City, which subsequently put forward three resolutions that the City accepted: to invite Sustainable Calgary to be involved in similar projects that the City is aware of; to support decisions that bring major decision-making parties together to discuss the report; and to direct the report to all City departments and ask for their response.

Sustainable Calgary's current challenge is how to integrate a citizen's initiative into government processes. One proposal is the creation of an arm's length independent organization or agency that can respect and maintain the integrity of the project as it has evolved until now, for example, through a citizens' sustainable development commission.

A lesson learned regarding indicators themselves was the creation of an "indicator in progress" – a good indicator for which a technically sound measure does not exist (e.g., food grown locally). The response was to set up a task force for such an indicator to respect citizens' interest in it and explore how to begin to measure it.

What is continuing to happen with citizens

After the launch of the State of Our City Report, Sustainable Calgary received funding to do a series of sustainability indicator workshops and public forums to expand the community representation to the project, for example, to involve youth, business, social studies teachers, ethnocultural communities in the city, street involved people, the disabled and the low-income community. The workshops and forums are being held at convenient times where people work or

gather. They are part of "2000 Voices," the citizen involvement plan for the development of the second report. The process goal is to engage 2,000 citizens; so far workshops and presentations have drawn about 900 people. Another objective is to make a strong effort to get a better base of indicators; the goal is to add between 6 and 12 new indicators to the report card.

The project Sustainable Calgary was invited to participate in City of Calgary initiatives concerning indicators and considerations for the future quality of life in the city. The State of Our City Report is being used in the curriculum of several courses at the University of Calgary. Sustainable Calgary is working with a local agency on a project to explore community-based outcome indicators for new immigrants, intending to address newcomers directly and also professionals in immigrant service agencies. Sustainable Calgary also received funding to coordinate two other initiatives – the Green Map and the Ecological Footprint.

Once the report card project is institutionalized, Sustainable Calgary plans to focus its efforts on facilitating the changes needed to mobilize community people to positively influence various indicators through pressure, presence and action. The objectives are to advocate for support of the project and to promote action.

B5: Edmonton 2005

Edmonton 2005: A Place for All began in 1994 when the Muttart Foundation brought together funders, consumers and service providers in the human services field – services that help, care for, support and protect people. The group created a vision of Edmonton and its human services sector and produced a discussion document – Edmonton 2005: A Place for All.

Mechanisms

As a discussion document, Edmonton 2005 stimulated community-wide discussion in two stages: Stage 1 – community visioning, which happened over nine months in 1996; stage 2 – modeling and mobilizing over 6 months in 1996/97. Stage 1 began with distribution of the discussion document and other relevant information: 2,000 copies of Edmonton 2005; 12,000 copies of a brochure describing Edmonton 2005 to public places; mailing information to over 900 non-profit organizations, community leagues and business community members; and holding a contest to encourage young people aged 5 to 24 to share their ideas. Participants contributed their views through a number of avenues: 52 discussion groups, 7 drop-ins, 32 personal interviews, 33 written submissions and 327 entries into the youth contest. A total of 1,354 citizens were involved.

Results

Seven themes for human services emerged from the citizen discussions: people want human services that are caring, relevant, accountable, accessible, well-funded, connecting people and nurturing relationships, and supporting personal and community development.

While Stage 1 identified what people want, Stage 2 supported individuals, groups and organizations to identify how to make the vision workable and viable. Strategies included: participants identifying 20 examples of community actions in keeping with their vision; three vision to action workshops that brought together diverse people for discussions; a vision to action workshop for young people; facilitation support provided to groups wanting to act on their specific ideas; information sharing of ideas collected; and completion of a literature review focusing on 10 case studies of community development approaches to human services. Four key issues were identified and discussed: factors that support action; factors that create barriers to action; priorities for action; and tips for action. The Muttart Foundation also prepared three background documents free of charge.

Ten factors that support vision to action emerged consistently from the workshops, success story interviews and literature review: taking a long-term view; knowing the community; involving community members; starting small, risk taking and building on success; sharing a vision and values; finding a catalyst (someone with the ability to make things happen); developing connections and ownership; obtaining needed financial resources; developing a structure that supports action; and building in evaluation and learning.

Nine barriers emerged:

- focussing on the wrong issues;
- lacking information and understanding;
- inadequate and unstable resources;
- expectations for community action without support;
- power issues (threatening the status quo);
- the labour intensiveness of building community ownership and sustaining commitment;
- differing attitudes and perceptions;
- short-term outcomes evaluation; and
- discounting the ideas of certain community members.

Five areas for community action emerged: help communities learn and build on strengths; work with schools to make community connections; make opportunities for community development; create and support grassroots caring; and tackle money matters (raise money).

How citizens continue to be involved

To support vision to action, the Muttart Foundation will provide small grants to support community-based action if proposals demonstrate that they further the vision of Edmonton 2005.

B6: Taking Toronto's Vital Signs

The local foundation community was concerned about the lack of funding to community initiatives and was considering an indicator project as a means to monitor the effects of the funding changes. As well, the amalgamation of cities in the greater Toronto area with outlying areas in 1998 presented an opportunity to reassess what people in the City of Toronto value about their homes and civic structures and to institutionalize the priorities through a set of values and indicators. The Laidlaw Foundation responded by convening an initial meeting with other philanthropic organizations to discuss the state of the city after amalgamation. The Toronto Community Foundation agreed to spearhead the project – the Toronto Community Indicator Project – supported by a number of partners: the Hospital for Sick Children Foundation, the Laidlaw Foundation, the Maytree Foundation, the Ontario Trillium Foundation, the Toronto Star, the United Way of Greater Toronto, the Board of Trade, the Social Planning Council, the University of Toronto and the Walter & Duncan Gordon Foundation.

Mechanisms

To begin the process, a number of community leaders, academics and experts met periodically over approximately one year. During that time, about 1,400 people were kept informed of the proceedings of meetings and, through a response booklet, an estimated few hundred contributed to what became a proposed set of 10 areas of concern to which indicators and measures were to be eventually assigned. The 10 areas were then tested on focus groups. Subsequently, an Environics telephone survey of 444 City of Toronto residents confirmed the 10 areas and determined a sense of ranking for them. With the confirmation of the 10 areas, a survey of the literature then provided approximately 195 indicators to correspond to the areas of concern. About 60 of these were selected and with the 10 areas of concern, a discussion guide, which posed questions and proposed indicators per area, was developed for general distribution. Respondents were required to select the questions and indicators that best represented their concerns per area. Approximately 6,000 discussion guides and response booklets were broadly distributed, for example, to funders, partners, municipalities, foundations, the universities, and organizations and individuals on a mailing list maintained by the project. Input was also solicited through a web site. A synthesis of the information gathered from the guides plus the work of an internal technical review team resulted in 24 indicators and 12 supplementary ones. This proposal was again disseminated to about 600 people with an estimated 100 attending a workshop for further refinement of the indicators. Another synthesis of input produced a final set of 26 indicators for the 10 areas of concern.

Results

The distribution of the discussion guides and booklets was seen more as a good model for community animation than a tool to gather input. However, the effectiveness of the process and support materials depended on English language skills and literacy.

The project thus far has been more about process than product. People were given the opportunity to discuss what concerned them most about their city.

Lessons learned are summarized as follows:

- Governance – Such a project can be relatively easily overtaken by interest groups, with indicator results interpreted according to a particular view. For example, business interests may not be sufficiently critical of the status of community quality of life whereas social justice activists may be too critical. For a project to maintain a balanced view of quality of life requires governance (control) to be ideally in neutral hands. Given the context in which Taking Toronto's Vital Signs was created, it being run independent of formal city influence and funding, and deliberately parallel to the city planning processes, is viewed as one of its strengths. Not being an officially sanctioned process, it deliberately had no stated vision and will not set benchmarks for indicator measures. In this way, it has kept a diverse set of interests at the table and will not judge whether an indicator value is too high or too low. The polarization that does exist as to whether Toronto is a good or not good place to live is being addressed by the search for an indicator to demonstrate the difference of opinion. While balancing the diverse interests has been difficult, their presence has added to project credibility.

- Diversity – The people involved in project governance are not reflective of Toronto's cultural diversity nor are all sectors involved. The challenge is to find the appropriate representatives of diversity. The arts community, for one, was hesitant to become involved because of a perceived threat that the project's mandate to measure performance with selected indicators would supply the instruments to justify budget cuts.

- Infrastructure – Such a project sets expectations that indicators will be maintained and monitored over time. Locating the project where it will be most useful with secure funding should become an issue and part of the project workplan early on.

- The purpose of the indicators (anticipated application and audiences) needs to be very clearly identified at the outset of the project, that is, whose views are to be predominant. Taking Toronto's Vital Signs began with concerns of the foundation community regarding lack of funding to community initiatives, but the current proposed indicators do not reflect only the concerns of foundations. More broadly based issues were raised by citizens that foundations cannot address. Vital Signs now has more of a community "watchdog" orientation.

- Regarding indicator selection, there needs to be a balance between the concerns of citizens, funders and experts. The challenge lies in matching citizens' and funders' ideas and concerns over what indicators should be monitored with what experts would consider to be technically sound indicators, that is, those for which reliable data exist that truly represent the areas of concern. Whatever the results are, the indicator selection process must be transparent.

How indicators are being used

Indicators are not yet confirmed. Eventually the Vital Signs will be a community advocacy tool to inform city officials of issues.

B7: Quality of Life in Jacksonville (Florida)

A strong motivation for community improvement is an explicitly stated goal of the City of Jacksonville, the Jacksonville Chamber of Commerce and the Jacksonville Community Council Inc. (JCCI). The QOL project, funded by the City of Jacksonville, with strong support and involvement from the Chamber of Commerce, represents an effort to monitor Duval County's progress on an annual basis.

Mechanisms

During the summer of 1985, over 100 volunteers met in subcommittees under the leadership of a steering committee appointed by the JCCI president in consultation with the Chamber of Commerce. The volunteers developed a quality of life model with nine elements. They also selected specific indicators for each element, guided by criteria assigned by the steering committee.

Results

Seventy-one indicators are organized around the nine elements, which include:

- education
- the economy
- public safety
- natural environment
- health
- social environment
- government/politics
- culture/recreation
- mobility

In 1991, new task forces involving over 140 volunteers reviewed the indicators. As a result, several were eliminated due to data problems, others were revised for clarity and several new indicators were added. Guided by research conducted by JCCI staff on existing standards or goals for the various indicators, the task forces established a target for each indicator for the year 2000. The task forces also identified a "most important" indicator for each element. From these, a top-priority indicator became the focus for community attention and action during the 1990s. Finally, the task forces ranked the elements.

Beginning in 1986, data for all indicators are reported annually. Annual updates display data for 14 years except for the new indicators added in 1991.

Regarding lessons learned, the 1998 Quality of Life Committee of volunteers recognized the need for several improvements, to be addressed through a new Indicators Steering Committee:

- some indicators need to be reported at the regional level (e.g., core versus suburban areas)

- some indicators need to be reported at the neighbourhood level

- linkages among indicators need to be identified and recognized

- targets need ongoing attention – some may be too idealistic, some may not be enough so; targets should be set for only five years; methods used to select targets must be documented and as objective as possible.

During 2000, newly established volunteer task forces are addressing these lessons learned through an intensive process of reviewing, revising and upgrading the entire indicator set, after which new Targets for 2005 will be established.

How indicators are being used

JCCI publishes two QOL documents annually: an executive summary and a reference document. Each document is also accessible on the Internet via JCCI's website. The documents are widely used by public and private decision makers in Jacksonville to inform strategic planning and to guide policymaking. Through media exposure and JCCI presentations, the documents have become a major source of public knowledge and awareness about aspects of community life. Once the upgrading process is completed and new targets are set, JCCI will reassess its approach to disseminating the indicator information and will initiate a new advocacy and marketing effort to make the information both more visible and user-friendly.

B8: Sustainable Seattle

The indicators project grew out of a one-day conference in November 1990 sponsored by the Washington, DC, based Global Tomorrow Coalition, in which community leaders from all facets of Seattle life came together around the idea of citizens choosing their own ways of measuring long-term community well-being. In February 1991, the Sustainable Seattle Network formed with 30 volunteers meeting to further the concept of creating indicators to measure Seattle's health.

Today Sustainable Seattle is a volunteer-based civic network and forum. Formerly a program of the YMCA, it is now incorporated as a non-profit organization. A core of volunteers represent a wide spectrum of community life.

Mechanisms

For the six months following the creation of the Sustainable Seattle Network, an Indicators Task Team made up of people with diverse backgrounds met regularly and eventually drafted a list of 29 potential key indicators and a number of secondary "provocative" ones. At this point, the team recognized the need to get a broader perspective on indices across the environmental, economic and social sectors and embarked on a recruitment campaign to create a Civic Panel to collectively imagine what aspects of community were important to measure. Invited to participate were 300 citizen leaders and grass roots activists with knowledge in: resource consumption, education, economy, transportation, natural environment, health, social environment, culture and recreation, population and community participation. Over 150 citizens agreed to participate and an additional 20 interested people volunteered.

Volunteers were divided into groups to address the topic areas in workshops. Twenty Sustainable Seattle volunteers were trained as facilitators and recorders. Prior to each workshop, participants received background materials, an agenda with specific goals was planned and coordinators were briefed to lead the workshop. Techniques of facilitated whole group dialogue and small group sessions were used at each meeting.

Four participatory workshops were held over six months, with the goal of developing consensus recommendations for key indicators. At the first workshop, in addition to orientation, each participant received "Draft Indicators Version 1" developed ahead of time by a Task Team and a six-page feedback survey. The draft had a list of 29 potential indicators and many secondary and provocative ones. Over the summer, the Panelists reviewed the draft list and recorded their comments in the survey. Based on the responses to the survey, the Task Team revised the indicator list, framed comments and discussion questions and divided the Panelists into topic areas based on their interests and knowledge.

Over the course of the second and third workshops, Panelists reached agreement on three to five (or more) key indicators for their topic areas, with a total of 99 indicators. Another draft list was prepared. During a fourth and final workshop, 15 key indicators were selected from the 99.

Participants also developed chains of causation between key indicators and brainstormed on strategies for putting the indicators to work in business, education, the media, communities and policymaking. Next, a number of Civic Panelists joined the Task Team to select what were eventually 40 indicators from the original 99, that would give a "whole system" snapshot of sustainability. After seven iterations, a final version of indicators was sent to all Civic Panelists for review and comment. The project then embarked on data collection and analysis. Many Panelists continued to volunteer in finding and collecting data, and evaluating and reviewing information.

Results

In response to "How do we balance concerns for social equity, ecological integrity and economic vitality?" and "How do we create a livable community today while ensuring a healthy and fulfilling legacy for the future?," citizens identified five domains of concern and 40 indicators.

How indicators are being used

The goals of Sustainable Seattle are:

- to influence local actions, both individual and collective, that move Seattle in the direction of sustaining a healthy, balanced relationship between people and the earth, leaving a worthy legacy of prosperity for future generations;

- to publish and apply the indicators; track progress toward the goals of sustainable living and development; and facilitate local actions by which individuals and groups can move indicators in a positive direction over time;

- to inform the area's citizens and leaders about local to global trends, principles and practices of sustainable development;

- to establish sustainability as a significant factor in our decisions: in homes, neighbourhoods, businesses, schools, the natural environment and civic life;

- to provide an open forum for cross-community dialogue around critical issues of sustainability across the spectrum of environmental, economic and social concerns; and

- to serve as a resource centre for applying the practices of sustainable living and development in the Seattle metropolitan area and to facilitate innovative partnerships in addressing issues of long-term sustainability.

How citizens continue to be involved

Several teams of volunteers support the organization's general mission. For example, a team dealing with curriculum development is exploring a framework for high school youth to help

them understand and take action on sustainability. Another team updates indicators with new data and keeps profiles of organizations that work to move indicators in a positive direction. A neighbourhood network team of volunteers is promoting sustainability initiatives in Seattle communities to maximize citizen participation in the City's Neighbourhood Planning Process. A policy group initiates and informs discussions about key policy and program issues affecting the area. And volunteers research and write the Seattle Guide to Sustainable Living, a resource intended to inspire action toward daily sustainable living.

B9: Florida Commission on Government Accountability to the People (GAP Commission)
   (1992/93 to 1997/98)

In 1991/92, the Florida business community became concerned about government accountability regarding its budget-setting process particularly as there were no goals in place as to what expenditures were meant to achieve. In response, the Governor appointed a commission of about 15 people comprising business and academic leaders, referred to as a citizen group. The legislature approved funding for the project.

Mechanisms

Approximately 15 GAP commissioners were appointed by the Governor and confirmed by the legislature. The first chair was a businessman; the subsequent chairs were a city mayor, a bank president and, lastly, a professor at the business school at the University of Florida. The commissioners then invited approximately 20 other people to form a volunteer group of experts to develop the accountability framework and measures. These were primarily academics with some experts from government committees and some private sector economists. In 1992/93, the commissioners and the volunteer group together developed six categories and about 400 measures. For some of the measures, data were available for 1985 and 1990. The plan was to collect data for 1995 and 2000.

With the proposed framework and measures, the Commission invited interest groups from across the state to attend publicized open hearings in seven or eight cities, to deliver input on the categories and measures. GAP staff (of which there were four) attended the meetings along with any commissioners who were able to attend, depending on location. About 20 to 25 different people responded to the Commission's proposals in each city, they being mostly representatives of strong interest groups, for example, concerning education. The Commission's proposed categories and measures were minimally adjusted as a result of the citizen input.

A final task of the Commission was goal setting for the measures developed. The Commission struck a Goals Development Committee chaired by a business school professor. Various agencies and associations were approached to nominate what became between 150 to 200 people for a Delphi-type survey. The participants, largely leaders and experts, were asked to set goals for about 40 of the most important measures. They were supplied with data from 1985 and 1990, data and information about another 8 to 10 states plus information about any goals already set (e.g., immunization rates). Material was mailed out to participants and in some cases followed up with phone calls. The mean or median of the survey results were assessed by the volunteer expert group and goals were set for about 40 measures. Some goal values were changed by the expert group to be realistic (e.g., the survey showed zero tolerance for infant mortality, which the volunteer group adjusted to a more realistic figure).

Results

The GAP Commission published its first book of measures with goals in about 1996. The press and the legislature wanted the Commission to assign a "grade" to the state's performance against the goals. It obliged and assigned a lower grade than some politicians had hoped for. At the same time, the Commission was beginning to study different public agencies (e.g., those dealing with juvenile justice). The finding of non-existent/conflicting/or overlapping goals and processes among some agencies combined with the lower than expected state performance grade upset enough legislators that they cut the Commission's funding. The private sector supported the initiative for one more year, but when in 1998 there was no legislative support, the project was effectively disbanded.

Of particular value to the measures and goals development process were the two opportunities for public input: during the statewide open hearings on the proposed measures and the subsequent survey of leaders and experts for goal-setting. Other positive aspects of the process were the involvement of approximately 1,000 leaders (as opposed to citizens); the interest generated within some cities to the extent that they undertook similar processes locally; and the communications established among various community agencies and interest groups in the course of responding to the Commission's proposed measures. The statewide travel also to some degree distanced and protected the Commission from the legislature and produced some public buy-in.

The lesson learned was that the Commission was a captive of the legislature. Despite the relatively broad endorsement of the measures, goals and the Commission's studies of public agencies, its funding was cut because of its opinions on agency and state performance. In hindsight, the Commission required more visibility and publicity to develop more awareness and understanding in the general public buy-in for it to better withstand the criticisms of the legislature.

How indicators are being used

Some political candidates have used the benchmarks as speaking points. Some cities compare themselves to the state benchmarks.

B10: Minnesota Milestones

Minnesota Milestones began in 1991, being one of the earliest state legislature efforts to promote accountability for results.

Mechanisms

In 1991, Minnesota Planning, an agency of the State Legislature, at the request of the Governor, drafted the Minnesota Milestones with the input of thousands of citizens from every region of the state. Over a two-year development period, citizens described, through community meetings, written correspondence or surveys, what they wanted their state to be like in 30 years.

Results

Five common themes appeared regarding a vision for quality of life and four categories for goals and indicators: people, community and democracy, economy and environment.

How indicators are being used

The indicators are a catalyst in the growing movement toward performance measurement and quality management in government, and have inspired Minnesota cities and counties to develop their own systems of performance accountability. For example, a spinoff of the Minnesota Milestones is the *Children's Services Report Card*, which provides county data to track the well-being of local children. The Legislature offers incentives for local governments to develop performance reporting systems. The Legislature also requires major state agencies to report publicly on their performance and use the reports in their budget requests. State agencies are motivated to find new ways to measure customer satisfaction, efficiency and effectiveness. Public agencies have also formed partnerships to improve societal outcomes (e.g., the Department of Health works with health care providers and community groups to reduce smoking).

How citizens contine to be involved

Revisions to the goals of Minnesota Milestones 1998 came from members of the public and from consultation with state agencies and experts in specific fields. Minnesota Planning first created a public review draft with proposed changes on which Minnesotans were invited to comment. Three surveys gauged support for goals: a Minnesota State Survey conducted by the University of Minnesota among a random sample of 800 citizens; a non-scientific mail and Internet survey of several hundred people; and a survey of about 500 public and private school students. As a result of citizen input, a technical review of the goals and changes in state policy, 90 percent of the goals were kept or modified; the wording for half the goals was changed; about one-third of the indicators were replaced and another third modified; indicators with insufficient data were dropped; and each indicator no longer had a specific target unless set by public agencies.

B11: Oregon Shines and Oregon Benchmarks

In the early 1980s, Oregon suffered a bust in its timber-dependent economy with thousands of jobs lost. By the mid 1980s, jobs were being created again, but average incomes were well below the national average. In response, the state Governor involved more than 150 business, government and community leaders in a process to create a revitalization plan for the state, called *Oregon Shines.* The original vision and goals of *Oregon Shines* were employment oriented; the three statewide goals were a superior workforce, an attractive quality of life to attract people and firms, and an international frame of mind. To monitor whether the state was moving in the right direction, *Oregon Shines* recommended the creation of a board to uphold the vision by identifying key activities needed and to measure progress. In 1989, the Legislature established and funded the Oregon Progress Board, which began work on the Oregon Benchmarks as the state's report card, first published in 1991.

Mechanisms

One hundred and fifty business, government and community leaders assembled by the state Governor developed the original *Oregon Shines* strategic plan. The development of benchmarks began in 1989 with the Oregon Progress Board forming six steering committees. Hundreds of people were involved through the steering committees. In addition, there were 12 statewide meetings held to gauge what citizens cared about the most. Through facilitated discussion sessions and electronic voting to test consensus, citizens were able to share their views. Written comments were also submitted to the Progress Board from over 200 organizations and individuals.

Following the release of the first benchmarks in 1991, the Oregon Business Council commissioned a study to explore the core values of Oregonians. The survey was conducted in 1992 and involved 1,362 citizens from all the state's counties in several hundred hours of face-to-face interviews. The Oregon Values and Belief Study released in 1993 demonstrated core values in four key areas: families, employment, education and livability. These closely tracked the principles in *Oregon Shines* and the benchmarks, and helped inform the refinement of subsequent benchmark reports.

In developing its 1995 report, the Progress Board used a number of techniques to engage the public, in addition to the findings of the survey: regional meetings where over 2,000 people participated in 29 town hall meetings across the state; direct mail requests for comments resulted in over 500 written responses; and the 1991 benchmark report was widely distributed.

In early 1996, a new state Governor convened a 46-member citizen Task Force, including legislators, county and local officials, and representatives from business, labor, academia and the media, to assess the state's progress toward the original *Oregon Shines* goals and to update the vision. In 1997, the Task Force produced the *Oregon Shines II* report. In developing the report, the Task Force heard from numerous experts and a team of researchers at the University of Oregon provided economic analyses. The Task Force also looked at the findings from several

opinion polls, including one on what "quality of life" means to Oregonians. Task Force members also met with citizens in every state county to hear their ideas about the future. In 10 meetings, the Task Force heard from over 400 business and community leaders about local and regional issues affecting the future. In seven public meetings, Task Force members heard from state agencies, interest groups and individuals regarding the effectiveness of the benchmarks. As a result, eight recommendations were included in the 1997 report and many benchmarks were either improved or discarded (259 benchmarks in the 1995 report were reduced to 92 and 39 original priority benchmarks were reduced to 22).

Results

There were originally 259 benchmarks divided into three categories (goals): creating highly capable, self-reliant people; maintaining and improving the state's exceptional quality of life; attainment of a diversified, globally competitive economy that pays high wages. By 1997, the *Oregon Shines II* goals had evolved to be: quality jobs for all Oregonians; safe, caring and engaged communities; and healthy, sustainable surroundings.

Oregon Shines II (1997) has three overarching goal categories (values), seven areas for which benchmarks are developed, and 92 benchmarks (indicators).

Regarding indicator development, lessons learned were:

- not too many indicators

- increase data accuracy

- set targets consistently

- make more data available at the local level

- regard benchmarking as the beginning of a process rather than an end

- integrate benchmarks into larger strategies for achieving desired results, including understanding of root causes of problems

- integrate benchmarks into budgeting

- create realistic alternatives for improving outcomes

- state government must take the lead in the effort to integrate benchmarks into day-to-day operations as an example to all government agencies, non-profit agencies and private organizations (the change agents)
- consider overarching goals as interconnected, as opposed to independent

How indicators are being used

The original 1991 benchmarks were adopted by the Oregon legislature as a yardstick for legislative proposals. Subsequently, several bills were passed for education reform, workforce preparation and economic development in support of influencing the benchmarks.

Benchmarks encourage results-based accountability in priority areas and raise awareness of how linkages across sectors can influence benchmark standing, pointing to the need for coordination. State agencies have crafted strategies that address critical benchmarks and shape agency planning and budgeting to influence benchmarks. For example, in the Department of Human Resources, a Community Partnerships Initiative coordinates welfare, public health and other state functions around the benchmarks, and the Adult and Family Services Division used the benchmarks in developing agency performance measurement systems. A number of local Oregon governments adopted benchmarks of their own. Government and non-government organizations have gathered additional benchmark data that had been missing. Initiatives have been undertaken as a result of poor benchmark standing, for example, children immunization.

B12:   Newfoundland and Labrador Strategic Social Plan and the Community Accounts Project

In the late 1980s, through its annual briefs to the social policy committee of the provincial Cabinet, the Community Services Council of Newfoundland and Labrador (CSC) began to promote to government the need for a strategic social plan to guide the planning and funding of social programs. CSC maintained that a social plan was needed to balance the strategic economic plan already in place. In its 1992 Throne Speech, the provincial government announced its intention to prepare a social plan. Between 1992 and 1995, deputy ministers from departments that had social policy mandates along with the Chairman of the Economic Recovery Commission and the head of the CSC formed a "Strategic Planning Group." By June 1996, the Group had developed the Strategic Social Plan Consultation Paper which the Premier released along with an announcement for a public consultation process. A month later, the government appointed 15 private citizens with a variety of backgrounds to a Social Policy Advisory Committee (SPAC) to conduct throughout the province public consultations around all manner of social policy issues.

Mechanisms

In August 1996, the SPAC began a series of facilitated meetings with stakeholders (experts) around issues affecting key sectors identified in the Consultation Paper, including the voluntary sector. Interestingly, while the stakeholder meetings were conducted by sector, common themes and concerns arose among the issues and solutions raised. This pointed to the need for a framework to capture the issues in an integrated manner.

Later in September 1996, the consultations became public hearings. A detailed "How to Participate" brochure and a public dialogue schedule were released. In each community visited, advance advertising on the radio, in the local papers and on posted notices invited community members to participate. Public servants were given permission to speak in camera. Beginning in late September, over a nine-week period more than 100 meetings took place in 30 locations, with representatives from 150 communities. Committee members had input from over 1,500 participants and received 685 submissions, workbooks, questionnaires, e-mails, letters and telephone comments. The meetings were strongly facilitated with people being probed and encouraged to speak not only of concerns and issues but also of the solutions to resolve them. A Social Policy Workbook was prepared, and evaluation forms and a "Final Thoughts" questionnaire were circulated after many meetings.

The meeting formats were numerous: private interview sessions, public meetings, one-on-one drop-in sessions, private meetings with government employees, invitational meetings with stakeholders (experts) around key sectoral issues, round table discussions with private individuals and representatives of a variety of groups, formal presentations of briefs, and specific group meetings – women's groups, literacy workers, social assistance recipients, rural development councils and zone boards, consumers of mental health services, child protection teams, family resource centres and the disabled.

SPAC presented to government the results of public involvement in defining social issues in a two-volume report: the people's views in *Volume 1: What the People Said*; and SPAC recommendations to government in *Volume II: Investing in People and Communities: A Framework for Social Development.*

As for lessons learned, the most challenging aspect of the consultation process was the distillation of people's viewpoints on social issues into a macro level perspective. The SPAC reviewed the notes of every meeting and analyzed general and sector-specific issues. Common themes led to the positioning of recommendations within an integrated social development framework. The intent was to direct action across areas and sectors of concern. One recommendation was the undertaking of a social audit.

Results

The SPAC presented its report in March 1997. Shortly afterward, the Premier and the Chair of the SPAC released it. The government had accepted the SPAC's recommendations in principle and formed special ministerial and interdepartmental committees to develop a strategic social plan. Using the SPAC's proposed social development framework to a significant extent as a foundation, and with additional research and analyses, the government prepared and released in 1998 *People, Partners and Prosperity: A Strategic Social Plan for Newfoundland and Labrador*. The plan contains a collective vision for Newfoundland and Labrador, a value set, four goals and corresponding objectives and actions to be taken.

Goal 4 of the Strategic Social Plan (SSP) is to achieve integrated and evidence-based policy development and monitoring as the foundation for the design, delivery and evaluation of social development programs and services. Additionally, the SSP commits government to completing a Social Audit within five years of the 1998 release of the SSP.

To address Goal 4, the government launched the Community Accounts Project with $300,000 per year as primary funding from the budget of the SSP. These funds are supplemented by further amounts from within the Newfoundland Statistics Agency, the agency developing the community accounts. The project is a work-in-progress, with resources currently directed toward the creation of the accounts. Within the next 12 to 18 months, resources will be progressively redeployed from account creation to maintenance and provision of support to end-users. Access to the accounts will gradually be opened to government departments and government's community-based partners in the SSP.

The purpose of the indicators in the community accounts is to provide objective evidence that will permit government to measure progress toward the overall vision, goals and objectives presented in the SSP. Specific objectives for the community accounts are to:

- provide an objective, quantitative basis for monitoring the social and economic progress of the province, regions, economic zones and individual communities as well as for specific population groups considered to be "at risk";

- inform public policy debate by creating consensus among the three levels of government, community agencies and other stakeholder groups on key indicators to use in policy development and program evaluation and the actual value of those indicators at specific points in time;

- provide a tool to explore potential cause-effect relationships between various indicators and domains as a basis for understanding the root causes of social problems and to guide policy and program development;

- make data readily available to policymakers, service delivery agencies and the public in an easy-to-understand form at minimal or no incremental cost to the user.

The Community Accounts translate the vision, values, and goals of the SSP into an organized database of key social and economic indicators. Arranged by domains of interest, the main accounts are hierarchical in structure. Each account begins at the provincial level and progresses to the province's six SSP regions, 20 economic development zones, 80 local areas, and more than 400 incorporated communities. This capacity to disaggregate provincial-level data is a unique feature that permits comparisons across communities.

From each of the main accounts, a small number of core benchmarks is gathered into a "Well-being" Account. For ease of use, a single well-being indicator, such as self-assessed health status, is presented as a graphic showing the value for each community vis-à-vis the range of values for other communities.

The interconnections among the domains abound, permitting exploration of relationships between them and thus inference of the root causes of problems and identification of useful interventions. Currently, a limited set of indicators are drawn from summary well-being accounts and are supported by an extensive array of other indicators, many of which are still under development.

How indicators are being used

The intent is for the community accounts to provide evidence for use in needs identification, planning, program design and program evaluation. In particular, the accounts will provide much of the evidence for the Social Audit. While the accounts are under development, access is given to only a limited number of organizations to ensure that resources are not prematurely diverted from creating the accounts to end-user support. However, the following are two examples of actual uses of the accounts:

- The Central Region steering committee for the SSP identified at-risk communities by noting those that have 10 key indicators below the 25th percentile of all communities. The Steering Committee is now using this information in collaboration with local groups to determine where to focus its energy and resources.

- The Department of Health and Community Services is using the accounts to identify areas of greatest need to help determine communities on which to target a new program for youth at risk.

The accounts are being developed collaboratively by drawing together groups of experts in each area of interest: an advisor from the Memorial University of Newfoundland as team leader, other academic and government researchers, managers from line departments, and users. Together they develop the conceptual framework for each account and decide on its contents. A technical team makes templates for the data tables, gathers data from many administrative and other sources, and carries out complex data preparations before posting the information on a website.

Additionally, in 1999-2000, the Newfoundland Statistics Agency is working closely with a five-member sub-committee of the Premier's Council on Social Development to develop the overall conceptual framework for the community accounts and the social audit. Some members of this sub-committee are primarily citizen representatives while others represent stakeholder organizations within the field of social development.

B13: A Strategy for Sustainable Development for the United Kingdom

The United Kingdom's first sustainable development strategy was developed in 1994 as a result of the commitment made at the 1992 Earth Summit. In 1997, the new Labour government announced its intention to update the Strategy with an emphasis on the social dimensions of sustainable development alongside economic issues, the environment and resource use. A national consultation process began in 1998.

Mechanisms

In early 1998, the government published and distributed a consultation document – *Opportunities for change,* a summary leaflet for the general public and more detailed documents on specific aspects of sustainable development. It arranged seminars and discussions with different groups of people across the country – businesses and trade unions, consumer groups, local authorities and NGOs. Within the UK governments, the sustainable development advisory bodies and relevant statutory bodies were consulted.

Opportunities for change generated over 1,000 responses ranging from local community groups to major international companies, and the leaflet saw over 4,500 responses. The government also consulted on a set of 13 headline indicators of sustainable development. Over 650 responses were received, research was conducted with focus groups and input was sought at a seminar of experts in May 1998 and at a series of roadshows and seminars around the country.

A consultation on a set of 13 "headline" indicators, *Sustainability counts,* was published in November 1998. The idea of a very limited set of indicators received widespread support, as generally did the indicators proposed. However, the consultation identified some additional issues that respondents felt should be included. Two indicators were added to the original proposals – one on levels of crime and a second on tackling poverty and social exclusion. The indicator initially proposed on social investment was extended to include investment in all assets.

Results

Identified were four strategy objectives. A core set of approximately 150 indicators – including the 15 headline indicators –will be central to monitoring and reporting on progress toward sustainable development. Guiding principles and approaches (reflecting key themes from the 1992 *Rio Declaration on Environment and Development)* were:

- putting people at the centre
- taking a long-term perspective
- taking account of costs and benefits
- creating an open and supportive economic system
- combatting poverty and social exclusion
- respecting environmental limits
- precautionary action

- using scientific knowledge
- transparency, information, participation and access to justice
- making the polluter pay

Responses to *Opportunities for Change* with widespread support:

- setting challenging, measurable targets for each key policy area
- highlighting education, health and poverty as sustainable development issues
- government working in partnership with business in areas such as best practice programmes and market transformation
- interest in company environmental or sustainable development reporting
- better recognition of sustainable development in the planning system
- participation and community empowerment as crucial to building sustainable communities
- transport as a key priority, including in relation to air pollution
- reform of fisheries and agricultural policies
- use of economic instruments, provided the social impacts can be managed
- international co-operation as a key to sustainable development.

Leaflet responses revealed strong concerns about:

- better, cheaper public transport
- less out-of-town development and revitalization of town centres
- more opportunities for recycling

From the variety of points of input, a key lesson learned was that reaching consensus on indicators (agreeing on what are the most important to measure and monitor) can be difficult because of differing perceptions of issues, for example, city versus rural, inner city versus suburban, and regional versus city.

How indicators are being used

The Strategy is encouraging increased reporting on sustainable development issues, including reporting by businesses, local authorities, individual government departments and public bodies. Starting in 2000, the government will report annually on progress by the whole country using the headline indicators. Details on the core set of approximately 150 indicators that were included in *A better quality of life* were published in *Quality of life counts* in December 1999.

How citizens continue to be involved

The Strategy will be fully reviewed after five years to account for changing priorities. A new Sustainable Development Commission will monitor progress and recommend action where needed, with its processes to be developed with the input of all stakeholders.

B14: Federation of Canadian Municipalities QOL Reporting System

In 1995, the federal government announced transfer payment formula changes, and removed national standards for the delivery of health, education and social services. The policy decisions replaced the shared cost-based Canada Assistance Plan with block funding through the Canada Health and Social Transfer (CHST), effective April 1, 1996. The CHST introduced provincial discretion for spending of the transferred monies.

Because indications were that financial assistance to provinces and ultimately to municipalities would be reduced over time, the Federation of Canadian Municipalities (FCM) launched a Social Policy Study on downloading effects of federal/provincial transfers. After the Study was released, municipalities agreed that a nationwide monitoring tool was needed to measure long-term effects of transfer payment changes. Sixteen municipalities across Canada were eventually involved in the development of a national QOL reporting system, with each contributing funds to the project. Statistics Canada and Human Resources Development Canada also contributed funds.

Mechanisms

Several mechanisms for involving municipalities and citizens in the project were employed. First was the FCM's Social Policy Study, then FCM's Big City Mayors' Caucus that decided on the need for a QOL monitoring tool, and lastly, the FCM project Technical Team that included the 16 municipal partners in the project. The Technical Team oversaw the development of the eight QOL indicators in the 1999 report. To expedite the task, the group was subdivided into smaller "indicator teams" of two or three municipal governments to work on each indicator. Each team had a "lead" and "support" community involved in the indicator design, with the lead community holding citizen consultations, generally involving focus groups. The indicator design plans and numbers of focus groups varied for each indicator. The indicator teams then vetted their ideas and findings through the larger Technical Team, thereby ensuring that the work remained community-based yet national in scope.

Results

Fifty-three indicators measure quality of life. Eight measures are currently being addressed. Two new indicators are pending.

How indicators are being used

The QOL databases and benchmarks give municipal governments and communities a tool for monitoring and responding to social and economic change. Because each indicator was designed so that interrelationships among indicators might provide more complete descriptions of municipalities than seen in Statistics Canada census data, the QOL system has the potential to encourage policymakers to direct cross-sector public and private forces toward common goals and interests.

How citizens continue to be involved

Further citizen consultations will be held to develop the two new indicators being planned. As well, review and indicator revision will potentially include citizen input.

B15: Quality of Life in Ontario

Social development councils across Ontario have been documenting the impact of cutbacks on communities. The quality of life index was conceived in this environment as a community development strategy to monitor the living and working conditions of Ontario citizens. The Ontario Social Development Council (OSDC) worked in partnership with the Social Planning Network of Ontario on a quality of life index (QLI) research project. Project associates were the Centre for Health Promotion at the University of Toronto, the Ontario Healthy Communities Coalition and the Centre for Applied Sustainability at York University. Health Canada funded the project.

The purpose of the project was to develop a quality of life index (a composite index) to be a tool for community development, to allow monitoring of key indicators that encompass the social, health, environmental and economic dimensions of community life.

Mechanisms

A preliminary set of indicators was identified by a Project Work Group of 11 Social Planning Councils with OSDC. Through a workshop format, the 11 councils became empowered to access the information and data that they needed to populate indicators. The empowerment included establishing an active communication network among the participating communities to exchange information. Following field trials to collect data for indicators, 12 were ultimately selected for inclusion in the QLI. With the QLI established, the local Social Planning Councils issued press releases to inform the public of the initiative and gathered community agencies to receive and respond to the QLI.

Results

Twelve quality of life indicators comprise the index in 1999. Lessons learned were:

- If the QLI is to have broad public credibility, it must include both positive and negative measures to provide a balanced perspective.
- A set of core or head line indicators is needed for comparative reporting.
- A quality of life report should make recommendations on how to make progress toward goals.
- Indicator selection criteria must be clearly stated.

How indicators are being used

A number of the community partners of the project have adopted the QLI as a local tool for monitoring and measuring changes in quality of life.

B16: Genuine Progress Index (GPI) Atlantic (Nova Scotia)

In July 1997, the Nova Scotia Department of Economic Development and Tourism and the Atlantic Canada Opportunities Agency (ACOA) funded GPI Atlantic to undertake a feasibility study for the development of an advanced economic accounting system (full cost accounting) for Nova Scotia in the context of the demands of the new economy. GPI Atlantic's purpose was to create a practical policy-relevant sustainable development index and apply new accounting methods to the Atlantic region, beginning with Nova Scotia. Because the project paralleled Statistics Canada's own interest in developing expanded economic accounts (e.g., the new Canadian System of Environmental and Resource Accounts), Statistics Canada recognized the Nova Scotia initiative as a "pilot project" with potential applicability to the whole country. The index is to be ready for demonstration purposes by the year 2001. No new data will be generated except for a planned survey to establish consensus on the fundamental values, purposes and objectives embodied in the index. The main goal of the Nova Scotia index is to integrate already existing and proven work from several different areas and to link and connect disparate and scattered data sets from a variety of sources. The GPI method is to assess the economic value of social and environmental assets and to calculate their depreciation or depletion as costs. The GPI will be a practical comprehensive policy-relevant tool to guide and implement a sustainable development strategy.

Mechanisms

The project partners – Statistics Canada, federal and provincial government officials and policy planners, statisticians, researchers, academics, experts and consultants – have become a de facto Advisory Council for the Nova Scotia Sustainable Development index. While there is reference made to surveying "stakeholders" to validate the values underpinning the indices selected, these will be people informed of and involved in the field of new accounting methods.

Results

Each of the 20 components of the GPI is being developed as a stand-alone module to ensure that the methodologies for each sector have integrity in their own right and to provide practical, policy-relevant information on a sectoral basis to government officials. Of the 20 components, completed or to be completed by the end of the year, are economic valuations of civic and voluntary work and of unpaid housework and child care, the cost of crime, accounts for greenhouse gas reduction strategies and for three renewable resources – forests, soils and fisheries, an ecological footprint analysis, and modules on sustainable transportation, population health, income distribution and the costs of underemployment. Sample results and progress reports on the development of the Nova Scotia GPI are available on the GPI Atlantic website at www.gpiatlantic.org.

How indicators are being used

In order to demonstrate the policy relevance of the new accounting methods at the micro-level in addition to their function as societal measures of progress, the module on greenhouse gas emissions includes not only an estimate of the potential costs of climate change for the province, but also presents a case study examining the impacts of a partial shift of freight from road to rail from a full-cost accounting perspective.

Overall, indicators are designed to provide policymakers with a practical tool for informed decision-making, including linking economic, social and environmental factors for long-term strategic planning. The principle users and beneficiaries of the GPI research are to be:

- Nova Scotia provincial government policymakers
- Nova Scotia citizen, voluntary, business, labour, professional, sectoral and community groups
- media personnel
- Statistics Canada

Secondary users will be:

- academics, researchers, statisticians and others working on similar initiatives
- other provinces, the federal government and other jurisdictions.

B17: Alberta's Measuring Up

Measuring Up is one-half of the government's annual performance report to the people of Alberta, and part of the government's overall performance measurement and public accountability system. *Measuring Up* contains 25 core government non-financial performance measures related to the 17 government goals contained in the Government Business Plan. The 17 goals are further grouped under three core business areas – people, prosperity and preservation.

The entire government performance measurement system is structured in a hierarchical format with three tiers of performance information providing varying degrees of detail. Core government measures form the top tier and provide broad societal level indicators of overall performance. Key ministry measures support the core government measures by providing additional detail, and report on overall individual ministry performance at a high level. Internal management measures provide further detail on ministry activities, and are intended to support management decision making.

Measuring Up contains a mix of core government measures, supported by societal indicators and more specific supplemental measures, to provide readers with the additional contextual information. The core government measures represent areas where the government acknowledges responsibility, as opposed to the supplemental information, which is only intended to enhance readers' understanding of the issues affecting a particular policy area. The report also attempts to reflect the combined influence of government programs and strategies implemented by various ministries in pursuit of a particular policy outcome.

Mechanisms

The initial set of 22 core government measures was selected in 1995 by a special Treasury Board sub-committee comprised of ministers, senior government officials, the Auditor General and private sector representatives. Prior to this approval process, a package of proposed government and ministry measures was distributed to ministry stakeholders and the public for commentary and feedback. Changes to the core government measures are now reviewed and approved by the Standing Policy Committees and Treasury Board as part of the annual business plan review process.

Results

The 25 indicators are grouped under three broad policy areas: People (7), Prosperity (11), and Preservation (7). The 1999 Measuring Up report was the fifth annual report on the government's non-financial performance. Implementation of the performance measurement system has reinforced the government's desire to demonstrate the results of its policies and programs in terms of outcomes. Ministries are also required to report on the results for their key ministry measures in their annual reports.

How indicators are being used

Each measure has an associated target allowing decision makers to assess the government's progress toward its stated goals. The results for the core government measures and key ministry measures are reviewed by the Standing Policy Committees and Treasury Board as part of the annual business plan review process. This information is used to assist legislators in determining whether changes are required in existing government policies and programs. Measures published in the business plans are debated in the Legislature during Committee of Supply, and results information is also discussed during the Public Accounts Committee's review of the province's audited year-end statements.

B18: BC Regional Socio-economic Statistical Profiles

The project's mandate is to expand the availability and utility of regional (i.e., sub-provincial) data for decision makers. Data and information on regional socio-economic conditions are generally not as well developed as that available at the provincial or national levels. Given the fact that economic and social conditions that are summarized through provincial level statistics are not likely to accurately reflect all regions within the province, a data gap exists with respect to our knowledge and understanding of regional conditions. Compounding the problem of data quality and availability at the regional level is the difficulty faced by decision makers to effectively synthesize large volumes of data across many regions.The initial goal of the project was to provide provincial government policymakers with information that will support fact-based decision making when allocating budgetary resources.The sponsor of the project was the BC Deputy Ministers' Committee on Social Policy (DMCSP) and was funded by the chair of the committee – the Deputy Minister of the Ministry of Social Development and Economic Security.

Mechanisms

Citizens per se were not involved in the project. However, as part of an evaluation of the initial methodology and results, advice was sought from various researchers in academic institutions across Canada as well as federal government departments. The external reviewers were asked to comment on:

- the variables used in the construction of the indices
- validity of the data
- reliability of the data
- weights used in estimating the indicators
- general views on the use of indicators for public policy

As a result of the involvement of these external reviewers, a number of modifications were made to the initial methodology and data sources.

Results

The regional socio-economic profiles are an intermediate output of the project. As the project is still in the development phase, the true outputs (i.e., the index scores by region across the various dimensions of health, education, crime and economic hardship) have not been released yet outside the working group developing the index. There was a desire on the part of the DMCSP to secure general acceptance of the concepts within the senior executive of government before a wider public distribution of the results.

Regarding lessons learned, given that broad socio-economic indicators are viewed as a form of program evaluation at the macro level, it is important that support at the senior levels of government be secured. Even though many in government talk about the need for greater

accountability, most program delivery managers are cool to the concept. This lack of commitment can even permeate up to the senior levels within government.

The external review of the concepts and methodology was a very productive exercise. A number of very good suggestions for improvement were provided. In general, if such a project is being initiated from within government, it is important that it not be seen as an initiative of central control agencies such as Treasury Board but rather as a social policy initiative (i.e., a tool for better decision making). If it is seen as coming from Treasury Board, line ministries may be slow to buy in as it may appear as a budgetary control tool.

B19: Conference Board of Canada: Performance and Potential

Responding to concerns that Canada's standard of living will slowly erode in the 21st century, the Conference Board of Canada chose to develop a better understanding of the challenges and choices facing Canadians by producing an annual report on the socio-economic performance and potential of Canada. The first report was produced in 1996.

Mechanisms

The values and framework for the performance analysis in the annual Performance and Potential reports were and continue to be the products of sector experts within the Conference Board. Upon release of each annual performance report, consultations involved the Conference Board's members for the most part, comprising potentially 500 business, government and labour organizations. As well, the reports are delivered and input sought during presentations to government officials and at different conferences.

Results

Forty indicators serve to monitor progress toward the ultimate goal of a high and sustainable quality of life.

How indicators are being used

First, current performance is compared to key comparator countries to determine if Canada is a top, average or poor performer. Second, an assessment of whether an indicator is likely to increase, decrease or remain static over time provides a dynamic dimension to the evaluation.

The report is intended to promote open and informed debate that will help formulate national priorities and lead to public policies and business strategies that will improve socio-economic performance.

B20: Canadian Council on Social Development Personal Security Index (1999)

The Personal Security Index (PSI) 1999 report is the first output of a research project intended to demonstrate what Canadians understand personal security to be and how their views change over time, and to determine the indicators and benchmarks for the components of personal security from which future evaluations can be made. (Development of a composite index requiring weighting of indicators is pending.) Economic and physical personal security are the focus for CCSD, reflecting the issues that have risen to the forefront of Canadian's concerns (e.g., unemployment and less secure forms of work, crime rates and threats to health services). The CCSD developed the PSI in collaboration with the Insurance Bureau of Canada, Health Canada and the National Crime Prevention Centre.

Mechanisms

The goal of the research project was to develop indicators that were both understandable to the general public and captured citizens' most essential concerns about their personal security. To develop the index, an internal CCSD project team first proposed a central concept of personal security and a list of indicators derived mainly from existing Statistics Canada databases that embodied the various dimensions of their concept, and a survey done on behalf of CCSD of over 2,000 Canadians asking about their perceptions of personal security and the security of their families. The indicators were submitted to an external group of advisors in a variety of fields. After a number of iterations, the internal and external bodies selected and ranked the indicators that best captured the different dimensions of personal security using a set of criteria that they had developed. The indicators were combined into a conceptual framework and were then submitted for assessment to three focus groups of citizens selected by a polling firm on the basis of regional and demographic distribution. Their views helped inform the choice of indicators.

Results

The areas of economic and physical security are measured by 10 indicators each.

How indicators are being used

The PSI is a tool that measures at a very basic level whether Canadian's well-being is improving or declining. Over time, the PSI will measure changes in both the economic and physical security of Canadians with 1999 being the baseline for future analysis.

For the year 2000 report, the relative value of each indicator and component will be determined within a composite index. Citizen input will be sought for the weighting exercise.

B21: Canadian Institute for Health Information National Population Health Indicators

In 1998, the Advisory Council on Health Info-structure (Health Canada), the Canadian Institute for Health Information (CIHI) and Statistics Canada consulted with over 500 people, including health service administrators, researchers, caregivers, government officials, health advocacy groups and consumers, regarding their information needs. The consultation objectives were:

- identify major current and emerging health issues;
- identify associated health information needs;
- identify priorities for health information in Canada; and
- gain insight as to how the partner organizations can be more responsive.

One priority identified through the consultation was the need for comparable quality data on key health indicators for health and health services, to answer two questions: How healthy is the population? and, How well is the health care system performing? In response, CIHI and Statistics Canada launched a collaborative process to identify what measures should be used to report on health and the health system. In addition to serving the institutions, the goal was to support regional health authorities in monitoring the following:

- overall health of the population served, how it compares to other regions and how it is changing over time;
- major non-medical determinants of health;
- health services received by the region's residents; and
- characteristics of the community and health system that provide contextual information.

Mechanisms

To identify health information needs, 14 consultative sessions were held across the country involving approximately 500 participants, most of them with provincial and regional health institutions. Two special sessions involved national NGOs and Health Canada. Senior ministry officials from each province and territory were involved in session coordination. Representatives of key stakeholder groups were invited to participate to ensure that all major groups had an opportunity to articulate their issues, describe their related information needs and their preferences for products and services relating to these needs. While a balance of stakeholder interests was sought, consumers as a group were sometimes under-represented.

What followed the consultations was launching the development of a core set of indicators to come from comparable quality data to assist regional health authorities. An environmental scan first identified and reviewed related initiatives and assessed the feasibility of possible indicators given the availability and comparability of data from national sources. Next, CIHI in cooperation with the Federal/Provincial/Territorial Advisory Committees on Population Health and Health Services, Health Canada and Statistics Canada convened a national consensus conference on population health indicators. Through an iterative Delphi process, 81 experts from regions (23 percent of participants), provincial/territorial governments (21 percent), the federal

government (12 percent), national associations (15 percent), academics/researchers (16 percent) and other groups including consumers (12 percent) provided advice on where to start regarding measuring the health of Canadians, factors affecting health and health system performance.

Results

The first set of consultations produced a vision for a national health information system. The priorities to serve as benchmarks for national agencies in terms of relevance, value and utility of services and products were:

- building capacity at the provincial, regional and community levels for information use and evidence-based decision making;

- distributing information on health to consumers;

- decreasing cycle times, be it in terms of policy development, analysis and reporting;

- improving quality of health system performance based on comparability of outcomes at all governance and population levels;

- increasing system efficiency and affordability.

Affecting the vision were: the exigencies of reform and public affordability; the strategic use of information to improve population and individual health and to better manage the health care system; a client focus combined with personal accountability for health choices and decisions. Regarding health information, primary care, ambulatory care and privacy were priority issues for health information development.

With the vision in mind, the national consensus conference of predominantly experts developed a health indicators framework and confirmed a core set of indicators to populate it. These reflect the key strategic directions adopted by the Federal/Provincial/Territorial (F/P/T) Advisory Committee on Population Health and endorsed by the Conference of Deputy Ministers of Health.

The indicators are currently under development. Data to support the indicators will be made available to allow comparisons at a regional level across the country and will also "roll up" to the provincial and national levels. To be useful at the regional level, data will need to be augmented wherever possible with qualitative assessments of health, the determinants of health, and information about the performance and management of the health care system, available locally or provincially.

How indicators are being used

Compilation, verification and reporting of comparative data to support indicators in the four domains have begun for the 17 large urban regions across Canada. These have been made available to the regional health authorities.

As to "what is the right number," when referring to the indicator results, some provinces have set numerical targets (what should be achieved given local conditions and resources) for some of the indicators. In other areas, there has been a request for benchmarks (what could be achieved as established by available evidence or best practice). Providing benchmarks for all or some of the benchmarks will require a pan-Canadian process similar to that undertaken in the United States (US Healthy People 2010). Experts would develop agreements as to the best interpretations of available evidence. CIHI is calling for such a process in Canada.

Appendix C: Glossary of selected terms

Community Indicators

>   measurements of local trends that include all three dimensions of what it takes to
>   build a healthy community – economic, environmental and social.[12]

Community Quality of Life

>   is the concept used to explore community factors seen by participants as
>   influencing health... [made up of] factors that [make] life good or not good for
>   people, community resources that [assist] community members in coping, and
>   services that [assist] community members.[13]

Development

>   refers to the qualitative improvement in the structure, design, and composition of
>   physical stocks and flows, that result from greater knowledge, both of technique
>   and of purpose.[14]

Economic well-being

>   is determined by many factors:

>   - effective per capita flow of consumption, including consumption of marketed
>   goods and services, household production, leisure and other unmarketed goods
>   and services;
>   - net societal accumulation of stocks of productive resources, including
>   accumulation of tangible capital, housing stocks and consumer durables, net
>   accumulation of human capital, social capital, and R&D investment, net changes

---

[12] Redefining Progress (1997), *The Community Indicators Handbook,* San Francisco. P. 1.

[13] Raphael, Dennis et al., *Government Policies as a Threat to Health: Findings from Two Toronto Community Quality of Life Studies.* Department of Public Health Services, University of Toronto. P. 2.

[14] Daly, Herman, quoted in GPI Atlantic, *Measuring Sustainable Development, II: Progress to Date*, cited on-line November 15, 1999 at home.istar.ca/~cliffe./gpi/progress.html.

in the value of natural resources stocks; environmental costs, and net change in level of foreign indebtedness;

- poverty and inequality, indicated by income quintiles and depth and incidence of poverty;
- security, including personal security from crime and ill health and economic security from job loss, unemployment, large income fluctuation and unanticipated inflation.

Interactive knowledge

> refers to information derived from lived experience... based on the meanings and interpretations individuals provide to events and conditions... collected through qualitative methods such as focus groups and open-ended interviews, and the data that are analyzed and reported are the words and concepts provided by participants.[15]

Measure

A measure is the data supporting an indicator. For example, water potability may be an indicator, while levels of various contaminants in the water are the measures by which potability is assessed. Several measures may constitute an indicator, in which case it can be considered a composite or complex indicator as opposed to a simple indicator where one measure represents an indicator.

Productivity

> is the relationship between output of goods and services and the inputs of resources, human and non-human, used in the production process, with the relationship usually expressed in ratio form.[16]

Quality of Life

> is the degree to which a person enjoys the important possibilities of his or her life in three main areas: *Being* – who one is, with physical, psychological and spiritual components; *belonging* – the fit between a person and his or her physical, social and community environments; *becoming* – the day-to-day activities that a person

---

[15] Raphael, Dennis et al., *Government Policies as a Threat to Health: Findings from Two Toronto Community Quality of Life Studies.* Department of Public Health Services, University of Toronto. P. 2 and 3.

[16] Centre for the Study of Living Standards, *Productivity: Key to Economic Success,* Report prepared by the CSLS for the Atlantic Canada Opportunities Agency, March 1998. P. 7.

carries out to achieve personal goals, hopes or aspirations, with practical, leisure and growth aspects.[17]

Quality of life is a conceptual framework, consistent with sustainable human development and determinants of health, for the interdependence of social, health, economic and environmental conditions in communities.[18]

Equivalent phrases:[19]

- social well-being
- community livability
- social welfare (mostly used in Europe)
- social attainment and happiness
- human development

Quality of life is a feeling of well-being, fulfillment, or satisfaction resulting from factors in the external environment (as opposed to the quality of interpersonal relationships as determining happiness).[20]

Social well-being

is determined by these factors:

- quality of the workplace and working conditions
- health status (self-assessed, standard trends, health professionals per capita, etc.)
- personal security, financial exposure from prolonged or serious illness
- education
- environmental indicators
- social health (government spending directly benefitting citizens, social contacts, civic activity, etc.)

---

[17] *The Quality of Life Profile: A Generic Measure of Health and Well-being,* cited on-line at http://www.utoronto.ca/profile.htm on November 2, 1999.

[18] Shookner, Malcolm, *The Quality of Life in Ontario 1997,*Ontario Social Development Council, Social Planning Council of Ontario.

[19] Treasury Board Secretariat, *Medium Term Policy Planning, Quality of Life, Issues Paper,* Draft 18/06/99.

[20] Quality of Life in Jacksonville: Indicators for Progress, cited on-line at www.jcci.org/home.htm on November 26, 1999.

Societal indicators

Elaborating on a definition of social capital, a societal indicator measures the skills and knowledge, health, self-esteem and social networks of people and communities.[21]

> is a statistic of direct normative interest which facilitates concise, comprehensive and balanced judgements about the condition of major aspects of society... [it] is a direct measure of welfare and a change in the "right" direction means everything else being equal, people are better off.[22]

Standard of living

> the level of living, as the factual circumstances of well being, the actual degree of satisfaction of the needs and wants of a person or group of persons. A standard of living is the circumstances to which people aspire, constituted by housing, health, education, social status, employment, affluence, leisure, social security and stability.[23]

---

[21] Department of the Environment, Transport and the Regions, *A better quality of life: a strategy for sustainable development for the United Kingdom,* Chapter 4, Guiding Principles and Approaches, section 4.4.

[22] Sharpe, Andrew (1999), *A Survey of Indicators of Economic and Social Well-being,* Centre for the Study of Living Standards. P. 7.

[23] Bunch, Mary (1995), *Social Indicators: Annotations from the Literature,* Working Paper F-02, Canadian Policy Research Networks Inc. P. 17.

Appendix D: Websites

Canadian Council on Social Development
www.ccsd.ca/pr/psihle.htm

Conference Board of Canada
www2.conferenceboard.ca/pubs/default.htm

Edmonton
www.gov.edmonton.ab.ca/planning/PopulationForecast.PDF

Federation of Canadian Municipalities
www.fcm.ca

Florida
fcn.state.fl.us/eog/govdocs/gapcomm/critical/critical_bnchmks/critical_benchmks_pdf.html

GPI
home.istar.ca/~cliffe/gpi

Hart Environmental Data
www.subjectmatters.com/indicators/

Hamilton-Wentworth
www.vision2020.hamilton-went.on.ca/indicators

Human Resources and Development Canada
www.hrdc-drhc.gc.ca/stratpol/arb/publications/

Minnesota
www.mnplan.state.mn.us/press/mm-92.html/mm/aboutmm.html

Ontario
www.qli-ont.org/qlispring99.html

Oregon
www.econ.state.org.us/OPB/
www.econ.state.org.us/opb/orshines/pdf

Winnipeg
www.city.winnipeg.mb.ca/city/html/govern/corporateframework/plan_wpg.htm

Redefining Progress
www.rprogress.org/pubs/pdf/SocIndHist.pdf

Toronto
www.torontovitalsigns.com/intro.html

Treasury Board
www.tbs-sct.gc.ca/rma/communic/prr99/mfr99

United Kingdom
www.environment.detr.gov.uk/sustainable/quality/life

Appendix E: Project references and information sources

Albert's Measuring Up

"Alberta Treasury Measuring Performance: A Reference Guide," cited on-line January 4, 2000, at http://obm5.treas.gov.ab.ca/comm/perfmeas/measupgu/guide3.html

Correspondence from Ken Ogata, Alberta Treasury, Government of Alberta, February 17, 2000.

"Government of Alberta Annual Report," cited on-line January 4, 2000, at http://obm5.treas.gov.ab.ca/comm/perfmeas/measup99/people.html

"Report to Albertans on Budget '98 – Agenda for Opportunity," cited on-line on January 4, 2000, at http://obm5.treas.gov.ab.ca/comm/perfmeas/measup99/append.html and http://obm5.treas.gov.ab.ca/comm/ganrep99/execsumm.html

BC Regional Socio-economic Statistical Profiles

Regional District 35 Central Okanagan Statical Profile, Sample of Regional Socio-Economic Statistical Profile, cited on-line January 4, 2000, at www.bcstats.gov.bc.ca/DATA/LSS/socec/socpage.htm www.bcstats.gov.bc.ca/DATA/LSS/socec/profile.pdf

E-mail correspondence with Don McRae, BC Stats, January 7, 2000.

Canadian Council on Social Development Personal Security Index

Canadian Council on Social Development (1999), *Personal Security Index 1999: How Confident Are Canadians about Their Economic and Physical Well-being*? Ottawa, Canada: Canadian Council on Social Development.

Canadian Institute for Health Information National Population Health Indicators

Correspondence from Dr. John Millar, Vice-President, Canadian Institute for Health Information, February 8, 2000.

Canadian Institute for Health Information (1999), *National Consensus Conference on Population Health Indicators: Final Report.*

Conference Board of Canada: Performance and Potential

Conference Board of Canada (1999), *Performance and Potential 1999*, Ottawa, Canada: Conference Board of Canada.

Interview with Brenda Lafleur, Conference Board of Canada, November 19, 1999.

Federation of Canadian Municipalities QOL Reporting System

Federation of Canadian Municipalities (1999), *The FCM Quality of Life Reporting System: Quality of Life in Canadian Communities*.

Interview with Sue Welke, Federation of Canadian Municipalities, March 7, 2000.

Florida Commission on Government Accountability to the People (GAP)

Florida Commission on Government Accountability to the People (GAP) (1997), "Critical Benchmark Goals," cited on-line November 8, 1999, at
fcn.state.fl.us/eog/govdocs/gapcomm/critical/critical_bnchmks/critical_pgs.1-10.pdf

Interview with Arnold Heggestad, past-Chairman of the Goals Development Committee of GAP, November 9, 1999.

Hamilton-Wentworth Vision 2020

Correspondence from Bill Pearce, Manager, Long Range Planning, City of Hamilton and Regional Municipality of Hamilton-Wentworth, February 18, 2000.

"Summary of the Sustainable Community Planning Process," cited on-line November 14, 1999, at http://www.hamilton-went.on.ca/document.htm

Interviews with Bill Pearce, Manager, Long Range Planning, City of Hamilton and Regional Municipality of Hamilton-Wentworth, December 16, 1999, and January 17, 2000.

Vision 2020 Progress Team (1998), *Strategies for Sustainable Community*, Hamilton Wentworth, Ontario: Regional Municipality of Hamilton Wentworth.

"Vision 2020 – Promoting Action Towards a Sustainable Community in Hamilton-Wentworth: Sustainability Indicators 1998 Report Card," cited on-line January 4, 2000, at http://www.vision2020.hamilton-went.on.ca/indicators/98reportcard.html

"Vision 2020 – Promoting Action Towards a Sustainable Community in Hamilton-Wentworth: Sustainability Indicators 1997 Report Card," cited on-line January 4, 2000, at http://www.vision2020.hamilton-went.on.ca/indicators/97reportcard.html

Quality of Life in Jacksonville (Florida)

Correspondence from David Swain, Jacksonville Community Council Inc., Jacksonville, Florida, February 7, 2000.

"Quality of Life in Jacksonville: Indicators for Progress," cited on-line November 26, 1999, at http://www.jcci.org/home.htm

Minnesota Milestones

Minnesota Milestones 1998: Measures that Matter

Newfoundland and Labrador Strategic Social Plan and the Community Accounts Project

Correspondence from Penelope Rowe, Executive Director, Community Services Council, Newfoundland and Labrador, February 20, 2000.

Correspondence from Bill Duggan, Newfoundland Statistics Agency, February 6, 2000.

Government of Newfoundland and Labrador (1998), "People, partners and prosperity: A strategic social plan for Newfoundland and Labrador," cited on-line January 5, 2000, at http://www.gov.nf.ca/ssp/pdf

Government of Newfoundland and Labrador, "The Strategic Social Plan's Community Accounts," cited on-line January 10, 2000, at http://nfstats.gov.nf.ca/CommunityAccounts/CommunityAccounts.htm

Interview with Alton Hollett, Director, Newfoundland Statistics Agency, January 7, 2000.

Interview with Penelope Rowe, Executive Director, Community Services Council, Newfoundland and Labrador, January 21, 2000.

"Strategic Social Plan – Volume 1: What the People Said: Report of the Strategic Social Planning Public Dialogue, Newfoundland and Labrador," cited on-line January 6, 2000, at http:www.gov.nf.ca/publicat/spac/volume1.htm

Genuine Progress Index (GPI) Atlantic (Nova Scotia)

Correspondence from Ron Colman, Director, GPI Atlantic, February 7, 2000.

President of the Treasury Board (1999), *Managing for Results 1999: Annual Report to Parliament*, Canada.

GPI Atlantic (1998), *Measuring Sustainable Development: Application of the Genuine Progress Index to Nova Scotia – Report Summaries*.

GPI Atlantic (1999), *Measuring Sustainable Development: Application of the Genuine Progress Index to Nova Scotia – Project Profile & Budget 1998-2001*.

GPI Atlantic, "Measuring Sustainable Development II: Progress to Date," cited on-line November 15, 1999, at http://home.istar.ca/~cliffe/gpi/progress.html

Quality of Life in Ontario

Ontario Social Development Council and Social Planning Network of Ontario (1999), "The Quality of Life in Ontario, Spring 1999," cited on-line November 25, 1999, at http://www.qli-ont.org/qlispring99.html

Ontario Social Development Council and the Social Planning Network of Ontario, "The Quality of Life in Ontario, Fall 1998," cited on-line November 25, 1999, at http://www.qli-ont.org/fall98.html

Ontario Social Development Council and the Social Planning Network of Ontario, "The Quality of Life in Ontario 1997 – Quality of Life Index Report Summary," cited on-line November 25, 1999, at http://www.qli-ont.org/report.html

Ontario Social Development Council, the Social Planning Network of Ontario, the Centre for Health Promotion at the University of Toronto and the Ontario Healthy Communities Coalition (July 1997) Quality of Life Index Project Methodology Report.

Interview with Farah Habib, Social Researcher, Ottawa-Carleton Social Planning Council, December 17, 1999.

Shookner, Malcolm (1999), *A Quality of Life Index for Ontario,* for presentation at the 9th Conference on Canadian Social Welfare Policy, Montreal, June 1999.

Oregon Shines and Oregon Benchmarks
"Creating Change for Oregon's Future," cited on-line November 17, 1999, at http://www.aspee.hhs.gov/progsys/oregon/history/intro.htm

"Oregon Benchmarks," cited on-line January 13, 2000, at http://www.econ.state.or.us/opb/highlights/benchmark_tables.html

Oregon Progress Board, "Executive Summary," in "Oregon Shines II – Updating Oregon's Strategic Plan: A Report to the People of Oregon, January 21, 1997," cited on-line November 17, 1999, at http://www.econ.state.or.us/opb/orshines.pdf

Oregon Progress Board, "Ways You Can Help Achieve Oregon's Goals for a More Prosperous Future," in "Oregon Shines II – Updating Oregon's Strategic Plan: A Report to the People of Oregon, January 21, 1997," cited on-line November 17, 1999, at http://www.econ.state.or.us/opb/orshines.paf

"The Oregon Progress Board At-a-Glance," cited on-line November 15, 1999, at http://www.econ.state.or.us/blurb.htm

"State Results-Based Accountability Initiative," *Harvard Family* II: 3, 1996.

Sustainable Calgary

Interview with Noel Keough, Project Coordinator, Sustainable Calgary, December 8, 1999, and January 17, 2000.

Sustainable Calgary (1998), *State of Our City Report 1998*, Calgary, Alberta.

Sustainable Calgary News (Winter 1998).

"Sustainable Calgary," cited on-line June 9, 1998, at
http://www.telusplanet.net/public/sustcalg/
and http://www.telusplanet.net/public/sustcalg/more.html
and http://www.telusplanet.net/public/sustcalg/state.html
and http://www.telusplanet.net/public/sustcalg/state_indicators.html
and http://www.telusplanet.net/public/sustcalg/state_time.html
and http://www.telusplanet.net/public/sustcalg/sustainability.html

Sustainable Seattle

Sustainable Seattle (1998), *Indicators of Sustainable Community 1998*, Seattle, WA: Sustainable Seattle.

Taking Toronto's Vital Signs

"Taking Toronto's Vital Signs," cited on-line at http://www.torontovitalsigns.com/indicators/

"Taking Toronto's Vital Signs: The Toronto Community Indicator Project."

Interviews with Mary Rowe, Project Coordinator, Toronto's Vital Signs, November 26, 1999, and January 17, 2000.

E-mail correspondence from Mary Rowe, December 3, 1999.

Two Community Quality of Life Projects: South Riverdate and

Lawrence Heights of Toronto

"Community Quality of Life Project: A Health Promotion Approach to Understanding Communities," cited on-line January 12, 2000, at http://www.utoronto.ca/qol/comunit.htm

Raphael, Dennis, Brenda Stinmetz, Rebecca Renwick et al. (1999), "The Community Quality of Life Project: A Health Promotion Approach to Understanding Communities," in *Health Promotion International* 14: 3.

Raphael, Dennis, Sherry Phillips, et al., "Government Policies a Threat to Health: Findings from Two Toronto Community Quality of Life Studies," manuscript.

"The People, Places and Priorities of Lawrence Heights: A Health Promotion Approach to Understanding Communities," cited on-line January 12, 2000, at http://www.utoronto.ca/qol/Lhpop1.htm

"The People, Places and Priorities of Riverdale: A Health Promotion Approach to Understanding Communities," cited on-line January 12, 2000, at http://www.utoronto.ca/qol/rvcommunity.htm

Interview with Hersh Sehdev, Program Director at South Riverdale Community Health Centre, January 10, 2000.

"The Priorities of Lawrence Heights," cited on-line January 12, 2000, at http://www.utoronto.ca/qol/reports.htm

"The Priorities of Riverdale," cited on-line January 12, 2000, at http://www.utoronto.ca/qol/reports.htm

Plan Winnipeg 2020 Vision

City of Winnipeg (1999), *Plan Winnipeg ...2020 Vision (Draft, September 13, 1999).*

Correspondence from Joan Wiens, City of Winnipeg, February 11, 2000.

International Institute for Sustainable Development (1998), *Quality of Life Indicators for the City of Winnipeg.*

"Plan Winnipeg 2020 Vision: Plan Winnipeg Background," cited on-line November 17, 1999, at http://www.city.winnipeg.mb.ca/city/html/govern/corporateframework

A Strategy for Sustainable Development for the United Kingdom

Correspondence from Paul Robson, Department of the Environment, Transport and the Regions, February 8, 2000.

Department of the Environment, Transport and the Regions, "A Better Quality of Life: Foreword," cited on-line January 13, 2000, at
http://www.environment.detr.gov.uk/sustainable/quality/life/foreword.htm

Department of the Environment, Transport and the Regions, "A Better Quality of Life," cited on-line November 23, 1999, at http://www.environment.detr.gov.uk/sustainable/quality/life/

Department of the Environment, Transport and the Regions (November 21, 1998), "Sustainability Counts," cited on-line December 2, 1999 at
http://www.enivronment.detr.gov.uk/sustainable

Department of the Environment, Transport and the Regions (February 4, 1998), "Sustainable Development: Opportunities for Change, Consultation Paper on a Revised UK Strategy – Contents," cited on-line November 23, 1999, at
http://www.enivronment.detr.gov.uk/sustainable/consult1/ind.htm

Department of the Environment, Transport and the Regions (February 4, 1998), "Sustainable Development: Opportunities for Change, Consultation Paper on a Revised UK Strategy – Seeking your views: the Consultation process," cited on-line November 23, 1999, at
http://www.enivronment.detr.gov.uk/sustainable/consult1/sd012.htm

Department of the Environment, Transport and the Regions (November 21, 1998), "Quality of Life Counts," cited on-line December 10, 1999 at
http://www.environment.detr.gov.uk/sustainable/quality99/index.htm

Bibliography

Bunch, Mary (1995), *Social Indicators: Annotations from the Literature,* Working Paper F-02, Canadian Policy Research Networks Inc.

Centre for the Study of Living Standards, *Productivity: Key to Economic Success,* Report prepared by the CSLS for the Atlantic Canada Opportunities Agency, March 1998.

Cobb, Clifford W. and Craig Rixford (1998), *Lessons Learned from the History of Social Indicators,* San Francisco: Redefining Progress.

Daly, Herman, quoted in GPI Atlantic, *Measuring Sustainable Development, II: Progress to Date*, cited on-line November 15, 1999 at home.istar.ca/~cliffe./gpi/progress.html

McCracken, Mike and Katherine Scott (1998), *Social and Economic Indicators: Underlying Assumptions, Purposes and Values,* Ottawa: Statistics Canada Symposium on Gender Equality Indicators: Public Concerns and Public Policies, March 1998.

Redefining Progress (1997), *The Community Indicators Handbook,* San Francisco.

Sharpe, Andrew (1999), *A Survey of Indicators of Economic and Social Well-being*, Centre for the Study of Living Standards.

Shookner, Malcolm (1997), *The Quality of Life in Ontario 1997,* Ontario Social Development Council, Social Planning Council of Ontario.

_____ (1999), *A Quality of Life Index for Ontario*, Ontario Social Development Council, for presentation at the 9th Conference on Canadian Social welfare Policy, Montreal, June.

The Quality of Life Profile: A Generic Measure of Health and Well-being, cited on-line at http://www.utoronto.ca/profile.htm on November 2, 1999.

Treasury Board Secretariat, *Medium Term Policy Planning, Quality of Life, Issues Paper,* Draft 18/06/99.