



*Approaches to Measuring:*  
**Community  
 Change Indicators**







*Approaches to Measuring  
Community  
Change Indicators*

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PAUL BORN AND  
DENISE L. WHALEY



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Published by:

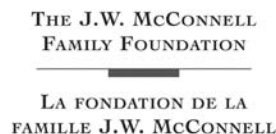
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This publication was made possible through the generous support of:





## About Vibrant Communities

Vibrant Communities is a unique initiative that supports and links collaborations from over a dozen urban centres across Canada who are experimenting with comprehensive and collaborative approaches to reduce poverty.

Started in 2002 by The J.W. McConnell Family Foundation, the Caledon Institute of Social Policy and Tamarack – An Institute for Community Engagement, the network includes community collaboration from Abbotsford, B.C.'s Capital Region, Calgary, Edmonton, Hamilton, Saint John, St. John's, Surrey, the Saint Michel neighbourhood in Montreal, Trois Rivières, Waterloo, and Winnipeg.

The Vibrant Communities initiative is generously supported by contributions from The J.W. McConnell Family Foundation, Maytree, Human Resources and Skills Development Canada as well as a number of other private and community organizations.

## About this Resource

*Approaches to Measuring: Community Change Indicators* consolidates the research and content of four previously published papers measuring less poverty in communities, more vibrant communities, more collaboration and more citizen engagement. This consolidated research paper was developed by Vibrant Communities with the financial assistance of The Ontario Trillium Foundation.

This consolidated paper and the series of four papers review measurement tools and techniques used by a variety of organizations across Canada and internationally. *Approaches to Measuring: Community Change Indicators* is a living document which Tamarack – An Institute for Community Engagement may upgrade periodically based on new learning and feedback from readers.

Please note that this paper and the others can be downloaded free of charge from [www.tamarackcommunity.ca](http://www.tamarackcommunity.ca).

Papers in this Series:

- Approaches to Measuring: Community Change Indicators
- Approaches to Measuring Less Poverty in Communities
- Approaches to Measuring More Vibrant Communities
- Approaches to Measuring More Community Engagement
- Approaches to Measuring More Collaboration in Communities

## About The Ontario Trillium Foundation

A leading grantmaker in Canada, The Ontario Trillium Foundation (OTF) strengthens the capacity of the voluntary sector through investments in community-based initiatives. An agency of the Government of Ontario, OTF builds healthy and vibrant communities. Learn more about The Ontario Trillium Foundation at: [www.trilliumfoundation.org](http://www.trilliumfoundation.org)

La Fondation Trillium de l'Ontario (FTO), l'une des plus importantes fondations subventionnaires au Canada, renforce les capacités du secteur bénévole en investissant dans des initiatives communautaires. Relevant du gouvernement de l'Ontario, la FTO favorise l'épanouissement de communautés saines et dynamiques dans toute la province.

[www.trilliumfoundation.org](http://www.trilliumfoundation.org)

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DE L'ONTARIO**



## About the Research Team

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Denise L. Whaley worked as a summer researcher for Tamarack – An Institute for Community Engagement. Denise received her Bachelor's Degree in Peace and Conflict Studies from the University of Waterloo. She is currently a graduate student in Rural Planning and Development at the University of Guelph and student member of OPPI/CIP.

### **Liz Weaver**

Liz Weaver of the Vibrant Communities Canada team provides coaching, leadership and support to Ontario community partners, including Opportunities Waterloo Region and the Hamilton Roundtable for Poverty Reduction. As lead coach, she helps initiatives develop their frameworks of change, supports and guides their projects and helps connect them to Vibrant Communities and other comprehensive community collaborations.

### **Paul Born**

Paul is fascinated by and loves to share stories of community and citizen engagement. An author of three books including *Community Conversations*, *Creating Vibrant Communities* and *Leaderful Communities*, he is internationally recognized for his innovative approaches to community building. Paul is the President of Tamarack – An Institute for Community Engagement and co founder of their signature project Vibrant Communities Canada that has to date reduced poverty for more than 175,000 families.

### **Tamarack – An Institute for Community Engagement**

The following individuals provided insight and guidance on the development of this paper.

- **Paul Born**, President, Tamarack – An Institute for Community Engagement
- **Mark Cabaj**, Vice President, Tamarack – An Institute for Community Engagement and Executive Director, Vibrant Communities Canada
- **Eric Leviten-Reid**, Learning and Evaluation Coordinator and Coach, Vibrant Communities Canada
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# Section One: Approaches to Measuring: Community Change Indicators

## Introduction

Several years ago when Tamarack was reviewing its mission and mandate we spoke of things we would like to be known for. The ideas we stood for and the outcomes we wanted to achieve. We had established ourselves and our programs in our first five years and had come to understand our work as broader than community engagement. After much thought and consultation we came up with the following vision and mission. It was built around four key words,

- Vibrant
- Engaged
- Collaborative
- Less poverty

We wrote:

*“Tamarack exists to build vibrant and engaged communities in Canada. Our work will result in more collaborative approaches and less poverty.*

*A vibrant community is one where committed citizens work together to build a community that is caring, prosperous and sustainable.*

*Our mission is to engage citizens in inspired action as they work and learn together on behalf of their communities to create and realize bold visions for the future.”*

The work of building vibrant communities was at the core of our work and our intention and we recognize that vibrancy would require committed citizens that were collaborating and working together using community building techniques. We further used three words to define vibrancy in a community and these were caring, prosperous and sustainable.

Engaged communities were central to the vision of our work. We further elaborated on this in our mission which considered the importance of bold visions and inspired actions and collaboration in the work and learning of such citizens. We knew that no community could be vibrant if its citizens were not engaged and active.

The outcomes of our work were to be concrete. Less poverty we recognized would be much easier to measure. We know a lot about reducing poverty as our most important national project Vibrant Communities Canada has already reduced poverty for more than 170,000 people. This became obvious to include in our mission.

Lastly we wanted our work to result in more collaboration. This was not collaboration for the sake of partnership but rather it was to be a transformative approach. Our most vital interest was collaboration that brought together many different sectors and in turn fostered a new kind of dialogue between them. This was our hope in building better futures for communities.

Once having agreed on the vision and mission of the organization our next challenge was a way to measure the outcomes of our work. The research you are about to read is our first step in trying to capture how others might have done that. Measuring outcomes is not foreign to us. In Vibrant Communities Canada we have gone to great lengths to measure specifically engagement and less poverty. Evaluation has always interested us not only as a means for monitoring our activities but also an important way to tell the story of our work.

As we were exploring how we might go about researching the outcomes we received a phone call from The Ontario Trillium Foundation who had adopted a complimentary vision for their work and they were asking us our take on outcome measures. It did not take long for us to agree to work together and in turn we undertook this research together. This is the result of the research that was initiated by a conversation between a small team at the Tamarack Institute and a small team at The Ontario Trillium Foundation.

*Approaches to Measuring: Community Change Indicators* is the consolidated research and content of four papers we produced and later published in Engage! our monthly Ezine.

I want to thank first Liz Weaver for taking the raw research and massaging it so that it looks and feels like a publication. Second I want to thank Denise Whaley for all of the work in researching the raw material and writing it in a way that was accessible. There are many folks at The Ontario Trillium Foundation who deserve our thanks but the two that provided both inspiration and input are Robin Cardozo, CEO and Marilyn Struthers, Program Manager, Province-wide Programs.

It is our sincere hope that you will find this research both useful and accessible. It is best used online as you can just click on the links and access the measurement tools described in this report.



Paul Born  
*President,*  
*Tamarack – An Institute for Community Engagement*



## Summary

The purpose of *Approaches to Measuring: Community Change Indicators* is to collate and provide a consolidated reference report for individuals, organizations and collaborative planning tables engaged in community change efforts. The intended impact of this resource is twofold. First, the measurement summaries and the accompanying annotated lists act as a starting point for exploring difference approaches. Secondly, these approaches can aid in developing further conversations about measurement tools and techniques employed by organization which measure community change efforts. As such, each of the papers in this series serves as a briefing note, tool and reference.

## Background

This report is part of a funded project with The Ontario Trillium Foundation which seeks to research and build on current practices and knowledge about four aspects of healthy and vibrant communities and outline metrics currently being used to monitor each aspect. The four aspects are:

- Approaches to Measuring Less Poverty in Communities
- Approaches to Measuring More Vibrant Communities
- Approaches to Measuring More Community Engagement
- Approaches to Measuring More Collaboration in Communities

The final paper in this series is a consolidated reference paper which combines all four approaches and provides an overview and questions to consider.

- Approaches to Measuring: Community Change Indicators

Ultimately, these reports are a starting point and further dialogue is required to generate a consensus about measuring, monitoring and reporting community change and progress.

As a first step to preparing these papers, key informant interviews were held with individuals from Tamarack – An Institute for Community Engagement and Vibrant Communities Canada. The key informants identified approaches which they believed offered a compelling perspective on the topics including poverty, community vibrancy, citizen engagement and collaboration and/or a practical set of measures and research tools. Additional information was collected by sourcing background documents on each approach. In some cases, the same measurement tool or approach appears across multiple sections or papers. This measurement tool or approach provides data on a variety of levels relevant to each of the measurement perspectives.

## Details

*Approaches to Measuring: Community Change Indicators* is a consolidated approach to four aspects of measuring community change efforts including:

- Approaches to Measuring Less Poverty in Communities
- Approaches to Measuring More Vibrant Communities
- Approaches to Measuring More Community Engagement
- Approaches to Measuring More Collaboration in Communities

It should be noted that the tools and approaches described in this paper and in the other papers in the series are not a complete list of all approaches currently in use but provide an overview of a variety of tools which can be used to measure community change.

There are generally two types of measurements: quantitative or numeric (hard data) and qualitative or stories (soft data). Most of the approaches in the four sections of this consolidated paper collect and report data using both forms of measurement. Qualitative data is often viewed as being less rigorous and by combining it with quantitative data, you get a more comprehensive picture of what is changing in communities.

## Emerging Evaluation Practice

Many of the evaluation strategies presented in these papers are based on similar theories and ways of thinking about measurement and evaluation. Two such examples stand out for further explanation, *Theory of Change*<sup>1</sup> and *Developmental Evaluation*<sup>2</sup>.

Theory of Change is a method or technique that can assist communities to think about, plan and evaluate their work. It involves ‘backwards mapping’ from the goals or desired outcomes of the program to identify what is needed in the program design to accomplish these goals. Theory of Change was more fully developed for community use by the Aspen Institute Roundtable on Community Change and is an integral part of the design of Vibrant Communities, Sustainable Livelihoods, National Indicators and many other approaches.

Developmental evaluation is a complete approach to evaluation which is appropriate to situations and shifting contexts, innovation and complexity. Differing from *formative evaluation* that is focused on refining existing models, programs or strategies, and *summative evaluation* that is focused on judging the worth of those models, programs or strategies, *developmental evaluation* is intended to help people and organizations create and continually adapt interventions. Unlike traditional situations where the emphasis is on ‘think, plan, implement and monitor’, the process of thinking, planning, implementing and evaluation is continuous and simultaneous. This is vastly different from traditional evaluation as shown in the figure below.

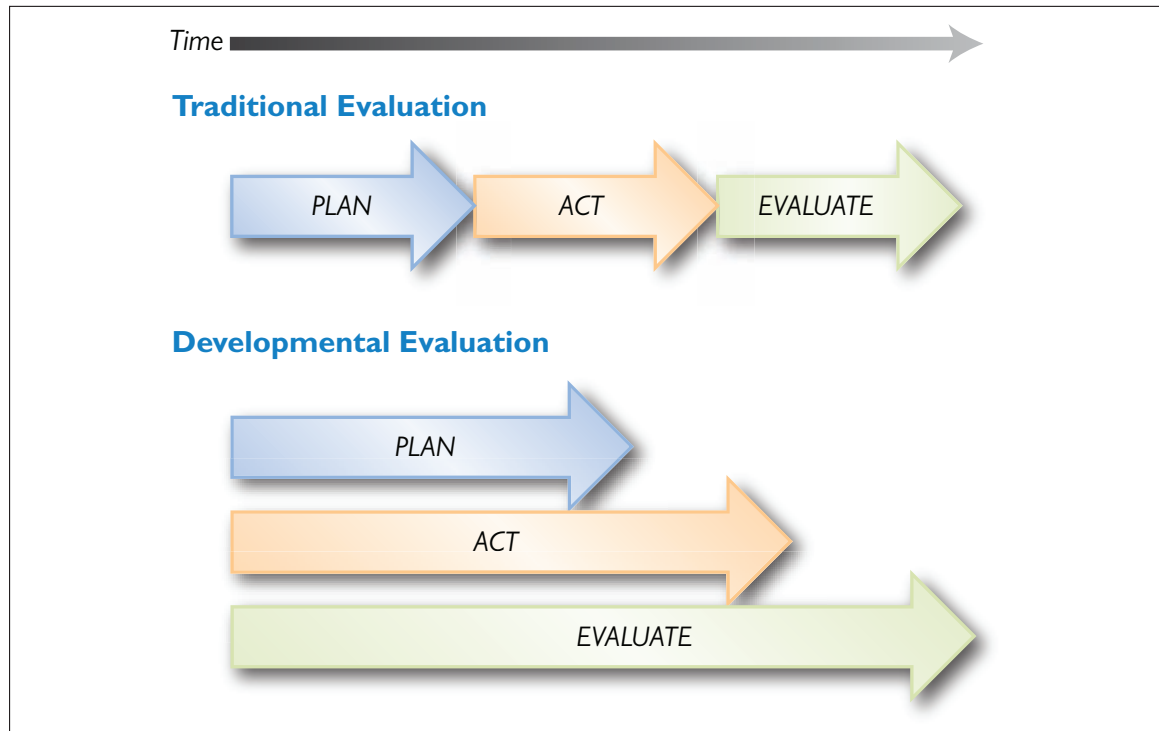
Jamie Gamble explains the theory and approach to developmental evaluation in *A Developmental Evaluation Primer* published by The J.W. McConnell Family Foundation and can be found on their website. It is worth reviewing these concepts in order to understand how evaluation and measurement are developed in these approaches. Developmental evaluation and theory of change are an emerging part of modern evaluative frameworks used by many of the approaches included in this paper.

<sup>1</sup> For more information on Theory of Change, its origins and ideology please see the website: <http://www.theoryofchange.org>

<sup>2</sup> For more information see J. W. McConnell Family Foundation, *Sustaining Social Innovation: Developmental Evaluation*. <http://www.mcconnellfoundation.ca/default.aspx?page=139>



## Traditional versus Developmental Evaluation Approaches



(adapted from Gamble, *A Developmental Evaluation Primer*, p. 30)

The implications for measurement in development evaluation are significant. The process of identifying what measures are required, gathering and analyzing data on them and making decisions is highly adaptive. In developmental evaluation, the emphasis is often on rapid feedback, 'good enough' level of proof, and the refinement, addition and dropping of measures. Developmental Evaluation also puts emphasis on casting a wide net in search of outcomes; seeking unintended outcomes as well as intended ones. Global measures of community wellbeing include those facets of life which have been identified as important to a quality, happy and full life.

### For Further Reading

Each of the measurement tools identified in the four sections of this paper measuring less poverty, more vibrant communities, more engaged communities and more collaborative communities follows a consistent format.

- **Summary** – Provides the essence of the approach and explains why the approach is included in this section.
- **Background** – Includes the history of the approach, its current application and information about the organization and partners if applicable.
- **Details** – Explains further what and how the approach measures progress.
- **For Further Reading** – Provides a resource list of web links and print resources to find additional information and examples about the approach.

## Section Two: Approaches to Measuring Less Poverty in Communities

### Overview

Many current poverty reduction strategies and poverty measurement tools use similar theories, approaches, tools and measures. This section provides an overview of ten different approaches to measuring less poverty in communities. It should be noted that this is not a complete list of all approaches currently in use but provides an overview of a variety of different approaches for measuring less poverty.

It is also important to clarify that this section is focused specifically on approaches which measure less poverty in communities rather than less poverty in individuals. The examples cited in this section describe multi-faceted approaches which measure poverty reduction or elimination.

There are measures that focus solely on income and purchasing power of individuals which are not included. Poverty lines, low income cut off (LICO), low income measures (LIM), and market basket measures (MBM) are not described in this paper. Information about these income measures can be found through [Statistics Canada](#) and the [National Council of Welfare](#).

Most approaches highlighted in this section include some form of income measure, however, none use income as the sole measure. Some of the approaches – such as Sustainable Livelihoods and Community Vitality – measure poverty reduction from both the perspective of the individual and the community change. An annotated list of web-based resource links is also included. Where possible, examples of programs utilizing the measurement approach are also included.

The ten approaches to measuring less poverty in communities have common indicators. By far the most common indicators of less poverty were:

- income, poverty rate
- ability to gain employment
- access affordable housing
- access to quality education
- access to affordable childcare





Although, not as common, many approaches also considered these indicators:

- access to goods and services
- access to credit
- ability to buy a home
- access to affordable transportation

Indicators which were identified in four or more approaches were considered more relevant indicators of less poverty in communities. A focus on assets and asset building was identified as a pathway out of poverty for at least four of the approaches. Asset building approaches can be measured at both the individual/family and community level. Four of the approaches emphasized the importance of building links across a variety of sectors (government, business and citizens) to achieve community change.

Some other themes identified in the examples:

- nearly all measured multiple indicators across many dimensions of change
- nearly all included locally gathered data and national statistical data
- most used community-specific indicators which best represented the unique program or activity
- a number included income measures
- half measured community-level change
- only four engaged people living in poverty in the process

## Summaries: Approaches of Measuring Less Poverty in Communities

### *Vibrant Communities Canada*

#### Summary

Vibrant Communities are comprehensive, place-based community initiatives focused on poverty reduction that employ a Framework or Theory of Change approach. Each framework for change details economic, social and systems change initiatives meant to reduce poverty in the specific community or neighbourhood. The Vibrant Communities approach model focuses on poverty reduction, cross-sector community engagement, undertaking a comprehensive approach to poverty, leveraging the assets of the community, an active action and learning process and on-going evaluation.

#### Background

Vibrant Communities began in 2002 as a community-driven initiative for reducing poverty in Canada. Its national sponsors are The J.W. McConnell Family Foundation, the Caledon Institute of Social Policy, and Tamarack – An Institute for Community Engagement. Vibrant Communities exist in twelve communities across Canada. Vibrant Communities Trail Builders are collaborative, place-based initiatives focused on implementing multi-year programs and strategies designed to reduce poverty.

#### Details

Each Vibrant Communities Trail Builder initiative is developed by its local community collaborative planning table. Each community is also encouraged to develop its own indicators for measuring poverty relevant to their own community context. Vibrant Communities Canada has identified a number of cross-community or ‘proxy indicators.’ Since each community approach is unique, Trail Builder communities report on a variety of indicators including: changes in income, education and training, housing, financial assets, new/improved employment, the number of low income individuals/families benefitting from the Vibrant Communities initiatives and the numbers of individuals and organizations engaged in the collaborative approach.

In the Theory of Change document, each Trail Builder community commits to measurable targets expected to be achieved during the life of the project. A target is set for the number of individuals and/or households the trail builder community will impact over a set period of time as well as the number of people accessing programs, the number of community partners engaged in the process and policy and systems change impacts.

Vibrant Communities Trail Builders also use Developmental Evaluation which requires a program to determine goals but be flexible about outcomes. Developmental Evaluation includes the use of statistical data and captures community change stories as the project unfolds. This is different from traditional evaluation which identifies fixed goals to measure progress and fixed methods for evaluation. Developmental Evaluation requires continuous evaluation, reflection and learning throughout the project.



The *Learning and Evaluation Process* involves:

- Developing a community relevant Theory of Change which also includes a definition of the specific approach for poverty and poverty reduction
- Capturing results of the strategies, understanding the challenge being addressed, the strategy to be used and the anticipated results/achieved results
- Producing regular reports summarizing the work being done and the results achieved
- Sharing information, design and results among other Vibrant Communities initiatives or other interested groups

Trail Builder communities submit bi-annual reports to Vibrant Community sponsors. The impact of Vibrant Communities is also measured by:

- Depth of Impact
- Systems Change – New community resources or structures, new or adjusted policies or improved delivery of existing government programs and new working relationships in the community
- Community Capacity – Community stories and reflections are part of the evaluation

### For Further Reading:

Vibrant Communities, *Learning and Evaluation for Trail Builder Initiatives in Vibrant Communities*. February 2005 <http://tamarackcommunity.ca/downloads/vc/TBpackage.pdf>

This resource describes the three streams Vibrant Communities are using for evaluation: Community Approach, Strategies and Projects and Reporting and Dissemination. Included is information about Theory of Change and Developmental Evaluation.

Evaluation and Learning, Vibrant Communities <http://tamarackcommunity.ca/g2s34.html>

The Vibrant Communities website has resources including Trail Builder Community Updates detailing how progress is being made toward goals.

Born, Paul (ed.), *Creating Vibrant Communities: How Individuals and Organizations from Diverse Sectors of Society are Coming Together to Reduce Poverty in Canada*. Toronto: BPS Books. 2008

This book thoroughly describes the Vibrant Communities approach to poverty reduction, the evaluation framework, as well as providing case examples from communities across Canada.

Developmental Evaluation: Sustaining Social Innovation, The J. W. McConnell Family Foundation <http://www.mcconnellfoundation.ca/default.aspx?page=139>

This webpage explains the origins of Developmental Evaluation and provides comparisons to traditional evaluation approaches in a concise format.

Vibrant Communities, *Evaluating Vibrant Communities: 2002 – 2010*. September 2010. [http://tamarackcommunity.ca/g2\\_VC\\_Evaluation.html](http://tamarackcommunity.ca/g2_VC_Evaluation.html)

This recently released Evaluation Report summarizes the results of nine years of comprehensive poverty reduction work undertaken in thirteen communities across Canada.

## National Performance Indicators

### Summary

National Indicators is a broadly used approach for measuring poverty and poverty reduction strategies in the United States. It focuses on six national goals for reducing poverty and provides companion indicators to measure poverty. Indicators are measured against poverty reduction targets set by the individual program.

### Background

This approach is used by all Community Action Agencies in the United States. Community Action Agencies are non-profit and charitable organizations with a strategic focus on poverty reduction. The National Indicators of Community Action Performance were developed in 2005.

The service areas of Community Action Agencies (CAAs) cover 96 percent of the nation's counties. Our agencies are connected by a national network that includes the Community Action Partnership national association, regional associations, state associations, a national lobbying organization, and a national association of Community Service Block Grant administrators.

*(Community Action Partnership)*

### Details

National Performance Indicators, as they are also known, can be used in conjunction with *Community Scales*, individual scales or agency level scales which use the same set of national goals for reducing poverty (*see Community Scales resource list*). The following are the six national goals identified to guide poverty reduction strategies:

**Goal 1:** Low-income people become more self-sufficient. (FAMILY)

**Goal 2:** The conditions in which low-income people live are improved. (COMMUNITY)

**Goal 3:** Low-income people own a stake in their community. (COMMUNITY)

**Goal 4:** Partnerships among supporters and providers of service to low-income people are achieved. (AGENCY)

**Goal 5:** Agencies increase their capacity to achieve results. (AGENCY)

**Goal 6:** Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems. (FAMILY)



The goals are a starting point that all US government poverty reduction strategies are to use in the design of their programs. The approach also uses a set of sixteen outcome and performance indicators (updated for 2009). The National Performance Indicators are designed to directly measure progress toward these goals. Results measured are numbers-based, tracking only the increases in the identified indicators. Agencies will not necessarily use all indicators but must report on those relevant to their individual programs. Indicators are organized by types:

- Process Indicators – Provide evidence of whether the program unfolded according to plan
- Service Delivery Indicators – Provide straightforward information about what a program is providing. How much? How many? How often?
- Customer Satisfaction Indicators – Provide information about whether a program met its customers’ expectations
- Impact Indicators – Provide evidence of whether the program had the impact (achieved outcomes or results) which were identified

Of the indicator types, the *Impact Indicators* are the most important to national goals as they measure progress directly. These are also measured against targets set by the programs design. The other indicators are related to the specific program evaluations and do not necessarily measure progress in reducing poverty.

The table below provides an overview of the types of indicators used at the community level.

### Measures of Success in Poverty Reduction

GOAL 2: COMMUNITY REVITALIZATION THE CONDITIONS IN WHICH THE LIVES OF LOW INCOME PEOPLE ARE IMPROVED	
	Examples of outcome indicators:
<i>National Performance Indicator 2.1 – Community Improvement and Revitalization</i>	<ul style="list-style-type: none"> <li>• Jobs created/saved</li> <li>• “Living wage” jobs created/saved</li> <li>• Affordable housing units created, preserved or improved</li> <li>• Health care services/facilities for low income people created or saved</li> <li>• Affordable child care spaces and out of school programs</li> <li>• New or expanded affordable transportation resources</li> <li>• Educational and training placement opportunities, that are available for low income people</li> </ul>
<i>National Performance Indicator 2.2 – Community Quality of Life and Assets</i>	<ul style="list-style-type: none"> <li>• Community assets – Result of a change in law, regulation or policy, which results in improvements to quality of life and assets</li> <li>• Services, including community facilities, services to improve public and safety, and commercial services within low income neighbourhoods</li> <li>• Neighbourhood quality of life resources</li> </ul>
<i>National Performance Indicator 2.3 – Community Engagement</i>	<ul style="list-style-type: none"> <li>• Number of community members volunteering and hours donated</li> </ul>

<b>GOAL 3: COMMUNITY REVITALIZATION</b> <b>LOW INCOME PEOPLE OWN A STAKE IN THEIR COMMUNITY</b>	
<i>National Performance Indicator 3.2 – Community Empowerment through Maximum Feasible Participation</i>	<ul style="list-style-type: none"> <li>• Low income people participating in community organizations that provide input to decision making and policy setting</li> <li>• Low income people acquiring businesses in their community as a result of Community Action assistance</li> <li>• Low income people purchasing homes in their community as a result of Community Action assistance</li> <li>• Low income people engaged in non-governance community activities or groups created or supported by Community Action</li> </ul>

*(National Indicators of Community Action Performance)*

### For Further Reading:

About CAAS, Community Action Partnership Website

[http://www.communityactionpartnership.com/index.php?option=com\\_content&task=view&id=21&Itemid=50](http://www.communityactionpartnership.com/index.php?option=com_content&task=view&id=21&Itemid=50)

This website aids in understanding the work and structure of the Community Action Partnerships and agencies. It includes publications and news about current activities.

*National Indicators of Community Action Performance*

[http://tamarackcommunity.ca/downloads/vc/Indicators\\_Comm\\_Action\\_Perf.pdf](http://tamarackcommunity.ca/downloads/vc/Indicators_Comm_Action_Perf.pdf)

Vibrant Communities (Tamarack) created a summary of the National Indicators Approach which provides more detail about the goals and indicators. This resource provides a good overview of the approach to poverty reduction. It does not provide more information about metrics used to measure progress.

*National Performance Indicators Instruction Manual*. National Association for State Community Services Programs. May 2009

[http://www.nascsp.org/documents/FY09NPIInstructionsFINAL\\_000.pdf](http://www.nascsp.org/documents/FY09NPIInstructionsFINAL_000.pdf)

For those interested in a detailed document explaining all the indicators and recent updates, this resource is the most current example of how this approach is developed, used and reported.

*Targeting Field Manual: Setting and Reviewing Targets*. NASCSP. August 2008

<http://www.nascsp.org/documents/NASCSPPerformanceTargetingManual8-18-08FINAL.pdf>

This document serves as a resource for understanding how to develop targets, indicators and measurements for the National Performance Indicators approach. It explains the terminology and measures with a high level of detail.

*National Performance Indicators – Agency Level Forms*

<http://nascsp.org/documents/FY08NPIFormsFinal.xls>

This is an excel file template for logging performance indicators. It provides an example of a comprehensive tool used for tracking progress and is provided for an agency to use in reporting but can also serve as a guideline for how templates can be used in reporting progress.



## Community Scales

### Summary

Community Scales use what are called *dimensions of change* to measure the community and systems change which is expected to result in permanent reduction of poverty at the community level. Dimensions of change involve 5 components, including, public policy, equity, civic capital, service and support systems and economic opportunity.

### Background

The source of Community Scales is a document entitled *Community Scales: a Ladder for the Twenty-First Century* produced in 1997. The Community Scales framework was developed through a collaborative effort involving members of the National Community Services Block Grant Monitoring and Assessment Task Force Committee on Scales and Ladders. Scales have been adapted for use at the individual or family level and are currently being used by Missouri Community Action Family Self-Sufficiency Scale and Massachusetts Family Self-Sufficiency Scales and Ladders, among others.

### Details

The community scales approach provides a comprehensive approach to measuring progress of program and community-level change. Community scales are a continuum to measure change within community systems or conditions; and include dimensions for change such as public policy, equity, civic capital, service of support systems and economic opportunity. The scale thresholds are described simply as: thriving, safe, stable, vulnerable or in crisis. Using an assessment tool, indicators can be evaluated based on these scale thresholds and tracked over time. The following table provides an example of a tool developed from the source document which allows the assessment and later reassessment of the community on five dimensions of change.

After assessing a specific community-level situation, such as available affordable housing, the agency would identify targets to work towards and outcome indicators to measure this progress. After the project is initiated, the agency uses the scaling tool to track changes by comparing the results of the initial assessment with a series of periodic re-assessments. Careful development of the scaling tool is crucial because it becomes the framework to assess the community situation, plan program interventions, measure incremental progress, and reassess intervention strategies.

## Community Scaling Tool

THRESHOLDS		DIMENSIONS				
		PUBLIC POLICY	EQUITY	CIVIC CAPITAL	SERVICE & SUPPORT SYSTEMS	ECONOMIC OPPORTUNITY
5.	Thriving	Innovative	Achieves Equity and Values Differences	Investing	Comprehensive and Integrated	Vibrant
4.	Safe	Supportive	Affirming	Contributory	Preventive	Emerging
3.	Stable	Selective or Reactive	Toleration and Awareness	Participating	Comprehensive but Reactive	Stagnant
2.	Vulnerable	None or Unenforced	Complacent and Uninformed	Awareness and Education	Responsive but not Comprehensive	Contracting
1.	In Crisis	Hostile	Conflict and Fear	Isolation	Non-responsive	Collapsed

(Adapted from *Community Scales: A Ladder to the Twenty First Century*, p. 7)

### For Further Reading:

*Community Scales: A Ladder to the Twenty First Century. A Proposal to the Community Services Block Grant Monitoring and Assessment Task Force for Measuring Change at the Community Level.* 1997

<http://www.roma1.org/files/rtr/communityScale.pdf>

This is the main source document which explains the Community Scales approach, the methods, indicators and measures.

*Missouri Community Action Family Self-Sufficiency Scale.* March 1999

[http://www.roma1.org/files/rtr/MO\\_familyscalenevest.doc](http://www.roma1.org/files/rtr/MO_familyscalenevest.doc)

This resource serves as an example to show how scales can develop into tailored indicators and programs. The Missouri Family Self-Sufficiency Scale measures at the individual/family level only.

*Massachusetts Family Self-Sufficiency Scales and Ladders Assessment Form*

[http://www.roma1.org/files/rtr/MA\\_Scale.doc](http://www.roma1.org/files/rtr/MA_Scale.doc)

This assessment form provides an example of a simple-to-use checklist style evaluation. The practitioner can use the form to assess the family's situation and to track progress as part of a poverty reduction program.





## Neighbourhood Vitality Index

### Summary

The Neighbourhood Vitality Index considers the overall health and well-being of a community, including poverty. The index consists of a number assigned to each indicator identified by each initiative during project development. The index can be used to track changes over the long term.

### Background

Neighbourhood Vitality Index was developed in a report by Sean Meagher called *A Neighbourhood Vitality Index: an Approach to Measuring Neighbourhood Well-Being*. It was prepared for the United Way of Greater Toronto for use in City of Toronto neighbourhoods. The Strong Neighbourhoods Task Force, a project of the City of Toronto and the United Way of Greater Toronto with support of the provincial and federal governments, also measures neighbourhood vitality.

### Details

The Neighbourhood Vitality Index framework is based on approaches developed by the National Neighbourhood Indicators Partnership (NNIP) and the document *Building and Operating Neighborhood Indicator Systems: A Guidebook*. One of the basic principles in the Neighbourhood Vitality Index is that those measures which describe the number of people in poverty is not considered fully illustrative of neighbourhood health but suggests that percentages of people in poverty tell more of the neighbourhood story. Comparing poverty percentages relative to the surrounding region and looking at the range of incomes in neighbourhoods is vital.

Examples of measures used in the Neighbourhood Vitality Index include:

- Income
- Mobility Access to Employment
- Neighbourhood Conditions
- Access to Community Facilities
- Family Composition
- Collective Efficacy
- Employment
- Distribution of Employment
- Access to Employment
- Connection to Community Services
- Participation in Community Structures
- Safety
- Housing
- Business Activity
- Business Connection
- Educational Attainment
- Demographic Cohesion
- Access to Capital
- Business Climate
- Access to Public Amenities
- Skills Development
- Presence of Community Facilities

## For Further Reading

Sean Meagher, *A Neighbourhood Vitality Index: An Approach to Measuring Neighbourhood Well-Being, an Action for Neighbourhood Change Report for the United Way of Greater Toronto*. 2006

[http://www.publicinterest.ca/sites/default/files/T&R\\_Vitality\\_Index.pdf](http://www.publicinterest.ca/sites/default/files/T&R_Vitality_Index.pdf)

This foundational document explains the Neighbourhood Vitality Index approach. The full set of indicators is detailed. A sample survey for gathering data at the institutional level is included.

Geoffrey Dobilas and Fraser Battye, *Measuring Neighbourhood Vitality, Final Report*. GHK International (Canada) Ltd. January 2005

[http://www.urbancentre.utoronto.ca/pdfs/curp/SNTF\\_Neigh-Vitality\\_RP3.pdf](http://www.urbancentre.utoronto.ca/pdfs/curp/SNTF_Neigh-Vitality_RP3.pdf)

This report was developed for the “Strong Neighbourhoods Task Force: to develop a Neighbourhood Vitality Tool for Toronto neighbourhoods.” The document contains the framework for using Neighbourhood Vitality measures and outlines what Neighbourhood Vitality indicators have been developed for 140 Toronto Neighbourhoods. It also explores what other jurisdictions have done around neighbourhood indicators and reports on the findings of what was measured in Toronto neighbourhoods.

G. Thomas Kingsley (ed.), *Building and Operating Neighborhood Indicator Systems: A Guidebook*. National Neighborhood Indicators Partnership. March 1999

<http://www2.urban.org/nnip/pdf/guidebk.pdf>

This document provides the framework and theory used for developing neighbourhood indicators used in the index.



## Sustainable Livelihoods Framework

### Summary

Sustainable Livelihoods uses a unique approach to assessing poverty through a technique called asset-mapping. Asset mapping involves determining the specific attributes an individual or community might have including financial, social, personal, physical and human assets. This model determines which assets must be built over the course of the program and assets are reassessed at set intervals to measure poverty reduction progress. Measuring an improvement in individual or community assets is viewed as a more durable and sustainable approach.

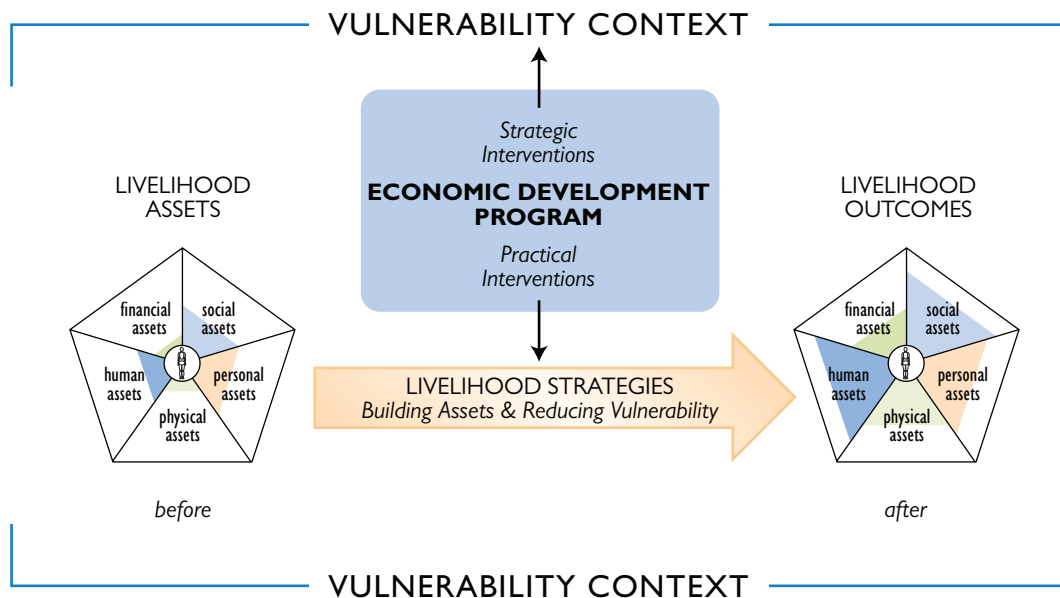
### Background

This measurement tool was developed in the United Kingdom by the Department for International Development and further adapted by Eko Nomos and the Women's Economic Development Consortium. Opportunities Waterloo Region, a Vibrant Communities partner in Ontario, has used this approach to measure individual and community changes.

### Details

Asset mapping and asset development are considered to provide a more permanent pathway out of poverty for families and individuals. Many of the approaches using asset mapping concentrate on individual level change, however, there are examples of strategic interventions through policy change and economic development. Below is a diagram which illustrated an asset mapping approach.

### The Role of Program Interventions



(Women and Economic Development Consortium, 2002)

The individual is assessed on many asset criteria such as housing, skills and access to transportation. These fall into the asset categories of human, physical, personal, social and financial. The degree to which an individual does not have the assets required identifies their level of vulnerability. Throughout the program, assets are built upon and re-mapped as they develop. As an individual's assets are increased, it is expected that the individual is more likely to achieve an enhanced and sustainable standard of living.

In the previous diagram, the individual and community is seen to have a level of vulnerability which will be reduced as they move through the program. As assets are built, the pentagon will be filled in more completely. This also reveals those assets which have increased and those which are still lacking. Change is easy to visualize but may not be as easy to measure in traditional data collection methods.

### For Further Reading

Janet Murray and Mary Ferguson, *Women in Transition out of Poverty: An asset based approach to building sustainable livelihoods*. Women and Economic Development Consortium. January 2001  
<http://www.cdnwomen.org/PDFs/EN/CWF-WIT-asset.pdf>

This foundational document explains the adaption of Sustainable Livelihoods Framework for Canadian circumstances. It explains the theory and methodology of the approach to evaluation and provides case study examples of Canadian asset-building programs.

Janet Murray and Mary Ferguson, *Women in Transition out of Poverty: A guide to effective practice in promoting sustainable livelihoods*. January 2002  
<http://www.cdnwomen.org/PDFs/EN/CWF-WIT-guide.pdf>

This is a companion to the above resource. It provides practical tools to develop programs using the Sustainable Livelihoods approach including an evaluative framework. It also includes blank templates for asset-mapping and outcome tracking.

Mary MacKeigan and Sanjay Govindaraj, *Putting People First: Exploring the Sustainable Livelihoods Approach in Waterloo Region*. January 2004  
[http://tamarackcommunity.ca/downloads/vc/op2000\\_sla.pdf](http://tamarackcommunity.ca/downloads/vc/op2000_sla.pdf)

This document provides a look into a project which used Sustainable Livelihoods in the Waterloo Region, Ontario called Opportunities 2000. It explains the principles and theory behind Sustainable Livelihoods as a case study of Opportunities 2000 and also provides comprehensive tools and outcome tracking templates for both the individual and group program participants.



## Family Economic Success – Annie E. Casey Foundation

### Summary

Family Economic Success focuses on a number of economic domains including workforce development, family economic supports and asset-building. The concept is used to guide program design and policy related work for many of the programs funded by the Annie E. Casey Foundation.

### Background

Annie E. Casey Foundation developed the Family Economic Success framework for a variety of programs and communities to increase poorer families' assets. Vibrant Communities Edmonton, a member of the Vibrant Communities initiative, adopted and adapted the Family Economic Success approach in their work and used it to identify poverty reduction strategies. Making Connections is the flagship initiative of the Annie E. Casey Foundation launched in 1999.

### Details

This approach focuses on building the assets and resources of families so they can meet their needs over the long term. These goals are accomplished through development of specific programs which are determined as foundational to improving assets.

The Casey Foundation believes that the children in greatest trouble in America today are those whose parents lack the earnings, assets, services or social support systems required to consistently meet their families' needs. Most of these children are growing up in impoverished communities that are disconnected from the economic mainstream. The Foundation is working to help these isolated families secure adequate incomes, stabilize their finances, accumulate savings and live in vibrant, economically viable neighborhoods through a combination of an approach known as building family economic success, or FES. The approach involves three key components:

- **Asset-building** – strategies to help families build wealth and save for the future.
- **Family economic supports** – public and private supports to help families establish credit, reduce debt, and increase their financial security; and
- **Workforce development** – the skills and education necessary to get good jobs and build careers.

*([www.aecf.org/MajorInitiatives/FamilyEconomicSuccess.aspx](http://www.aecf.org/MajorInitiatives/FamilyEconomicSuccess.aspx))*

The Annie E. Casey Foundation website contains a wide range of resources for the family economic success approach. These include resources for developing indicators, targets, benchmarks and interim milestones. The following table provides some examples of targets and indicator strategies that can be incorporated into evaluations.

### Example Targets and Indicators

Target	Indicator
Community has increased level of assets	<ul style="list-style-type: none"> <li>• Increase in the services provided by financial institutions</li> <li>• Increase in the number of employers who look to the neighbourhood for employee recruitment</li> <li>• Increase in the outlets and opportunities for reasonably priced housing, goods and services</li> <li>• Increase in the availability and quality of neighbourhood-based services and supports</li> <li>• Increase in private investments in the neighbourhood</li> <li>• Increase of public resources committed to the neighbourhood infrastructure</li> </ul>
Families have increased earnings and income	<ul style="list-style-type: none"> <li>• More parents and young adults are employed</li> <li>• More parents are employed in jobs that provide family supporting wages, benefits, and career advancement possibilities</li> <li>• Increase in levels of family income and earnings</li> <li>• Increase in the stable labour force attachment of parents</li> </ul>
Target	Indicator
Families have increased levels of assets	<ul style="list-style-type: none"> <li>• Increase in levels of family savings and increase in number of families that save</li> <li>• More families own their own homes and other assets, such as cars</li> <li>• More eligible families file for available tax credits</li> <li>• Increase in family access to reasonably prices housing, consumer goods, and financial services</li> <li>• Fewer families have payment disruptions in housing status and living conditions, such as utility shut-offs and foreclosures</li> </ul>

*(adapted and excerpted from Building Strong Financial Futures, p. 6-7)*

### Example: Making Connections

Making Connections initially identified and supported twenty-two project sites across the United States designed to address the isolation and disconnection experienced by many families in targeted neighbourhoods. Isolation was addressed by bridging social and economic connections for families. The following table provides examples of Making Connections outcomes; benchmarks and interim milestones in key areas (*see the source document for more examples*). Interim milestones are considered important to support the process to achieve longer term goals.



## Example Outcomes, Benchmarks and Interim Milestones

Workforce and Income	
Outcome: Neighbourhood families have adequate incomes to meet families basic needs	
Benchmark	Interim Milestone
More parents with young children employed	More families in ESL or adult education classes
Neighbourhood Economic Development	
Outcome: Neighbourhood blight is reduced to where the neighbourhood feels whole and safe	
Benchmark	Interim Milestone
Increase in public resources committed to target neighbourhood for infrastructure	Completion of strategic plan for neighbourhood economic development

(adapted and excerpted from *A Framework for Making Connections*, p. 8)

## For Further Reading

The Annie E. Casey Foundation, *Building Strong Financial Futures for Families and Communities: A Framework for Family Economic Success*. 2003. <http://www.aecf.org/upload/publicationfiles/building%20strong%20financial%20futures-framework%20for%20fes.pdf>

This resource explains the Family Economic Success approach to poverty reduction and how evaluation measures progress. It gives examples of targets and indicators at the family and the community level.

Annie E. Casey Foundation. *Family Economic Success A Framework for Making Connections*. 2002 <http://www.jff-projects.org/~jff/Documents/FESFrame.pdf>

This document provides a framework for how Making Connections projects will develop outcomes, benchmarks and milestones, working with a strategic focus for change.

## Canadian Index of Wellbeing

### Summary

The Institute of Wellbeing has identified several indicators for measuring wellbeing in Canada which are tracked and reported. This approach does not solely focus on measuring less poverty in communities but rather is designed as a national approach to reporting broadly on well-being. This approach was included because it's both new and offers a Canadian approach to analyzing a variety of domains of wellbeing.

### Background

The Canadian Index of Wellbeing was launched in June 2009 and was developed by the Institute of Wellbeing. The Atkinson Charitable Foundation began the early work to developing an index in 1999 and continues to support the project. The Canadian Research Advisory Group was established in 2004 to assist in the development of the Canadian Index of Wellbeing.

### Details

The Institute of Wellbeing intends to track wellbeing indicators nationally, document trends over time and report results to the public:

The CIW will track Canada's progress and provide a set of indicators in eight interconnected categories that will enable us to see whether we are better or worse off than we used to be, whether we will leave the world a better or worse place for the generations that follow, and what we need to change to achieve a better outcome.

*(About the Institute, CIW website)*

Canadian Index of Wellbeing is not a poverty reduction measurement tool. Rather, it is intended to be a source of information to Canadians about wellbeing in general. Although much data is collected from community level indicators, this data is aggregated to the national level. There are three different, but connected categories in the Index of Wellbeing: living standards; healthy populations and community vitality.

At the time of this paper, Community Vitality measures did not include poverty indicators specifically, however, there are current discussions around the addition of new indicators which may include poverty.





Economic participation and employment is measured within the domain of *Living Standards*. Living Standards identifies economic indicators such as:

- Income – Income distribution, median income, LICO, wealth distribution, persistence of low income
- Work – Long term unemployment, employment rate, job quality
- Basic Necessities – Housing suitability and affordability, food security

It is worth noting that the way CIW has defined and separated the categories it reports on. This is different from some of the other approaches which do not separate indicators into interconnecting categories but consider health, wellbeing and vitality as one in the same.

### **For Further Reading:**

Andrew Sharpe and Jean-Francois Arsenault, *Living Standards: a Report of the Institute of Wellbeing*. June 2009

[http://ciw.ca/Libraries/Documents/LivingStandards\\_DomainReport.sflb.ashx](http://ciw.ca/Libraries/Documents/LivingStandards_DomainReport.sflb.ashx)

This report details the current indicators used to measure poverty and improvement progress in Canada. It reports the current findings of the Institute. Most of the indicators are income based, however employment, housing and food security are also included.

Katherine Scott, *Community Vitality: a Report of the Institute of Wellbeing*. June 2009

[http://ciw.ca/Libraries/Documents/CommunityVitality\\_DomainReport.sflb.ashx](http://ciw.ca/Libraries/Documents/CommunityVitality_DomainReport.sflb.ashx)

This is a report of the Community Vitality Domain of the index. The Community Vitality domain does not currently include indicators of poverty but rather these are included in the Living Standards Domain. This report explains the framework for evaluation and how the indicators are measured.

## Government of Ontario – Poverty Reduction Strategy

### Summary

The Government of Ontario's Poverty Reduction Strategy has identified eight poverty reduction indicators. The focus of these eight indicators moves beyond just income as a measure of poverty and includes other measures such as low birth weight, educational progress, high school graduation and housing. The strategy focuses on eliminating child poverty and therefore most of the indicators track the progress of children. The Government of Ontario's Poverty Reduction Strategy was launched in December 2008 and a progress report was released in December 2009.

### Background

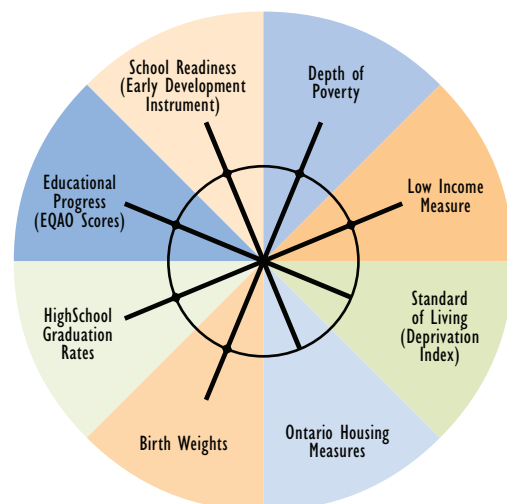
Ontario's Poverty Reduction Strategy was developed through a series of community consultations and released to the public in December 2008. Although provincial, communities are identified as an important part of the strategy and community-level initiatives are encouraged because municipal governments are closest to their communities and have tools to respond to the needs of communities. The provincial government has asked municipalities to look at public transportation and recreation as specific areas which can be improved at the community level.

### Details

The Ontario Poverty Reduction Strategy set a measurable target for less poverty: a 25% reduction in the number of children living in poverty within 5 years. There is an expectation that 90,000 children will be moved out of poverty during this time. The target was established using Statistics Canada's Low Income Measure (LIM), which is calculated as 50% of median income. The *Breaking the Cycle* (2008) report identifies a short-term strategy of putting money in families' pockets, making work pay and changing the way that government works. It notes that progress on these initiatives is easy to measure.

### Child and Youth Opportunity Wheel

In addition to using the Low Income Measure to gauge whether Ontario's poverty reduction strategy is meeting its target, seven child poverty indicators have also been identified. The following diagram identifies the Province's other indicators of child poverty. These indicators are measured as baseline data. Progress toward reaching the goal of moving 25% of low income children out of poverty in the next 5 years will be reported based on these indicators. While much of the indicator data is



(*Breaking the Cycle*, 2008)



already being collected by a variety of sources, the Ontario Housing Measure and Standard of Living (Deprivation Index) are currently under development. These are shown as incomplete spokes of the Child and Youth Opportunity Wheel.

### **For Further Reading**

*Breaking the Cycle: Ontario's Poverty Reduction Strategy, Targets and Measures*

[http://www.growingstronger.ca/english/targets\\_measures.asp](http://www.growingstronger.ca/english/targets_measures.asp)

This shorter document is part of the website for the Ontario Poverty Strategy.

It provides an overview to the targets and measures being used.

*Breaking the Cycle: Ontario's Poverty Reduction Strategy (Full Report)*

[http://www.growingstronger.ca/english/pdf/Ontario's\\_Poverty\\_Report\\_EN.pdf](http://www.growingstronger.ca/english/pdf/Ontario's_Poverty_Report_EN.pdf)

This is the full report which describes the details of the strategy and the indicators.

The roles of other levels of government including federal and municipal are detailed in this report.

Government of Ontario. *Breaking the Cycle: The First Year*. Ontario's Poverty Reduction Strategy, 2009 Annual Report.

<http://www.children.gov.on.ca/htdocs/English/growingstronger/report/2009/index.aspx>

This progress report identifies the first year results achieved by Ontario's Poverty Reduction Strategy across eight indicators.

## United Kingdom – Poverty Reduction Strategy

### Summary

The United Kingdom (UK) poverty reduction strategy includes a holistic set of indicators and measures. Indicators are tracked and reported to the public annually. Indicators are largely numeric including the number of residents within the population measured who have access to central heating. The UK poverty reduction strategy is far-reaching, involving many sectors and levels of government.

### Background

*Opportunities for All* reports on the UK poverty strategy which began in 1999. The solutions however are cross-governmental, each area has its own programs and sets of measures with separation of regions, urban and rural areas. *Opportunities for All* reports are drafted by the UK Department for Work and Pensions. Cabinet Office Social Exclusion Task Force provides its own reports to measure progress. Joseph Rowntree Foundation also provides third-party reporting using the same indicators.

### Details

The UK has identified a broad set of fifty indicators which reflect poverty and social exclusion. The fifty indicators are sorted into six overarching categories: income, children, young adults, working-age adults, older people, and community. Indicators of success for community are reflected by improved outcomes in long-term unemployment or worklessness, crime, health and educational attainment.

Specific community identified indicators track:

- Those who are without a bank account
- Are dissatisfied with their local area
- Are without home contents insurance
- Are victims of crime and those having fear of crime
- Their non-participation in employment, education or community organisations
- Their ability to travel

Housing as a category is broken down into several specific indicators:

- Without central heating
- Non-decent homes
- Energy inefficient homes
- Fuel poverty
- Not applied for Housing Benefit
- Overcrowding
- Unmet Housing Need
- Homelessness
- Polarisation by housing tenure
- Mortgage re-possession and significant arrears



The selected indicators are tracked, noting trends over time and are logged within a matrix. These matrices report indicators simply as improved, stable or worse. Data is collected in many cases using survey methods such as the English House Condition Survey (EHCS). These reports are made publicly available on the [www.poverty.org.uk](http://www.poverty.org.uk) website.

The Cabinet Office Social Exclusion Task Force works with other UK government agencies to identify guidelines for measuring success and poverty reduction progress. Recommendations include using outcome-based measures which can be numerically tracked. The intent is to ensure accountability, transparency and reliability.

## For Further Reading

DWP Department for Work and Pensions, Publications, Opportunity for All  
<http://www.dwp.gov.uk/publications/policy-publications/opportunity-for-all/>

This document provides access to annual reports which assesses the UK poverty strategy progress. Background information, indicators and case studies are available.

The Poverty Indicators – The Poverty Site, Joseph Rowntree Foundation <http://www.poverty.org.uk>

This website is maintained by a third party reporting group, the Joseph Rowntree Foundation, which monitors and reports on all the poverty indicators measured by the *Opportunities for All* strategy. Data is available for UK indicators, as well as those of the European Union and includes comprehensive graphs and charts.

Guy Palmer, Tom MacInnes and Peter Kenway, *Monitoring Poverty and Social Exclusion*. Joseph Rowntree Foundation. December 2008  
<http://www.jrf.org.uk/publications/monitoring-poverty-and-social-exclusion-2008>

This lengthy report details the progress or regression over ten years of the UK poverty strategy as assessed by the Joseph Rowntree Foundation.

*Think Research*. Cabinet Office Social Exclusion Task Force. 2008 [http://www.cabinetoffice.gov.uk/media/cabinetoffice/social\\_exclusion\\_task\\_force/assets/think\\_research/think\\_research.pdf](http://www.cabinetoffice.gov.uk/media/cabinetoffice/social_exclusion_task_force/assets/think_research/think_research.pdf)

Chapter four of this publication entitled, *Outcome-focused monitoring and evaluation: How do you know whether your service objectives have been achieved?*, has useful information and recommendations about how to develop measures which can be attributed to the program, and how to analyse and report on data effectively.

*Reaching Out: Progress of Social Exclusion*. Cabinet Office Social Exclusion Task Force. 2007  
[http://www.cabinetoffice.gov.uk/media/cabinetoffice/social\\_exclusion\\_task\\_force/assets/reaching\\_out/reaching\\_out\\_progress\\_report\\_2007.pdf](http://www.cabinetoffice.gov.uk/media/cabinetoffice/social_exclusion_task_force/assets/reaching_out/reaching_out_progress_report_2007.pdf)

This is a short UK government report on the success of reducing poverty and social exclusion as of 2007. This report is easy to read and comprehensive with many charts and key findings highlighted. It provides a good overview of progress.

## Social Determinants of Health

### Summary

Social Determinants of Health measure health inequalities through social indicators, including poverty, hunger, social inclusion and access to clean water. Although the ideology is particularly relevant to developing countries, all countries can use the Social Determinants of Health approach to measure lower health outcomes for individuals living in poverty. Social Determinants of Health measure ways that poverty and social exclusion impact health through a set of indicators. This work has influenced a variety of well-being and poverty projects worldwide.

### Background

The World Health Organization (WHO) developed the framework for Social Determinants of Health to Reduce Health Inequalities and subsequently designated a Commission on Social Determinants of Health (CSDH) in 2005. There are a variety of Canadian examples including the Vancouver Island Health Authority report on island resident's health in 2006. Health Canada has made a commitment to continued research of the Social Determinants of Health.

### Details

Social Determinants of Health is a WHO initiative to promote understanding and improving human health inequalities as they relate to other inequalities such as poverty. Social and economic disadvantage is linked to health inequities. A population health approach establishes indicators related to mental and social well-being, quality of life, life satisfaction, income, employment and working conditions, education and other factors which are well known to affect human health.

WHO encourages countries to design and develop measures for programs which improve population health. Specific indicators are established to monitor health status and to help understand and evaluate current interventions and programs. Health Canada and Statistics Canada have formed a joint partnership with the Canadian Consortium for Health Promotion Research to develop community health indicators.

The Measurement and Evidence Knowledge Network (MEKN) of the WHO Commission on Social Determinants of Health map out measurable indicators which affect health. Evaluation metrics can be drawn from these categories:

- Poverty
- The social and economic effects of aging
- Hunger
- The experience of gender relations
- Occupational exposure to hazards
- The experience of ethnic relations including direct experience of racism



- Occupational experience of relations at work
- Home circumstances
- The degree and ability to exert self efficacy especially through disposable income
- The accumulated deficits associated with particular life courses
- Dietary intake
- Schooling
- Habitual behaviours relating to food, alcohol, tobacco and exercise
- Marital status
- Position now and in the past in the life course
- Socioeconomic status

(MEKN, 2007)

### Example: Vancouver Island Health Authority

The Vancouver Island Health Authority produced a report *Understanding the Social Determinants of Health: A Discussion Paper (2006)* which identified measures for social determinants of health. In the report, initial data was collected and charted which highlights the positive health outcomes for poorer segments of the population using a social determinants of health approach. Outcomes were noted by incomes, indicators and geographic locations.

### For Further Reading:

Josiane Bonnefoy, et al., *Constructing the Evidence Base on the Social Determinants of Health: A Guide*. November 2007 [http://www.who.int/social\\_determinants/knowledge\\_networks/add\\_documents/mekn\\_final\\_guide\\_112007.pdf](http://www.who.int/social_determinants/knowledge_networks/add_documents/mekn_final_guide_112007.pdf)

The Measurement and Evidence Knowledge Network of the World Health Organization's Commission on Social Determinants of Health (CSDH) produced this document to guide practitioners in developing programs around social determinants. There are recommendations on how to measure social determinants of health and develop an evidence base. This is an excellent resource for understanding Social Determinants.

*Understanding the Social Determinants of Health: A Discussion Paper from the Office of the Chief Medical Health*. Officer Vancouver Island Health Authority. May 2006 [http://www.crd.bc.ca/reports/regionalplanning\\_/generalreports\\_/housingaffordability\\_/buildingthehousingaf/miscellaneous\\_/understandingsociald/understanding\\_social\\_determinants\\_of\\_health\\_05082006.pdf](http://www.crd.bc.ca/reports/regionalplanning_/generalreports_/housingaffordability_/buildingthehousingaf/miscellaneous_/understandingsociald/understanding_social_determinants_of_health_05082006.pdf)

Vancouver Island Health Authority provided this report on the health of Vancouver Island using Social Determinants. The document reports on indicators identified for the Island and it measures at both the island region and the community levels.

Pan American Health Organization (WHO), Global Learning Device on Social Determinants of Health and Public Policy Formulation

<http://dds-dispositivoglobal.ops.org.ar/curso/cursoeng/contexto.html>

This website contains an online course on Social Determinants of Health to reduce health inequalities. It is aimed at WHO staff to assist in influencing government policy, as well as the general public to increase the knowledge base on the topic. This is a comprehensive and user-friendly tool to learn about the Social Determinants of Health.





## Section Three: Approaches to Measuring More Vibrant Communities

### Overview

Wellbeing implies a state of health, happiness and freedom for individuals. This state, which is more typically ascribed to individuals, can also be applied to communities. Community wellbeing can be measured using specific indicators related to how citizens feel about and fit into their community. Safety, social cohesion and inclusion are some of the indicators that go beyond individual wellbeing and describe community wellbeing.

The purpose of this section is to provide an overview of the different approaches that organizations and governments have used to measure greater community wellbeing or more vibrant communities. Some wellbeing or vibrant community indicator systems include a broad selection of domains which provide a more complete picture of the community.

When reviewing the approaches and indicators included in this paper, all included *poverty* and/or *poverty rate* in terms of income, employment security and access to housing as important indicators of wellbeing. Poverty, as a group of indicators, was the only unifying measure across all the approaches.

Other significant, reoccurring indicators were:

- Community safety/freedom from crime
- Access to education
- Physical health
- Social support/social cohesion
- Engagement of citizens

Many of the approaches also included the following indicators:

- Health of the natural environment
- Culture, community vibrancy, diversity and access to arts and recreation
- Economic health of the community (business growth and opportunity as well as access to a variety of goods and services)

These appeared in several (approximately half or more) of the approaches reviewed. The above indicators represent a minimum standard when determining the wellbeing of a community.

Some of the approaches reviewed contained the following common themes:

- All included a variety of community indicators
- All attempted to be holistic including both the needs of individuals and the needs of the community
- Nearly all measure a wide variety of dimensions
- Nearly all use standardized indicators rather than community specific or community chosen indicators

A small number of the approaches identified and used community specific data solely.

- Most used national statistical data and in some cases augmented it with local community data
- Less than half used subjective indicators (feelings, opinions, thoughts)
- Only a few approaches link across sectors for information
- Very few focused on community change
- Only four approaches were grassroots



## Summaries: Approaches to Measuring More Vibrant Communities

### Vibrant Communities Canada

#### Summary

Vibrant Communities are comprehensive, place-based community initiatives focused on poverty reduction that employ a Framework or Theory of Change approach. Each framework for change details economic, social and systems change initiatives meant to reduce poverty in the specific community or neighbourhood. The Vibrant Communities model focuses on poverty reduction, cross-sector community engagement, leveraging the assets of the community around poverty reduction, an active action and learning process and on-going evaluation. Vibrant Communities measures increased community wellbeing through a variety of indicators including the number of individuals or households impacted and the number of partners engaged in the work.

#### Background

Vibrant Communities began in 2002 as a community-driven initiative for reducing poverty in Canada. Its national sponsors are The J.W. McConnell Family Foundation, Caledon Institute of Social Policy and Tamarack – An Institute for Community Engagement. There are currently twelve trail builder communities across Canada engaged in collaborative, place-based initiatives that are implementing multi-year programs and strategies to reduce poverty.

#### Details

Vibrant Communities is an approach to measuring community wellbeing which focuses on creating pathways out of poverty through community engagement, with an emphasis on multi-sector collaboration including low-income individuals.

“Vibrant Communities is a community-driven effort to reduce poverty in Canada by creating partnerships that make use of our most valuable assets – people, organizations, businesses and governments.”

*(Vibrant Communities Website)*

Vibrant Communities measure progress by establishing targets for numbers of individuals and households impacted within a set period of time. Progress results are gathered annually and reflect the number of individuals/households who have increased assets as a result of Vibrant Communities initiatives. Measures are reported on the following asset categories.

- Personal Assets
- Physical Assets including emergency supports, food, housing, transportation and dependent care

- Social Assets including civic participation and networks
- Human Assets including health, life skills, financial literacy, education and employment
- Financial Assets including employment income, non-employment income, savings and debt and cost reduction

### Example: Trail Builder Communities

Each Vibrant Communities Trail Builder initiative is developed by a community collaborative planning table. Each community is also encouraged to develop its own indicators for measuring poverty which are relevant to the community context. Vibrant Communities Canada has also identified a number of cross-community or proxy indicators. Since each community approach is unique, Trail Builder communities report on a variety of indicators including changes in income, education and training, housing, financial assets or new/improved employment for individuals and households, as well as reporting on the individuals and organizations engaged in the initiative.

In the framework for change document, each Trail Builder community commits to measurable targets which are expected during the life of the projects. A target is set for the number of individuals or households the Trail Builder community will impact over a set period of time. Key measures in evaluation look at the number of households and individuals impacted as well as the number of people accessing programs, the number of community partners engaged in the process and policy and systems change impacts.

Vibrant Communities Trail Builders use *Developmental Evaluation* which requires a program to determine goals but be flexible about outcomes. Developmental evaluation includes both statistical data and captures community change stories as the project unfolds. This is different from traditional evaluation which identifies fixed goals to measure progress and fixed methods for evaluation. Developmental Evaluation requires continuous evaluation, reflection and learning throughout the project.

The Learning and Evaluation Process involves:

1. Developing a community relevant Theory of Change which also includes a definition of the specific approach for poverty and poverty reduction
2. Capturing results of the strategies and understanding the challenge being addressed, the strategy to be used and the anticipated results/achieved results
3. Producing regular reports to summarize the work being done and the results achieved
4. Sharing information among other Vibrant Communities initiatives or other interested groups



Trail Builder groups submit bi-annual reports to the sponsors of Vibrant Communities. The impact of Vibrant Communities is also measured by:

- Depth of Impact
- Systems Change – New community resources or structures, new or adjusted policies or improved delivery of existing government programs and new working relationships in the community
- Community Capacity – Community stories and reflections are part of the evaluation

### For Further Reading:

*Learning and Evaluation for Trail Builder Initiatives in Vibrant Communities*. February 2005  
<http://tamarackcommunity.ca/downloads/vc/TBpackage.pdf>

This resource describes the three streams that Vibrant Communities are using for evaluation: Community Approach, Strategies and Projects and Reporting and Dissemination. Also included is information about Theory of Change and Developmental Evaluation.

Vibrant Communities – Evaluation and Learning <http://tamarackcommunity.ca/g2s34.html>

The Vibrant Communities website includes Trail Builders Community updates.

Born, Paul (ed.). *Creating Vibrant Communities: How Individuals and Organizations from Diverse Sectors of Society are Coming Together to Reduce Poverty in Canada*. Toronto: BPS Books. 2008

This book thoroughly describes the Vibrant Communities approach to poverty reduction, the evaluation framework, as well as providing case examples from communities across Canada.

Sherri Torjman, *Reclaiming Our Humanity*. Caledon Institute of Social Policy. Ottawa. 2001  
<http://www.caledoninst.org/Publications/PDF/553820045.pdf>

This article by Sherri Torjman describes the origin of the name *Vibrant Communities*. Torjman identified Vibrant Communities as those without poverty, which ensured support, inclusion and learning of its members. She also described social capital as an essential ingredient to enabling communities to make things happen collectively.

Vibrant Communities, *Evaluating Vibrant Communities: 2002 – 2010*. September 2010.  
[http://tamarackcommunity.ca/g2\\_VC\\_Evaluation.html](http://tamarackcommunity.ca/g2_VC_Evaluation.html)

This recently released Evaluation Report summarizes the results of nine years of comprehensive poverty reduction work undertaken in thirteen communities across Canada.

## Healthy Communities/Healthy Cities

### Summary

The Healthy Communities approach considers the wellbeing and health of communities using a holistic lens. The approach does not have specific metrics for measuring community change, but rather individual initiatives must identify measures relevant to that community.

### Background

Internationally, the Healthy Cities and Communities movement began in 1986 as a result of a meeting convened by the World Health Organization (WHO). There are now many initiatives worldwide. The Ontario Healthy Communities Coalition began in 1992.

### Details

The Healthy Communities approach focuses on capacity building to build stronger, more resilient communities. The approach uses a *determinants of health* and *capacity-building* framework.

There is no general evaluation framework for Healthy Communities. However, the work of Robert Pampalon and others suggests the development of a Healthy Communities Index for measuring wellbeing of communities. Examples of suggested measurement categories are:

- Livelihood security
- Safety and freedom from crime
- Environmental quality
- Educational attainment
- Risk behaviours and prevention (health)
- Social supports

These categories are chosen, in part, because data that is both credible and regularly collected is already available through Statistics Canada and other sources.

### For Further Reading

BC Healthy Communities <http://www.bchealthycommunities.ca/content/home.asp>

The BC Healthy Communities website provides an overview of what they do, their history and background information about the Healthy Communities Movement.

Ontario Healthy Communities Coalition <http://www.ohcc-ccso.ca/>

The Ontario Healthy Communities Coalition works with the diverse communities of Ontario to strengthen their social, environmental and economic wellbeing. The website contains resources, research publications and webinars for learning about Healthy Communities.



Robert Pampalon et al., *Developing a Healthy Communities Index: A Collection of Papers*. February 2005  
[http://secure.cihi.ca/cihiweb/products/Developing\\_a\\_Health\\_Communities\\_Index\\_e.pdf](http://secure.cihi.ca/cihiweb/products/Developing_a_Health_Communities_Index_e.pdf)

This collection of papers was written by a variety of authors, including Robert Pampalon, Daniel Friedman, Chris Lalonde, Elizabeth Beader, William Boyce, Ronald Colman, Clyde Hertzman and John Burrett. It was commissioned by the Canadian Population Health Initiative (CPHI), part of the Canadian Institute for Health Information (CIHI). The papers are original, opinion-oriented think-pieces, written to help broaden the use of health-related indicators beyond health services, individual health status and economic markers.

*Twenty Steps for Developing a Healthy Cities Project*, 3<sup>rd</sup> ed. WHO, 1997  
<http://www.euro.who.int/document/e56270.pdf>

This resource outlines the characteristics of a healthy city and provides background information on the movement. The Twenty Steps to Developing a Healthy City project presents a detailed process to mobilize your own city project. Also included is a set of six results areas for the Healthy Cities project including cross sector action, healthy public policy, community participation, health awareness, innovation and strategic planning.

## Community Indicators Victoria, Australia

### Summary

Community Indicators Victoria measures the wellbeing of the communities and regions in the state of Victoria, Australia. Community Indicators Victoria (CIV) collects data from an identified set of indicators and aggregates the data to the community and regional levels. The data is then compared against the outcomes of all Victoria communities. This work is a strong example of indicator-driven measures.

### Background

Community Indicators Victoria (CIV) partners with The McCaughey Centre, the University of Melbourne, Vichealth, RMIT University, Australian Bureau of Statistics, The City of Victoria, Victorian Local Governance Association and the Municipal Association of Victoria. CIV is an international example of a region that is using a broad selection of indicators to measure wellbeing.

### Details

Community Indicators Victoria uses 22 domains under five categories to measure wellbeing.

### CIV Domains

Healthy Safe and Inclusive Communities	Dynamic Resilient Local Economies
Personal health and Wellbeing	Economic Activity
Community Connectedness	Employment
Early Childhood	Income and Wealth
Personal and Community Safety	Skills
Lifelong Learning	Work-life Balance
Sustainable Built and Natural Environments	Culturally Rich and Vibrant Communities
Open Space	Arts and Cultural Activities
Housing	Leisure and Recreation
Transport Accessibility	Cultural Diversity
Sustainable Energy Use	Democratic and Engaged Communities
Biodiversity	Citizen Engagement
Air Quality	
Water	
Waste Management	

Within each domain, data is collected on indicators. Indicator measures are aggregated to the community or regional level and are publicly reported through the Community Indicators Victoria website. Reporting on citizen engagement can increase involvement in community decision-making processes. Community Indicators Victoria wants to establish a sustainable Victorian approach to the development and use of local community wellbeing indicators, to improve citizen engagement, community planning and policy making. The following table provides examples of measures used by CIV. Because each domain uses a number of indicators, not all are listed.





## Indicator Examples

What is measured	How data collected
Self-assessed health <i>DHS Victorian Population Health Survey</i>	<i>DHS Victorian Population Health Survey (VPHS)</i> : annual, state health region
Road accident death and injuries (per 100,000 residents)	Victoria Police Transport Accident Commission
Employment Rate	ABS Labour Force Surveys Census, five-yearly by collection district. 2006
Percentage of people who in the last 12 months had "Participation in Citizen Engagement" including having: <ul style="list-style-type: none"> <li>a. Attended a town meeting, public hearing or public affairs discussion group</li> <li>b. Met with, called or sent a letter to any local politician</li> <li>c. Joined a protest or demonstration</li> <li>d. Signed a petition</li> </ul>	Community Indicators Victoria Survey
Kilometres of dedicated walking and cycling trails	Local council records Bicycle Victoria maps VicRoads maps Parks Victoria Metropolitan Trail Network
Percentage of population who believe Multiculturalism strengthens their community	Community Indicators Victoria Survey
Percentage of people who are members of a local community organisation or decision-making body	Victorian Department of Planning and Community Development (DPCD) Telephone Survey

CIV has created a comprehensive and detailed report about the measures used. They have not reached the stage of measuring the impact on communities. Currently, there has been an emphasis on gathering and reporting the data for informed, engaged and integrated community planning and policy making.

## For Further Reading

*Measuring Wellbeing, Engaging Communities, Developing a Community Indicators Framework for Victoria: the Final report of the Victorian Community Indicators Project, (VCIP)*. July 2006  
[http://www.communityindicators.net.au/system/files/20060817\\_VCIP\\_Final\\_Report\\_0.pdf](http://www.communityindicators.net.au/system/files/20060817_VCIP_Final_Report_0.pdf)

This report explains the development of the framework for measuring community indicators and the development of the Community Indicators Victoria.

Community Indicators Victoria Website <http://www.communityindicators.net.au>

The CIV website provides data and reports on the indicators for each area within Victoria. Background information about indicators and how they were developed as well as indicator maps showing how each region is doing is available through this website.

## Social Determinants of Health, World Health Organization

### Summary

Social Determinants of Health measure health inequalities through social indicators, including poverty, hunger, social inclusion and access to clean water. Although the ideology is particularly relevant to developing countries, all countries can use the Social Determinants of Health to measure lower health outcomes in individuals living in poverty. Social Determinants of Health measures ways that poverty and social exclusion impact health outcomes through a set of indicators. This approach has influenced a variety of wellbeing and poverty projects worldwide.

### Background

The World Health Organization (WHO) developed the framework for Social Determinants of Health to Reduce Health Inequalities and subsequently designated a Commission on Social Determinants of Health (CSDH) in 2005. There are a variety of Canadian examples including the Vancouver Island Health Authority report on island resident's health in 2006. Health Canada has made a commitment to research around Social Determinants of Health.

### Details

Social Determinants of Health is a WHO initiative to promote understanding and improving human health inequalities as they relate to other inequalities, such as poverty. Social and economic disadvantage is linked to health inequities. A population health approach establishes indicators related to mental and social well-being, quality of life, life satisfaction, income, employment and working conditions, education and other factors which are well known to affect human health.

WHO encourages countries to design and develop measures for programs which improve population health. Specific indicators are established to monitor health status and to help understand and evaluate the effects of current interventions and programs. Health Canada and Statistics Canada have formed a joint partnership with the Canadian Consortium for Health Promotion Research to develop community health indicators.

The Measurement and Evidence Knowledge Network (MEKN) of the WHO Commission on Social Determinants of Health map out measurable indicators which affect health. Evaluation metrics can be drawn from these categories.

- Poverty
- The social and economic effects of aging
- Hunger
- The experience of gender relations
- Occupational exposure to hazards
- The experience of ethnic relations including direct experience of racism
- Occupational experience of relations at work
- Home circumstances



- The degree and ability to exert self efficacy especially through disposable income
- The accumulated deficits associated with particular life courses
- Dietary intake
- Schooling
- Habitual behaviours relating to food, alcohol, tobacco and exercise
- Marital status
- Position now and in the past in the life course
- Socioeconomic status

(MEKN, 2007)

### Example: Vancouver Island Health Authority

In 2006, the Vancouver Island Health Authority produced the report, *Understanding the Social Determinants of Health: A Discussion Paper*, which identified a number of measures for social determinants of health. In the report, initial data was collected and charted, highlighting the positive health outcomes for poorer segments of the population using a social determinants of health approach. Outcomes were noted by incomes, indicators and geographic locations.

### For Further Reading:

Josiane Bonnefoy, et.al., *Constructing the evidence base on the social determinants of health: A guide*. November 2007 [http://www.who.int/social\\_determinants/knowledge\\_networks/add\\_documents/mekn\\_final\\_guide\\_112007.pdf](http://www.who.int/social_determinants/knowledge_networks/add_documents/mekn_final_guide_112007.pdf)

The Measurement and Evidence Knowledge Network of the World Health Organization's Commission on Social Determinants of Health (CSDH) produced this document to guide practitioners in developing programs around social determinants. There are recommendations on how best to measure social determinants of health and develop an evidence base.

*Understanding the Social Determinants of Health: A Discussion Paper from the Office of the Chief Medical Health*. Vancouver Island Health Authority. May 2006 [http://www.crd.bc.ca/reports/regionalplanning\\_/generalreports\\_/housingaffordability\\_/buildingthehousingaf\\_/miscellaneous\\_/understandingsociald/understanding\\_social\\_determinants\\_of\\_health\\_05082006.pdf](http://www.crd.bc.ca/reports/regionalplanning_/generalreports_/housingaffordability_/buildingthehousingaf_/miscellaneous_/understandingsociald/understanding_social_determinants_of_health_05082006.pdf)

Vancouver Island Health Authority provided this report on the health of Vancouver Island using Social Determinants. The document reports on indicators identified for the island, measuring at both the regional and community levels.

Pan American Health Organization (WHO), *Global Learning Device on Social Determinants of Health and Public Policy Formulation* <http://dds-dispositivoglobal.ops.org.ar/curso/cursoeng/contexto.html>

This website contains an online course on Social Determinants of Health to reduce health inequalities. It is aimed at WHO staff to assist in government policy development, as well as the general public to increase the knowledge base on the topic.

## Quality of Life Reporting System, Federation of Canadian Municipalities

### Summary

The Federation of Canadian Municipalities (FCM) measures change across ten domains and develops reports on the wellbeing of communities participating in the Quality of Life Reporting System.

### Background

The Federation of Canadian Municipalities (FCM) designed the Quality of Life Reporting System which measures, monitors and reports on social, economic and environmental trends in Canada's largest cities and communities. Communities with a population base of 200,000 or more are included.

### Details

FCM measures change across ten domains. The analysis of trends across domains is based on the view that quality of life is influenced by a variety of factors, including the development of a vibrant local economy, the availability of affordable, appropriate housing, dependable community infrastructure, civic engagement and reliable access to clean air and drinking water.

“Led by FCM, the QOLRS measures, monitors and reports on social, economic and environmental trends in Canada's largest cities and communities.”

(FCM website)

There have been two reports published by the FCM and several themed reports. Themed reports delve into specific issues in more detail, for example the 2010 report *Mending Canada's frayed social safety net: The role of municipal governments*.

The following figure displays the indicators FCM has chosen to measure across each of the domains. Reports generated from this data provide analysis around specific issues on a rotating basis and do not present the entire picture for each reporting period.

### For Further Reading

Federation of Canadian Municipalities, Quality of Life Reporting System (QOLRS)  
[http://www.fcm.ca/English/view.asp?x=1115&utm\\_source=QOLRS&utm\\_medium=303redirect&utm\\_campaign=QOLRSredirect/](http://www.fcm.ca/English/view.asp?x=1115&utm_source=QOLRS&utm_medium=303redirect&utm_campaign=QOLRSredirect/)

The Federation of Canadian Municipalities has provided this system mainly for municipalities to use in tracking the wellbeing of their communities. This website contains links to all published reports.

Federation of Canadian Municipalities. *Mending Canada's frayed social safety net: The role of municipal governments*. March 2010. [http://www.fcm.ca/CMFiles/QofL6En\\_Embargp1KGE-3242010-6436.pdf](http://www.fcm.ca/CMFiles/QofL6En_Embargp1KGE-3242010-6436.pdf)

This Federation of Canadian Municipalities themed report examines the critical role Canadian municipalities play in poverty reduction and social and economic inclusion efforts at the community level.



## FCM QOLRS Indicators

Demographic & Background Information (DBI)	Affordable, Appropriate Housing (AAH)	Civic Engagement (CE)	Community and Social Infrastructure (CSI)	Education (ED)	Employment (EM)	Local Economy (LE)	Natural Environment (NE)	Personal & Community Health (PCH)	Personal Financial Security (PFS)	Personal Safety (PS)
DBI1 Population Growth	AAH1 30%+ Income on Shelter	CE1 Voter Turnout	CSI1 Social Housing Waiting Lists	ED1 Education Levels	EM1 Unemployment/ Employment Rates	LE1 Business Bankruptcies	NE1 Air Quality	PCH1 Low Birth Weight Babies	PFS1 Community Affordability	PS1 Young Offenders
DBI2 Household & Family Composition	AAH2 50%+ Income on Shelter	CE2 Women in Municipal Government	CSI2 Rent-Geared-to-Income Housing	ED2 Literacy Levels	EM2 Quality of Employment	LE2 Consumer Bankruptcies	NE2 Urban Transportation	PCH2 Teen Births	PFS2 Families Receiving EI/ Social Assistance	PS2 Violent Crimes
DBI3 Average Income	AAH3 Core Housing Need	CE3 Newspaper Circulation	CSI3 Social Assistance Allowance	ED3 Adult Learning	EM3 Long Term Unemployment	LE3 Hourly Wages	NE3 Population Density	PCH3 Premature Mortality	PFS3 Economic Dependency Ratio	PS3 Property Crimes
DBI4 Renters & Owners	AAH4 Substandard Units	CE4 Volunteering	CSI4 Subsidized Child Care Spaces	ED4 Education Expenditures	EM4 Labour Force Replacement	LE4 Change in Family Income	NE4 Water Consumption	PCH4 Work Hours Lost	PFS4 Lone Parent Families	PS4 Injuries and Poisonings
DBI5 Population Mobility	AAH5 Changing Face of Homelessness	CE5 Charitable Donations	CSI5 Public Transit Costs	ED5 Classroom Size		LE5 Building Permits	NE5 Wastewater Treatment	PCH5 Suicides	PFS5 Incidence of Low Income Families	
DBI6 Foreign Born	AAH6 Vacancy Rates		CSI6 Social Service Professionals	ED6 Student / Teacher Ratio			NE6 Solid Waste	PCH6 Infant Mortality	PFS6 Children Living in Poverty	
DBI7 New Immigrant Groups	AAH7 Rental Housing Starts		CSI7 Private Health Care Expenditures	ED7 Post-Secondary Tuition			NE7 Ecological Footprint		PFS7 Income Gap	
DBI8 Language Spoken at Home	AAH8 Monthly Rent			ED8 Spending on Private Education			NE8 Recreational Water Quality			
DBI9 Visible Minorities										
DBI10 Aboriginal Population										

(QOLRS Indicator Table)

### Example 2: Winnipeg, Community Driven Indicators of Wellbeing

#### Summary

The City of Winnipeg, Manitoba has developed a community-based approach to identifying and measuring wellbeing indicators, which also includes and considers the social determinants of health.

## Background

The Quality of Life indicators project was initiated and led by the Quality of Life Research Unit at the University of Toronto. This unit has been developing conceptual models and instruments for research, evaluation and assessment since 1991. This project was developed in response to a lack of neighbourhood level statistics on wellbeing. In Winnipeg, project partners included SEED, Winnipeg Inc., and the Manitoba Centre for Health Policy.

## Details

Data for the Winnipeg Quality of Life project was gathered through the Winnipeg Quality of Life Survey and was specifically developed for this project.

“At this time, there are numerous organizations and individuals working in Winnipeg’s inner city on projects to enhance individual quality of life, but there is no adequate way in which to document and measure the changes that occur within neighbourhoods.”

(Winnipeg Quality of Life Project Final Report)

Examples of Winnipeg Indicators:

- Self-Reported Health
- Neighbourhood comfort
- Condition of Parks
- Adults in Neighbourhood for Children to Look-up To
- Comfort Walking at Night
- Adults in Neighbourhood to Watch Out for Children’s Safety
- Comfort at Neighbourhood Event
- Asking for Help During a Crisis
- Safety from Crime
- Housing Conditions
- Availability of Childcare
- Availability of Schools
- Recreation Programs by Cluster for 2001
- Library Hours per Week and Education by Cluster
- Library Attendance in Past Year

## For further Reading

City of Winnipeg Quality of Life Indicators, *Community Quality of Life Indicators: Best Cases*. Hardi. 2006 <http://www.springerlink.com.proxy.lib.uwaterloo.ca/content/v67472/>

This electronic book can be accessed free through a university library subscription or downloaded for a fee through <http://www.springerlink.com/content/h748v0u3j6527464/>. The book contains best practice community examples using Quality of Life Indicators as well as research for developing a community assessment and indicator approach. Some community examples, mostly from the US, are: Jacksonville, Santa Monica, Seattle, Buffalo and Sacramento County and Florence (Italy). This particular chapter of the e-book explains the process used to identify the City of Winnipeg Quality of Life Indicators. This is a helpful resource to learn more about developing indicators.



*Winnipeg Quality of Life Project: Final Report*. March 2005

<http://www.seedwinnipeg.ca/documents/Doc1TitlePageplus.pdf>

This report includes the results of measuring Quality of Life indicators. This resource is a summary only. A full report from 2004 is available but uses a different set of indicators.

You may access this older report from:

<http://www.seedwinnipeg.ca/documents/FinalCompleteReport.pdf>

*Local Quality of Life Indicators, Supporting Local Communities to Become Sustainable: a guide to local monitoring to complement the indicators in the UK Government Sustainable Development Strategy*.

August 2005 [http://www.audit-commission.gov.uk/nationalstudies/firerescue/Pages/](http://www.audit-commission.gov.uk/nationalstudies/firerescue/Pages/localqualityoflifeindicators_copy.aspx)

[localqualityoflifeindicators\\_copy.aspx](http://www.audit-commission.gov.uk/nationalstudies/firerescue/Pages/localqualityoflifeindicators_copy.aspx)

This website of the Audit Commission in the UK, an independent body which ensures responsible spending by government in the UK, contains links to the report named above and an accompanying document list of quality of life indicators. This document supports, explains and evaluates the indicators as they relate to the UK Government Sustainable Development Strategy.

*Quality of Life '08 in Twelve of New Zealand's Cities* <http://www.bigcities.govt.nz/>

Another example of a Quality of Life project which was developed to address the growing pressures on urban communities, concern about the impacts of urbanisation and the effects of this on the well being of residents.

## Vital Signs<sup>®</sup>, Community Foundations of Canada

### Summary

Vital Signs<sup>®</sup> is a Canadian approach that looks at the wellbeing of communities based on data from indicators across ten domains or areas. Data is collected from primary (local) and secondary sources and compiled into yearly reports. These reports are made available on the participating community's website and summary reports are often published through a local newspaper.

### Background

Vital Signs<sup>®</sup> was originally developed by the Toronto Community Foundation. It expanded to eleven communities in 2007 and sixteen communities developed and published Vital Signs reports in 2009.

“Vital Signs<sup>®</sup> is an annual community check-up conducted by community foundations across Canada that measures the vitality of our cities, identifies significant trends, and assigns grades in at least ten areas critical to quality of life.”

*(About Vital Signs<sup>®</sup> website)*

Vital Signs<sup>®</sup> is coordinated by Community Foundations of Canada. It is supported by The J. W. McConnell Family Foundation. In 2008, the first international initiative of Vital Signs<sup>®</sup> (called Sinais Vitais) by the Instituto Comunitário Grande Florianópolis in Brazil was launched.

### Details

Vital Signs<sup>®</sup> communities choose community relevant indicators to measure wellbeing and combine these with a set of core indicators within ten areas. These core indicators are:

- The Gap between Rich and Poor
- Health
- Housing
- Arts and Culture
- Work
- Safety
- Learning
- Getting Started
- Environment
- Belonging and Leadership

Community relevance reflect local conditions and may include: Getting Around, Families, Sustainable City, Valuing Diversity, Changing Demographics, Economy, Innovation, and Aboriginal Community Life.





The specific indicators which monitor progress are chosen by the communities on a rotating basis. For example, in 2007 the indicator used to describe housing conditions was the ratio of average residential prices to median family income. In 2008, the housing indicator focused on the rental vacancy rate of a 2-bedroom unit.

The core data used in reports includes secondary research such as Statistics Canada data. Communities add additional supplementary data from local sources, including telephone surveys or local government agency reports. Community volunteers act as a reference group to provide report card grades which track positive shifts or identify community gaps or challenges.

## For Further Reading

Vital Signs®, Community Foundation of Canada

<http://www.vitalsignscanada.ca/about-vital-signs-e.html>

This is the main Vital Signs® website which contains the national reports and also includes previous years' reports. There are links to all the individual community reports and background information about Vital Signs®.

*Toronto's Vital Signs®, Expanded Report 2008.* Toronto Community Foundation

<http://www.tcf.ca/Portals/0/docs/Toronto%27sVitalSigns2008.V6A.TCFWeb%284%29.pdf>

This is a detailed Vital Signs® report that uses a broad set of indicators. It provides a useful example of Vital Signs® as it the largest community report and therefore particularly comprehensive. Toronto has including one domain, *Getting Around*, that is not part of the core areas. This domain looks at transportation issues; specifically, issues around traffic related to commuting.

## **Measuring First Nations Wellbeing – Indian and Northern Affairs Canada**

### **Summary**

The Measuring First Nations Wellbeing project assesses wellbeing in First Nations communities relative to other Canadian communities and tracks these results over time. The Measuring First Nations Wellbeing project Community Wellbeing Index (CWI) is composed of four primary indicators: education, labour force activity, income, and housing conditions.

### **Background**

The Community Wellbeing Index is a modification of the United Nations' Human Development Index and was developed by Indian and Northern Affairs Canada to compare the average level of wellbeing of Registered Indians to other Canadians. The HDI is a composite index used by the UN Development Program to measure and compare the quality of life in 170 countries.

### **Details**

The Community Wellbeing Index contains four primary indicator domains:

- Education is measured by literacy standards (at least a Grade 9 education) and the attainment of at least a high school diploma
- Labour force activity is measured by labour force participation (labour force participants divided by the total population) and employment among labour force participants (employed persons divided by labour force participants)
- Income is defined as average total income (total income divided by total population)
- Housing conditions are measured by housing quality (if major repairs are needed), and housing quantity (if the home is crowded, containing more than one person per room)

Indicators were limited to these four areas because of limitations of source data for First Nations Communities. This data is provided by Statistics Canada. Indian and Northern Affairs Canada recognize that it would be useful to expand the four indicators areas if additional data were available.



## For Further Reading

*Measuring Aboriginal Wellbeing: The Human Development Index (HDI) and the Community Wellbeing Index (CWB)* <http://www.ainc-inac.gc.ca/ai/rs/pubs/rsh3-eng.asp>

This Indian and Northern Affairs Canada website provides background resources for measuring First Nations Wellbeing. From this site, articles detailing the measures, wellbeing maps of First Nations communities, and other research on First Nations wellbeing are accessible.

Jerry P. White and Paul S. Maxim, *Community Wellbeing: A Comparable Communities Analysis*. February 2007 <http://www.ainc-inac.gc.ca/ai/rs/pubs/re/cca/cca-eng.asp#chp2>

This is a report of the Community Wellbeing project of Indian and Northern Affairs Canada. This document details the methodology used in developing the CWB and the wellbeing analysis of the included communities.

Mindy McHardy and Erin O'Sullivan, *First Nations Community Wellbeing in Canada: Strategic Research and Analysis*. Directorate Indian and Northern Affairs Canada. October 2004 <http://dsp-psd.pwgsc.gc.ca/Collection/R2-344-2001E.pdf>

This web resource provides an example of an analysis of First Nations wellbeing. It provides maps and tables which report on the state of First Nations communities (over a certain size) in relation to one another and the non-First Nations communities.

## **Sustainable Community Indicators Program (SCIP), Environment Canada**

### **Summary**

Sustainable Community Indicators Program (SCIP) uses a holistic approach to measuring well-being which considers the long-term health of the community. This approach recognizes that a one-size-fits-all method will not ensure sustainability when identifying indicators and therefore requires the individual community to identify their own community-relevant indicators.

### **Background**

Environment Canada and Canada Mortgage and Housing Corporation conceived SCIP as a response to cities, non-government organizations and others who were calling for the Canadian government to provide guidelines to help communities develop and use sustainable development indicators. A partnership was formed with the Federation of Canadian Municipalities.

### **Details**

“SCIP is an internet-based reference guide to help communities and organizations develop indicators of sustainability and establish a sustainability indicators program.”

*(SCIP website)*

SCIP does not propose indicators, but has developed tools which assist communities and/or individual initiatives create their own set of indicators. Indicator development is intended to be a collaborative effort involving a range of community members and stakeholders.

### **Example: Winnipeg First Nations Community**

The International Institute for Sustainable Development (IISD) conducted a joint project with the Assembly of Manitoba Chiefs (AMC) to measure the wellbeing of the Winnipeg First Nations community. The following table details the sustainability indicators identified during community consultation.



## Winnipeg First Nations Indicators

Category	Domain	Example Indicators
Environment	Security	Number of First Nations police officers
	Housing	Number of First Nations people who lack affordable housing/are homeless
Category	Domain	Example Indicators
Economic	Governance	Number of programs teaching First Nations governance
	Employment	Number of First Nations people considered working poor
Social	Health	Number of First Nations people with chronic health conditions
	Education	Number of First Nations teachers
Culture	Culture Identity	Number of schools with First Nations curriculum
	Community Services	Number of community service organizations serving First Nations people

(*Developing Sustainability*, p. 14)

## For Further Reading

Sustainable Community Indicators Program, Environment Canada

<http://www.ec.gc.ca/soer-ree/English/scip/default.cfm>

The SCIP program was created by Environment Canada and Canada Mortgage and Housing Corporation to help communities identify and develop sustainable development indicators. This website includes guidelines for developing indicators. There is a step by step guide with tools including models, checklists, and templates.

Canadian Sustainability Indicators Network <http://www.csin-rcid.ca>

This website is a network of resources across Canada. CSIN aims to accelerate progress toward sustainable development by furthering sustainability indicator best practices in Canada. This website provides links to resources and best practice examples worldwide.

*Developing a Sustainability Indicators System to Measure the Wellbeing of Winnipeg's First Nations Community*. July 2008 [http://www.iisd.org/pdf/2008/amc\\_dev\\_indicators\\_wpg.pdf](http://www.iisd.org/pdf/2008/amc_dev_indicators_wpg.pdf)

International Institute for Sustainable Development (IISD) has been working on a joint project with the Assembly of Manitoba Chiefs (AMC) to measure the wellbeing of Winnipeg First Nations community. This report contains information about how the indicators were developed and the process of public consultation and collaboration.

## Neighbourhood Vitality Index

### Summary

Neighbourhood Vitality Index measures the overall health and wellbeing of a community, including community engagement indicators. The index consists of a number assigned to each indicator identified by each initiative during project development. The index can be used to track changes over the long term. This approach is a good example of neighbourhood level measures.

### Background

Neighbourhood Vitality Index was developed in a report by Sean Meagher called *A Neighbourhood Vitality Index: an Approach to Measuring Neighbourhood Wellbeing*. It was prepared for the United Way of Greater Toronto for use in City of Toronto neighbourhoods. The Strong Neighbourhoods Task Force, a project of the City of Toronto and the United Way of Greater Toronto with support of the provincial and federal governments, also measures neighbourhood vitality.

### Details

The Neighbourhood Vitality Index framework is based on approaches developed by the National Neighbourhood Indicators Partnership (NNIP) and the document, *Building and Operating Neighborhood Indicator Systems: A Guidebook*.

Examples of Neighbourhood Vitality measures of wellbeing:

- Income
- Employment
- Housing
- Access to Capital
- Mobility
- Distribution of Employment
- Business Activity
- Business Climate
- Access to Employment
- Access to Employment
- Business Connection
- Access to Public Amenities
- Neighbourhood Conditions
- Connection to Community Services
- Educational Attainment
- Skills Development
- Access to Community Facilities
- Participation in Community Structures
- Demographic Cohesion
- Presence of Community Facilities
- Family Composition
- Safety
- Collective Efficacy



**...our vitality index requires 5 elements**

1. A neighbourhood definition to address boundary issues
2. A definition of neighbourhood vitality and a corresponding theory of change
3. Sources of secondary data
4. Tool for acquiring primary data
5. Processes for assessing and interpreting data in the context of neighbourhood input

(Meagher, p. 9)

Primary data is acquired through questionnaires and surveys. Special attention is paid to ensure that the data is robust and cost effective.

## For Further Reading

Sean Meagher, *A Neighbourhood Vitality Index: An Approach to Measuring Neighbourhood Wellbeing*. An Action for Neighbourhood Change Report for the United Way of Greater Toronto. 2006  
<http://www.publicinterest.ca/sites/default/files/T&R%20Vitality%20Index.pdf>

This foundational document explains the Neighbourhood Vitality Index approach, details about its full set of indicators, and also includes two sample surveys.

Geoffrey Dobilas and Fraser Battye, *Measuring Neighbourhood Vitality, Final Report*. GHK International (Canada) Ltd. January 2005  
[http://www.urbancentre.utoronto.ca/pdfs/curp/SNTF\\_Neigh-Vitality\\_RP3.pdf](http://www.urbancentre.utoronto.ca/pdfs/curp/SNTF_Neigh-Vitality_RP3.pdf)

This report was developed for the Strong Neighbourhoods Task Force to develop a Neighbourhood Vitality Tool for Toronto neighbourhoods. The document details the framework for using neighbourhood vitality measures and the neighbourhood vitality indicators, which have been developed for 140 Toronto neighbourhoods. It explores what other jurisdictions have done with respect to neighbourhood indicators and also reports on the results measured in Toronto neighbourhoods.

G. Thomas Kingsley (ed.), *Building and Operating Neighborhood Indicator Systems: A Guidebook*. National Neighborhood Indicators Partnership. March 1999  
<http://www2.urban.org/nnip/pdf/guidebk.pdf>

This source document provides the framework for developing neighbourhood indicators used in the index. It is a useful resource that helps explain the theory behind the indicators and how to go about developing indicators that are relevant to each neighbourhood.

## Canadian Index of Wellbeing

### Summary

The Institute of Wellbeing has identified several indicators for measuring wellbeing in Canada which are tracked and reported. The Institute for Wellbeing is a reporting agency and not linked to specific programs or communities. This approach is included because it is both new and offers a Canadian approach to analyzing a variety of domains of wellbeing.

### Background

The Canadian Index of Wellbeing was launched in June 2009 developed by the Institute of Wellbeing. The Atkinson Charitable Foundation began the early work to developing an index in 1999 and continues to support the project. The Canadian Research Advisory Group was established in 2004 to assist in the development of the Canadian Index of Wellbeing.

### Details

The Institute of Wellbeing intends to track wellbeing indicators, document trends over time and report its findings to the public.

“The CIW will track Canada’s progress and provide a set of indicators in eight interconnected categories that will enable us to see whether we are better or worse off than we used to be, whether we will leave the world a better or worse place for the generations that follow, and what we need to change to achieve a better outcome.”

*(The Institute of Wellbeing website, About the Institute)*

The Canadian Index of Wellbeing is not a community improvement strategy, rather it is intended to be a source of information to Canadians and communities about wellbeing in general. Although much of the data is collected from community level indicators, this data is aggregated to the national level. The areas considered are:

- Arts, Culture and Recreation
- Civic Engagement
- Community vitality
- Education
- Environment
- Healthy Populations
- Living Standards
- Time Use





These categories are considered interconnected and still in development. At the time of this paper, Community Vitality, Healthy Populations and Living Standards Reports are available, while the other categories are still under development. Under each category and domain are a set of indicators which are measured. The following table provides a snapshot of some of these indicators.

### Example: CIW Indicators

Community Vitality	Healthy Populations	Living Standards
Participation in group activities	Self-rated health	After tax median income
Volunteering	Health-adjusted life expectancy	Income distribution
Number of close relatives	Rate of diabetes	Incidence of low income
Caring for others	Depression	Wealth Distribution
Rate of property crime	Life expectancy at birth	CSLC Economic Security Index
Rate of violent crime	Infant mortality	Long-term unemployment
Feeling of safety walking alone after dark	Smoking	Employment Rate
Belief that others can be trusted	Patient satisfaction with health services	CIBC Employment Quality Index
Experienced discrimination	Population with regular family doctor	Housing suitability and affordability
Providing assistance to others	Influenza immunization among age 65+	
Sense of belonging to local community		

Indicator data is obtained from Statistics Canada reports and other database sources.

### For Further Reading:

Katherine Scott. *Community Vitality: A Report of the Institute of Wellbeing*. June 2009

[http://ciw.ca/Libraries/Documents/CommunityVitality\\_DomainReport.sflb.ashx](http://ciw.ca/Libraries/Documents/CommunityVitality_DomainReport.sflb.ashx)

This report about the Community Vitality Domain of the Index of Wellbeing provides an overview of the methodology. It also explains trends and how the indicators were selected.

Andrew Starpe and Jean-Francois Arsenault, *Living Standards: A Report of the Institute of Wellbeing*.

June 2009 [http://ciw.ca/Libraries/Documents/LivingStandards\\_DomainReport.sflb.ashx](http://ciw.ca/Libraries/Documents/LivingStandards_DomainReport.sflb.ashx)

This report looks at income and wealth distribution. It provides an overview of the methodology and explains trends in income and wealth.

Ronald Labonte, Nazeem Muhajarine, Brandace Winquist and Jacqueline Quail, *Healthy Populations: A Report of the Institute of Wellbeing*. June 2009

[http://ciw.ca/Libraries/Documents/HealthyPopulation\\_DomainReport.sflb.ashx](http://ciw.ca/Libraries/Documents/HealthyPopulation_DomainReport.sflb.ashx)

Health is considered a component of wellbeing and this report looks at six areas, including Aboriginal Health. The report provides an overview of the methodology and explains the trends in health.

The Canadian Index of Wellbeing website

<http://www.ciw.ca/en/TheCanadianIndexOfWellbeing.aspx>

On the Institute of Wellbeing website, users can access a variety of documents including the history of the Institute and a report on Community Vitality. Because this website is recently developed, it will be useful to check it often for updates on new reports as they become available. This website also contains tables which accompany the individual reports.



## Section Four: Approaches to Measuring More Community Engagement

### Overview

Engagement implies citizen involvement in decision-making processes. The questions about how much involvement and how meaningful this involvement is, are important factors to consider when measuring more community engagement. Community engagement is often defined as citizens working collaboratively, through inspired action and learning, to create and realize bold visions for their common future. However, there are many components in this broad definition that make it challenging to identify effective measurement tools.

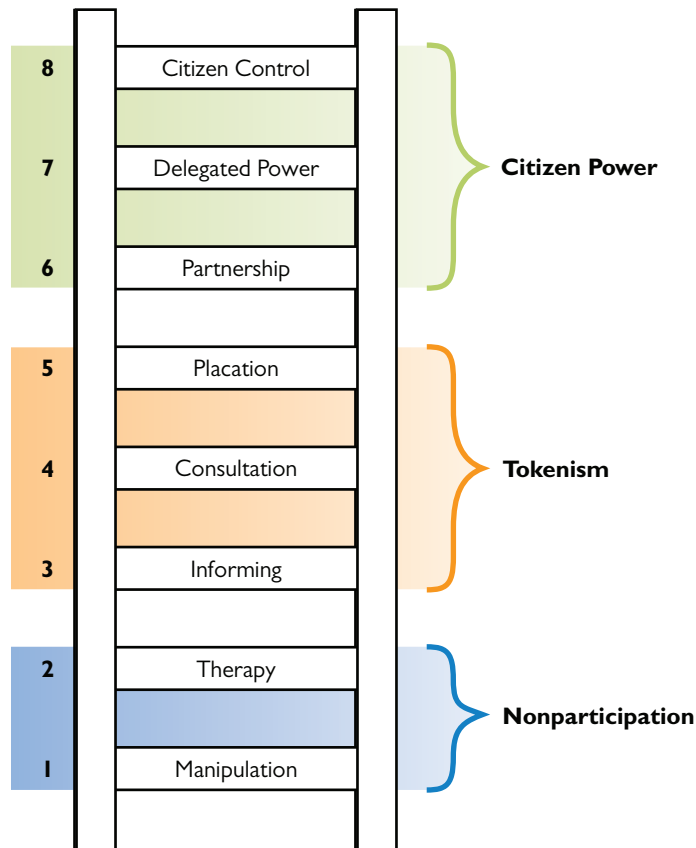
For the purposes of this section engagement in communities is defined as citizens *participating in a meaningful way*. In some cases, it may not specifically indicate that the community member was engaged in decision-making, but that they were an active part of *doing and being* in the community. This more precise definition of engaged communities was useful when developing this paper and determining the tools to profile.

Community engagement is measured and defined in many different ways. What we understand community engagement to mean may be different depending on what and who we are looking at within our community. This paper provides a simple overview of different approaches and, where available, outlines possible indicators which communities are using to monitor and track levels of community engagement. Some definitions of community engagement include individuals who spend time working in the community through a group, such as when coaching children's sports teams or volunteering time with seniors. Others definitions consider voter turnout as a measure of engagement. Still, others look at the level in which members of the community work together in collaborative processes or through formal groups (citizen's advisory groups, and other committees or boards) to create policy change, build connections and/or realise a common vision for their community.

In many cases, the examples in this section focus on creating positive change in communities, including community-led programs to reduce poverty, restore an ecosystem or develop the urban landscape. In these examples, community engagement leads to improvement within a community. This deeper level of community engagement strives for community change outcomes which are more challenging to measure and report.

Sherri Arnstein's work, *A Ladder of Citizen Participation* (1969), is an influential approach to the contemporary understanding of citizen engagement and participation. The following diagram is Arnstein's ladder, a visual approach using the rungs of the ladder to climb from ineffectual processes to full citizen control. Many other adaptations of this model have been developed which build or expand the original ladder concept to specific situations or new thinking.

### Ladder of Citizen Participation



(Arnstein 1969)

Measuring community engagement is of significant interest to organizations, networks and communities. There is limited consensus about the measures for engaged communities. In fact, no single indicator was used by all approaches.

Each approach described in this paper used different indicators but the following list outlines the recurring indicators:

- the number of people at meetings or groups
- the number of people who were members of a community group, such as clubs, sporting groups, senior's organization or others
- the number people participating in civic events and activities, including town meetings, petitions, protests



Only a few of the community engagement indicators probed the meaningful involvement of citizens in decision making processes.

Other common themes discovered:

- nearly all groups used their own data
- some indicators included national statistical data
- an overwhelming majority used “standard indicators” such as voter turnout which can be applied across communities
- only four used community-specific/community chosen indicators
- about half used subjective indicators – feelings, thoughts, opinions such as sense of belonging, community, satisfaction of the process – either by those surveyed or by evaluators (as in the case of Community Scales)

Some of the common indicators for community engagement are found below.

- Half of the approaches used engagement in community activities (meetings, events, group memberships, voter turnout) as main measure of engagement
- half used measures representing a number of dimensions
- few linked engagement across sectors (various government, public, businesses)
- less than half considered community change or considered impact
- less than half of the approaches were developed by the community

## Summaries: Approaches to Measuring Community Engagement

### Waterloo Region Crime Prevention Council

(formerly Waterloo Region Community Safety and Crime Prevention Council)

#### Summary

Waterloo Region Crime Prevention Council is a good example of community engagement in action. The approach uses performance targets that the Waterloo Region Crime Prevention Council connects to a community crime prevention strategy. It identifies community engagement as a key component of crime prevention. The importance of this work lies in the broad crime prevention strategy which includes: information-sharing and decision-making with the public and the building of community partnerships to develop social capital.

#### Background

The Waterloo Region Crime Prevention Council is an advisory group to the Region of Waterloo and includes many partners around the region such as Waterloo Region Police, both the public and Catholic school boards, Region of Waterloo, Conestoga College and the cities of Cambridge, Waterloo and Kitchener.

#### Details

The Waterloo Region Crime Prevention Council developed targets for community engagement and included these in the 2003-2007 business plan. This is a collaborative community planning council which brings members of the public together to enhance community vibrancy.

“We believe we are stronger working together”  
“We believe that the community is part of the solution.”

*(Preventing Crime in Your Community)*

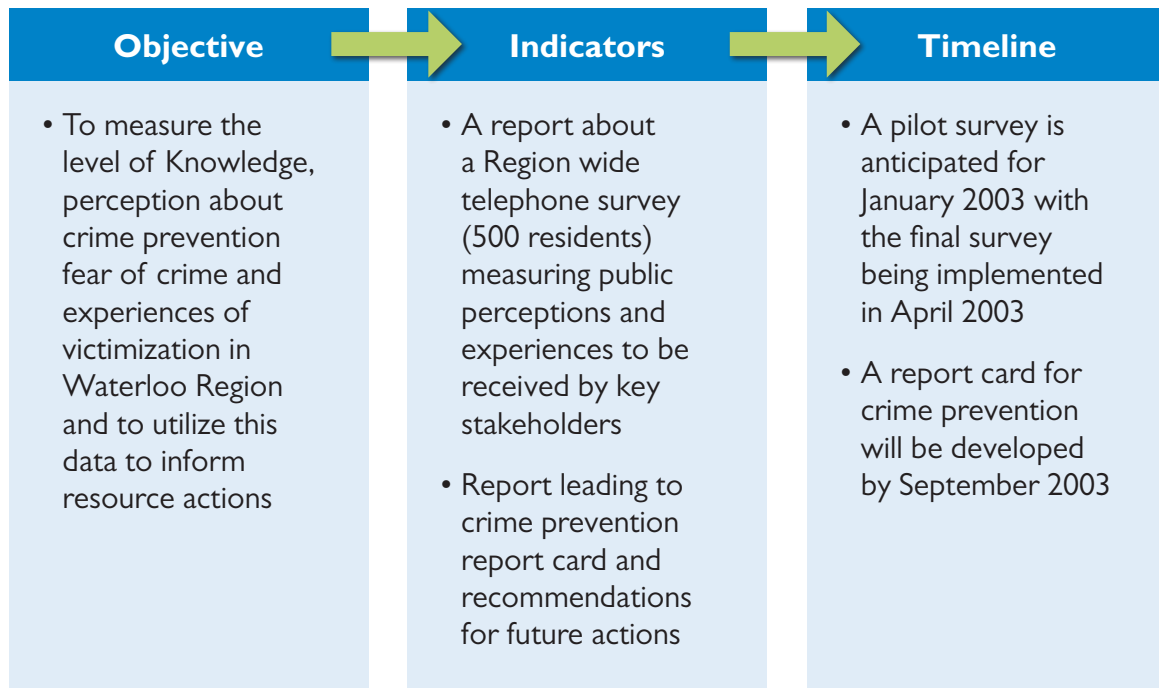
The Waterloo Region Crime Prevention Council asserts that the public plays a key role in preventing crime. Their mandate is to increase the participation of the community through educational campaigns, data collection, information-sharing, and outreach. The Council’s business plan describes clear objectives for how community engagement will be accomplished.

The business plan highlights their public engagement goal, “To be a resource to the community through public education, knowledge building, responding to critical issues, and advocacy.”



The business plan identifies the need to overlap public engagement and the role of local government. The identified goal for local government is to make community safety and crime prevention a significant criterion in all community decision-making. In addition, rural communities are identified as an area for improved outreach. Strategies to involve rural community members through meetings and action plans are specifically outlined because rural communities do not have regular partnerships with the council. The following chart below provides a snapshot of the community engagement planning process of the Waterloo Region Crime Prevention Council.

### Waterloo Region Crime Prevention Council



*(adapted from the Business Plan, 2003-2007)*

Examples of other indicators include: availability of public information for crime prevention; actions taken from roundtable discussions; numbers and types of public meetings; and, support activities offered in complex community situations.

Missing from this business plan is a comprehensive framework for determining what these measures mean and the impact they have on community change. For example, a telephone survey is identified as an indicator of their objective, but there is no information about how the results will be interpreted and used.

## For Further Reading

Community Safety and Crime Prevention Council, Business Plan. 2003-2007 (Now the Waterloo Region Crime Prevention Council)

[http://www.preventingcrime.net/howeare/CS&CPC\\_Business\\_Plan.pdf](http://www.preventingcrime.net/howeare/CS&CPC_Business_Plan.pdf)

This resource explains the objectives and indicators used to measure progress for engaging the community in working towards crime prevention. This is an example of how an advisory group has put into action a number of preventative measures and how they plan to engage local government and community members to achieve their objectives.

Waterloo Region Neighbour to Neighbour Toolkit. 2004

<http://www.neighbourtoneighbour.ca/index.html>

The Neighbour to Neighbour Toolkit is a project created for Waterloo Region to help citizens gain the knowledge they require to help contribute to their community. This resource helps community members build relationships with one another which will help make a difference in their community through knowing, understanding and supporting one another.

Waterloo Region Crime Prevention Council Website <http://www.preventingcrime.net/index.asp>

This website details the activities of the Waterloo Region Crime Prevention Council. There are many useful resources including information about the model they are using for community engagement, as well as useful tools such as Neighbourhood Action Kit, and Reach Out and Say Hi campaigns.

Preventing Crime in Your Community, Brochure. 2008

<http://www.preventingcrime.net/howeare/COMM0908.pdf>

This is a brochure that explains what the Crime Prevention Council is and does. It is useful as a quick overview about the partnerships and sectors which collaborate with the council, the council's view of causes of crime, and the actions citizens and communities can take to make a difference in prevention of crime.





## Smart Growth BC

### Summary

Smart Growth BC is part of the Smart Growth movement which aims to reduce the effects of urban development on the natural environment while also making development more user-friendly to citizens. One of the guiding principles of Smart Growth is effective community engagement where all stakeholders are included in decision-making processes to enable sustainable communities.

### Background

Smart Growth BC was incorporated in 1999 and is part of the Smart Growth movement. This movement began during the 1970's in some Canadian cities, although all cities do not necessarily use the Smart Growth name (CMHC 2005). Smart Growth BC was created as a joint project of the University of Victoria Eco-Research Chair of Environmental Law and Policy, and the West Coast Environmental Law Association.

There is a vast Smart Growth network across the United States, but it has not developed as fully in Canada.

### Details

“Citizens are not just periodic voters, they are stewards of their community and a political force for change. The role of the smart growth supporter is to represent the community interest during the community-planning and policy – development stages of urban development.”

*(Smart Growth Toolkit, p. III-1)*

Smart Growth BC is part of the Smart Growth movement which aims to reduce the effects of urban development on the natural environment while also making the development more user-friendly to citizens. The example in the following chart lists some of the actions encouraging public participation.

Smart Growth BC sets out a guide for how the community should be engaged including a policy for engagement and tools which can be used to develop measures to monitor progress.

## Smart Growth Toolkit

Principles & Goals	Tools
<b>Public Participation in Development Decisions</b>	Regional Growth Strategies Official Community Plans Local and Neighbourhood Plans Urban Design Guidelines Development Approval Information Smart Growth Performance Indicators Monitor Development Processes (re-zoning & OCP ) Lobbying

*(Excerpted and adapted from Smart Growth Toolkit, p. III-40)*

There is no standard measurement package for this approach and local groups need to establish their own performance indicators based on their community's official plan. Impact is assessed based on an evaluation feedback loop which focuses on the action taken by authorities regarding the official plan. The community's role in influencing planning and development processes in the office plan are indicators of success.

## For Further Reading

Smart Growth Toolkit: Part III Citizen Involvement Tools. 2001

[http://www.smartgrowth.bc.ca/Portals/0/Downloads/J1\\_ToolKitPart\\_III.pdf](http://www.smartgrowth.bc.ca/Portals/0/Downloads/J1_ToolKitPart_III.pdf)

This document is Part Three of the Smart Growth Toolkit. It provides tools – including a checklist for community meetings. In this document you will find a more detailed list of the tools referenced in the chart above. This set of tools is important in evaluating the effectiveness or impact of community engagement.

Smart Growth Network Online <http://www.smartgrowth.org>

This online network is accessible to many of the US-based projects. The website contains useful case studies and examples of American projects in action. Users may search a variety of topics, such as community engagement, and access many useful documents.

Community Engagement, Smart Growth BC website

<http://www.smartgrowth.bc.ca/Default.aspx?tabid=109>

This web page on the Smart Growth BC website explains the principles of community engagement, and provides case study examples from three communities in BC. There are also links to the full Toolkit document and other links to navigate the Smart Growth website.



## Community Indicators Victoria

### Summary

Community Indicators Victoria measures the well-being of the communities and regions located in the State of Victoria, Australia. One of the domains of well-being measured is community engagement. Data is collected through identified indicators and aggregated to the community or regional level. The data is then compared for all Victoria area communities. The profiled indicator measures go beyond simple counts, such as numbers attending meetings, and include subjective data about how much people feel engaged in their community. This is a good example of an indicator driven measure.

### Background

Community Indicators Victoria bases their approach to measuring engagement of communities on the work of Adams and Hess in *Measuring Community Engagement* (2005). Community Indicators Victoria partners are The McCaughey Centre, The University of Melbourne, Vichealth, RMIT University, the Australian Bureau of Statistics, The City of Victoria, the Victorian Local Government Association and the Municipal Association of Victoria.

### Details

Citizen engagement is one domain of Community Indicators that Victoria uses to measure well-being. Within each domain, indicator data is collected. Measures on the indicators are aggregated to the community or regional level and reported on a public website. The rationale for reporting on engagement moves from traditional governance practices to more inclusive community decision-making. “Community Indicators Victoria aims to establish a sustainable Victorian approach to the development and use of local community well-being indicators, with the purpose of improving citizen engagement, community planning and policy making.” (*CIV Website “About US”*)

What is measured	How data collected and measured
Percentage of people who think they have a real say on issues important to them	Victorian Department of Planning and Community Development (DPCD) Telephone Survey
Percentage of people who in the last 12 months had “Participation in Citizen Engagement” which includes having: <ul style="list-style-type: none"> <li>a. Attended a town meeting, public hearing or public affairs discussion group</li> <li>b. Met with, called or sent a letter to any local politician</li> <li>c. Joined a protest or demonstration</li> <li>d. Signed a petition</li> </ul>	Community Indicators Victoria Survey
Percentage of women elected as councillors	Municipal Association of Victoria Election results analysis

What is measured	How data collected and measured
Percentage of people who feel they have an opportunity to vote for a political candidate who they trust	Community Indicators Victoria Survey
Percentage of people who are members of a local community organisation or decision-making body	Victorian Department of Planning and Community Development (DPCD) Telephone Survey

While CIV has created a fairly comprehensive and detailed report on the measures used, they have not reached the stage of measuring the impact of increasing engagement on communities. The current emphasis is on information-gathering and reporting with the intent of increasing engagement in communities.

## For Further Reading

*Measuring Wellbeing, Engaging Communities: Developing a Community Indicators Framework for Victoria*, Final Report. Victorian Community Indicators Project (VCIP). July 2006

[http://www.communityindicators.net.au/system/files/20060817\\_VCIP\\_Final\\_Report\\_0.pdf](http://www.communityindicators.net.au/system/files/20060817_VCIP_Final_Report_0.pdf)

This report explains the development of the framework for measuring community indicators and the development of the Community Indicators Victoria. It describes the methodology used to choose indicators and recommendations for future use and development. Indicators are described as well as their relevance and rationale for inclusion.

D. Adams and M. Hess, *Measuring Community Engagement*

<http://www.engagingcommunities2005.org/abstracts/Hess-Michael-final.pdf>

This document is a summary on the progress for developing the Victorian Indicators and explains their possible influence in establishing a national framework of measurement indicators. The usefulness of this document is to understand the theory behind many of the concepts of why community engagement is important and what effective engagement means.

Jeanette Pope, *Indicators of Community Strength: a framework and evidence*. Department for Victorian Communities. June 2006

[http://www.dvc.vic.gov.au/Web14/dvc/rwpgslib.nsf/GraphicFiles/Indicators\\_of\\_Community\\_Strength\\_framework\\_and\\_evidence.pdf/\\$file/Indicators+of+Community+Strength\\_framework+and+evidence.pdf](http://www.dvc.vic.gov.au/Web14/dvc/rwpgslib.nsf/GraphicFiles/Indicators_of_Community_Strength_framework_and_evidence.pdf/$file/Indicators+of+Community+Strength_framework+and+evidence.pdf)

This resource details the evidence behind the value of community engagement. In this document the indicators of community strength are examined and explained with particular emphasis on detailing the social networks that are crucial to effective engagement within communities.



## Communities Scotland

### Summary

Communities Scotland uses a well-developed model for community engagement and a standardized framework for measuring engagement and its impact. The model emphasizes early and inclusive citizen engagement in community planning activities. Impacts are measured after indicators and metrics have been designed in collaboration with community members. This approach was included because of the way impact is measured. As well, the evaluation process itself was developed in collaboration with the community members and government.

### Background

Communities Scotland worked to engage citizens in the processes of community revitalization, planning, and community development. Communities Scotland was a branch of the Scottish Government which was dissolved in 2008. This work continues as part of the Scottish Government's Housing and Regeneration Directorate.

### Details

Although Communities Scotland was dissolved, their website contains many valuable resources. Updated information about community engagement activities in Scotland may be found at the Scottish Community Development Centre website: <http://www.scdc.org.uk/> and the Scottish Government website: <http://www.scotland.gov.uk>.

Some of the key elements of the model used by Community Scotland include the development of national standards for effective community engagement and indicators for evaluating these national standards.

### NATIONAL STANDARDS FOR COMMUNITY ENGAGEMENT

1. **INVOLVEMENT:** we will identify and involve the people and organisations who have an interest in the focus of the engagement
2. **SUPPORT:** we will identify and overcome any barriers to involvement
3. **PLANNING:** we will gather evidence of the needs and available resources and use this evidence to agree the purpose, scope and timescale of the engagement and the actions to be taken
4. **METHODS:** we will agree and use methods of engagement that are fit for purpose
5. **WORKING TOGETHER:** We will agree and use clear procedures that enable the participants to work with one another effectively and efficiently
6. **SHARING INFORMATION:** we will ensure that necessary information is communicated between the participants

7. **WORKING WITH OTHERS:** we will work effectively with others with an interest in the engagement
8. **IMPROVEMENT:** we will develop actively the skills, knowledge and confidence of all the participants
9. **FEEDBACK:** we will feed back the results of the engagement to the wider community agencies affected
10. **MONITORING AND EVALUATION:** we will monitor and evaluate whether the engagement achieves its purposes and meets the national standards for community engagement

*(National Standards, p. 6)*

Evaluation of engagement processes is a key part of this model and includes identifying the results of engagement and their impacts.

“...the key question is: how can community planning engage with community issues and community change, rather than how can we engage communities in the community planning process.”

*(Models of Community Engagement, p. 3)*

Communities Scotland designed a way of measuring results and impact in community engagement. The list below outlines the indicators Community Scotland has identified for evaluating community engagement.

### **INDICATORS FOR THE MONITORING AND EVALUATION STANDARD**

1. The engagement process and its effects are continually evaluated to measure progress, develop skills and refine practices
2. Progress is evaluated against the intended results and other changes identified by the participants *(see Planning standard indicator 7)*
3. Appropriate participants collect and record this information
4. The information is presented accurately and in a way that is easy to use
5. The participants agree on the lessons to be drawn from the evidence of the results and the changes that occurred
6. The participants act on the lessons learned
7. Progress is celebrated
8. The results of the evaluation are fed back to the participants and the wider community
9. Evidence of good practice is recorded and shared with other agencies and communities

*(National Standards, p. 18)*



The Communities Scotland approach tries to identify what matters to evaluation. It works to measure only what can be reasonably measured and what is deemed necessary to measure. There are no standard measures for every project. Indicators are tailored to the specific project. An indicator is a proxy measure used when the outcomes cannot be directly measured – for example, parents’ attendance at school meetings could be used as an indicator of parental involvement with a school.

Communities Scotland recommends the use of two tools for evaluations which assist in developing metrics for specific projects: the LEAP framework (Learning, Evaluation and Planning) and VOICE (Visioning Outcomes In Community Engagement). More information on both LEAP and VOICE is included in the annotated list below.

### For Further Reading

*Evaluation of the Effective Engagement of Community in Regeneration: Final Baseline Report.*  
ODS Consulting. December 2006

This report is an evaluation by independent consultants about the effectiveness of community engagement in influencing revitalisation projects in Scotland. It serves as a useful critique of the approach and evaluates what has worked and where improvements are needed. There are several case studies from community projects and a set of measurement and evaluation tools that accompany the report.

*National Standards for Community Engagement.* Communities Scotland. 2005  
<http://www.scotland.gov.uk/Topics/Education/Life-Long-Learning/LearningConnections/samedifference/sd4s5>

This publication provides a detailed overview of the expectations for how community engagement will be encouraged, practiced and evaluated. It describes the principles that guide engagement processes and the indicators used to evaluate them. A key part of the document is the emphasis on ensuring that community members who wish to be a part of the process do not experience any barriers to participation. This document outlines how the barriers are to be removed so all citizens are able to participate.

Stuart Hashagen, Models of Community Engagement. Scottish Community Development Centre, May 2002. <http://leap.scdc.org.uk/uploads/modelsofcommunityengagement.pdf>

Various models for community engagement are described as well as a definition of engagement which may be helpful to those looking for another definition to aid in their own understanding of engagement. The document looks at a type of ladder system of engagement similar to Arnstein’s Ladder of Participation and describes what types of actions might be involved for each step of the ladder. This may be useful to anyone looking at depths of engagement and activities and processes which might accompany them. An example they provide is that *Reactive ‘community consultation’* might involve surveys, questionnaires or focus groups.



Scottish Community Development Centre: Supporting Best Practice in Community Development, VOICE <http://www.scdc.org.uk/voice/>

This website provides access to a tool for evaluating engagement called VOICE (Visioning Outcomes in Community Engagement). The VOICE tool may be downloaded and used to plan, implement and evaluate processes of community engagement and is designed to support the National Standards for Community Engagement in Scotland. From this website you may also access many other resources including information about LEAP.





## Living in Niagara 2008

### Summary

Living in Niagara 2008 describes indicators in different areas of life in the Region of Niagara, Ontario. Six measures of engagement are tracked and reported. This work offers an example using the determinants of health as indicator-driven measures of wellbeing which place an emphasis on community engagement.

### Background

The Living in Niagara report was financially supported by a collaboration including the Niagara Community Foundation, the Ontario Trillium Foundation, the United Way of St. Catharines and District, Opportunities Niagara, Bridges Community Health Center and the Region of Niagara.

### Details

“Through consultations with the Steering Committee of the Niagara Social and Community Planning Project and its Research Working Group made up of community leaders and stakeholders, 11 key areas were identified that are affecting the quality of community life in Niagara.”

*(Living in Niagara website)*

Of these areas, one domain called *Belonging and Leadership* specifically details community engagement. The following list contains what is measured in this domain:

- Volunteering
- Charitable giving
- Political involvement
- Sense of community belonging
- Participation in social networks and social activities in Niagara
- Religious affiliation

Measures are compared to other cities in Ontario (and Canada) and a score from 1-5 is assigned for each measure (1 representing a very poor grade and 5 representing an excellent grade, or being a leader in this area).

Data sources include telephone surveys and Statistics Canada data. There are no measures for the impact of engagement and little information about the scores assigned.

## Living in Niagara 2008 and Vital Signs

The domains used for the Living in Niagara report and Vital Signs are very similar – specifically *Belonging and Leadership*. The difference lies in how individual Vital Signs communities identify indicators and how these indicators are measured. Vital Signs communities usually use voter turnout as a key measure for engagement. Vital Signs has a well-developed set of measures in other areas for community well-being, but the Living in Niagara report included additional community engagement indicators.

### For Further Reading

Dr. Heather Lee Kilty, *Living in Niagara, 2008: Critical indicators for reflecting on life in Niagara*. Niagara Community Research and Action Council.

<http://www.livinginniagarareport.com/wp-content/uploads/2009/02/niagar-report-final-16.pdf>

This lengthy report explains in detail the indicators and measures used, the research methodology applied and the sources for data gathering. This real life example is useful as a case study for community indicators. The report also summarizes how Niagara is doing and what needs improved.

*Caring Canadians, Involved Canadians: Highlights from the Canada Survey of Giving, Volunteering and Participating*. 2007

<http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=71-542-XIE&lang=eng#formatdisp>

This is a critical resource used for accessing data in the Living in Niagara Report. This resource is also useful as a source of information about citizen engagement in Canada. This data has been aggregated to the national level.

Guelph and Wellington's Vital Signs. 2008

[http://www.guelphwellingtonvitalsigns.ca/pdf/Guelph\\_CommunitysVitalSigns\\_2008.pdf](http://www.guelphwellingtonvitalsigns.ca/pdf/Guelph_CommunitysVitalSigns_2008.pdf)

Guelph's Vital Signs project includes Voter Turnout, Community Organization memberships, and charitable donations as indicators of community engagement. This report provides a comparison to the Living in Niagara report. See also the main website for Vital Signs at: <http://www.vitalsignscanada.ca/index-e.html>



## Auditing Community Participation

### Summary

This resource called *Auditing Community Participation: An Assessment Handbook* was selected because it is one of the most comprehensive and complete evaluation packages for assessing community engagement. Included in this resource are a set of community mapping tools, indicators and an impact assessment tool to evaluate the effectiveness of the engagement process.

### Background

Danny Burns and Marilyn Taylor wrote this paper for the Joseph Rowntree Foundation in the United Kingdom. The Joseph Rowntree Foundation is an independent charity founded in 1904 which focuses efforts on poverty, empowerment and place.

“Our aim is to contribute to the creation and development of strong, sustainable and inclusive communities.”<sup>4</sup>

### Details

Burns and Taylor have designed a comprehensive framework and templates for evaluating community engagement. Although they used the term participation, both participation and engagement are interchangeable in this case because the definition of participation uses a deeper understanding of the level of activity of the community members, or rungs in Arnstein’s Ladder of the process.

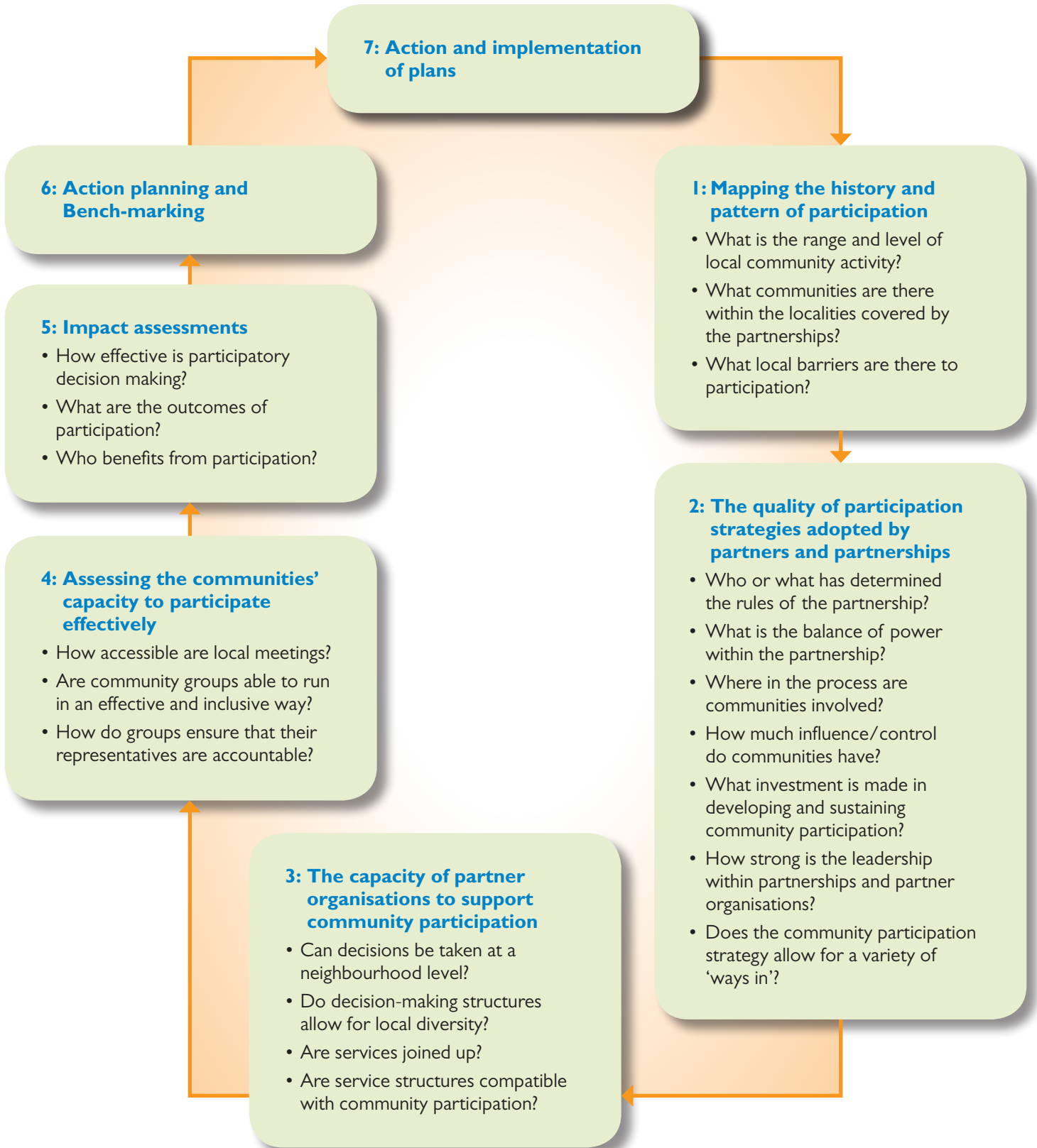
The audit tools provided can be used for self-assessment but the use of an independent facilitator is recommended, especially if credibility is an issue for the audit.

The following figure shows how the audit process is mapped out. Comprehensive indicators to accompany each set of questions are provided but users are encouraged to develop their own indicators and measures which are specifically relevant to their projects.

A key part of this resource is the *impact assessment framework* because it determines the value of and the impact of the engagement. Measuring value and impact provides a deeper understanding of the effectiveness of the community engagement process.

<sup>4</sup> See *Strategic Plan 2009-2011* at: <http://www.jrft.org.uk/NR/rdonlyres/99F149F5-C52E-4F61-A216-E122E3EFB689/0/JRFStrategicPlan20082011.pdf>

## The Audit Process



(adapted from Burns and Taylor, 2000)



## For Further Reading

Danny Burns and Marilyn Taylor, *Auditing community participation: An assessment handbook*.

Joseph Rowntree. 2000 <http://www.jrf.org.uk/publications/auditing-community-participation>

This resource describes all the tools required to complete community mapping, assessing community capacity and the final impact assessment. Included are checklists, key questions and sample indicators which correspond to the seven steps outlined in the previous figure.

<http://www.jrf.org.uk/work/workarea/community-engagement-decision-making>

This section of the Joseph Rowntree website details their approach to community engagement and includes links to recent publications which may aid in understanding the research and practice of community engagement through case studies.

## Vibrant Communities Canada

### Summary

Vibrant Communities are comprehensive, place-based community initiatives focused on poverty reduction employing a framework for change planning approach. Each framework for change details economic, social and systems change initiatives meant to reduce poverty in the specific community or neighbourhood. The Vibrant Communities model focuses on: poverty reduction; cross-sectoral community engagement; an action and learning process; and, evaluation.

For Vibrant Communities, “the community” includes people living in poverty, the business community, the voluntary sector and government. Targets are set for numbers of people in the community engaged and networks formed within a set period of time. The work of Vibrant Communities offers a unique and practical approach to engagement because the targets are set, measured and evaluated.

### Background

Vibrant Communities began in 2002 as a community-driven initiative for reducing poverty in Canada. Its national sponsors are The J.W. McConnell Family Foundation, the Caledon Institute of Social Policy and Tamarack – An Institute for Community Engagement. Vibrant Communities includes twelve communities across Canada called Trail Builders. Vibrant Communities Trail Builders are collaborative, place-based initiatives that are implementing multi-year programs and strategies designed to reduce poverty.

### Details

An important element of the Vibrant Communities framework is community engagement. The Vibrant Communities model encourages the engagement of individuals representing all sectors of the community including business, government, voluntary and individuals living with low income.

Vibrant Communities measures community engagement through specific targets identified for the number of people and organizations to be engaged over a period of time within a specific community and nationally.

#### Example: Quality of Life Challenge BC Capital Region

The Quality of Life Challenge (QOLC) is a Vibrant Communities Trail Builder based in Victoria, British Columbia. The Quality of Life Challenge measures community engagement by the number of “community connections” built.

“The CHALLENGE included people living on low incomes in decision making and in other meaningful ways. Through their participation, hundreds of individuals and organizations learned about the realities of living on a low income in this region – attitudes and policies changed”

*(Report of Phase One, 2003 to 2006, p. 5)*



Measures of Community Connections were:

- 2,255 individuals were engaged in Phase One of the CHALLENGE
- \$1.8 million in cash and in-kind was invested in the CHALLENGE since the beginning:
  - 43% from the private sector
  - 31% from community organizations
  - 25% from governments, and the rest from individuals
- 2087 individuals and organizations from every part of this region received CHALLENGE decals for making changes to improve the quality of life

*(Report of Phase One, 2003 to 2006, p. 5)*

QOLC set a target of 1,000 stories shared about local people and groups who have enhanced the quality of life in this region. At the completion of phase one in 2006, 900 stories were collected and disseminated.

## For Further Reading

Vibrant Communities Canada <http://www.vibrantcommunities.ca>

*Vibrant Communities* is a community-driven effort to reduce poverty in Canada by creating partnerships that make use of our most valuable assets – people, organizations, businesses and governments. Visit the Vibrant Communities website to learn more.

Learning Centre, Tamarack – An Institute for Community Engagement

<http://tamarackcommunity.ca/g3s1.html>

The Learning Centre website provides resources about community engagement including many models of engagement, case studies and information about involving different sectors in engagement processes.

*Our Growing Understanding of Community Engagement.* Tamarack – An Institute for Community Engagement [http://tamarackcommunity.ca/downloads/home/ce\\_report.pdf](http://tamarackcommunity.ca/downloads/home/ce_report.pdf)

This article proposes a definition and understanding of engagement and a literature review of models and work of community engagement. Also included are many definitions for key terms used by various agencies and groups. Reviewing these different versions of terminology is useful to aid in understanding of how other groups may use definitions to guide their work in this area.

Mark Cabaj, *Engaging & Animating Your Community: The Potential of Municipally Supported, Collaborative and Comprehensive Community Initiatives.* Tamarack – An Institute for Community Engagement. [http://tamarackcommunity.ca/downloads/clife/mcabaj/mc\\_creativecity.pdf](http://tamarackcommunity.ca/downloads/clife/mcabaj/mc_creativecity.pdf)

This presentation details the value of community engagement and how the current trend of declining engagement is affecting communities. It proposes the model of Comprehensive Community Initiatives as a way to reverse the trends.

*A Bold New Way for People in BC's Capital Region to Work Together: Report of Phase One, 2003 to 2006.* Quality of Life Challenge. [http://www.qolchallenge.ca/pdf/QoLC\\_Phase\\_1\\_%20complete\\_book.pdf](http://www.qolchallenge.ca/pdf/QoLC_Phase_1_%20complete_book.pdf)

This is a report of the Quality of Life Challenge, a part of the Vibrant Communities movement in Canada. This resource gives a practical example of a place-based poverty reduction strategy which uses community engagement as a way to build networks and give low income people a leadership role in community.

Vibrant Communities, *Evaluating Vibrant Communities: 2002 – 2010*. September 2010. [http://tamarackcommunity.ca/g2\\_VC\\_Evaluation.html](http://tamarackcommunity.ca/g2_VC_Evaluation.html)

This recently released Evaluation Report summarizes the results of nine years of comprehensive poverty reduction work undertaken in thirteen communities across Canada.





## Robert D. Putnam and the Saguaro Seminar

### Summary

The Saguaro Seminar measures social capital in the United States using telephone surveys. The data is collected and measured against benchmarks. Some of the questions identified in the telephone survey relate directly to community engagement, while others relate to social capital in general. This data is available through their website.

### Background

Robert D. Putnam has done extensive work around the issue of social capital in the United States. He has written books and articles about the decline of social capital and its implications to the wellbeing of Americans.

The Saguaro Seminar was developed in partnership with Robert D. Putnam, Dr. Thomas H. Sander, Louise Kennedy Converse and The John F. Kennedy School of Government, Harvard. This approach was included because of Putnam's contribution to current thinking about social capital and community engagement, as well as the comprehensiveness of the Saguaro framework.

### Details

“What I claim to have shown so far is that by a variety of different measures there has been a massive transformation of social bonds in America over our lifetime.”

*(Social Capital: Measurements and Consequences, p. 9)*

The term social capital is often used interchangeably with civic engagement, although social capital, by definition, includes both formal and informal relational bonds between neighbours, schools and the community in general. Social capital also describes the amount of trust and acceptance one has of others in the community. Community engagement can be considered a part of social capital because those individuals who: give time and effort; do unpaid activities to enhance their community; or, give back to the community; are considered as contributing to social capital.

The Saguaro seminar measures social capital through surveys. This began with a 25 minute survey, the *2000 Social Capital Community Benchmark Survey*, and was updated for the *2006 Social Capital Community Survey* (also 25 minutes). Later the survey was refined to a 5-10 minute Social Capital Short-Form Survey. A few of the relevant community engagement questions included on the survey are listed below:

- Currently registered to vote
- Voted in last election
- Signed a petition in the past 12 months
- Attended a political meeting or rally in the past 12 months
- Participate in religious organization

- Participate in sports club, league or outdoor activity
- Participate in youth organization
- Participate in parent association or other school support group
- Participate in neighbourhood association
- Participate in a seniors group
- Worked with others to get people to fix or improve something in neighbourhood

Putnam has used the results of the survey to outline the implications or impact of the decline of social capital over the past forty or fifty years. Through Putnam's published work, the impact has been brought to the attention of the nation and beyond. Through the survey results and other tools from the Saguaro website, citizens are able to develop their own programs to work towards enhancing engagement in their communities.

## For Further Reading

The Saguaro Seminar: Civic Engagement in America. Social capital measurement overview:

<http://www.hks.harvard.edu/saguaro/measurement.htm>

This section of the Saguaro website outlines the surveys and methods used to measure social capital. From this resource, readers can also access tools and resources to use for developing programs for enhancing social capital in communities. There are also links to similar work in other countries.

Social Capital Community Survey. 2006 <http://webapps.ropercenter.uconn.edu/CFIDE/roper/collectioninterest/webroot/registration.cfm?subject=SCC06>

This is the full version of the Social Capital Community Survey. This survey includes a 25 minute questionnaire. In order to access this resource, you will need to complete a free registration. There are many questions which relate specifically to engagement, but most others relate to social capital in general.

Robert D. Putnam. *Bowling Alone: The Collapse and Revival of American Community*. New York: Simon & Schuster. 2000

This book follows up and builds on work from a journal article from 1995 *Bowling Alone: America's Declining Social Capital* from the *Journal of Democracy*. Putnam and a team of researchers have produced a wealth of information detailing declining social capital and the implications for communities.

Robert D. Putnam, *Social Capital: Measurements and Consequences*

<http://www.oecd.org/dataoecd/25/6/1825848.pdf>

This conference paper looks at the different measures Putnam has used for tracking social capital in the US. It includes charts which map out the measures. This resource offers useful insight into the decline of engagement in the US.



## Youth Engagement – Laidlaw Foundation

### Summary

The Laidlaw Foundation provides an example of a youth engagement initiative which involves a detailed and well-developed evaluation process to measure the progress and impact of projects. Program and evaluation examples are youth-led. Outcomes are identified and tracked over different periods. The Laidlaw Foundation is a good example of project-based youth leadership and engagement.

### Background

The Laidlaw Foundation was established with an endowment by Mr. Robert A. Laidlaw in 1949 to benefit charitable, educational and cultural organizations in Ontario.

In 1999 the Laidlaw Foundation initiated the Youth Engagement Programme (YEP) to support activities that build knowledge and understanding of positive youth development and effective youth engagement practices. The Foundation funds youth-led engagement initiatives in the Greater Toronto Area.

### Details

The Laidlaw Foundation provides grants for youth-led programs. The main focus of the Foundation since 2000 has been funding youth engagement initiatives. The following is their definition of youth engagement.

#### Definition of Youth Engagement

Youth Engagement is a process of meaningful, voluntary participation of people 12 to 24 years in the decision making and governance of organizations and programs which results in:

- an impact or contribution towards change
- an increase in youth's understanding of what impacts them
- shared power between youth and adults
- youth opinions, perspectives valued
- youth building their vocabulary of experiences

*(Laidlaw Foundation website)*

YEP takes a continuous learning approach to their evaluation. The Laidlaw Foundation encourages grantees to document what works and what doesn't work when engaging youth and looks to build on existing knowledge. YEP hopes to avoid grantees "feeling that evaluation results are interpreted in a pass/fail dichotomy and foster honest assessments for the purpose of learning."

The Laidlaw Foundation YEP objectives are identified for years 1 and 3.

#### Year One Objectives:

- Increase the percent of qualifying Youth-led applications by 25%
- Increase the quality of youth-led applications

#### Year Three Objectives:

- Increase funding to youth-developed and youth-run programmes to 70% of total annual funding
- Increase the number of funded programmes that evaluate whether they are successful or not and why not

For evaluation of these objectives, measures are tracked through standardized tracking forms. Questions on the forms are quantitative, such as the number of youth involved in programs or the number of groups which added youth programs. There are also qualitative questions asking whether youth felt empowered to create change and how they were affected by the programs. Impact of the youth-led programs is a major part of the evaluation.

### For Further Reading

Laidlaw Foundation Website, <http://www.laidlawfdn.org/cms/index.cfm>

The Laidlaw Foundation website explains the history and mandate of the foundation and provides information about projects funded. There are also many documents about the theory and concepts of youth engagement and resources for evaluating youth engagement.

Evaluation Tools, Laidlaw Foundation: <http://laidlawfdn.org/cms/file/children/youth-eval-tools.pdf>

The Laidlaw Foundation website provides several evaluation tools and resources. These resources detail youth engagement strategies, expected outcomes, and examples for designing evaluation forms.



## Community Scales

### Summary

Community Scales use “dimensions of change” to measure the community and systems change that is expected to result in permanent reduction of poverty at the community level. Dimensions of change include: public policy, equity; civic capital; service and support systems; and, economic opportunity. This approach was selected because of the comprehensive approach to measuring progress of programs and community-level change.

### Background

The source of Community Scales is a document entitled *Community Scales: a Ladder for the Twenty-First Century* produced in 1997. “The framework described in this paper was developed through a collaborative effort of the members of the National Community Services Block Grant Monitoring and Assessment Task Force Committee on Scales and Ladders.” (*Community Scales*, p.3) Scales have been adapted for use at the individual or family level and are currently being used by Missouri Community Action Family Self-Sufficiency Scale and Massachusetts Family Self-Sufficiency Scales and Ladders, among others. (*See For Further Readings for details and links.*)

### Details

Community scales are a continuum for measuring community change; “the dimensions for change include public policy, equity, civic capital, service of support systems and economic opportunity” (*Community Scales*, p. 17). The scale thresholds are described simply as: thriving; safe; stable; vulnerable or in crisis. Using an assessment tool, indicators are evaluated based on these thresholds and tracked over time. The following table provides an example of a tool developed from the source document which includes the assessment and later reassessment of the community on five “dimensions of change.”

After assessing a specific community context, such as available affordable housing, the agency identifies targets to work towards outcome indicators to measure progress. After the project is initiated, the agency can use the scaling tool to track changes by comparing the results of the initial assessment through a series of re-assessments. Careful development of the scaling tool is crucial because it becomes the framework to assess community change, plan program interventions, measure incremental progress, and reassess intervention strategies. A useful example of application is shown on page 11 of the document *Community Scales: a Ladder for the Twenty-First Century*.

## Community Scaling Tool

THRESHOLDS		DIMENSIONS				
		PUBLIC POLICY	EQUITY	CIVIC CAPITAL	SERVICE & SUPPORT SYSTEMS	ECONOMIC OPPORTUNITY
5.	Thriving	Innovative	Achieves Equity and Values Differences	Investing	Comprehensive and Integrated	Vibrant
4.	Safe	Supportive	Affirming	Contributory	Preventive	Emerging
3.	Stable	Selective or Reactive	Toleration and Awareness	Participating	Comprehensive but Reactive	Stagnant
2.	Vulnerable	None or Unenforced	Complacent and Uninformed	Awareness and Education	Responsive but not Comprehensive	Contracting
1.	In Crisis	Hostile	Conflict and Fear	Isolation	Non-responsive	Collapsed

(Community Scales, p. 7)

### For Further Reading:

*Community Scales: A Ladder to the Twenty First Century. A Proposal to the Community Services Block Grant Monitoring and Assessment Task Force for Measuring Change at the Community Level.* 1997  
<http://www.roma1.org/files/rtr/communityScale.pdf>

This main source document explains the Community Scales approach, the methods, indicators and measures. This document and the following one, offer the main body of knowledge about scales and how they work.

*Scales, From A to Y: Almost Everything You Ever Wanted to Know but Where Afraid to Ask.*  
 CSBG Monitoring and Assessment Task Force Scales and Ladders Committee. September 1999  
<http://www.roma1.org/files/rtr/scalesA-Ybw.pdf>

This document expands on the first document from 1997. It further explains the use of scales from the individual, community and agency levels.



*Family Self-Sufficiency Scale*. Missouri Community Action. March 1999

[http://www.roma1.org/files/rtr/MO\\_familyscalenewest.doc](http://www.roma1.org/files/rtr/MO_familyscalenewest.doc)

This resource is an example that shows how scales can develop into tailored indicators and programs. The Missouri Family Self-Sufficiency Scale has developed measures at the individual/family level.

*Massachusetts Family Self-Sufficiency Scales and Ladders Assessment Form*

[http://www.roma1.org/files/rtr/MA\\_Scale.doc](http://www.roma1.org/files/rtr/MA_Scale.doc)

This assessment form provides an example of a simple-to-use, checklist evaluation form. The practitioner may use the form to assess a family's situation and to track poverty reduction progress.

## Neighbourhood Vitality Index

### Summary

Neighbourhood Vitality Index measures the overall health and well-being of a community and includes indicators of community engagement. The index consists of a number assigned to each indicator identified during project development. The index can be used to track changes over the long term. This approach is a good example of neighbourhood level measures.

### Background

The Neighbourhood Vitality Index was developed in a report by Sean Meagher called *A Neighbourhood Vitality Index: an Approach to Measuring Neighbourhood Well-Being*. It was prepared for the United Way of Greater Toronto for use in Toronto neighbourhoods. The Strong Neighbourhoods Task Force, a project of the City of Toronto and the United Way of Greater Toronto with support of the provincial and federal governments, also measures neighbourhood vitality.

### Details

Neighbourhood Vitality bases their framework on the ideas from National Neighbourhood Indicators Partnership (NNIP) and the document, *Building and Operating Neighborhood Indicator Systems: A Guidebook*.

Examples of measures relevant to engagement:

- Neighbourhood Conditions
- Connection to Community Services
- Business Connection
- Participation in Community Structures
- Access to Community Facilities
- Collective Efficacy
- Demographic Cohesion

### For Further Reading

Sean Meagher, *A Neighbourhood Vitality Index: An Approach to Measuring Neighbourhood Well-Being, An Action for Neighbourhood Change Report for the United Way of Greater Toronto*. 2006  
<http://www.publicinterest.ca/sites/default/files/T&R%20Vitality%20Index.pdf>

This foundational document explains the Neighbourhood Vitality Index approach and details the full list of indicators. Included is a sample survey for gathering data at the institutional level.





Geoffrey Dobilas and Fraser Battye, *Measuring Neighbourhood Vitality: Final Report*.

GHK International (Canada) Ltd. January 2005

[http://www.urbancentre.utoronto.ca/pdfs/curp/SNTF\\_Neigh-Vitality\\_RP3.pdf](http://www.urbancentre.utoronto.ca/pdfs/curp/SNTF_Neigh-Vitality_RP3.pdf)

This report was developed for the “Strong Neighbourhoods Task Force: to develop a Neighbourhood Vitality Tool for Toronto neighbourhoods.” In the document is the framework for using Neighbourhood Vitality measures and Neighbourhood Vitality indicators which have been developed for 140 Toronto Neighbourhoods. It explores what other jurisdictions have done around neighbourhood indicators. It also reports on the measurement results of Toronto neighbourhoods.

G. Thomas Kingsley (ed.), *Building and Operating Neighborhood Indicator Systems: A Guidebook*.

National Neighborhood Indicators Partnership. March 1999

<http://www2.urban.org/nnip/pdf/guidebk.pdf>

This source document provides the framework for developing neighbourhood indicators used in the index. It is useful to understand the theory behind indicators and how to developing indicators which are relevant to neighbourhoods.

## Canadian Index of Wellbeing

### Community Vitality and Civic Engagement

#### Summary

The Institute of Well-being has identified several indicators for measuring well-being in Canada. The Canadian Index of wellbeing is currently a reporting strategy but future plans include influencing community change efforts. This approach is included because it uses a new set of indicators and domains of focus.

#### Background

The Canadian Index of Well-being was launched in June 2009 and was developed by the Institute of Wellbeing. The Institute describes itself as independent and non-partisan. The Atkinson Charitable Foundation began preliminary work on developing an index in 1999 and continues to support the project. The Canadian Research Advisory Group was established in 2004 to assist in the development of the Canadian Index of Wellbeing.

#### Details

The Institute of Wellbeing tracks wellbeing indicators, documents trends over time and reports its findings to the public:

“The CIW will track Canada’s progress and provide a set of indicators in eight interconnected categories that will enable us to see whether we are better or worse off than we used to be, whether we will leave the world a better or worse place for the generations that follow, and what we need to change to achieve a better outcome.”

*(The Institute of Wellbeing website, About the Institute)*

The Canadian Index of Well-being is intended to be a source of information to Canadians about wellbeing in general. Although much data is collected from community level indicators, this data is aggregated to the National level. Categories that are being tracked include:

- Arts, Culture and Recreation
- Civic Engagement
- Community vitality
- Education
- Environment
- Healthy Populations
- Living Standards
- Time Use



On their website CIW explains that civic engagement:

“...measures the participation of citizens in public life and in governance; the functioning of Canadian governments with respect to openness, transparency, effectiveness, fairness, equity and accessibility; and the role Canadians and their institutions play as global citizens.”

These categories are considered to be interconnecting and are still in development. Engagement in communities will fall under both civic engagement and community vitality. Currently, civic engagement reports and indicators are not available. The community vitality domain has several indicators of engagement including:

- participation in group activities
- volunteering
- belonging to community
- Charitable giving
- Number of close neighbours
- Help received, close friends
- Bridging ties – scale of importance about maintaining ties with those of other ethnic background

The Institute of Well-being explains the domain of community vitality as, measuring, “the strength, activity and inclusiveness of relationships among residents, private sector, public sector and voluntary organizations.” (*The data used is from Statistics Canada.*)

### **For Further Reading:**

Katherine Scott, *Community Vitality: a Report of the Institute of Wellbeing*. June 2009

[http://ciw.ca/Libraries/Documents/CommunityVitality\\_DomainReport.sflb.ashx](http://ciw.ca/Libraries/Documents/CommunityVitality_DomainReport.sflb.ashx)

This is a report of the Community Vitality Domain of the Index of Wellbeing. It explains the framework for evaluation and how the indicators are measured.

The Canadian Index of Wellbeing website: <http://www.ciw.ca/en/TheCanadianIndexOfWellbeing.aspx>

This is the Institute of Wellbeing website which includes the history of the Institute and reports on community vitality. When it becomes available, the civic engagement report will be posted on this site.

## Section Five: Approaches to Measuring More Collaboration in Communities

### Overview

Collaboration is the collective effort of a group of diverse individuals, organizations and/or sectors working together for a common purpose. More than just a working group, collaboration implies that the stakeholders are coming together from different places to accomplish something more significant collectively than that which could be accomplished individually.

Collaboration can occur in a single organization or sector, or may cross many different sectors. In the Vibrant Communities example, collaboration specifically includes multi-sector partners and focuses on the engagement of government agencies, voluntary sector organizations, businesses, and citizens, including individuals living with low income, to work together to reduce poverty. Of course, not all collaboration works to reduce poverty. This section of the paper focuses on researching tools which measure more collaboration through the lens of healthy and vibrant communities.

The purpose of this section is to review and describe different approaches that organizations and governments have used to measure more collaboration in communities. More collaboration in communities can be measured in many different ways. The measurement approaches detailed in this section did not use a consistent methodology, and instead, developed customized measures versus using a set of easily recognized indicators.

There are significant challenges in measuring more collaboration in communities. Most examples provided measure the impact of the collaborative effort from the perspective of the individuals involved but often don't measure the overall impact on communities of multiple collaborative efforts.

Most approaches to evaluating collaboratives measure the value and success rather than measuring:

- Increasing collaboration in communities or groups
- Numbers of pre-existing collaborations or collaborative projects
- The collective community impact of multiple collaborative efforts

Self-assessment tools seem to be the approach used most often for measuring collaboration. The Collaboration Factors Inventory and Partnership Self-Assessment attempts to capture the amount of collaboration and level of cooperation occurring within a single collaborative group. The Vibrant Communities example measures collaboration in terms of numerical data; quantifying both the collaborative effort and impact on individuals.



Other significant themes from the examples provided include:

- More than half of these approaches use subjective questions like thoughts, feelings and opinions, to evaluate through feedback either in self-evaluation or external evaluation
- More than half also used standardized measures (measures all projects with same criteria)
- More than half used community specific measures (developed by initiative) either with standardized measures or exclusive to other measures
- All the examples used at least some of their own data with only one including national statistical data (The most common approach to measuring collaborations involves an internal versus external or community perspective)
- Only two of the approaches attempted to measure the impact or long-term effects of their collaboration
- Only two approaches were specifically multi-sector

## Summaries: Approaches to Measuring More Collaboration in Communities

### Vibrant Communities Canada

#### Summary

Vibrant Communities are comprehensive, place-based community initiatives focused on poverty reduction. Vibrant Communities uses a framework for change when developing a community plan or strategies focused on poverty reduction. Each framework for change details the economic, social and systems change initiatives meant to reduce poverty in the specific community or neighbourhood. The Vibrant Communities model focuses on poverty reduction, cross-sector community engagement, leveraging community assets, an active action and learning process and on-going evaluation.

#### Background

Vibrant Communities began in 2002 as a community-driven initiative for reducing poverty in Canada. Its national sponsors are: The J.W. McConnell Family Foundation, Caledon Institute of Social Policy and Tamarack – An Institute for Community Engagement. Vibrant Communities is a network of twelve initiatives across Canada. Vibrant Communities Trail Builders are collaborative, place-based initiatives currently implementing multi-year programs and strategies to reduce poverty.

#### Details

Each Vibrant Communities Trail Builder initiative is developed by a local community collaborative planning table. Each community is also encouraged to develop its own indicators for measuring community change and progress around poverty reduction. Vibrant Communities Canada has also developed a number of cross-community or proxy indicators. Since each community approach is unique, Trail Builder Communities report on a variety of indicators including changes in income, education levels, housing and financial assets and changes in the collaborative structure including the engagement of multi-sector partners.

**“Vibrant Communities is a community-driven effort to reduce poverty in Canada by creating partnerships that make use of our most valuable assets – people, organizations, businesses and governments.”**

*(Vibrant Communities Website)*

Vibrant Communities measure progress of collaboration by both the number of connections made and the results-based outcomes of the collaborative. Trail Builder communities submit regular reports to the sponsors of Vibrant Communities.

Trail Builders are asked to examine the contributions their collaborations make to advancing specific strategies or projects. A key element of the Vibrant Communities model is multi-sector engagement around the issue of poverty and tracking collaborative partnerships is an important part of the evaluation. The table below is a sample partnership tracking tool used by Trail Builder initiatives.



Vibrant communities also have partnership targets which are used to measure and evaluate the program. The partners working with the initiative may be contributing by:

- Serving on the initiative's governing body
- Providing funding or in-kind support to the convenor group or its partners
- Implementing a poverty reduction initiative
- Providing technical knowledge/expertise
- Using influence to advance the initiative's work
- Organizing community members to make things happen

### Partnership Tracking Tool

Sector	# of Partners	Breakdown
Government		Federal – Provincial – Regional – Municipal – First Nations –
Business		
Non-profit		
Low-Income		
Interested Citizens		

### For Further Reading:

*Learning and Evaluation for Trail Builder Initiatives in Vibrant Communities*. February 2005  
<http://tamarackcommunity.ca/downloads/vc/TBpackage.pdf>

This resource describes the three streams of evaluation which Vibrant Communities are using for evaluation: Community Approach; Strategies and Projects; and, Reporting and Dissemination. Included is information about the Theory of Change and Developmental Evaluation.

Evaluation and Learning, Vibrant Communities <http://tamarackcommunity.ca/g2s34.html>

The Vibrant Communities website includes Trail Builders Community updates which details progress is being made toward poverty reduction goals in communities across Canada.

Born, Paul (ed.). *Creating Vibrant Communities: How Individuals and Organizations from Diverse Sectors of Society are Coming Together to Reduce Poverty in Canada*. Toronto: BPS Books. 2008

This book thoroughly describes the Vibrant Communities approach to poverty reduction, the evaluation framework, and provides case examples from Trail Builder communities across Canada.

Vibrant Communities, *Evaluating Vibrant Communities: 2002 – 2010*. September 2010.  
[http://tamarackcommunity.ca/g2\\_VC\\_Evaluation.html](http://tamarackcommunity.ca/g2_VC_Evaluation.html)

This recently released Evaluation Report summarizes the results of nine years of comprehensive poverty reduction work undertaken in thirteen communities across Canada.

## The Community Collaboration Project

### Summary

The Rural Development Institute and Brandon University in Manitoba developed the Community Collaboration Project (CCP) to increase capacity and governance in rural communities. Measures used to evaluate each collaborative were developed by each group. Indicators were chosen at the beginning of the project based on both quantitative and qualitative measures. These measures were expected to be updated over time. Data was collected from diverse sources and reviewed by the Rural Development Institute and each regional roundtable.

### Background

The Rural Development Institute and Brandon University engaged in the Community Collaboration Project: Empowering Communities and Building Capacity, from 2005 – 2008. This project was funded through the Government of Canada's Rural Secretariat, Agriculture and Agri-Food Canada. The Community Collaboration Project (CCP) was initiated in 1999 in Manitoba and Nunavut as a collaborative arrangement between communities in four regions of Manitoba and the Kivalliq region of Nunavut, federal, provincial and territorial government departments and agencies, non-government organizations and Rural Development Institute (RDI) of Brandon University. (*Fact Sheet, 2007*)

### Details

The Community Collaboration Project (CCP) focused only on rural collaboration projects, including multi-community collaborations. Because of the lack of resources rural communities face, the collaboration efforts, in many cases, brought together individuals and groups to address diverse planning, economic development and infrastructure issues, among others. CCP provided opportunities for new forms of collaboration and governance.

**With access to the appropriate tools, resources and information, individuals living in rural and northern communities can engage in self-sustaining, informed, local decision-making and meaningful dialogue between and among communities, organizations and governments.**

In evaluating and measuring individual collaboration projects, the Rural Development Institute established a framework for evaluation using a Logic Model and Participatory Evaluation. Each project was also provided with a comprehensive evaluation handbook. The annotated list below provides detailed information about the specific projects.

The handbook stressed the importance of establishing a baseline before the project begins in order to measure progress. Specific indicators were developed by each project. According to the Handbook, the indicators to be selected should be a combination of quantitative measures (have a numerical value) and qualitative measures (reflect perceptions, judgments or attitudes).





The final list of indicators should be a balanced mix of quantitative and qualitative measures so that a more realistic picture of what has happened is described.

When developing indicators, thought should be given to:

- data availability and data collection: what is possible with the resources available;
- attribution: measuring results that can be reasonably attributed to the group's activities;
- usefulness: potential use of evaluation findings while taking into account the importance of ensuring that the captured information is relevant; and
- Simplicity: two-three indicators per outcome (make sure the evaluation process isn't guiding the group instead of the group guiding the evaluation)."

(*Evaluation Handbook*, p. 30)

The Evaluation Handbook also advised that the indicators selected should be of a quantity and type that would be manageable for the number of stakeholders and must also be relevant to at least one stakeholder.

This approach recommended that the regional round table, advisory group, Rural Development Institute and University partners should decide on the best way to collect information based on the individual group itself and their comfort level with particular tools, resources available, cultural aspects, language, etc. The data was to be collected from a wide variety of sources; from meeting minutes and personal accounts to Statistics Canada data. Data collection for the indicators was the combined responsibility of Rural Development Institute and the Regional Roundtable.

## For Further Reading

Marian Beattie and Robert C. Annis, *The Community Collaboration Story, Community Collaboration Project: Empowering Communities & Building Capacity, 2005–2008* (CCP Model Project). Rural Development Institute, Brandon University. <http://www2.brandonu.ca/organizations/rdi/Publications/CCP/CommCollabModelFinalReport-Nov2008.pdf>

The Community Collaboration Story is the final report of the CCP project including information about participant roundtable groups. The Community Collaboration Story shares lessons learned about the different models and extensive details on several of the actual roundtable projects. For a shorter presentation with the essence of what was learned see the document *Rural Matters! Forging Healthy Canadian Communities*, July 2008 at <http://www2.brandonu.ca/rdi/Publications/CCP/CommCollabStory-RuralMattersPresentation.pdf>

Fact Sheet: Community Collaboration Project (CCP): Empowering Communities and Building Capacity 2005-2008:

[http://www2.brandonu.ca/rdi/Factsheets/CCP\\_ModelsProjectFactsheet-July2007.pdf](http://www2.brandonu.ca/rdi/Factsheets/CCP_ModelsProjectFactsheet-July2007.pdf)

This fact sheet offers a quick overview of the CCP. It explains the collaboration model and provides details of two regional roundtables: Waterwolf Region and Yukon Region.

*CCP Process Handbook*. 2006:

[http://www2.brandonu.ca/rdi/Publications/CCP/CCP\\_ProcessHandbook.pdf](http://www2.brandonu.ca/rdi/Publications/CCP/CCP_ProcessHandbook.pdf)

This handbook was produced for the roundtable groups participating in the CCP. The bulk of this document is a set of useful tools for collecting information and planning projects. Included are a blank Logic Model template and other tools and worksheets for designing, tracking and evaluating each project. This resource provides sample tools which may be adapted for other collaborative initiatives.

Rural Development Institute, Community Collaboration Project Website

<http://www2.brandonu.ca/rdi/ccp.asp>

This website offers links to actual examples of CCP projects and other resources and publications of the Rural Development Institute. Although the project ended in 2008, there are a lot of valuable resources available about this project and others.



## Partnership Self-Assessment Tool

### Summary

The Partnership Self-Assessment Tool, developed by the Centre for the Advancement of Collaborative Strategies in Health, consists of a questionnaire for participants involved in a collaborative planning process which evaluates the collaborative project after it has been completed. It is designed to be completed by participants from within the project to measure the strength of the partnership's level of collaboration and the success of working together.

### Background

The Partnership Self-Assessment Tool is a free product of the Centre for the Advancement of Collaborative Strategies in Health – The New York Academy of Medicine. In 2001, the Center conducted the National Study of Partnership Functioning, a rigorous, evidence based study of partnerships throughout the United States which led to the development of the Partnership Self-Assessment Tool.

### Details

The National Study of Partnership Functioning looked at 63 partnerships throughout the United States. It was designed to determine the extent to which partnerships achieve synergy. According to the study, partnerships with a high level of synergy have a special kind of leadership. This special kind of leadership relationship promoted productive interactions and the ability to efficiently use resources to achieve change. The National Study of Partnership Functioning called this *partnership efficiency*.

The Partnership Self-Assessment Tool can be used to uncover the partnership's strengths and weaknesses in areas that are known to be related to:

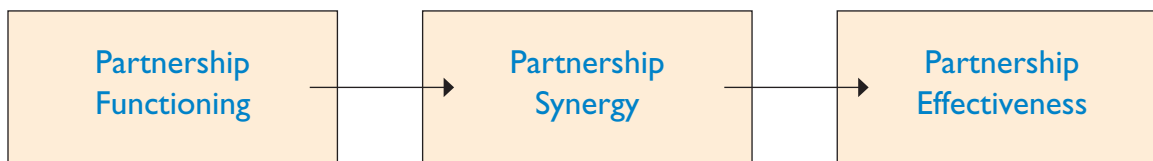
- Synergy – leadership
- Efficiency
- Administration and management
- Sufficiency of resources (financial and non-financial)

Synergy is a key indicator of a successful collaborative process because it reflects the extent to which the partnership can do more than any of its individual participants. Put another way, a partnership's level of synergy indicates the extent to which the partnership, as a whole, is greater than the sum of its parts.

(Tool Report)

The Partnership Self-Assessment Tool also measures the partners' perspectives about the partnership's decision-making process, the benefits and drawbacks of participating in the partnership and their overall satisfaction with the partnership.

## Synergy: The unique advantage of collaboration



(adapted from *Partnership Synergy*, p. 184)

Measuring the collaboration's effectiveness is gathered through of a self-assessment questionnaire which must be completed within 30 days of distribution. The Partnership Self-Assessment Tool suggests that 65% of questionnaires must be completed for a valid result. The Partnership Self Assessment Tool is now only available in a print format. The website provides an evaluation guide for organizations to successfully use the tool.

The primary function of this tool is to assess how well the collaboration worked. It is a self-assessment tool of the collaborative experience rather than an independent evaluation of the collaborative results and, as such, it measures only the value and success of a specific collaborative planning process from the experience of the participants in that process.

## For Further Reading

Partnership Self-Assessment Tool, *Center for the Advancement of Collaborative Strategies in Health*: <http://partnershiptool.net/>

This is the website of the Partnership Self-Assessment Tool. There are instructions provided to guide you through the process and assess results.

Roz Lasker, Rebecca Miller, and Elisa Weiss, *Partnership Synergy: A Practical Framework for Studying and Strengthening the Collaborative Advantage*. The Milbank Quarterly. June 2001. V: 79, 179-206. <http://cacsh.org/pdf/milq792.pdf>

This paper explains the framework used to determine a successful partnership and how to improve existing partnerships. This article also defines the concept of partnership synergy, its value and how it is achieved. The theory behind the Partnership Self-Assessment Tool is also described in this paper.

The Center for the Advancement of Collaborative Strategies in Health – Website  
<http://cacsh.org/index.html>

This website details the functions of the Center and includes links to other resources. The Center states that they create models which “conceptualize – in a measurable way – how collaboration strengthens the ability of a group to identify, understand, and solve complex problems.”



## Evaluating Collaboratives

### Summary

The University of Wisconsin – Extension, has developed a framework for the evaluation of collaboratives based on their experiences working with groups and group processes for several years. This approach provides guidelines for developing indicators and measures based on identifying the desired outcomes of the project using a logic model approach.

### Background

Evaluating Collaboratives is a manual produced by the University of Wisconsin – Extension, Program Development and Evaluation. A description of the work of the Program Development and Evaluation Unit is to provide training and technical assistance to enable Cooperative Extension campus and community-based faculty and staff to plan, implement and evaluate high quality educational programs.

### Details

The University of Wisconsin – Extension produced the resource *Evaluating Collaboratives, Reaching the Potential* in 1998 which states:

“Readers looking for a ‘cookbook’ or ‘best method’ for evaluating collaboratives will be disappointed. Our purpose is to provide a compendium of ideas and research for you to think about and choose from as you help your collaborative reach its potential”

*(Evaluating Collaboratives, Reaching the Potential, p. 1)*

In this approach, the collaborative group will need to identify the specific outcomes they are trying to achieve. It is through this part of program planning design that the group defines the indicators and measures for those outcomes.

Determining the desired outcome and developing a set of indicators to measure progress and achievement of the outcome can be uncovered through the following questions which can be used as evaluative questions after the program begins:

#### Typical Questions

- Has anything improved as a result of our work? Changed? What? How? For whom?
- To what extent are we achieving desired outcomes? Keeping our promise?
- What difference has resulted from our working as a collaborative?
- Was the collaborative effort worth the time and costs to achieve its results?

Final outcomes or impact refers to the highest level outcome. These results usually take a long time to achieve and have wider socioeconomic and /or environmental benefit. Outcome assessment focuses on two components including changes to individuals, families, groups, organizations, systems, or communities and the value that is added as a result of the collaborative process.

The *Evaluating Collaboratives: Reaching the Potential* resource provides useful information about developing and measuring outcomes.

## For Further Reading

Ellen Taylor-Powell, Boyd Rossing and Jean Geran, *Evaluating Collaboratives: Reaching the Potential*. 1998 <http://learningstore.uwex.edu/pdf/G3658-8.PDF>

This paper is the result of several years of group discussion and information gathering about how to evaluate collaboratives aimed at filling the gap left when traditional evaluations were not working well to evaluate them. The document also includes worksheets and tools which may be adapted to many projects.

University of Wisconsin – Extension, Program Development and Evaluation, Evaluation <http://www.uwex.edu/ces/pdande/evaluation/index.html>

The University of Wisconsin – Extension, Program Development and Evaluation website contains a wealth of resources to understand the types of models and tools this program is using for evaluations.

*Evaluating Collaboratives, National Extension Family Life Specialists Conference*. April 2005 [http://www.uwex.edu/ces/pdande/evaluation/powerpt/05aprilconfcollaboratives.ppt#347,1,Evaluating Collaboration](http://www.uwex.edu/ces/pdande/evaluation/powerpt/05aprilconfcollaboratives.ppt#347,1,Evaluating%20Collaboration)

This is a presentation is an overview of the evaluation process for the collaborations discussed above.



## Evaluating Community Collaboratives

### Summary

Tom Wolff & Associates have developed survey tools which measure and analyze collaborative groups on a variety of attributes including the group's structure, inclusivity effectiveness and communication. This website provides free tools and surveys to assist groups in assessing themselves.

### Background

Tom Wolff is a US-based consultant on coalition building and community development. He has over 30 years of experience training and consulting with diverse groups including communities, individuals and organizations.

### Details

This approach enables the evaluation to be conducted by either the group or an external evaluator. Wolff stresses that the collaborative group will be able to integrate evaluation processes into their regular operations. The collaboration is the primary consumer of the evaluation, and therefore the collaborative group needs to be heavily engaged and invested in the evaluation process.

### Evaluation Breakdown

Type of Evaluation	Main Question	Focus	Methodology
Process	What activities took place?	<ul style="list-style-type: none"> <li>day-to-day activities of your collaboration</li> </ul>	<ul style="list-style-type: none"> <li>activity logs</li> <li>surveys</li> <li>interviews</li> </ul>
Outcome	What was accomplished?	<ul style="list-style-type: none"> <li>accomplishments</li> <li>number and type of changes in policies or practices in the community</li> <li>development of new services.</li> </ul>	<ul style="list-style-type: none"> <li>surveys of self-reported behaviour changes</li> <li>surveys rating significance of outcomes</li> <li>number of objectives met</li> </ul>
Impact	What were the long-term effects?	<ul style="list-style-type: none"> <li>impacts on the community</li> <li>over and above specific outcomes</li> </ul>	<ul style="list-style-type: none"> <li>Statistical Indicators</li> </ul>

*(Information used from Evaluating Community Collaboratives, p. 5)*

Information is gathered using a variety of surveys, charts and checklists by the group. A sample of the surveys and attributes measured appear below:

- Group Satisfaction Survey
- Assessing the Group including:
  - Clarity of coalition’s vision and goals
  - Effectiveness of outreach & communication
  - Opportunities for responsibility/growth for members
  - Effectiveness in doing projects
  - Use of research and external sources
  - Sense of community within group
  - Relationship of group with elected officials, and other external leaders
- Climate Diagnostic Tool: The Six R’s of Participation (recognition, respect, role, relationship, reward, results)
- Inclusivity Checklist
- Sustainability Benchmarks

### For Further Reading

Tom Wolff, *A Practical Approach to Evaluating Coalitions*. T. Backer (Ed.), *Evaluating Community Collaborations*. Springer Publishing. 2002 <http://www.tomwolff.com/resources/backer.pdf>

This is the fourth chapter in the book entitled *Evaluating Community Collaborations*. This chapter is available online with the extensive worksheets and surveys which makes this an extremely useful tool.

Tom Wolff – Website <http://www.tomwolff.com/>

The Tom Wolff and Associates website provides an overview of their work on building collaborations and coalitions, plus access to resources and research publications. Also accessible from this website are bi-annual newsletters, and under the tools tab, are assessment tools for groups.





## Collaboration Factors Inventory

### Summary

The Amherst H. Wilder Foundation Collaboration Factors Inventory is an online tool which evaluates collaborative efforts through a questionnaire which is completed by participants. The tool automatically calculates a score based on the responses by a group or individuals in the group. This score can be used to guide the collaborative understanding of the process they are/were involved in. This is a free and easy to use tool.

### Background

The Amherst H. Wilder Foundation is a non-profit health and human services organization founded by Amherst H. Wilder and family. Wilder Research is a non-profit research and evaluation group dedicated to practical research in the field of human services and part of the Amherst H. Wilder Foundation.

### Details

The Wilder Collaboration Factors Inventory is an online questionnaire which measures collaboration at the following levels:

- The effectiveness of a group, including leadership, decision-making ability and ability to achieve goals
- The level of collaboration achieved within the group
- The group members belief in the credibility and image of the collaborative within the greater community

The questionnaire can be completed at any stage of the collaboration, although some questions may seem less applicable at the onset because no opinion or data may be available yet. After completing the questions, a report is generated with a score for each of the 20 factors.

The report generated by the online tool can then be used in dialogue with the group to build on strengths and develop weaker areas. Although this tool may be used by an individual, a better result will be found when a good portion of the group members complete the assessment. The following figure provides a sample of a completed report with the factors and scores listed.

For the best interpretation of the scores, the creators recommend purchasing the book, *Collaboration: What Makes It Work (2<sup>nd</sup> Ed.)*.

## Sample Report

### Collaboration Factors Inventory

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Thank you for completing the inventory!

The figures below show your average score on each of 20 factors. Averages can range from 1 to 5. To better interpret your scores, refer to [Collaboration: What Makes It Work, Second Edition](#). If you do not own this publication, you may purchase it online by clicking on the link.

**Bookmark this page to return to these scores later** (please note that old scores may occasionally be cleared from this database). You may also print these summary scores or [your individual item responses](#) if you prefer.

Factor	Factor Average
History of collaboration or cooperation in the community	4.0
Collaborative group seen as a legitimate leader in the community	2.5
Favorable political and social climate	5.0
Mutual respect, understanding, and trust	4.5
Appropriate cross section of members	3.5
Members see collaboration as in their self-interest	4.0
Ability to compromise	2.0
Members share a stake in both process and outcome	4.7
Multiple layers of decision-making	2.0
Flexibility	4.0
Development of clear roles and policy guidelines	2.5
Adaptability	2.5
Appropriate pace of development	3.5
Open and frequent communication	3.7
Established informal relationships and communications links	4.0
Concrete, attainable goals and objectives	4.3
Shared vision	4.0
Unique purpose	5.0
Sufficient funds, staff, materials, and time	3.0
Skilled leadership	4.0

What is working well in your collaborative? (optional)

*communication, dedication*

What needs improvement in your collaborative? (optional)

*clear leadership, more connections*

*As a general rule...*

Scores of 4.0 to 5.0 - strengths, don't need attention

Scores of 3.0 to 3.9 - borderline, deserve discussion

Scores of 1.0 to 2.9 - concerns that should be addressed

*Other helpful Wilder sites:*

[Twin Cities Compass](#) | [Wilder Research](#) | [Amherst H. Wilder Foundation](#) | [Executive Summary blog](#) | [Community DataWorks](#)

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## For Further Reading

Wilder Collaboration Factors Inventory <http://wilderresearch.org/tools/cfi/index.php>

This is an online tool for assessing a collaborative group. Groups can register for this assessment, then members can complete the online questions, and when finished, the tool will generate a report with scores on different attributes within group work. There are 42 questions to be completed which rate the collaboration.



Wilder Research <http://www.wilder.org/research.0.html>

This is the Wilder Research section of the Amherst H. Wilder Foundation website. There are a number of articles and publications available on topics such as collaboration, engagement and evaluation.

Can This Collaboration Be Saved? <http://www.nhi.org/online/issues/129/savecollab.html>

In *Collaboration: What Makes It Work*, twenty factors proven to make or break a group effort are identified. Those factors fall into six categories including general environment, membership, structure and process, communication, purpose and resources.

## Collaborative Learning and Innovation

### Summary

Collaborative Learning and Innovation determines the level of social capital within groups as a measure of more collaboration. This approach offers a unique perspective on collaboration. This study may serve as an example to help build collaborative efforts.

### Background

Ann Svendsen is the executive director of Collaborative Learning and Innovation Group (CLI) of the Centre for Sustainable Community Development at Simon Fraser University.

### Details

Svendsen and Boutilier developed metrics used to evaluate a particular collaboration in Clayoquot Sound. These metrics provide a useful continuum:

Confrontation → Power → Struggle → Exploration → Cooperation Collaboration<sup>3</sup>

Svendsen and Boutilier documented the journey from conflict to collaboration among multiple groups in Clayoquot, including environmental non-governmental organizations (NGOs), First Nations, and the logging industry, and evaluated the process using a series of surveys, meetings and interviews. Among their findings were measures of more collaboration in the community including:

- Increased social capital – more specifically building/developing trust between the groups
- Increased networks between the groups through bridging and bonding relationships
- Shared meaning, norms and values

This approach offers another way to look at more collaboration from the perspective of building networks and social capital between groups. The source document in the reading list provides comprehensive information about the study.



## For Further Reading

Collaborative Learning and Innovation, Simon Fraser University:

<http://www.sfu.ca/cscd/cli/default.htm>

The CLI website provides several publications and resources on topics such as collaborative processes, engagement, building social capital and co-creative engagement.

Robert G. Boutilier and Ann C. Svendsen, *From Conflict to Collaboration: Stakeholder Bridging and Bonding in Clayoquot Sound*. 2000

<http://www.cim.sfu.ca/folders/research/8%20-%20Conflict%20to%20Collab%20Jan%2016.pdf>

This document details the study completed by Boutilier and Svendsen. The authors explain the concepts of bridging and bonding in relationships between groups that are useful for building collaborative relationships between conflicting groups. The authors break down the stages into manageable parts detailing the process which took place between the main stakeholders.

## Section Six: Conclusions, Reflections and Final Thoughts

Each of the sections of this consolidated paper provide insights into different tools and approaches used by organizations to measure community change across four aspects – less poverty, more vibrant communities, more engaged citizens and more collaboration. The various tools sourced in this paper are not a comprehensive list of all the measurement tools available but do provide a variety of different approaches which organizations can use to measure change.

Measuring collaborative community change efforts focused on a complex issue such as poverty is a challenging task. There are multiple players in the collaborative with different expectations. And measuring the change or impact on the complex issue is an equally challenging task. In the case of poverty, there are a number of inter-related root causes which may include access to secure income, housing, food, and community safety.

The tools used to measure change must be consistent with the activities undertaken by the collaborative planning table but also be resilient enough to measure shifts in the short term and over longer time horizons.

### Reflection Questions:

Reviewing each of the tools prompted a number of questions which should be considered.

#### **Approaches to Measuring Less Poverty in Communities: Reflection Questions**

- Is it possible that data which is now aggregated to city-wide statistics (through Statistics Canada) can be made more available to communities, using a smaller boundary, such as CDA (Census Dissemination Area)? Access to neighbourhood-based information and indicators can drive significant community change efforts.
- What are the minimum number and range of indicators which will effectively measure less poverty in communities?
- Can a set of standard indicators be identified to effectively measure poverty reduction?
- Will these standard indicators need to be augmented by community-specific or community-relevant indicators to truly understand local poverty reduction progress?
- Are there additional indicator approaches for measuring less poverty that should be considered and included in future papers?

#### **Approaches to Measuring More Vibrant Communities: Reflection Questions**

- Why is *poverty* the only common indicator across all these approaches when measuring more vibrant communities?
- What are the implications of poverty as an indicator for communities seeking to measure wellbeing?



- Should more subjective measures of wellbeing be included since citizen opinion may be an important part of determining community wellbeing?

Why are so few groups including indicators that review:

- Racial/ethnic relations
  - The built environment within neighbourhoods, including access to transportation, walkability, parks and neighbourhood degradation
  - Human services collaboration and capacity
- Can consensus be developed about community wellbeing, the relevant indicators and how community wellbeing is measured?

### **Approaches to Measuring More Community Engagement: Reflection Questions**

- Why are the indicators for measuring community engagement so diverse, and why is there no real consensus about the measures?
- How can we begin to identify the important, universal indicators that must be present when measuring engaged communities?
- Why meaningful decision-making is not considered a measure in most of these approaches?
- How do we determine effective citizen engagement? Is there a recipe?

### **Approaches to Measuring More Collaboration in Communities: Reflection Questions**

- Are there communities measuring the collective efforts and impacts of multiple collaborative planning processes and the effectiveness of the community's ability to solve social problems?
- Why are there so few examples using quantitative data for measuring collaboration or greater collaboration?
- Are there benchmarking tools which determine where and what collaborations are occurring in communities and how they can be tracked?

## **Final Thoughts**

This is a living document. We invite you to contribute your thoughts and perspectives as well as tools and approaches which you have found to be particularly useful in measuring community change. Please email us at [tamarack@tamarackcommunity.ca](mailto:tamarack@tamarackcommunity.ca) with your suggestions and ideas.







