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Community Quality-of-Life Indicators

Best Cases VIII

Springer

Community Quality-of-Life and Well-Being

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Chapter 1
Creating and Sustaining Community Indicators Projects: From Engagement to Results

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Abstract Sustaining indicator projects over time is an important challenge to address since taking effective action and tracking success on a given issue may take some time. Project sustainability is not about self-preservation but maintaining the capacity to serve and inspire the community for as long as improvements are needed and to continue to monitor over time. Care must be taken at each step of the development and maintenance of a community indicators project to insure its ability to stand the test of time. Successful community indicators projects share similarities: support from the initiating organization leadership and a host of partners; early and continuous engagement of the community and partners; selection of a solid framework and effective indicators; participation of stakeholders, decision-makers and subject matter experts; a willingness to conduct periodic evaluations and to innovate in response to community interests; good leadership and communications skills. This section includes multiple examples of practices and tools or exemplars that illustrate the relevance and strength of today's community indicators universe.

1.1 Introduction

The mission of the Community Indicators Consortium (CIC) is for community indicators to be used by all communities to facilitate sustainable improvements in their quality of life. Since 2005, CIC has offered resources and tools to help communities and practitioners advance the practice and effective use of community indicators. CIC maintains a popular database of over 300 projects located all over the world and has observed the rise and fall of dozens of projects each year.

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What we learned from our observations is that it is easier to create a community indicators project than to maintain it over the long term. As is true for other voluntary and community efforts, many community indicator projects are all too often short-lived. New reports or dashboards appear on the scene with a burst of staff and volunteer enthusiasm, dedication, and skill, and then fade away. Even projects that have survived for a good while struggle to remain relevant.

Sustaining indicator projects over time is an important challenge to address since, in most cases, taking effective action and tracking success on a given issue may take some time. Maintenance over decades is often essential if the project is to ignite, support and evaluate progress on actions designed to improve community conditions. If a project is not around long enough for results to be seen, the benefit of much of the entire effort may be lost.

1.2   Understanding Community Indicators

Community indicator projects use data, often displayed over time or comparing different locations, to tell the story of complex systems and to guide priority and agenda setting for groups involved in improving community-level conditions across the full spectrum of challenges affecting the community.

Communities, whatever their scale, are complex systems made up of many components, and various levels. To understand, predict, and improve a system, community indicators need the participation and support of the community they aspire to describe. Indicators should also be logically or scientifically defensible, which speaks to the need to include various experts in the selection and interpretation of indicators. Finally, involving stakeholders with authority or resources, and the will and ability to affect the chosen changes, in the process of identifying priorities and selecting the correct measures will help to ensure that community indicator projects are used to guide and support strategies or action.

Success for a community indicator project can be defined as the ability to improve outcomes, as measured by those very indicators that are expected to spur and guide the improvements. But changes in those outcomes may take years or may be masked by other trends. Meanwhile, community indicators bring a variety of less quantifiable, more subtle benefits such as: telling a compelling story about lesser known areas of the community, helping to understand complex issues, creating a common language for action, creating awareness for inequities within a community, bringing the community physically together and creating bonds and networks, informing policy-makers, or training future leaders among its volunteers.

1.3 Exemplary Practices

In 2018, CIC developed a *Community Indicators Project Development Guide* with the support of the William K. Kellogg Foundation. As the basis for its research, CIC interviewed the managers of ten successful[1] community indicator project, conducted a review of 30 webinars that focused on the operations and success of currently active community indicators projects, and reviewed the literature on community indicators. What follows is a summary of good practices that emerged from that work.

1.3.1 Getting a Solid Start

An important early step for any community indicators project is for its sponsoring organization, its various partners and its main funders to develop a common understanding of expectations, deliverables, resources and time commitment needed from the community and from the organization to support the project. For ACT Rochester, the first thing to do was to decide what the indicators project were going to do and who its key audience was (Johnson 2018). The Richmond Regional Indicators Project wanted to ensure that there was a need for their indicator project. An assessment showed that while there were a few organizations offering topic-specific data and other groups examining geography-specific data, there really wasn't any entity offering the breadth and depth that they hoped to offer and no other organization could tie metrics to analyze and then to create opportunity for action (Harris 2018).

Early and clear identification of the purpose and resources needed for a project can avoid later pitfalls. It is important at the inception of the project to consider the strength of the commitment of the home organization and the project's main partners and their appetite for long-term involvement.

Here again, the Richmond Regional Indicators Project made sure sustainability was part of the conversation early on. They worked with philanthropic and academic partners to leverage funds, other staff resources and data expertise. Once they established a need and sustainable funding, they then were able to move forward (Harris 2018).

An appropriate organizational host can provide a solid foundation for an indicators project and avoid the enormous effort of starting a nonprofit organization from scratch. Community foundations, for example, often have a mission that closely aligns with that of a community indicator project and often can serve as an appropriate host. Similarly, some academic research institutes might be a good fit for a project.

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[1]Success here was determined subjectively by the team based on output factors such as the project's longevity, resources associated with the project, overall reach, level of activity among their peers and/or visibility in the literature rather than on outcomes, although most of those projects were also the recipients of CIC Impact Awards.

Building a broad coalition from the outset may mitigate potential drawbacks associated with a project's original home. Such a coalition is likely to offer the strongest support both initially and over time and can be a key factor in long term sustainability of a community indicator system (Barrington-Leigh and Escande 2018). Focusing on influencers and decision-makers from the beginning will help build the community support to move from problem recognition to action (Pettit 2018).

1.3.2 Engaging the Community

A critical part of the initial process is to identify who will be engaged in a project, at what times, to what extent, and in what roles. The ability to engage the community and stakeholders is critical to the success of an indicator project and getting input and buy in early in the process is vital (Pettit 2018). Early consultation with the community will assure that the purpose of the project is well aligned with community desires and expectations.

Diversity and inclusiveness are imperatives throughout the process. Who is around the table when priorities are set; who are the partners in implementation and who gets to decide whether a successful outcome has been achieved in a community are all considerations that will define whether the community views the product of this efforts as reflecting their culture and identify or the priorities of the researchers. Community members want results they care about, not just data, so their priorities should drive what data to collect, report, and use (Epstein et al. 2016).

For Minnesota Compass, all users and stakeholders are partners in crafting something that's usable. "If we operate in a vacuum as researchers, giving what information we think is best, then we're going to fail in terms of sustainability, relevance and usefulness" (Liuzzi 2018).

Assessing the organization's standing in and connections to the community and other organizations within the community ensures that it has enough ability to identify and move the needle on issues that matter. If these relationships are not sufficiently strong, then the organization can consider taking on another role such as data partner and identify a partner organization with better standing in the community as its community face.

Regular engagement and reporting updates and findings will keep the community feeling connected and involved in shaping its own future. Identifying and involving stakeholders from the outset can be key to the success of an initiative. Such engagement is needed in the visioning process, on steering committees, as subject matter experts, and in indicator selection groups.

Subject matter experts are particularly important during the indicator selection process where they can contribute scientific or technical background to ensure that the indicator is logically connected to the goal or priority and is scientifically and technically sound. Their scientifically or technically informed views complement the practical, on-the-ground life experiences of community members and the advocacy from various stakeholders.

1.3.3 Selecting Meaningful and Relevant Indicator at the Appropriate Scale

Indicators are usually organized under a framework. Frameworks may be existing[2] or newly developed for a project. An existing framework can be used as a starting point for a community discussion or as a way to check for gaps in the community vision. A new framework may be created to adapt to the specific circumstances or goals for a particular community. A framework is usually made up of domains, which are broad content areas that will serve as the support structure for the indicators. Domains should relate directly to themes that emerged as part of the original conversation about indicators. Using goals as domains names, e.g., "clean and sufficient water for all", "healthy children", or "affordable quality housing", highlights these areas and demonstrates a commitment to realizing these aspirations.

The selection of several indicators under each domain is another opportunity for a cooperative process. Compass uses Topic Advisory Groups, or TAGs, and starts by identifying a convener or co-conveners; for example, a project leader and a key community leader are an ideal pairing. Invitation lists of community members representing different sectors, ages, ethnicities, etc. are compiled. At the first of the two TAG meetings, participants are asked to weigh in on broad questions, e.g., What matters most to you? What do you need to know to make changes? Following that meeting, the project staff reviews notes from the discussion, looking into data sources for potential indicators, and creating a "why/why not" document that goes through every idea from the TAG meeting and provides a rationale for why an indicator should or should not be used. Then, in the second TAG meeting, a proposal for three to four indicators per domain is shared, and the TAG brainstorms how to connect the community to the indicators (Liuzzi 2018).

Truckee Meadows Tomorrow (TMT) began with 9 major conceptual areas. A task force met with different groups of community members, reaching over 2000 residents. To get the word out about online surveys and events, they partnered with various organizations who had well-read listservs or large e-mail lists. TMT provided citizens with possible indicators and had citizens indicate which indicators they feel best addressed the topic. TMT came up with a community engagement process to get feedback on what quality of life meant to different people. From a list that had been made by community members, a broader audience was asked to vote—using Monopoly money—on what issues were most important. Every person got $100 of Monopoly money to allot how they wanted (Hruby 2018).

Criteria can help sort out those indicators that are most appropriate for inclusion and discard other indicators that are not as good a fit. The criteria can address relevance, strength, and availability of data. For each proposed indicator, consider the following questions:

- What are we trying to measure and why?

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[2]See for example the United Nations Sustainable Development Goals, the Australian National Development Index (ANDI), the Canadian Index of Wellbeing (CIW), Healthy People 2020.

- What does research show about the link between the indicator and the domain or goal?
- Does this indicator measure an input, output, or outcome?
- Are past, current and future data available for this indicator at the desired scale?
- How often could this indicator be updated?
- Can anything be done to move the needle on this indicator (is it actionable)?

Actionable indicators, or leading indicators, are measures that can be moved by future actions, as opposed to lagging indicators that show what has already happened.

It is important to consider the time frame at which to measure an action. Numbers on adult literacy, for example, may take a generation to improve, but tracking readiness for school in young children can inspire focused and immediate action.

When considering the appropriate scale for the data, it's important to consider whether reporting only one set of data at the province or state, county, or watershed scale provides enough information. Will the larger scale mask disparities or impacts among different sub areas or populations? Typically, the smallest geography available is the most useful in diagnosing issues to address, although availability of data at the level of specificity needed by the community may be the limiting factor. As a rapidly developing and growing suburb dealing with a wide range of social and health issues needed indicators, the community of Cardinia Shire (Victoria) needed neighborhood level livability indicators that would not mask hidden health disparities within small areas across municipalities. As described in this volume, the neighborhood level indicators were particularly useful to Victorian public health officials planning legislation and also led to the formation of a partnership of local agencies (Davern et al. 2020). Also in this volume, Ridzi (2020) offers a thorough discussion on the usefulness of measures at different scales, from regional to address-level, building on the work of the Central New York Foundation and CNYVitals. He argues that, by paying close attention to each actor's target outcomes (and the data layer they use to measure them), it is possible to see how these levels of data help to coordinate actors that naturally inhabit different tiers of action.

Finally, indicators should be looked at through different lenses that reflect the social and cultural communities. Disaggregating data by sex, income levels, rural/urban residence, or ethnic, racial, or cultural group affiliation can reveal important differences, especially for communities that aim to address equity or social justice.

The Measure the Dream index is developed to uncover racial and ethnic differences to ensure equitable outcomes for all, recognizing that working towards equality can support a community's cohesion, resilient, and sustainability (O'Connell et al. 2020, in this volume).

Also relevant to deciding at what scale to report data is knowing at what scales decisions or policies made for that area; what scale will resonate with community members and help draw them into taking action; and, whether data and resources are available to acquire data at smaller scale.

In addition to the raw data obtained, each indicator needs background information (metadata) comprising a few paragraphs that explains why the indicator is important

and how it relates to the vision or goals. This description should also include details about the source and timing of the data and any information related to its strengths or limitations. This information is necessary for transparency, use, and building an organizational memory of decisions and knowledge that can outlast any particular person in the event of personnel changes in the indicators project.

If the data does not exist to develop an indicator that was strongly supported by the community, proxy measures that resonate with the community can be identified. Sustainable Calgary was asked to measure cultural diversity. After convening a panel of experts, United Way, university researchers, and foundation, they identified "Diversity among positions of power and influence" as a proxy measure for cultural diversity and Sustainable Calgary was able to collect data and report on this measure.

When the community said they cared about public events and parties but measures to track occurrence of those events was not available, the Baltimore Neighborhood Indicators Alliance (BNIA) figured out that every time a block party happened, a permit from the city was needed, so they worked with the city to track the number of permits it granted. It's an important indicator of activity in the public space (Iyer 2018).

Keeping indicators fresh though periodical evaluations, review and updates of the list of indicators is key to project sustainability and, most importantly, to their relevance to the community. Some projects may go as far as reorganizing their indicators under a new framework that is based on more recent science, such as the Social Determinants of Health (Brutschy et al. 2020; Davern et al. 2020) or a new focus for the community as a result of a major community trauma (Iyer 2018) or resilience following a natural disaster (Gardere 2018).

For the Jacksonville Community Council, Inc. (JCCI), one of the longest living indicator projects in the US, something had to be done when the project had grown to over 180 indicators. Through a large community initiative that involved 16,000 voices, residents prioritized issues and highlighted areas that they wanted to see progress in. Through this effort, they reduced the number of indicators that were publicly maintained to 50 indicators, knowing that those indicators were aligned with the community's vision. This helped them emphasize the relevance of what the trend lines were showing (Cohn 2015).

Projects that excel are constantly keeping their ears to the ground to understand evolving or changing priorities. They position themselves ahead of the curve regarding new problems, commit to periodic evaluations, and have multiple channels of communication with their intended audiences. They know and understand the community and the community knows and understands them.

1.3.4 Building Bridges Between Project and Users

Just putting out a report or an updated dashboard is not enough. "You can come up with the best indicators for the community, but if the community doesn't know about them or what to do with them, it's useless" (Hruby 2018).

Successful projects emphasize continuous and direct engagement with the community and key stakeholders. The data part is easy; thinking early about a mechanism for this information to change the way people are thinking about things is where most of the time should be spent (Pettit 2018).

Getting the right information to the right person at the right time and making the data become a key part of everybody's daily life is essential (Iyer 2018).

Many projects emphasize the importance of live events and presentation as part of the reporting process. Some host their own events, while others mainly respond to requests for presentations. Many attend meetings and share the indicators during conversation.

For BNIA, making data a key part of everybody's almost daily life and helping people understand the relevance of data has been an important part of their work. Supporting the written word with personal engagement is critical: a high level of interaction between indicators practitioners and users is likely to lead to greater data use. They attend community and municipal events that provide opportunities to create awareness about the indicators and to make a case about the relevance and importance of the data (Iyer 2018).

For Minnesota Compass, communications means being part of communities that, they hope, will use the indicators. They engage in all sorts of forms of outreach to make sure people know who they are–their identity, what they do and don't provide– and rely on a strategic communications plans to target specific outcomes (Liuzzi 2018).

Being intentional helps to pursue and accept opportunities. Projects may keep a record of the events they attend, splitting them out by topic area to understand which topics are resonating the most. This record can support planning for where to focus future efforts. Being ready and eager to strategically use different media to keep the project and its data in the news is critical. If a journalist or local radio DJ send out an email looking for feedback on a particular topic, ACT Rochester will work on their timeline and be ready with the data journalists are looking for Johnson (2018).

To help partners and users use their data, CNY Vitals started running monthly Data Fridays, inviting anyone who want to be better at managing and using their data, identifying outcomes, building databases, etc. to join this support group (Ridzi 2018). After seeing community members struggle to use the results of their survey, East Metro Pulse organized data parties to bring users of data together to learn how to read a data book and communicate what they learned to their stakeholders (Connell et al. 2020, in this volume). Every year, BNIA hosts Baltimore Data Day, a free and open workshop to help communities expand their capacity to use technology and data to advance their goals. Structured around a series of "how to" interactive workshops, Data Day brings Community leaders, nonprofit organizations, governmental entities and civic-minded "hackers" came together to see the latest trends in community-based data, technology and tools (BNIA, n.d.). At least 25% of attendees identify themselves as being community people (Iyer 2018).

1.3.5 Surviving Threats to Community Indicator Projects

Over time there is a natural drain of resources and energy and a buildup of fatigue-inducing habits that have the power to erode the relationships established with the community, funders, and volunteers. Volunteer fatigue can affect the vitality of a community indicator project, but this can be counteracted by good practices related to the "care and feeding" of volunteers.

Care must be taken to nurture and expand relationships. Each new stage in a project is an opportunity to re-engage, celebrate, deepen and strengthen the connections with existing partners, and create new ones. Maintaining a strong network of partners helps soften the blow inflicted by internal or external strife.

Diversity, inclusion and inclusiveness are a lens by which to view community indicators and serve as benchmarks for overall success for community efforts. Beyond equitable participation in the indicators work, these concerns mesh with evidence based practice—what actually works to produce improved outcomes as viewed through an equity lens. Developing equity agendas for key elements of the process, and guidelines for effective practice should be front and center as the indicators project moves ahead.

While regular and meaningful communications must take place with community members, stakeholders, funders and policy-makers throughout the life of the project, the website or other communications media can be used to strengthen partnerships. "Being a volunteer network, often we have to compete with other priorities of partner organizations. Since we don't directly provide funding for our partners, we have to offer something that's of value to each organization. We highlight partners, communicate success stories, and track partner engagement over time" (Joo 2018).

Similarly, SA 2020's website is a hub for 145 nonprofit partners with a microsite for each partner, to show who they are, but also to provide a space for them to talk about their connection to the SA2020 community vision. SA 2020 points website visitors to either volunteer, or get more information, or even donate to those organizations (Fox 2016).

Projects that are overly associated with one charismatic leader, dependent on a person that holds most of the knowledge and connections, or that are the "pet project" of a funder or elected official may not survive if that person leaves the scene. Applying good leadership practices and building strong partnerships should prevent this from happening.

Decreased or lost funding is usually the single most difficult problem to solve. When funding goes down, so does the capacity to support a successful project. Funding is influenced by the health and stability of the lead organization and the diversity of its revenue sources, the level to which the local community, and its funders, understand the value of indicators, and the strength of the partnerships that were established. To respond to funding cuts, the community indicator project may reduce staffing, research and outreach, which can in turn lead to decreased interest in the project on the part of funders thus creating a downward spiral. Careful

understanding of funding considerations, potential sponsors, and resource needs is essential before starting a project.

Projects facing threats, such as those described above, may cut down on outreach and engagement to double down on research and analysis, eventually becoming the proverbial "ivory tower," that is, an entity separated from the community and practical realities. This may work for a while as there may be a specialized audience that is receptive to the well-researched product, but it will not be as effective in the community, and eventually the project will lose the connections that allows it to identify what matters to, and therefore what can be done in, a community.

Using indicators to spotlight areas of community pride, as well as its deficits can spur the community to come together to celebrate. Measures that track progress help generate funding or policies.

An engaged community can offset lack of dedicated funding. In Juneau and Anchorage, community-led efforts to track sustainability measures lead to implementation of initiatives that advance the sustainability of the community and (in this volume).

As described in this volume, the Santa Cruz County Community Assessment Project (CAP) now in its 25th year, has stood the test of time and continues to spur action and results through committed leadership, a rigorous community engagement process, a willingness to improve and innovate and apply new models, and a distributed funding approach (Brutschy et al. 2020).

Projects with longevity have developed the ability to refresh and evolve. They evaluate periodically and strategically if their indicators are effective, if the people at the table are still the right ones, if they are still using the best delivery method for the data (Pettit 2018).

1.4 Conclusion

A main goal of community indicators projects is to tell a meaningful story that can lead to sustainable improvements in community conditions. Informing the community, changing minds and effecting change takes time. Telling such a story requires planning, good data, time, and resources, as well as an understanding of and commitment to community engagement. Project sustainability is not about self-preservation but maintaining the capacity to serve and inspire the community for as long as improvements are needed and to continue to monitor over time.

Care must be taken at each step of the development and maintenance of a community indicators project to ensure its sustainability. A project should be initiated with special attention to its ability to stand the test of time. Hallmarks of a successful community indicators project includes: support from the initiating organization leadership and a host of partners; early and continuous engagement of the community and partners; selection of a solid framework and effective indicators; participation

of stakeholders, decision-makers and subject matter experts; a willingness to conduct periodic evaluations and to innovate in response to community interests; good leadership and communications skills.

The rapid growth of the community indicator field and the contributions to community wellbeing across the globe provide a hopeful backdrop to the remainder of the book that details many of the "how to" aspects of the field as well as lessons learned born out of trials and applications.

Chapters 2 and 3 scope the geographic levels at which to present data. Ridzi (2020) engages in a discussion of the nested scales at which data can be used and the impact data have at each of those scales while Wascalus and Wolter (2020) examine the challenges of adapting data for small area geographies to rural areas.

Indices take a large amount of data to help uncover and reveal complex, "wicked" problems at the chosen scale. In Chaps. 4 and 5, Connell et al. (2020) tackles racial inequities by turning Dr. Martin Luther King Jr. 's call for racial equality and economic justice into an indicator framework to assess America's realization of prosperity and equality. After examining the appropriate scales at which interventions can move the needle, Crawford and Ridzi (2020) describe how a poverty index came to be to address regional disparities and what infrastructure is needed for monitoring efforts to alleviate one of the worst rates of poverty in the US. Similarly in Chap. 6, Summers et al. (2020) presents the Decision Integration for Strong Communities (DISC) application, a "dashboard" of community characteristics to help communities assess how resilient they are and find information to encourage smart growth planning.

In case studies from Australia, Canada and the United States (Chaps. 7 and 8), we are treated to the rationale for, as well as the development and implementation of, diverse community indicators projects. Davern et al. (2020) offer an example of indicator application in community and public health planning within a local government in Cardinia, a suburb of Melbourne. Powell (2019) contrasted the efforts of three Northern communities in the US and Canada and the conditions for success to establish indicators to track sustainability planning.

Brutschy et al. (2020) in Chap. 9 explores the conditions and attributes needed to successfully collect and leverage community data for positive impact, using a couple of data-supported initiatives as examples while Connell et al. (2020) in Chap. 10 focuses on data as a tool to engage with community members and data practitioners and expand the use of existing data sets.

In the final Chap. 11, from outside the field of community indicators, Abraham (2019) makes the argument that community indicators will improve the planning field's need for stronger reliance on both evidence and community participation.

Individually, these chapters support many of the practices outlined in this introductory chapter. Taken together they create a tapestry of practices, tools or exemplars, that represent the relevance and strength of today's community indicators universe.

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Chapter 2
Goldilocks Data-Connecting Community Indicators to Program Evaluation and Everything in Between

Frank Ridzi

Abstract Community indicators have long sought to measure and inspire community level change. On a much smaller scale, program evaluation and performance management seek to measure and inspire change among program participants. While communities across the United States may have robust community indicators and performance management cultures these two efforts are often disconnected, leaving a large amount of guesswork between identifying major community needs and coordinating the many nonprofit and other community partners needed to bring about positive change. In this paper, we utilize the metaphor of GPS map zoom levels to articulate the key types of data needed to build a comprehensive data ecosystem that integrates community indicators with program level performance monitoring. We then use the case study of Syracuse, New York to elucidate how a nested logic model approach can be used to coordinate efforts that approximate the Federal Reserve Bank of San Francisco's (Erickson 2017) vision of a "complex adaptive system" that will help organizations and sectors coordinate their work across silos to achieve shared outcomes (such as helping children be ready for kindergarten, youth graduate from high school, homeless people find homes or retrained workers hold a steady job) (Erickson 2017, p. 43).

2.1 Introduction

Community indicators (CI) and quality of life indices are a growing movement that seeks to use data to bring about measurable community improvement (Holden et al. 2017; Stevens et. al. 2019, p. 1). At the other end of the spectrum program evaluation and performance management (PM) are growing in popularity, especially as funders seek evidence of impact (Ridzi 2013; Stevens et. al. 2019, p. 6). Indeed this has been a focus of the Community Indicators Consortium, which has worked to

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