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Indicators of Healthy and Vibrant Communities Roundtable

Summary Report

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CPRN Research Report | June 2008



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Executive Summary

The Ontario Trillium Foundation (OTF) and Canadian Policy Research Networks (CPRN) hosted the *Indicators of Healthy and Vibrant Communities Roundtable* in Toronto on June 23, 2008. The purpose of the roundtable was to explore the possibilities for a shared set of community indicators in Ontario and the benefits these can provide to communities. The 46 participants included key decision-makers from the provincial and federal governments, not-for-profit organizations, think tanks and foundations.

This report summarizes the day's proceedings, including the main messages from key speakers and participants, and the principle discussion points from three breakout groups. It also sets out potential next steps to help realize a community indicator system for Ontario.

A number of common themes emerged from the three breakout groups which give a clear indication of the next steps to take in developing an indicator system for Ontario.

- Participants saw clear benefits in having a common system in Ontario similar to those presented for Newfoundland and Labrador and British Columbia. At the same time, they noted that people have to be realistic about how it can be designed and implemented.
- It is important to build on what exists. Starting from scratch and seeking ideal data which has not been collected will be very costly and time-consuming. It is far better to have information in the public domain as soon as possible, and build from that point.
- The system needs to cover a wide range of information in a coherent framework that would include a mix of core and optional indicators. The core indicators would apply to all communities and enable comparisons. The optional indicators would allow a focus on what is most important for specific communities and encourage the generation of local action to solve local issues.
- Open and easy access to information is very important.
- Communities need to be involved in the design, development and implementation of a system to ensure that their needs are met and that they have appropriate information to take local action.
- Capacity does not exist in all communities to understand and interpret indicators and these skills need to be developed by groups to enable them to participate and use indicators appropriately.
- Funding will be necessary to take this work forward, and it needs to be guaranteed over the long term to ensure the system survives.

As a next step, the breakout groups suggested that organizations (people working at the technical level) that have been involved in developing indicator systems should be brought together to work as a group to develop an indicator framework.

Regarding who should take the lead on developing the system, some felt that, as the system is developed and sustained over the long term, the Ontario government, specifically an Ontario Statistics Agency, should be the lead. Others felt that an organization outside of government should take the lead, as it would be independent and neutral.

Indicators of Healthy and Vibrant Communities Roundtable: Summary Report

Introduction

The Ontario Trillium Foundation (OTF) and Canadian Policy Research Networks (CPRN) hosted the *Indicators of Healthy and Vibrant Communities Roundtable* in Toronto on June 23, 2008. The Ontario Trillium Foundation is exploring the development of a set of community indicators to define healthy and vibrant communities to support decision-making both within the Foundation and by communities themselves. CPRN is interested in exploring whether and how Ontarians could be further involved in the selection and use of community indicators. The roundtable was an opportunity for all participants to explore the possibilities for a shared set of community indicators in Ontario.

This report summarizes the day's proceedings, including the main messages from key speakers and participants, and the principle discussion points from three breakout groups. It also sets out potential next steps to help realize a community indicator system for Ontario.

Purpose of the Roundtable

This roundtable was an opportunity for participants from the not-for-profit sector and the provincial government to explore the possibility for a shared set of community indicators in Ontario. Both CPRN and OTF are clear that in seeking to develop any set of indicators we learn from the work that has already taken place and that existing work not be duplicated. To inform the discussion, participants heard from three organizations that have designed and currently use systems of socio-economic community level indicators. An update from the Government of Ontario on its work to date in developing a government-wide indicator system was also presented.

More specifically, the objectives of the roundtable were to:

- learn from the experience of government and non-profit organizations in Canada that have developed and implemented projects to measure the extent to which communities are healthy and vibrant;
- understand how community level data are used to set agendas, develop policy, measure progress, and compare communities;
- understand the status of indicators within Ontario, i.e.
 - who is interested in indicators for healthy and vibrant communities
 - what has been done to date
 - what are the needs for the future; and
- assess the need for and interest in the development of relevant, valid, reliable and robust data that would be accessible and useful for various interested parties in Ontario – governments, foundations, non-profit organizations and communities.

Overview of the Day and Methodology

The 46 participants at the roundtable included key decision-makers from provincial and federal governments, not-for-profit organizations, think tanks and foundations. The agenda and participant list are attached in Appendices A and B.

The roundtable began with an introduction and welcome from Robin Cardozo, Chief Executive Officer of OTF and Sharon Manson Singer, President of CPRN. Participants then briefly introduced themselves to the rest of the room.

Three presentations were given on indicator systems currently operating in Canada:

- Gary Catlin, Director General of the Health Statistics and Measurement Branch at Statistics Canada focused on health indicators that Statistics Canada has been developing with the Canadian Institute for Health Information (CIHI).
- Alton Hollett, Assistant Deputy Minister for the Economics and Statistics Branch in the Department of Finance of the Government of Newfoundland and Labrador described the Community Accounts indicator system that the Government of Newfoundland and Labrador established to meet community and government data needs.
- Don McRae, Executive Director at BC Stats detailed the indicator system that has been developed by the Government of British Columbia.

Following the presentations, participants were invited to ask questions of the speakers.

The current situation in Ontario was introduced by Kevin Costante, Deputy Minister and Associate Secretary for Policy, the Cabinet Office, Government of Ontario.¹ The presentation provided an overview of the steps the government is taking to improve the way it shares and uses data. Craig McFadyen, Executive Coordinator for Economics and Resource Policy, the Cabinet Office presented a more detailed look at what is taking place on the use and development of community indicators within the Government of Ontario. Blair Dimock, Director of Research, Evaluation and Knowledge Management at OTF presented an overview of activity in the Ontario not-for-profit sector.

Participants then divided into three breakout groups comprised of government, not-for-profit and think tank representatives. These were facilitated by Sharon Manson Singer, Robin Cardozo and Blair Dimock. While the groups were encouraged to follow the format in which the discussion questions were presented, the flow of discussion inevitably meant that each group approached the issues in different ways. In the morning session participants discussed:

- How does the situation in Ontario compare with what the presenters discussed?
- What are the strengths and the gaps?
- What did we learn about the systems in British Columbia and Newfoundland and Labrador that would be beneficial for Ontario?

¹ Mr. Costante was appointed Deputy Minister of Northern Development and Mines effective July 21, 2008.

Following the lunch break participants returned to their breakout groups to discuss the following questions:

- How do we see the role of communities in setting indicators and collecting data?
- How should they be involved?

After the discussions, Sharon Manson Singer presented a vision of what a community level indicator system for Ontario could look like. She envisioned a set of core indicators that would be measured across all communities as a basis for comparison. It would be complemented by a set of optional indicators that communities would select. This would enable communities to focus on the issues that are most important to them and then generate local action to solve local issues.

The presentation was followed by a final breakout group discussion that considered:

- Is there a need for a common system in Ontario?
- Who would use such a system? For what purpose? How?
- Who should lead and contribute to its development?
- How important is it for communities to be involved in dialogues?

The roundtable concluded with summaries of the discussions from each of the breakout group facilitators. Potential next steps were identified that could be initiated by OTF, CPRN, the Government of Ontario and roundtable participants to fulfill the vision of an indicator system of healthy and vibrant communities for Ontario.

Presentations

The seven presentations are summarized below. Short biographies of the speakers are attached in Appendix C. The slides which accompanied the presentations can be downloaded from the CPRN website at www.cprn.org/doc.cfm?doc=1918&l=en.

The first three presentations summarized below come from statistical departments that have developed indicator systems. Case studies on these systems are also presented in *The Primer* distributed to participants before the roundtable. It provided an overview of nine community indicator models in use across Canada and served as background for the roundtable discussion. It can also be accessed at www.cprn.org/doc.cfm?doc=1918&l=en.

Health Indicators

*Gary Catlin, Director General, Health Statistics and Measurement Branch,
Statistics Canada*

Background

The Canadian Institute for Health Information (CIHI) and Statistics Canada are working on a joint initiative to produce a health indicators system. The goal is to support health regions across Canada in monitoring the health of the population and the functioning of the healthcare system.

The process began in 1998 when CIHI and Statistics Canada carried out an extensive consultation on health indicators with hundreds of people in government and in communities across Canada. In December 1999, the first of a series of consensus conferences was held to begin developing a framework of indicators. Conferences have occurred on a regular basis since and have helped to shape the system. In the fall of 2008, another conference to review existing indicators and assess the need for new data will be held. The consensus conferences, together with ongoing consultations with Ontario's health regions and the Local Health Integrated Networks (LHINs), help to ensure that the indicator system is developing consistent with user needs.

Lessons Learned

- Common data collection methods and data standards are important to ensure that agencies have quality data for comparison across regions and internationally. They are also key to analyzing trends over time.
- Differences in the size and composition of health regions can make comparisons difficult. The geographical boundaries of health regions are defined by each province. The size and make-up of these regions can vary across provinces. Data for some regions have to be suppressed, or aggregated with data for neighbouring regions, because of small sample sizes.
- As the geographical boundaries of administrative areas change, analysis of trends over time can also become difficult because of the loss of comparable geographic regions.
- Users are requesting data at ever smaller local (sub-regional) levels. While providing quality data at a very local level can be difficult and labour intensive, Statistics Canada is currently working with the 18 largest health regions to investigate ways to do so.

The Future for the System

Statistics Canada plans the following: to develop new indicators; hold a consensus conference in the fall of 2008; further the analysis of data in future data releases; and improve web products to make the system more useful to users.

The Newfoundland and Labrador System of Community Accounts

*Alton Hollett, Assistant Deputy Minister, Economics and Statistics Branch,
Department of Finance, Government of Newfoundland and Labrador*

Background

Community Accounts is operated by the Economics and Statistics Branch within the Newfoundland and Labrador Statistics Agency, part of the Department of Finance. It is an easy-to-use system that shows information by region, economic zone, municipality and neighbourhood, as well as for the entire province. The system is used by the provincial and local governments, community groups, researchers, and the general public.

Community Accounts originated from the 1985 Royal Commission on Employment and Unemployment in Newfoundland. The Commission was tasked to investigate why unemployment was so high in the province. It became apparent that the detailed information needed to answer the question was not available at the community level. This led to Statistics Canada and the Government of Newfoundland working together to build an income data set and, over time, additional socio-economic data were included.

The provincial government required data to inform decisions. A conceptual framework was needed that allowed people and communities to recognize themselves in the data. How to engage citizens became an important issue. The government found that when people were asked what they wanted from an indicator system, most could not respond. To assist with this process, in 1988, a prototype was built. It showed what could be developed and it allowed citizens to identify what they thought was missing. This approach produced feedback that helped develop the system.

Community Accounts includes the following: demographic profiles on each community; a Community Comparison Tool which allows comparison of a community against all others in the province and shows its relative performance on a particular indicator; and well-being summaries for each community that enables them to distinguish their strengths and weaknesses.

Lessons Learned

- When the government is building new themes into Community Accounts such as homelessness, it brings together people from the community to discuss their needs from the data and ensure that it is examining the right issues. Communities are always considered as the experts.
- Community Accounts is helping people understand themselves and their communities better. Citizens see more than numbers when they use the system; they see what is happening in their communities.
- It is important that the data are accessible so that they will be used by communities. Dedicated system developers and long-term support with adequate resources must be put in place for an indicator system to develop properly.
- Community Accounts has helped to level the playing field between communities, not-for-profit organizations and government because each is using the same data. When Community Accounts was initially developed, some groups disputed who had the best data; however, this is no longer the case.

- Government and its stakeholders are now focusing on results – what they want to achieve and what is the actual situation. It ensures the focus is now on implementing policy solutions and taking effective action for the community.

The Future for the System

Community Accounts began as a system to organize data, but it is now about providing data and information to support the social and economic well-being of the province. It will continue to ensure that accurate and up to date information is included and is focused on the data needs of communities and government.

BC's Experience with Community Indicators

Don McRae, Executive Director, BC Stats

Background

BC Stats, the central statistical agency of the province of British Columbia, provides socio-economic profiles and indicators on education, labour, crime, health and economic hardship for a number of provincial administrative regions including local health areas, regional districts, college regions, school districts and others. Census-based profiles at the regional (census division) and municipal levels are also available. Users of the system include school boards, not-for-profit organizations, businesses, consultants and regional health authorities. (There are 78 local health areas, corresponding to 23 health regions, which were already in place when the system was in development.)

The Government of British Columbia began developing an indicator system in 1998. It took one year to develop and was used by the government before it was made available to the public in 2001. A cross-ministry steering group, the Deputy Ministers Committee for Social Policy, led the process. Once the system was developed, the indicators supported government decision-making, such as the provincial budget. Today, more than 12 ministries support the system with a single portal of access to the data. As a result, officials have stopped debating the data source and now focus on the policy solutions.

BC Stats includes more than 100 indicators across six themes with two areas of special focus – children at risk and youth at risk. The system has been developed to use indicators that are already available, rather than defining ideal indicators for which data do not exist.

The main data sources are the census and provincial administrative data files. However, administrative data are largely stored in separate ministry branches and can be difficult to access. Administrative data also lack the ability to drill down to smaller areas and are not designed for statistical use.

BC Stats and Newfoundland and Labrador's Community Accounts are very similar systems; however, Community Accounts is much easier to use for non-statisticians.

Lessons Learned

- Data need to be at a small, local level so that people see it as relevant and will use it. On the other hand, data need to be at a large enough level to be reliable and be statistically sound.
- It is important to remember that:
 - Indicators only provide a proxy for social and economic situations in the province.
 - Indicators do not explain why something has gone wrong; rather they are a first step to alerting where there may be a problem.
 - Use of averages does not always show what the situation is at a local level and disaggregating is often necessary.
 - Indicators are not a substitute for analysis, but can help to guide when additional analysis is needed.
- Developers should make use of existing data to form their initial system and then put it in the public domain. From this, initial feedback can be collected and the system further developed. As the system progresses, the data gaps can be filled and the system refined to meet the needs of government, other stakeholders and the public.
- BC Stats would advise others planning to set up an indicator system to: identify the target audience; determine the geographical level that is meaningful for people; determine the framework first, i.e. decide on themes and how to structure the data within them; ensure on-going funding; and make the information as accessible as possible.
- Indicators should be timely, understandable, comparable, credible, and relevant.

The Future for the System

Increasing public access to the data, making it more user-friendly and building capacity in communities to use the system are objectives of BC Stats going into the future.

Introduction to the Situation in the Government of Ontario

Kevin Costante, Deputy Minister and Associate Secretary for Policy, the Cabinet Office, Government of Ontario

While there is a wealth of information held in ministries in Ontario, there is a great deal of work to be done to transform this information into knowledge and policy. As a first step, the data needs to be identified and collected. The provincial government needs to agree on regional geographic boundaries across all its departments and examine local level organization.

More work is needed within the government to improve data transparency. An example was presented of a department that decided not to publish certain potentially sensitive data. The data came to light anyway and the department was then accused in the media of hiding the truth. The department has subsequently published the data regularly and there is no more negative media coverage. Moral of the story: it is much better to provide data from the beginning.

The government wants to focus on turning data and information into helping to serve the public. It is working towards developing policy based on evidence, measuring progress and achieving results.

Developing a Core Statistics Resource in the Ontario Public Service

Craig McFadyen, Executive Coordinator, Economics and Resource Policy, Government of Ontario

The presentation began by comparing the situation in Ontario with those in other provinces described in the morning presentations. It was noted that in contrast to British Columbia and Newfoundland and Labrador, Ontario's effort has been modest to date.

The focus in Ontario is currently on developing a system that can be used by government decision-makers. As the system develops, the government plans to expand this to the public. The underlying purpose of the system is to attain greater accuracy and consistency in data.

Many ministries in Ontario collect statistical data for modelling. A large number of resources are allocated to this work, but it currently remains internal to the government and its ministries. There is very limited collaboration, although substantial work is occurring within ministries. The focus in the Ontario Public Service, however, is now on results-based planning, and common indicators will enable the government to adjust policies based on the actual results achieved.

The presentation set out a series of best practices for data collection and indicator model development for Ontario. The models covered were: the Ontario Census Partnership; the Geospatial Data Exchange; Financial Information Returns; Managing Information for Student Achievement; the Provincial Planning Database; Local Health Integrated Networks Atlas; Integrated Local Labour Market Planning; and Results-Based Planning.

Challenges and opportunities identified included:

- Data are complex; keeping data current is time-consuming.
- The differences in geographic boundaries used by different ministries create problems for data collection and comparisons.
- A potential "early win" may be the development of an inventory that will help direct people to the data they want. This would also be accessible to the public.

Presentation to the Roundtable on Community Indicator Models

*Blair Dimock, Director of Research, Evaluation and Knowledge Management,
Ontario Trillium Foundation*

This presentation provided an overview of the not-for-profit development and use of community indicators in Ontario. The importance of community level indicators to the Ontario Trillium Foundation as a granting agency was stressed. Granting decisions based on relevant and accurate community level data are critical for local grant review teams.

There are many examples emerging from the not-for-profit sector of community indicator systems. *The Primer* distributed to participants in advance of the roundtable provided case studies of a selection of these, as well as the three systems presented. *The Primer* can be accessed on the CPRN website at www.cprn.org/doc.cfm?doc=1918&l=en. Four examples are:

- *The Canadian Council on Learning's Composite Learning Index* which is comprehensive in terms of the many different dimensions of learning that it covers
- The Federation of Canadian Municipalities' Quality of Life Index where 11 out of 22 municipalities involved are based in Ontario
- Community Social Data Strategy which facilitates access to Statistics Canada data for local community agency consortia
- The Community Foundations of Canada's Vital Signs which has grown from a Toronto community report card to evaluations of more than a dozen communities across Canada.

Democratizing Data – A Vision for Ontario Citizens

Sharon Manson Singer, President, Canadian Policy Research Networks

All provincial governments with an aging population are very interested in what they can do to improve health outcomes. All the aspects of the social determinants of health need to be considered; indicators of healthy and vibrant communities will be central to this debate.

The proliferation of the Internet has transformed the way people interact and receive information. It has helped to strengthen the role of consumers. There are expectations from the next generation of leaders about access to information and their ability to get timely information when they want it and in a format that makes sense to them. Citizens have access to information from a number of sources and are empowered by this. The data that governments and others collect therefore need to be in an equally accessible format and available publicly. The data also need to be as local as possible. It is important that government and policy-makers interact with people at a very local level to ensure the public are involved in setting the indicators and that the systems have meaning for communities.

The presentation described a potential framework for Ontario including a set of core indicators that would be measured across all communities as a basis for comparison. It also included a set of optional indicators that communities could select. This would enable communities to focus on the issues that are most important to them, and to then generate local action to solve local issues.

Breakout Group Discussions

Participants were divided into three breakout discussion groups. Below is a summary of the common themes raised across the three groups. The summary does not follow the exact order of the questions posed to the group, as in most cases the discussion flowed freely. More details on the discussion within each of the groups can be found in Appendix D.

Common System in Ontario

- Participants saw clear benefits in having a common system in Ontario similar to those presented for Newfoundland and Labrador and British Columbia.
- Good horizontal decision-making needs good data. While Ontario has good financial data, it does not have socio-economic data of the same comparability.
- A common system would enable communities to take stock of their situation in comparison with others, and would help them set priorities, take action and monitor impact over time.

Caution on Design and Development

- Be realistic on how a common indicators system can be designed and implemented.
- Given the proliferation of various indicator systems in Ontario, it would be best to build on what exists.
- Starting from scratch and seeking ideal data which have not been collected would be very costly and time-consuming. It is far better to have information in the public domain as soon as possible, and build from that point.
- One option mentioned is to build on Vital Signs, designed by Community Foundations of Canada and produced for some communities in Ontario, and expand it across the entire province.
- Another option is to develop a prototype model which people can react to rather than beginning by asking them what they want from a system (similar to what was done in Newfoundland and Labrador with Community Accounts).
- Experience from Newfoundland and Labrador and British Columbia shows that in the first stage of development all users need to understand the indicators and what they mean. Later on, users can concentrate on what to do with the information and how it can help define meaningful action for the benefit of the communities.

Breadth of Information

- The system needs to cover a wide range of information in a coherent framework that would include a mix of core and optional indicators. The core indicators would apply to all communities and enable comparisons. The optional indicators would allow a focus on what is most important for specific communities and encourage the generation of local action to solve local issues.
- The system should be dynamic with flexibility to adapt and change over time.

Access to Information

- Open and easy access to information is very important.
- Opening up data systems for public access will help eliminate the fear and mistrust some people have towards statistical data.
- The system should be useful for a range of users including people with low literacy levels and hard-to-reach groups. Therefore, it needs to be straightforward and easy-to-use.

Quality of Information

- Data must be reliable and comparable.
- Data need to meet quality standards and be verified before they are included in the system and made available to the public.
- Creating one central indicator system which is recognized as the most reliable and complete system removes the debate around which data are most accurate and allows focus and energy to turn to policy solutions.

Community Involvement

- Communities need to be involved in the design, development and implementation of a system to ensure that their needs are met and that they have appropriate information to take local action.
- It is important to involve a range of people including community organizations and their leaders, municipalities, experts and citizens.
- Community involvement would also help gain buy-in and support to ensure the long-term success of the initiative.
- The government needs to put more emphasis on consulting with communities and addressing their needs, not only focusing on internal clients.

Capacity Building

- Capacity does not exist in all communities to understand and interpret indicators and these skills need to be developed by groups to enable them to participate and use indicators appropriately.

Conclusions

The roundtable closed with each of the facilitators providing a summary of the breakout group discussions. Sharon Manson Singer and Robin Cardozo then concluded the day by thanking participants for their thoughtful input into the discussions and giving so much of their time to this important issue.

Participants were reminded that all documents related to the conference would be available on the CPRN website following the roundtable. Participants had the opportunity through the evaluation form to register their interest in further work on this topic and they will be contacted in due course regarding next steps.

Next Steps

A strong message coming from participants was that there have been numerous attempts to set up an Ontario-wide indicator system but there has been little substantial progress. Participants were keen to see some tangible next steps coming from the roundtable. Some participants suggested that these should take place in the next six to eight months as the impetus will be lost if it takes any longer. Participants noted that funding will be needed to take this work forward and it needs to be guaranteed over the long term to ensure the system survives.

A step which can be taken in the short-term to mobilize the process is to bring together organizations (people working at the technical level) that have been involved in developing indicator systems to date and work as a group to develop an indicator framework and a timescale to develop output in the short-term.

Regarding who should take the lead on developing the system, some felt that, as the system should be developed and sustained over the long term, the Ontario government, specifically an Ontario Statistics Agency, should be the lead. Others felt that an organization outside of government should take the lead, as it would be independent and neutral.

OTF and CPRN will carefully consider the input from participants and the potential next steps to help meet the vision of a healthy and vibrant community indicator system which is available to all Ontario citizens as community members for defining expectations, confirming observations and taking action.

Appendix A. Agenda

8:30	<i>Registration and Continental Breakfast</i>
9:00	<i>Welcome</i>
	L. Robin Cardozo, Chief Executive Officer, Ontario Trillium Foundation Sharon Manson Singer, President, Canadian Policy Research Networks
9:15	<i>Introduction of Participants</i>
9:30	<i>Presentations on Three Systems for Collecting Socio-economic Indicators</i> Gary Catlin, Director General, Health Statistics and Measurement Branch, Statistics Canada Alton Hollett, Assistant Deputy Minister, Economics and Statistics Branch, Department of Finance, Government of Newfoundland and Labrador Don McRae, Executive Director, BC Stats
11:00	<i>Coffee Break</i>
11:15	<i>Review of the Situation in Ontario</i>
	Kevin Costante, Deputy Minister and Associate Secretary for Policy, the Cabinet Office, Government of Ontario Craig McFadyen, Executive Coordinator, Economic and Resource Policy, Government of Ontario Blair Dimock, Director of Research, Evaluation and Knowledge Management, Ontario Trillium Foundation
11:35	<i>Breakout Group Discussions</i>
	<ul style="list-style-type: none"> • How does the situation in Ontario compare with what the presenters discussed? • What are the strengths and the gaps? • What did we learn about the systems in British Columbia or Newfoundland and Labrador that would be beneficial for Ontario?
12:30	<i>Lunch</i>
13:15	<i>Continuation of Breakout Group Discussions</i>
	<ul style="list-style-type: none"> • How do we see the role of communities in setting indicators and collecting data? • How should they be involved?
14:00	<i>A Vision for Empowering Healthy and Vibrant Communities</i>
	Sharon Manson Singer, President, Canadian Policy Research Networks
14:15	<i>Breakout Group Discussions</i>
	<ul style="list-style-type: none"> • Is there a need for a common system in Ontario? • Who would use such a system? For what purpose? How? • Who should lead and contribute to its development? • How important is it for communities to be involved in dialogues?
15.15 to 16:00	<i>Summary of Breakout Group Discussions and Next Steps</i> Blair Dimock, Director of Research, Evaluation and Knowledge Management, Ontario Trillium Foundation L. Robin Cardozo, Chief Executive Officer, Ontario Trillium Foundation Sharon Manson Singer, President, Canadian Policy Research Networks

Appendix B. Participants List

Peter Amenta

Director
Ministry of Community & Social Services

Pedro Barata

Communications & Outreach Coordinator
Atkinson Foundation

Brian Beattie

A/Director, Citizenship Branch
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Rick Blickstead

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Deputy Minister
Ministry of Culture

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Winston Tinglin
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Ontario Trillium Foundation

Thomas Townsend
Executive Head
Policy Research Initiative

Nadine Valk
Senior Program Specialist – Crosscutting Themes
Canadian Council on Learning

Lisa Watson
Director, Strategic Initiatives
United Way Toronto

David West
Manager, Current Analysis
Ministry of Finance

Dan Wilson
Manager, Policy, Research and Evaluation
Ontario Trillium Foundation

Appendix C. Speaker Biographies

L. Robin Cardozo, Chief Executive Officer, Ontario Trillium Foundation

Robin Cardozo has been Chief Executive Officer of The Ontario Trillium Foundation since 1999. For 11 years prior to joining the Foundation, he held progressively senior positions at the United Way of Greater Toronto, culminating in his appointment as Vice President and Chief Operating Officer. In 1999, his leadership earned him the United Way movement's highest national honour, the André Mailhot Award. He was elected a Fellow of the Institute of Chartered Accountants of Ontario (FCA) in 2000. Robin's voluntary work has included the Board of Casey House Hospice, ICAO Income Tax Clinics for low-income individuals, and the CICA Not-For-Profit Task Force. Robin serves on the advisory board of The Centre for Effective Philanthropy, based in Boston.

Sharon Manson Singer, President, Canadian Policy Research Networks

Sharon Manson Singer has more than two decades of experience in the public policy environment. From 1997 to 2001, she held a number of deputy minister positions in the British Columbia government, including being the lead deputy minister for British Columbia during the creation of the National Child Benefit and the National Children's Agenda. She was a tenured professor at the University of British Columbia and is also an adjunct professor at the School of Public Administration at University of Victoria and Faculty of Management at Royal Roads University. Sharon received her PhD in welfare economics at Brandeis University as a National Welfare Fellow. She has served as an expert advisor to all levels of government in Canada and internationally on issues related to income security and poverty reduction.

Gary Catlin, Director General, Health Statistics and Measurement Branch, Statistics Canada

Gary Catlin is the Director General of the Health Statistics and Measurement Branch at Statistics Canada. It regularly publishes *Health Indicators* in partnership with the Canadian Institute for Health Information. In this capacity Gary is also responsible for the Canadian Community Health Survey, National Vital Statistics, the Canadian Cancer Registry and the Canadian Health Measures Survey. Prior to his current position, he worked with the Canadian Institute of Health Research, as well as other positions in Statistics Canada and the Ontario Ministry of Health.

Alton Hollet, Assistant Deputy Minister, Economics and Statistics Branch, Department of Finance, Government of Newfoundland and Labrador

Alton Hollett is the Assistant Deputy Minister of the Economics and Statistics Branch, Department of Finance. In this capacity, he is responsible for the Government of Newfoundland and Labrador's (NL) central statistics agency and economic research and analysis functions and services. He was Director of the NL Statistics Agency from 1996 to 2007. Community Accounts (CAs) has won the National IPAC Award for Knowledge Management and the Provincial Government's Award of Excellence. The CAs also made the short-list for the United Nations Award for Public Service. Since the public release of the CAs in 2001, Alton has worked to make the Community Accounts known nationally and internationally.

Don McRae, Executive Director, BC Stats

Don McRae is the Provincial Statistician and Executive Director of BC Stats, the central statistical agency for the Province of British Columbia. Don joined the Provincial Government in 1980 and has over 25 years of applied experience in the field of statistical research and analysis, and in data development for public sector decision-making. He holds a Bachelor of Science degree in Statistics and a Masters of Public Administration, and has been the Provincial Statistician and Executive Director of BC Stats since 1995.

Kevin Costante, Deputy Minister and Associate Secretary for Policy, the Cabinet Office, Government of Ontario

Kevin Costante was appointed Deputy Minister and Associate Secretary of the Cabinet, Policy, Cabinet Office on June 1, 2007. Prior to this appointment, he served as Deputy Minister of the Ministry of Community and Social Services (MCSS) twice from June 1999 to August 2000 and mostly recently from February 2004 to May 2007. Kevin originally joined MCSS in 1992 and from August 1993 to January 1998, he was Assistant Deputy Minister, Social Assistance and Employment Opportunities. He started his public service career in Saskatchewan, where he worked for a total of nine years at the Ministry of Education and the Saskatchewan Treasury Board. Kevin has a BA (Honours) and a Masters of Public Administration from Queen's University in Kingston. Following the roundtable, Kevin was appointed Deputy Minister of Northern Development and Mines, effective July 21, 2008.

Craig McFadyen, Executive Coordinator, Economic and Resource Policy, Government of Ontario

Craig McFadyen has been in the Ontario Public Service since 1989 and with Cabinet Office since 2006. As Executive Coordinator he is responsible for supporting and coordinating Cabinet decision-making related to economic affairs policy across the Government of Ontario. Prior to joining Cabinet Office, Craig held a series of positions in the Ministry of Intergovernmental Affairs including: Executive Lead and Director, Fiscal Federalism; Acting Assistant Deputy Minister, Operations; Director, Canadian Intergovernmental Relations; and Director, Office of Federal-Provincial Relations and Constitutional Affairs. Craig has also worked in the Ministries of Finance and Colleges and Universities. He has a PhD in Political Science from the University of Toronto.

Blair Dimock, Director of Research, Evaluation and Knowledge Management, Ontario Trillium Foundation

Blair Dimock was appointed OTF's Director of Research, Evaluation and Knowledge Management in March 2006. Prior to joining the Foundation, Blair was Director of Strategic Planning and Research at TVOntario. Earlier in his career, Blair worked with the Premier's Council, where he coordinated the Task Force on Lifelong Learning. Blair began his career as a lecturer in International Politics at the University of Toronto and at Trent University. He holds an Honours BA from Mount Allison University and an MA from the Norman Paterson School of International Affairs at Carleton University.

Appendix D. Details on Breakout Group Discussions

Tables 1 & 2: Facilitated by Sharon Manson Singer

Participants felt that good horizontal decision-making needs good data. While Ontario has good financial data, it does not have socio-economic data of the same comparability. One reason that the data are not as comparable is that they are often collected within different geographic boundaries. The data are also collected through different systems and analyzed using different statistical techniques which can also make comparability across regions a problem.

The Situation in Ontario

- There is a need for a vision for a common system of community indicators in Ontario to help drive this agenda forward. Previous efforts have not led to a common system resulting in a level of frustration within government.
- Ontario needs to focus less on internal clients and make more of an effort to consult with communities to see what matters to them.

Role of Communities

- Participants agreed that communities need to be involved in the selection of indicators.
- The definition of community should include organizations and their leaders and not just the members of the public.
- Consultation with “different” communities, expert panels and citizens is required. We need to think through how realistically to involve people without it becoming too daunting for them and too costly and time consuming for the developers.
- Educating community organizations and community members would be needed to ensure they can use the data. In the early stages it would be helpful to develop a prototype indicator model which people can react to, rather than asking them up front what they want from a system (similar to what was done in Newfoundland and Labrador with Community Accounts).

Access to Data

- Everyone needs to have access to the same information. By opening this up and levelling the playing field, it will eliminate the fear and mistrust some people have towards statistical data.
- There is a need to allow for local priorities in any indicator model.
- Moving to a centralized system will not be a simple task.

Quality of Data

- Data must be reliable and comparable.

Common Ontario System

- There was strong agreement that a common system of indicators is needed in Ontario. Currently Ontario uses Statistics Canada as its de-facto provincial statistical agency.
- The ability to research and publish is more or less supported by different governments in Ontario and the level of information that is made available publicly also varies significantly.
- Legislation may be required to make the system independent of political interference and to remove potential spin on the data. It should also require data to be released publicly on a regular basis.
- The government needs to set up a community of practice that brings together people to identify what works well and act as champions for the model.
- The impetus for change in Ontario may be the economic disparity across communities. Ministers must respond to questions in the House at the community level but they currently do not have the data to answer these questions.

Getting Communities Interested

- Community level advocates are needed if an indicators system is to be used by the community.
- A good way to get communities interested in the system would be to build on Vital Signs, a system developed by Community Foundations of Canada and produced for some communities in Ontario, with statistically reliable data across the whole province.
- There should be a mix of core and optional indicators and a facility to allow the system to be dynamic and to change.

Suggested Next Steps

- Identify an organization that is not politically managed which can have independence in leading the development of the system and work alongside the Ontario government who will provide the top down leadership.
- Allocate sufficient resources to ensure the system is supported and not just in the short-term.
- We need to use what we have right now, in terms of existing systems and indicators, and build on it.

Tables 3 & 4: Facilitated by Robin Cardozo

Participants appreciated the description of the systems already in place, in particular in Newfoundland and Labrador and in British Columbia. Participants agreed that a similar system in Ontario would be worthwhile, but Ontario has a lot to do to replicate those efforts. Given the proliferation of various systems in Ontario, it would be best to build on what exists, rather than start from scratch.

Objective of Indicators

- Enable communities to take stock and understand their actual situation.
- Allow communities to agree on priorities, take action and monitor impact over time.

Community Involvement

- Participants recognized that the Ontario government needs to assess its internal situation as a starting point.
- Different ministries sometimes gather similar information without talking to each other and this needs to be coordinated. But they were very clear that such an internal focus is not sufficient.
- Community organizations need to be involved at the outset and throughout the development and implementation processes. Involvement from the beginning would ensure that the information is meaningful for users, help gain buy-in and support to ensure the long-term success. It would be very short-sighted to exclude communities.
- Municipalities as important users of indicators, need to be involved.

Breadth of Information

- Participants agreed that the system needs to cover a wide range of information.
- A framework should be designed. It would include core indicators applying to all communities, as well as other indicators that would be relevant in specific situations
- There was no agreement on how many indicators would be in the core set – a range between 10 and 30 was suggested. A framework was viewed as a living system that would evolve over time.
- Emphasis and resources are often put on “health” indicators while “social” indicators are lacking.

Definition of Community

- A geographical basis is a useful starting point, since political and decision-making systems are geographically-defined.
- Communities of interest also need the information.
- Information systems can more easily allow access to data at both geographical and communities of interest levels.

How to Start?

- Discussion centred on two possible approaches:
 1. Defining the ideal situation and the objective (what defines healthy and vibrant communities and what matters most for communities) and looking for data; or,
 2. Starting by using information that already exists.
- There is a proliferation of indicators and information in Ontario; further development must take into consideration what already exists.
- Experience from Newfoundland and Labrador and British Columbia shows that in the first stage of development all users need to understand the indicators and what they mean. It can take a while to get consensus on the data and what it means. Later on, users can concentrate on what to do with the information and how it can help define meaningful action for the benefit of the communities.

Community Capacity Building

- Efforts will be needed to support and help communities; the capacity to understand indicators and interpret them does not necessarily exist.

Who Should Lead?

- Given the need for a system to be developed and sustained over the long term, the Ontario government was seen as the lead. It would be very difficult and challenging for voluntary organizations to undertake this initiative.
- Partnerships are key, including with the private sector, as investments have already been made by many groups.
- One participant noted that Ontarian citizens would really be the funders of the system through their government. Accordingly, there is a need for recognizing data as a common good and putting pressure on the government to assume the role of making relevant data available to all.

Documenting Success

- Case studies where indicators were used to affect change should be documented. Such cases already exist, for example, a report on a Neighbourhood Vitality Index.

Suggested Next Steps

- Participants saw the development of a system in Ontario as a three-step process:
 1. Select/define a framework
 2. Set up a system
 3. Document successes.

- The first step is seen as relatively easy and low cost. The second step is more resource intensive and needs a strong lead.
- Participants suggested that OTF and CPRN could lead by convening a meeting with the designers of the various systems in Ontario with a view to design a framework for the province. This would build on a thorough understanding of the various systems. The objective would be to build consensus on themes and specific indicators. This first cut of a framework could then be validated with a broader range of community organizations.

Tables 5 & 6: Facilitated by Blair Dimock

Lessons Learned from BC Stats and Community Accounts

- Community Accounts data has been drilled down to 400 communities, empowering people and supporting those acting locally.
- Community Foundations are also helping to interpret the data from the BC Stats system. This is a two-way process where BC Stats provides the data and the Vancouver Community Foundation carries out additional community level analysis on the data which is useful to BC Stats and communities.
- Both systems clearly show who is responsible for the data. The organizations have a mandate and resources to do this. Participants agreed that this is what is needed in Ontario.

Common Ontario System

- The data system needs to be housed in a Statistics Agency and be independent from government to allow continuous access.
- Data needs to meet quality standards and be verified before it is included in the system and made available to the public.
- Start with a framework and then populate it with indicators so that the system covers all thematic areas and is not biased to the one area where it may be housed.
- It is important to build on existing data. What is needed is an approach similar to Newfoundland and Labrador that brings all the information together and presents it in one coherent way.
- One participant suggested that some of the best practices come from Australia and New Zealand where isolated communities have to collaborate to collect good information.

Access to Data

- If the data exist, it can be released through freedom of information requests. Therefore, it is preferable to make the data available to the public regularly to prevent negative media coverage.
- Participants noted that a large proportion of the Ontarian population has low literacy levels. It is unlikely that the whole population will be able to access the system, especially those that are most vulnerable. While youth are Internet savvy, the baby-boom generation – currently the largest age group in Canada – are not always.

Role of Communities

- Participants noted that the role of communities in the development of the system needed to be clear. There needs to be a real flavour of the community and not only involving the same leaders from the same organizations.
- People are tired and cynical of consultation processes. Getting community members together to talk about their experiences and desires is important. It provides a place where voices are heard.
- Surveys are not always the best way to ascertain what people think. Discussions and dialogues are also needed. It is important to make sure that systems are not too complex and become out of the reach of communities and individuals.

Developing the Model

- The presentation from Sharon Manson Singer suggested that a range of indicators should be presented to the community to allow them to select indicators relevant to their local area. The group proposed that there should be three target groups for the system: agencies who speak for individuals; sophisticated users; and non-sophisticated users. It should be viewed as a matrix with the 100 indicator set on one axis and the three target groups on the other. Some of the indicators should be mandatory for all communities so that comparisons can take place.
- One participant suggested that “Incremental improvement is better than planned perfection.” There is a need to agree on what will be measured and to do it, rather than continually debate the measure. It was agreed that there should be no more than about 20 indicators for a good model. There should be data available throughout the development and not only at the end.
- Participants felt that government officials working on community indicators need to unite forces to design an initial system. Government should then consult communities to determine what community members think is needed or needs to be modified within the model. Capacity building may be required within some communities and community organizations to be able to contribute meaningfully.
- The best models emerge when you have few resources and an impetus and urgency to act. It is important to avoid creating a system that shows who is “best” or “worst” as this turns people defensive and unlikely to share their information. A final comment from one participant helped to sum up much of this part of the discussion: “If you build it, it will be renovated.”

Suggested Next Steps

- A champion(s) to lead the system is needed. They should be apolitical if possible, and outside of government.
- There needs to be leadership within government to take this forward.
- Bring together all the people that have been involved in developing indicator systems and in trying to develop an Ontario-wide system to identify the top 10 things that need to be done to develop an Ontario-wide indicators system. Do not replicate what already exists or create another report card.
- Make use of community partnerships that are already formed and give them additional assistance to support the community and to access additional data.



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