9.1. A Brief History of Social and Community Indicators[2]

Over the course of the 20th century, there has been a steady pattern of creating and re-evaluating measurements of human activity depending on what we wish to better assess and manage.

The history and politics of an internationally accepted and standardized system of measuring Gross Domestic Product, undoubtedly the most commonly used indicator, is fascinating. By the end of World War I, most first world nations had some sort of systematized estimates of national income. By 1932 the United States had begun the process of producing annual accounting reports of national income, but federal budget expenditures did not square with these calculations. By 1939, John Meynard Keynes had developed a mechanism through which one could more accurately assess the capacity to pay for the next outbreak of war, which had just emerged. Established in 1953, the internally accepted code for measuring progress, the United Nations System of National Accounts, has remained virtually unchanged in its conceptual architecture. Since that time, the main newcomer to the pool of economic indicators has been stock market indices. In Canada, the Toronto Stock Exchange Index, commonly known as the TSE 300, was only created in 1977, but has since become accepted as a major bell wether of the economy's energy.

What of non-monetary measures? Wesley Clair Mitchell was the economist who first undertook the study of business cycles in the U.S. He commissioned "Recent Social Trends" on behalf of the federal government in 1929, which was produced for the Hoover administration in 1933 by University of Chicago sociologist William Ogburn.

Interest in social indicators was revived around 1960 as NASA worried about the impact of the space program on specific programs and policies, public attitudes, and social change. In 1966, a massive publication called Social Indicators was published, edited by Raymond Bauer. Bauer

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[2] Sources for this section: Marilyn Waring, *If Women Counted*, New York: Harper & Row, 1988; Marc Miringoff, Marque-Luisa Miringoff, and Sandra Opdycke in *Children, Families and Government: Preparing for the Twenty-First Century*, Edited by Edward F. Zigler, Sharon Lynn Kagan and Nancy W. Hall, Cambridge University, 1996; *Measuring Well-being: Proceedings from a Symposium on Social Indicators*, Ottawa: Canadian Council on Social Development (CCSD), November 1996; Andrew Sharpe *A Survey of Indicators of Economic and Social Well-being*, Background Paper for the Canadian Policy Research Networks, Ottawa, 1999

defined social indicators as “statistics, statistical series, and all other forms of evidence that enable us to assess where we stand and are going with respect to our values and goals”. [3]

In 1967 Senator Walter Mondale proposed legislation calling for a Council of Social Advisors, a national system of “social accounting” and an Annual Social Report, structurally parallel to the existing federal mechanisms for economic reporting. The bill never passed. However the Bureau of the Census produced the Social Indicators report in 1973, 1976 and 1980. It was discontinued by the Reagan administration.

By the 1970s, a Social Science Research Council Centre for Coordination of Research on Social Indicators had been established in the United States. The U.S. federal government had published comprehensive data on social indicators and initiated survey research to enable development of social indicators. The journal Social Indicators Research was founded. Many local planning agencies and municipal governments had adopted a social indicators approach in one form or another. The use of social indicators had also spread to international agencies such as the UN and the OECD.

The decade of the 1990s, however, has seen an unprecedented explosion of such efforts. In the next section we consider some of the reasons why.

9.2. Reasons for the Current Proliferation of Indicator Projects

The insightful work of feminist economist Hazel Henderson presents the world of human activity as a layered cake, a cake that crumbles if any of the layers becomes deeply flawed.[4] A hierarchy of necessity means that upper layers are dependent on how the lower layers are made. The bottom layer is the natural world, the environment that provides all resources, recycles waste, and absorbs pollution if not overloaded. The next layer is the world of unpaid work: childcare, eldercare, housework, do-it-yourself maintenance, volunteer work, subsistence gardening and

[3] CCSD (1996), op. cit., p.7

[4] Hazel Henderson, *Creating Alternative Futures: The End of Economics*, New York: Berkley Pub. Corp., 1978

farming — what we might call private or informal social infrastructure. The next layer is the public sector, locus of foral public infrastructure like roads, schools, sewers, defence, health care, all made available through government spending using our pooled resources of taxes. The top layer is the private sector, which can only exist by being supported by the preceding three layers. This is the layer of buying and selling, savings and investments, jobs, incomes and accumulated assets.

There is a growing acknowledgement of the inter-relatedness and inter-dependencies between the economic, social and environmental arenas; similarly between the private, public and civic sectors. As this awareness increases, there is more and more questioning as to whether the right things in our complex societies are being measured, and whether the tools we have inherited enable us to understand and manage the problems we have at hand today.

Currently our most credible and widely accepted systematic measurements are primarily economic. Their focus is principally on the top layer, or the private sector, and secondarily on exchanges in the public sector — clearly insufficient to explain fully what is going on in our nation and in the world. Indeed, a good deal of the frustration that has given rise to many of the indicator projects that exist today derives from **the divergence between reported and experienced reality**. (This sensibility was wonderfully captured in the title of a feature article for the Atlantic Monthly in October1995: 'If the GDP is Up, Why is America Down?'[5]) The second major driving force has been the **shrinkage of the welfare state and its corollary, the devolution of responsibilities to subsidiary levels of government and other components of our social structure.**

The past two decades have been marked by profound change in every domain of human activity. During this time, economic, environmental, political and social developments have periodically suggested potential crises if left unattended. Sustainability has become an over-arching concept in each of these four arenas of human engagement. What generates sustainability? What generates crisis?

[5] The article, written by Clifford Cobb, Ted Halstead and Jonathan Rowe, sets out the case for producing a Genuine Progress Indicator, since "boosting the GDP is no longer a sufficient aim for a great nation".

Each of the four is examined below to survey the types of developments that have led to the friction between our existing ways of measuring and today's needs for strategic information.

9.2.1 Economic Developments

There are certain undisputed "master measures" that are accepted as the key indicators for major areas of life and which carry much symbolic weight. They define the form and content of public debate. Gross Domestic Product (GDP), the unemployment rate, the consumer price index, and, more recently, fiscal measures such as debt as a proportion of GDP, all lie at the heart of important public policy issues. Yet there is widespread acknowledgment of the inadequacy of these master measures in managing our society.

Master measures have a number of common characteristics. They are highly aggregated, which simplifies the complex and large-scale phenomena they depict. They imbed elaborate conceptual frameworks and elaborate accompanying data production processes. Ultimately, however, they can do little more than convey selected information about how the system is working by indicating some overall trend, telling us whether things are getting better or worse. This means they function no better, nor worse, than the newer indicator projects. In addition, the general public is no more likely to understand what is actually being measured by, for example, GDP or a stock market index than what is being captured by the newer indexes of change in human development or social health. The master measures are simply more legitimated by public acceptance after years of continued use.

The key problem with continued reliance on master measures is the palpable **divergence between reported and experienced reality**. If the economy is improving, why don't more people feel better off? If billions of dollars are being funnelled in foreign aid every year , why are the results so poor in terms of human development? Is it just because we are not growing the economy or expenditures fast enough? And if this is the case, what are the implications on the environmental side of the ledger?

The **dissatisfaction with existing macro-level measures of progress** has led to competing macro responses, such as the development of a Genuine Progress Indicator (GPI), the Index of Social Health (ISH) or the UN's Human Development Index (HDI). These are hybrid measures, using economic measures in combination with such "softer" social measures as use of time, health status, educational attainment, and the environment.

The clear limitations of existing credible — one could even say reified — economic measures have also led to micro-level responses. Communities, regions and sectors have attempted to gauge changes in their quality of life by tracking different aspects of human development, both individual and social, where people actually live. These measures are used as tools to assess progress, benchmark achievements or objectives, and/or guide local change.

The mounting evidence of counter-progress factors continues to raise questions about what we measure in the economic domain. These include

- average family incomes not responding to growing GDP as they have in the past
- increasing economic inequities which have become palpable and an unavoidable part of daily life for most residents of large urban centres, which translates into an increasing and visceral sense of insecurity for people across the entire income spectrum
- down-sizing and consolidation of corporations and governments as a pre-condition of fiscal health, which in turn has led to down-sizing of fiscal capacity in the non-profit or voluntary sector
- the significant erosion of livelihood from the resource-based economy in the major industrialized nations, which has until now been viewed as the functional underpinning to virtually any economy, notwithstanding the growth of the service or "new economy" sector

The most recent economic development - the arrival of the "surplus" in government budgets – raises one of the most critical economic and political questions of the day: how will that fiscal dividend will be shared among citizens? The answer, coming on the heels of decisive action to reduce the role of the state in the economy, will significantly impact the future of the economy. But there are no easy economic resolutions, since the question arises in a context of **polarized groups and interests**. That polarization itself is a product of the market- and state-induced developments that brought about the surplus scenario, developments which set out in stark relief the trade-offs at play in the **equity/efficiency debate** over how best to engineer the economy for the greatest good. In the interests of legitimate decision-making on the part of elected governments that are supposed to represent all citizens, what information is needed to address and balance these competing interests?

9.2.2 Environmental Developments

The United Nations estimated in 1987 that 50 per cent of the global population would live in urban areas by the year 2000. This projection catapulted the publication of *Our Common Future* by the United Nations World Commission on Environment and Development - also known as the Brundtland Commission – into the public arena. Prescient in its time, the report articulated how **urban growth** would continue to exert enormous pressures on the environmental, social and economic conditions in cities and their environs. Environmental degradation, poverty, declining urban services, deterioration of infrastructure and decreasing access to land and shelter are issues facing residents of urban areas in the first world as in the third world. Indeed, all of these phenomena have accelerated in the intervening years.

Consequently, there has been much effort devoted to the assessment, locally and globally, of the elements that are vital to achieving **sustainability**. In particular, what progress needs to be made in economic development, social development, and preservation of the environment, all together, in order to move our urban centres towards a sustainable state.

The recurrent fear of **environmental crises** also affects the amount of energy we put into measuring what is happening in the natural world. Global warming and changes in the ozone layer create one level of concern as we observe increasingly erratic and extreme weather patterns. More immediate and direct products of human handiwork are disasters such as Chernobyl, and in Canada the fall-out from the practices of clear-cutting in the forestry industry or the toxic sludge of industrial dumps such as the Sydney Tar Ponds.

Finally, the **supply of renewable resources** is re-emerging as a central issue, and one less likely to “go away” as it has appeared to do in the past. In the 1970s, the oil crisis sparked an era of environmental concern, based on its indirect impact on people through the costs of the economy. Now, in addition to recently mounting oil prices, the environmental issues are much more direct and fundamental. Water and arable land have become key issues around the world. Even in nations that are as blessed with these resources as Canada, citizens can no longer take for granted that their drinking water will be safe, or that there will be enough land where it is needed for building housing or growing food.

9.2.3 Political Developments

Since the 1980s there has been a generalized trend in Canada towards less government and enlarged responsibility for the market sector. The shrinkage of the welfare state has both been triggered by and has inflamed lack of consensus about the appropriate functions of government. [6] This process has two components: the **retrenchment of public services and the social safety net**; and the **devolution of responsibility**. Both lead communities to ask: what are the impacts locally of decisions taken at higher levels? Will the breach created by the withdrawal of government be effectively filled by some combination of market solutions and the non-profit voluntary sector? There is legitimate **concern about the health of different institutions in society**, those that are in danger of being viewed as irrelevant and those that are being stretched beyond their capacities.

This has been accompanied by a **major shift in political discourse, from a focus on the rights of the individual to a focus on the responsibilities of the individual**. A generation ago, the politics of individual rights and entitlement flourished as the foundation of what the state could and must provide its citizens. Today the government's role in advancing and supporting rights and entitlement is viewed with a great deal more skepticism. Ironically, the reverse holds true for corporate entities, who have seen a whole host of new rights enshrined in the context of

[6] In November of 1994, Vice-President Al Gore asked University of Toronto political scientist Thomas Homer-Dixon to produce a study concerning why states fail. The report looked at 130 cases over the past 40 years. A number of critical indicators show whether a state is in trouble, the first and most important being infant mortality. It is seen as an indicator of how much deprivation a culture will tolerate, "a cross-cultural indicator of the level of grievance in society". Democracy was not seen to be a sufficient safeguard against failure. It showed powerful linkages between environmental and demographic factors and violence. (Graham Fraser, "Professor delivers 'subversive' message", Globe and Mail, May 25, 1996)

international trade during this same period by these same governments. Whereas the state was once the enforcer, mandated to create a level playing field of equal opportunity for its citizens, today it is the citizen that must act as enforcer to ensure that, as the pool of public goods and services shrinks, the playing field does not become too distorted.

The United Kingdom governed by Margaret Thatcher was the earliest and most florid display of this reversal of the "rights/entitlement" sensibility, with the radical transformation of the public sector beginning in 1979. With re-election of the Conservatives under John Major, the significant retrenchment of public goods and supports was re-branded by focussing on a stylized Citizen's Charter of Rights introduced in 1991 – the state provided less, but the citizen could hold it more accountable for what it provided. There was no codified legislative charter. Rather, citizens' rights became an indicators project, a report card process that focussed on what citizens could expect from their most visible public institutions. The Charter requires that certain measures of performance be collected and published in a specified form regularly by public bodies such as hospitals, schools and local authorities. The league tables, as they are referred to, have the specific aim of enabling the citizen to make comparisons between the performance of different hospitals, schools and municipal councils.[7] If governments are withdrawing, there is a symmetrical withdrawal on the other side of the ledger too. There is **pervasive disenchantment with political institutions** seen both by those that want more public provision and those that want less as unresponsive, corrupted by entrenched power and money, disconnected from the people whom they are to serve, and above all serving special interests. The community level is where rubber hits the road, but the local level of government is severely impeded in its ability to assume responsibility for and resolve local challenges that have such broad dimension.

As a result, communities frequently feel they can no longer depend on government to solve

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[7] As described by the Inland Revenue department: "The Citizen's Charter sets out the quality and standards of service that people are entitled to receive when they have dealings with public bodies. Its provisions, of course, cover the Inland Revenue and are a Government commitment to high and consistent levels of service. In the Inland Revenue, Citizen's Charter requirements that have a bearing on everyday work are contained in the Taxpayer's Charter. All taxpayers have important rights in the way that their affairs are handled. These rights are set out in the Taxpayer's Charter…"
See http://www.inlandrevenue.gov.uk/manuals/pcmmanual/pcm101/02_0003_pcm12.htm
See also papers by Shirley Harrison, and by Alan Doid and John Wilson at
http://bam.abs.aston.ac.uk/govern/TRACK2.htm

problems."…[I]n the past when citizens gave up their proxy to governmental leaders they did so in part because they did not think they had enough information to form balanced judgement on the issue at hand. Given the explosion of information technology in recent years, citizens now feel they have enough information to be directly involved in the resolution of issues and expect to be so."[8]

This has led some to believe that the new politics is community problem solving, resulting in a shift from government to governance. However accurate this may be in describing the new locus of energy, it is the **interface of community politics with governments that shapes the new political reality**. This exchange rests on at least three dynamics:

- Evaluation of Government Performance - The need to monitor and assess the impacts and implications of the retreat from the welfare state is acknowledged on both sides of the equation. However, the different sides are likely to be asking different key questions: "Are governments doing the thing *righ*t?" and "Are governments doing the right thing?" These questions are, themselves, in tension with one another.

- Changing (Lapsing?) Delivery of Services – The growing reliance on voluntary activity, in the household and in the community, to assist dependent and vulnerable populations, at the same time the demands on individuals and families are producing a decline in the amount of time that volunteers contribute.

- Identity Politics - The development of a generation of citizens who have been raised to take the concept of equality of treatment as a right, but see concrete access to those rights being eroded by market-driven and legislative trends.

9.2.4 Social Developments

The *zeitgeist* that began to be articulated in the 1960s still underpins much of society's thinking today. "Liberation" or the breaking down of boundaries between individuals transcended to systems and states, witnessed by trade liberalization and communications — the emergence of a "borderless" world. "Small is beautiful" ideology and antipathy to the influence of large institutions underlie the mistrust of large government and devolution of power. "Consciousness-raising" or growing self-awareness has become the cult of individualism. The pressure for

[8] Christopher Gates, "Community Governance", Futures 31 (1999) pp.519-525, quote is from p. 522.

individual “choice” has never been greater.

These processes have all fuelled the ascendancy of the market as the key organizing principle of social life. More emphasis is consequently placed on private economic advantage and betterment, less on social benefit and well being. More emphasis is placed on the rationality of symmetrical commercial exchange relationships that can be quantified: Where does the flow of funds come from, where does it go? Who contributes, who are recipients? What is the demand for and supply of civic infrastructure? What gets crowded out in from the private sector in order to furnish the public goods?

The ascendancy of the market is accompanied by the concurrent **ascendancy of the individual**. In part it is a direct result of the calls for civil and human rights, decentralization, liberalization, breaking of barriers of the 1960s. In part increased individualism is a derivative product of the increased anti-commons emphasis of markets.

In the past the individual was widely acknowledged to be shaped, indeed defined, by the collectivity. A person’s identity was the product of one’s affiliations and location within a social matrix. This is less true today. Now virtually all elements of welfare or well-being can be conceived as achievable, at least at the most superficial level, individually. Housing units for one, meals alone, recreation alone, work alone. A person’s identity is commonly viewed as more dependent on their *current* habits of consumption, acquisition and “style”, rather than *background or history* of geography, education, class, race or religion.

An increasingly insular individual makes the possibility of defining what we have in common more difficult, let alone putting such a common overarching idea or belief into action. Nonetheless, despite living in an age of unprecedented wealth, many of humanity’s deepest problems are getting worse, not better. The “social question” from the Victorian era is the awakening sleeping giant in public conversation, with its concern about social instability, upheavals, and the impact of poverty, exclusion and inequality on the social fabric.

The response is a **growing interest in articulating and giving substance to the notion of the**

public or the common good. This stems partly from a) demographic phenomena (an aging population, the redomestication of social services, the feminization of poverty) b) concern that society seems to have lost its moral anchor, and c) suspicion or fear that these social developments are leading to the deterioration of social or civil cohesion.

The timeless yearning to identify with and be part of something greater, more important than just our puny life, something that is *commonly* understood as more important, may indeed be coming into vogue again. But it is difficult to achieve a sense of common purpose and direction if those who articulate the need to address such common-good deficits are seen as members of special interest groups. Indicators and studies of shared values, shared symbols of identify, or shared sense of ownership can provide insights as to whether this is a process that can gain a critical mass to promote action and movement, or is a process that is unwinding and de-mobilizing.

Some efforts have been made to find indicators that track the **connectedness** people have with one another. They examine the vehicles and transactions that engage people with one another, the frequency with which these activities take place in individuals' lives. The importance of child development, access to the basics – housing, food and clear water; health and education -, and a high degree social cohesion are increasingly recognized as the common conditions necessary to the thriving of individuals and communities. These are referenced in quality of life projects, indices of social health, studies of volunteering and giving, and "benchmark" enterprises.

Others seek the recognized **codes of behaviour** that are sustainable for the social union of our governing institutions. Outside the legal system, there is explicit rejection of any single or master moral code or overarching social ethic that could govern behaviour. Provinces demand no-strings-attached relations with federal governments transfers. The federal government can unilaterally cut those transfers and trade this off with the offer of increased provincial "flexibility". There is no commitment to negotiate the legal and operational code regarding the objectives of a social union. It may be that indicators become a substitute for policy in tracking what is happening in the absence of any robust consensus about concerted behaviours.

Both processes seek to identify the soft factors that provide common ground for public discussion on **how to achieve social consensus and enable cooperative action**. Indicators may play a role in each process.

The combination of recent economic and environmental developments makes the identification of sustainable goals and objectives urgent. Yet the combination of political and social developments makes the identification of common goals, objectives and standards more difficult. A systematic and reliable information base that could point up intersections of common interest would be a welcome addition. But the multi-media world of information in which we now live, with its continuous call for "what's happening", is overwhelming. The proliferation of indicators projects is but one example of this information overall. The following section offers a typology of indicators projects as another step in our effort to identify the most coherent trends and techniques.

9.3. A Typology of Projects[9]

The rich blossoming of new initiatives to produce new measures and information suggests not only multiple overlaps, but multiple "personalities" or motivations in these initiatives. Different pools of conversation about the quality of life, urban sustainability, social cohesion, and enhanced public accountability, to name but a few, all converge on the need for more information.

What do we need to know in order to govern ourselves appropriately? The question begs another: who wants to know what, and why?. Rationale defines content.

In this section we review the range of **purpose and elements of construction** that have been noted in indicators enterprises.

[9] There have been several recent attempts to survey the types of indicator projects that exist. Two of the most ambitious attempts bear noting: Barbara Legowski, "A Sampling of Community- and Citizen-driven Quality of Life/Societal Indicator Projects", Background Paper prepared for Canadian Policy Research Networks, March 7, 2000; and Trevor Hancock, Ron Labonte and Rick Edwards, "Indicators that Count! Measuring Population Health at the Community Level", prepared for Health Canada, June 1999.

9.3.1 Purpose[10]

At their most noble, civic indicators are used as measuring systems to assist societies and communities in steering towards a desired course, to clarify key issues and challenges, and to prioritize resources, especially spending. They do not just monitor progress; they help make it happen. They are key to the process of community adaptation and revitalization.

Indicators can achieve this explicitly and implicitly by identifying the state of affairs and change, and by revealing the impact of future or existing change or action. In this way, developing social indicators focuses consideration of common values and goals for progress and often stimulates new action and change.

There are essentially three kinds of "clients" or users who wish to monitor the progress of a range of social, economic and environmental variables. They are all potential **agents of change**:

- the general public, which seeks public education and enlightenment as a mechanism for civic engagement, exercising choice, and providing input to the policy development process
- leaders of the general public and public sector, who seek information for the purposes of performance evaluation and greater accountability in the public sector; and
- public sector officials, who assess data for the purposes of evidence-based public management, policy development and decision making.

Each of these users seeks different kinds of information, for different purposes. The four main **functional uses of indicators** are: 1) assessment of current needs and capacities 2) forecasts of likely future needs, capacities and opportunities; 3) allocation of budgets and resources; 4) evaluation and monitoring of programs.

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[10] Numerous authors have articulated a range of purpose for indicators. See Mike McCracken and Catherine Scott, Gender Equality Indicators: Public Concerns and Public Policies, (Ottawa: Status of Women Canada, 1999); Andrew Sharpe, op. cit.. CPRN (1999); Measuring Urban Sustainability: Canadian Indicators Workshop, CMHC and Environment Canada (June 1995 workshop); Redefining Progress (1997); Barbara Legowski, op. cit., CPRN (2000); Ken Land "Social Indicators" in Edgar F. Borgatta and Rhonda V. Montgomery (eds) Encyclopedia of Sociology, (New York: MacMillan, 1999).

Projects may have a **retrospective or prospective** objective. That is, some projects strive to see how things have functioned or changed in the past while others seek to influence developments in the future. Prospective projects themselves may choose different methodologies depending on the purpose. For example, one project will set benchmarks as a way of seeking improvement in a particular indicator, such as literacy levels or teen pregnancies. Another may focus on a more general barometer for improvement, such as improving air or water quality, which requires improvement in a cluster of indicators, not to mention increased public awareness of the issue.

How can one reasonably assess what is the capacity of a community to adapt and exercise control over its future in the face of social and economic change? Studies show that **successful and resilient communities** possess certain traits.[11] Furthermore, it can be demonstrated that resilience can be strengthened; it is not inherent in some communities and absent in others.

Indicators can play a dual role in identifying success and resilience. First, systematic comparative studies can **highlight traits that are common** to such communities. Second, communities can **compare results** in order to improve performance by looking at poorer showings on individual indicators. "Improvement" can mean any number of things, from making procedures or programs more effective, to reducing variations in standards between communities, to focussing resources in order to increase or decrease the existence of a certain factor.

Whether evaluating the quality of life, estimating the Human Development Index or Genuine Progress Index, comparing results in the League Tables, or tracking community benchmarks, civic indicators effectively operate as "report cards" about the subject at hand. The question is, what do you do with a report card?

The end goal of the indicator project can lead to **action or process**. Though the action aspect has been most emphasized here as the end product, indicators projects do not necessarily have

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[11] An interesting examination of this issue is found in "The Community Resilience Project", conducted by the Centre for Community Enterprise in British Columbia. The United Nation's Human Development Index is another mechanism for comparing resilience and success, on an international scale.

changed circumstance as their immediate objective. Sometimes the project is explicitly about process. For example, many quality of life projects seek to find ways of integrating concerns rather than seeing them as competing interests; i.e., a focus on finding "common ground" is the first difficult step. Similarly, some projects simply respond to the need for national co-ordinated information, for example in the health system.

The following two views of the tension between action and process in the purpose and use of civic indicators speak volumes:

> "Those who have worked for years to develop better indicators have been frustrated by the lack of success at achieving social change or even institutionalizing social reporting. Much emphasis has been placed on the agenda-setting role of indicators and how descriptive indicators can be used effectively in the public debate. Our concern is that advocates, especially at the community level, then wonder what comes next: How can they actually effect change in what they are describing? There may be an important rhetorical or persuasive role to be played by descriptive indicators in raising awareness but one cannot expect those same indicators to effect change in the conditions."[12]

> "…Indicator selection or information dissemination in the absence of "stories" or community-level constituencies prepared to interpret and act upon the information is unlikely to lead to any action that makes a difference to health determinants….[However] there are many cases where the whole participatory approach … brings immediate health rewards in itself – in galvanizing local optimism, esteeming local voices, building new support networks." [13]

Finally, **framing or "marketing" indicators** is a technique of appealing to a certain sensibility in discussing objectives. The key identifiable profiles of indicators are:

- Normative indicators – are the trends pointing in the "right" direction?
  - Reports based on reflective or strategic indicators – Where are we going, where do we want to be going?
  - Tend to focus on long term linkages between factors
  - Take a systemic perspective

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[12] Clifford Cobb and Craig Rixford "The Uses and Abuses of Social Indicators" paper presented at the CSLS Conference on the State of Living Standards and Quality of Life in Canada, October 30-31, 1998, Ottawa, Ontario.

[13] Labonte, et al. (1996) p. 30

- Life satisfaction indicators – are we better off?
  - Reports measure subjective and objective parameters of well-being as key to understanding social change and the quality of life
  - Tend to focus on both input and output dimensions
  - Take a social engineering perspective

- Descriptive - how are we doing?
  - Reports measure and analyze quantitative data designed to improve the functioning of society; related but not restricted to public policy objectives.
  - Tend to focus on performance evaluation
  - Take a comparative perspective (comparing jurisdictions at the international and more local level, and even between agencies in a given sector)

This typology is by no means fixed. In fact, many projects could be classified in more than one of the above profiles. Still, successful communication of the findings to the general public is a key aspect of developing a project that can have some impact. Consequently it is of some interest to know the different techniques of "branding" these efforts for the purposes of communicating their objective(s).

9.3.2 Elements

Despite enormous diversity in objectives, process and presentation, civic indicators share in common certain dimensions or elements.

Indicator projects tend to be located within one of the following **paradigms**:

- quality of life/social well-being
- sustainable development
- performance evaluation and accountability;
- determinants of health

Indicators are shaped by the nature of **who is requesting the information**. The clients or agents for information, as listed above, could be members of the general public, public sector officials, or a combination of both. Whether the project is directed from the top down or from the bottom up will have an **impact on both the content and periodicity** of the initiative. This is in part an **issue of resources** available to the different groups interested in the information, as well as the

purpose to which it is put.

All civic indicators provide characteristics of the population under study. The question is **who is being looked at, and who is rendered less visible**. What are the inherent biases in the "usual indicators? For example, "the" unemployment rate is a composite of a number of unemployment rates for different demographic groups that remain systematically and secularly different. "The" employment rate ignores unpaid work for dependents. "The" wage gap conceals real differences between full-time workers and all workers, including part-timers, and gender relations in different age cohorts. Each of these indicators bury, rather than reveal, very different empiric realities.

The pursuit of equal treatment by the equity-seeking groups (women, visible minorities, the native population, and the disabled) relies on an information base that is capable of identifying systemic discrimination. But most available data are based on attributes and outcomes of individual Canadians, devoid of structural context. Policies that have different impacts on different groups have differential costs and benefits on citizens. For example, if women remain in the minimum wage market far longer than men, minimum wage policies may have a gender-specific impact. Indicators that can identify these biases can be key to crafting a more reality-based and activist social policy framework. [14]

Indicators are also **circumscribed geographically**. They can be local, provincial, regional, national, or international. They can combine these, so that a national or provincial measure can also have a subsidiary dimension. For example, the results of provincial standardized educational testing can compare one district school board against another, one school against another, even one teacher or one child against another.

This leads to the issue of the **degree of aggregation**. Aggregation has two dimensions: one relating to what scope of community is being discussed; the other relating to the complexity or simplicity of the measure. National measures tend to be the most aggregated. These can be used

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[14] See Gender Equality Indicators: Public Concerns and Public Policies, Ottawa: Status of Women Canada, 1999, especially pp.103 to 134

for comparative purposes (for example, the Human Development Index, which compares the overall achievements of nations) or as a counterpoint to other aggregate measures (for example, utilization of a Genuine Progress Index or an Index of Social Health as a counterweight to defining progress through measures focused on the Gross Domestic Product). These are neither easily disaggregated nor easily replicated at a sub-national level.

Another aspect of aggregation is how the information is presented. Some projects rely primarily on the reporting of one synthetic measure. This is true of indices, such as the Human Development Index, the Index of Social Health, or one of the many Quality of Life indices. Though they are made up of various components, and the components themselves can be examined individually, they are communicated broadly as a single trend line: some thing (like health, or quality of life, or human development) is either improving or getting worse. Other projects do not attempt to synthesize developments into one measure; rather they lay out different parameters of the same general subject area in a grid. This includes some quality of life projects (such as that of the Federation of Canadian Municipalities), health “report cards”, or the results of standardized educational testing.

In either case, there are choices as to how to present the scope or degree of aggregation of the findings of a project, pointing to **a tradeoff between transparency and simplicity**. How many distinct indicators of change can be referred to at the same time? How many jurisdictions can be compared simultaneously? For the purposes of broad public communication, it is best to discuss one phenomenon at a time, especially if it is a relatively new concept. However the complexity of reality may implicate that this is a rather dishonest or biased presentation of “the facts”, potentially compromising the accepted legitimacy of a new measure.

The choice of measurement includes **objective and subjective indicators**. Objective indicators are more easily quantified and measured and frequently are available for inclusion in an indicators project at far lower cost because they exist somewhere in the system of statistical reporting for that sector of activity. Subjective indicators are more costly to produce since they rely on one-on-one survey techniques, but yield rich information. They evaluate individual satisfaction with certain aspects of the built and natural environments, economy and social domain. It could be argued that subjective indicators can more readily assess issues of social capacity than can objective indicators.

The focus of information can be situated anywhere in the feedback loop of information – action – information. The choice of measurement includes the choice **of input versus output data**. For example, health care input data would focus on resources, including the include number of hospital beds, doctors and hospitals. Output data would focus on outcomes, including infant mortality rate, waiting lists, etc. Whereas most civic indicators provide data on the characteristics of people and communities — "outputs" like literacy rates, rate of incarceration — fewer provide characteristics of the underlying conditions, or the "inputs" that produce these characteristic results such as total investments by population, per capita education spending.

9.4. Diversity and Divergence in Approaches to Indicators[15]

Virtually all social and civic indicators are products of concern that something is going wrong or is in a highly constrained fiscal, economic or environmental situation. This has led to a wide variety of responses that try to measure change. There are tendencies that pull in divergent directions as to what is the most effective way of doing **this (macro or micro**); what are the best **measuring techniques** to use; what are the best uses of **resources**; what are the most effective **uses for this information**. As well, there are significant differences of opinion as to the **role of the citizen and/or civic sector** in the development and use of this information.

The **criticism of existing master measures** such as the Gross Domestic Product has resulted in a host of **macro and micro responses**. However, even when in the same basic paradigm, there is no necessary conformity or convergence of approach.

At the **macro level**, three distinct types of initiatives have emerged **– the Human Development**

[15] A selective summary of some of the indicators referred to in this paper is presented at the end. This section of the paper does not attempt to provide an extensive sampling of the types of projects that are currently being undertaken. Indeed, this is likely impossible to do authoritatively. However, the Canadian Policy Research Network has commissioned two excellent background papers that provide a wealth of information. See Andrew Sharpe "A Survey of Indicators of Economic and Social Well-being", 1999; and Barbara Legowski,"A Sampling of Community- and Citizen-driven Quality of Life/Societal Indicator Projects", 2000.

Index, which was first published in 1990; the **Genuine Progress Indicator** (GPI) approach which was launched in 1995; and the **Index of Social Health** (ISH) approach, also launched in 1995.

In Canada, there are now three slightly different models of GPI that can be calculated: a national measure designed by Hans Messinger for Statistics Canada; Ronald Coleman's GPI Atlantic out of Halifax; and Mark Anielsky's GPI that is currently under construction for Alberta. The Canadian government, through Human Resources Development Canada, has also has replicated the ISH for the period 1971 to 1994.

At the **micro level**, there has been a greater proliferation of effort. These diverge along **geographic and sectoral** lines. There are, as described above in the typology section, micro projects that attempt to **measure quality of life, urban sustainability, or social infrastructure** for a given community or cluster of communities. These include:

- Quality of life: the Federation of Canadian Municipalities Quality of Life report for 17 major urban municipalities; the Social Planning Network of Ontario, now including 11 municipalities; individual projects such as the Edmonton Social Health Index, which is essentially a quality of life report;

- Sustainable Cities: the SCIP initiative - the Sustainable Community Indicators Program which is being piloted in several communities by Environment Canada and Canada Mortgage and Housing Corporation and

- Capacity and Resilience: Toronto's Community Agency Survey; the Community Resilience Project based out of British Columbia's Centre for Community Enterprise; The Parkdale Project

The quality of life paradigm itself shows remarkable diversity of approach. The focus can be on

- Community amenities, facilities - scope and depth of social infrastructure
- Social cohesion – indicators of community (institutional robustness), mutuality, indigenous action, tolerance
- Indications of vulnerability, fragility, non-sustainability, or destabilizing trends

The micro level has also spawned projects that take a slice of human activity and examine it for a given community or cluster of communities. This seems to be a growing trend, with indicators now produced in the **sectors** of health, justice, environment, education, public services, and homelessness. They include

- Canadian Institute for Health Information (CIHI)
- Homeless Individuals and Families Information System (HIFIS) sponsored by the Canada Housing and Mortgage Corporation
- Provincial standardized educational testing
- Government mandated municipal "report cards" on key public services[16]

As it is currently developing, the **sectoral approach tends towards the performance evaluation and accountability model**, though these projects may refer to issues of sustainability and use the indicators within as markers of future performance or as determinants of health.

The **micro level response is growing more diverse** in that there is a remarkable proliferation of indicators and projects that are emerging to **examine issues sector by sector**. Indeed, dis-aggregation and decentralization is inherent in the very spirit of the indicators movement.

This means that **measurement techniques** are as varied as the number of projects, partly as a function of the paradigm in which the projects find themselves, partly as a function of the normative assumptions made within each paradigm, and partly arising from the resources made available to these projects. These differences can been grouped into a number categories:

- Choice of variables – are they absolute measures, or relative measures. For example if discussing a monetized variable such as income or spending, are these values produced in real (deflated, or constant dollar) or nominal (current dollar) terms?
- Weighting of variables – are all variables considered to have the same weight in an index?
- Aggregation - are key variables presented as per capita, or average measures, or broken down in some fashion? For example, if there are significant variations are unemployment rates disaggregated for different regions, genders, age groups? Are incomes referred to as averages or per capita? Is the distribution of income referenced?

[16] The government of Ontario has mandated municipalities to produce annual "report cards" for taxpayers by the summer of 2001, providing an "efficiency grading" of nine local services – water, sewage, garbage, fire, police, roads land use, local government spending, and social services including the number of people on workfare in the area. Caroline Mallan and Richard Brennan, "Municipal report cards ordered", Toronto Star, October 4, 2000, p. A8.

- Availability and Timeliness - are key variables difficult to reproduce (for example, behavioural surveys, or voting patterns which are not annual)?
- Synthesis – are variables collapsed into a synthetic index or presented in parallel fashion?

The question of **resources** is central in understanding the variety, frequency and scope of each project.[17] However it also plays a role in understanding if these projects are capable of having impact, and therefore maintaining or increasing resources required to keep them operating. The two major forces at play at the community level are

- how do we get more money or resources from key funders to reverse declining economic/environmental/social circumstances?

- how do we assure better accountability and efficiency for the dollars being spent (by governments, voluntary agencies, business groups and citizens groups)?

The tension between these two questions results in divergence in the ultimate use of this information, whether for **information or strategic action purposes**. Most of the Canadian projects have not yet begun to use the collected information to target action, though this may change with the arrival of more government sponsored or mandated projects in the fields of health care, education and municipal service delivery. Only a few projects that focus on action, not just reporting, for example the Jacksonville 2000 or the Oregon Benchmarks, both projects that started in the U.S. in the mid or late 1980s. These action-oriented projects have an extraordinary level of support from government(s). They target the modification of individual behaviour (let's improve the literacy rate of the population; or let's reduce the teen pregnancy rate). The irony is that they rarely explicitly discuss the structural conditions that might have led to deterioration of the behaviour in the first place, and that provided the very impetus to create the benchmarks.

Civic indicators are widely perceived to be the product of a **de-centralist ethos**, whether explicitly or implicitly, thus **favouring the engagement and involvement of individual**

[17] Literally millions of dollars are devoted annually to the production of indicators in Canada. For example, for one initiative alone - the Canadian Institute for Health Information - some $350 million will be spent by the federal government over three years to coordinate information with the goal of improving health service. See the appendix for a description of this and other projects.

citizens. This may in fact be changing, with the growth in utilization of these techniques to monitor government performance and program implementation. However, emphasis on preparing the "citizen" with enough information relies on the individual's capacity to change his or her surrounding living conditions. Even if sufficiently engaged, this view **overlooks several facts about the civic domain**.

- Few communities are completely cohesive. Conflict or tension exists in greater or lesser degree between different groups, even in small communities. Some issues inflame these differences more than others.

- Governments themselves play a role in shaping communities. Social and welfare policies, legal frameworks and fiscal decisions shape who will be included and who will be marginalized, who will have authority and who will have lesser weight in community decisions. (Consider reductions in the provision of welfare, health and education; the introduction of legislation to ban begging on the streets; the elimination of employment equity legislation; the implementation of internationalized standards on free trade but the failure to implement international standards on human rights and the environment to which Canada and the provinces are also signatory.)

- The globalization of commerce has seen the erosion of social capital due not to citizen withdrawal from voluntarism and good works, but private capital's withdrawal from civic duty, including the support of the tax base. [18]

Thus the context of civic engagement can itself be significantly and substantively different throughout history. This clearly affects the impact of civic engagement, no matter how informed and coherent it is.

As seen, there is an extraordinary diversity of effort in the field of social and civic indicators, diversity that often pulls in different directions. What does the diversity indicate?

1. The primacy of devolution and subsidiarity is moving significant portions of governance to the local level.
2. Modern governance rests on a large volume of social intelligence – public data, reliable and capable of supporting public policy and public management.

[18] Derived from Trevor Hancock, Ron Labonte and Rick Edwards, *Indicators that Count! Measuring Population Health at the Community Level* , prepared for Health Canada, 1999, p.22.

3. Growing diversity and complexity signals the need for data generally, and in particular the need to generate data for small areas and communities.
4. Government-mandated requirements are most likely to yield regular reporting at a small/local enough level. (Oregon, U.K., Ontario)
5. Indicators are most effective when communicated regularly and broadly (through the media, especially) for a period of time.

Does this diversity also indicate any convergence and commonality in the process of collecting civic information? If so, are there ways of levering increasing convergence, or synchronicity, in this body of work?

9.5. Commonalities and Overlaps

Despite overwhelming diversity in the production of indicators, three observations about similarities bear noting:

The social and civic indicators projects that have been conducted over the course of the 1990s have converging results, indicating that the **"quality of life" was in decline over the 1990s, even as standard economic indicators showed general improvement**. This was true whether the project examined the local or national level, put an emphasis on the environment, determinants of health, income distribution or elements of social cohesion.

The great majority of these projects are **more output-oriented than input-oriented.** Far more is known about "where we are at" or "where we want to go" — be they objectives for water quality, health care, educational attainment, economic development — than what is known about the capacity and resources required to produce those results. Even performance evaluation systems rarely use a double-accounting methodology, which might be able to assess civic liabilities and assets in a given sector, or a cost-benefit analysis, which might be able to better guide the allocation of resources. To the extent that the ultimate goal is to transform civic indicator initiatives into a system of civic accounts, this represents a significant barrier.

Implicit in most of these projects is an **emphasis on the importance of the participation, or more, the engagement of citizens**, even when they are national in scope. Whether identifying common values or goals, developing strategies of advocacy, evaluating the efficacy of services, or assessing needs and capacities, it is uniformly stressed that **the development of measures must be relevant at the community level**, rather than just at higher provincial/regional or national levels. [19]

This does not mean that there should not be a national dimension. Indeed, there are comprehensive social indicator compendia in the United Kingdom, the Netherlands, Germany and Australia, and international publications such as the UN Human Development Report, the World Bank's Social Development Indicators, and the Luxembourg Income Study. But few of these projects have developed a systematized or core methodology of the kind that could be disaggregated or easily replicated at the community level. Furthermore, there is debate about what information these highly aggregated national measures impart, given significant regional, demographic and sectoral variations. On the other hand, it has been pointed out that the level of these indicators is not as important as the trends they document.[20] For example, the National Welfare Council, the Canadian Council on Social Development, the Vanier Institute, and Campaign 2000 have all produced national indicators on particular aspects of social conditions that have been influential in public debate in Canada.

There is also limited **convergence or commonality in the elements that are being measured** by this diverse set of projects. As early as 1995 discussions were being held about a common set of urban sustainability indicators, to be used by municipalities across Canada, provinces and

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[19] This has been reinforced in a wide range of reports on the subject: Canadian Policy Research Network - CPRN (2000), Canadian Council on Social Development - CCSD (1996), Canadian Institute for Health Information - CIHI (1999), Indicators that Count! Health Canada (1999), Federation of Canadian Municipalities - FCM (1999), Sustainable Community Indicators Program (SCIP) founded by Environment Canada and Canada Mortgage and Housing Corporation (1995), Ontario government report card initiative (2000)

[20] Andrew Sharpe and Lars Osberg, "An Index of Economic Well-Being for Canada", 1998, in *The State of Living Standards and Quality of Life in Canada*, Toronto: University of Toronto Press, forthcoming. Also available from www.csls.ca

federal governments to measure the sustainability of life in Canadian urban areas.[21]

By the late 1990s, a clear overlap was beginning to emerge among different projects, albeit in a finite range of specific indicators. The projects that currently have the most overlap are: the Quality of Life report produced by the Federation of Canadian Municipalities, the Quality of Life report produced by the Social Planning Network of Ontario, the Canadian Institute for Health Information Health Report (published by Maclean's Magazine), and the Sustainable Community Indicators Program which is being piloted by Environment Canada and Canada Mortgage and Housing Corporation. These projects provide information for all or various subsets of the 16 predominant municipalities in Canada. Health Canada has also been advised to partner with the SCIP initiative to develop a nationally standardized set of indicators designed for use at the local level. This is possible by providing both an educational program for users and considerable flexibility in the ultimate set of indicators chosen from the core set by the community. While a significant start, it is unlikely that whatever system is developed will be accessible for most of the 158 communities with 25,000 plus residents in Canada.

Ontario likely has the greatest number of overlaps in projects, consequently raising the potential for standardized information being made available to a greater number of smaller communities in that province. In addition to the nation wide projects mentioned above, Ontario is the site of a variety of "standardized", community-based, quality of life initiatives; the province-wide testing of students in Grades 3, 6, and 9; and the newly mandated municipal public services report card.[22]

Given the enormous economic and human resources that are being spent in creating the existing proliferation of information, **what is the possibility of further convergence** in order to achieve greater economies of scale in these undertakings? Who might find this synchronicity worthwhile? What would it take to energize it?

[21] Measuring Urban Sustainability: Canadian Indicators Workshop, June 19-21, 1995, Workshop Proceedings – Conference Hosted by State of the Environment Directorate, Environment Canada, and Centre for Futures Studies in Housing and Living Environments, Canada Mortgage and Housing Corporation

[22] See footnote 16.

If it could be argued for example, that for a 10% increment in costs communities across the country could achieve 190% more information, the high input-to-benefit ratio might be very appealing to an association of mayors, senior government agents, or the community economic development sector.

Possible barriers that may impede the initiative to achieve synchronicity in these projects include

1) Organic tensions: convergence requires certain standardization of procedure and content, which might entail connection with a central organization or clearing-house for methodology and resources. But the strongest magnetism behind different initiatives with different objectives is decentralization, a thrust that resists convergence. High levels of dis-aggregation are central to the spirit of the indicators movement.

2) Resources: indicators that are simple and cost-effective to collect are not commonly perceived as benchmarks or targets for performance that can easily induce action or policy change. Indicators that can shed new light on a problem, policy, resource or capacity involve expensive primary research. Moreover, indicators by their nature involve long-term longitudinal study. Money is a major roadblock for communities (geographic and communities of interest) and smaller institutions, even when compiling "off-the-shelf" data. Yet it is precisely at this most local level that information from indicators can most effectively be used.
3) Impact: the cost of such an undertaking has to be balanced by its impact: are these measures capable of guiding developments and change in people's lives? This requires political, not just civic, engagement, which is most commonly absent from such projects.

4) Sustainability: without identifiable impact, it is unclear how long resources would continue to be found for such projects, even if they have achieved economies of scale. Already the frequency of replication of some of these projects is falling. Without sustained predictable repetition, indicators lose their credibility.

Though there is no standard information-collecting process, a common understanding of the essential kinds of things that need to be measured is developing. This can be compared somewhat with Hazel Henderson's "layered cake" analogy. Communities function with a layering of

1. civic conditions – stability, civic facilities and services, equity, community capital, institutions, households and community/collective functions
2. civic behaviours - networks, institutions, governance, mutuality, generosity, social cohesion, participation and engagement, concerted action
3. and civic capacity.

Communities need information about the top two layers to be able to ascertain the direction in which the third layer is going.

That is the purpose of creating a system of civic indicators and community accounts. It could be the key to understanding the dynamics of a civic economy, which is far broader and richer a system than a market economy.

9.6. A Summary of Selected Indicator Initiatives

Over the last decade, there have been hundreds of initiatives attempting to measure civic or social change, or change in well-being, at individual, state, and national community levels.

Among the recent surveys of this literature, two recent background papers commissioned by the Ottawa-based Canadian Policy Research Networks stand out: "A Sampling of Community- and Citizen-driven Quality of Life/Societal Indicator Projects", by Barbara Legowski, dated March 2000; and "A Survey of Indicators of Economic and Social Well-being" by Andrew Sharpe. These papers provide comprehensive and detailed accounts of recent initiatives in the Canadian and American experience, and are recommended as supplements to this appendix.

This report reviews only a selected few initiatives in order to identify the potential for adaptation towards a common tool, or series of tools, that could be used by communities of varying size across the nation

Both the commonalities and the differences among the techniques discussed below provide insight as to how these systems could be built upon, expanded, or harmonized for the purpose of improving the efficiency and/or impact of these initiatives.

What we seek, in the end, is a way to achieve greater synergy of effort. If successful, such a result could reduce the costs of production while increasing the power of measures that express human progress in a more holistic manner. The fact that some of these initiatives are already starting to build upon one another highlights that this may be the best way forward in the attempt to create a system of civic indicators and community accounts.

The Oregon Benchmarks Experience

This project was initiated in 1987 in response to severe economic conditions, which were especially hard on this resource-based state. The decline in the wood resource sector triggered a significant multiplier effect on feeder industries in the manufacturing and service sectors, while a slump in international economic conditions slowed the tertiary industries. This resulted in growing disparity between rich and poor, increasing poverty, and greater levels of urban congestion.

The project was unanimously adopted in 1989 by the state legislature as a strategic plan to drive the economy forward, the only such project to have received such endorsement by a level of government to help develop policies.

It is a voluntary program, which means not all counties within the state undertake the project at all, and most do not undertake to identify and monitor the hundreds of benchmarks that were created. The Multnomah project (which includes the state's biggest city, Portland) is the most ambitious and has 80 benchmarks, but even that is considered too many in practice.

The Multnomah project has identified 5 “breakthrough” benchmarks that are focal points for interrelations between benchmarks: readiness to learn when entering school; reduced teenage pregnancies; a competent, loving adult for every child; reduced domestic violence; and reduced juvenile crime. Because the legislature adopted the 80 benchmarks, the legislature will have to ratify a scaling down of those 80 to 5.

The benchmarks are tracked at five-, 10-, 15- and 20-year marking points on where the community wants to get. Core services critical for achieving these benchmarks are identified: public safety strategies; alcohol and substance abuse programs; mental health care; and health care.

To mobilize toward these goals, an agreement was signed between the Clinton Administration, the state legislature and the local government to link federal transfers to state and local government performance. Called the “Oregon Option”, this involved consolidating federal programs and funding strategies to give state and local governments more flexibility in achieving mutually agreed-upon outcomes.

In Multnomah county, the budget is now developed within the context of benchmarks and the budget document is seen as an educational tool for strategic planning. There is some activism to allocate money by benchmark, not by department.

The Genuine Progress Indicator (GPI)

Among those who think about these things, the disenchantment with the Gross Domestic Product (GDP) as the basic macro-measure of the economy and consequently of the well-being of society could not be over-emphasized. It is silent on the distribution of “wealth” in society, does not reflect environmental or ecological health, and excludes consideration of unpaid contributions of work, resulting is sever gender-bias.

For these and many other reasons, there have been a number of attempts in Canada and around the world to measure social health in a nation. These projects all develop synthetic measures, i.e., one number to provide an index of change in answer to the question: are we doing better or worse?

The GPI is an index that compiles rates of change in each indicator based on an actual or imputed constant dollar value. Social costs are proxied into economic costs associated with crime, family breakdowns and natural disasters, and these are also subtracted from the GDP. Environmental damage and resource depletion are also subtracted. *Stocks* of both consumer spending on durables and governments' capital stock of streets and highways are converted in values for *flow* of services. Government expenditures which are considered curative are subtracted from the GDP. Some personal issues related to time use are incorporated.

Criticisms remain about this process, and they can be sorted into three categories:

1) What is excluded: for example, human capital, private versus public spending on health or the distribution of income
2) How the numbers are crunched: for example, the weighting of factors or the imputation of economic values for social values
3) Not useful as a political tool: the lack of transparency of the measure means that for many non-specialists, it is a difficult concept to grasp and communicate. Because it is not easily grasped, it is an indicator whose only purpose it to measure and, at that, in an imperfect way. For both reasons it is unlikely to be adopted by politicians, bureaucrats or advocates as an instrument that can help shape policy.

The Social Planning Network of Ontario (SPNO) Quality of Life Index

This index was first developed in 1997, and uses 1990 as its benchmark year. It has since been updated twice. It was developed in concert by social planning agencies across Ontario in response to the two-pronged erosion of this province's "quality of life": cutbacks in social services, and deteriorating economic conditions.

It limits the number of indicators that are included in order to provide transparency when reporting the updates. There are four parameters: social, health, economic and environmental. Within each parameter are three key indicators. Each is weighted equivalently, and each is tracked in and of itself.

This format provides the ability to make a general statement ("the quality of life has declined in Ontario since 1990"). At the same time, it can be used to specify how the number of hours of poor air quality and virtually all environmental factors improved, though the number of bankruptcies and children in care of the Children's Aid Society increased.

The information for all twelve indicators is readily accessible in 8 communities throughout Ontario, and each community provides this input for creation of the aggregate.

Life in Jacksonville: Quality Indicators for Progress

In 1985 over 100 volunteers were organized into subcommittees by the Jacksonville Chamber of Commerce and Jacksonville Community Council Inc. The City of Jacksonville funds the project, though the JCCI is funded similarly to Social Planning Councils in Ontario…by the United Way, the city, and individual and corporate contributors. The report is prepared annually for the Jacksonville Chamber of Commerce, not the city, by the Jacksonville Community Council Inc. in consultation with the Chamber of Commerce.

The explicitly stated goal is to establish a quality of life project to provide the motivation for community improvement in Jacksonville, Florida. To achieve this the project marshalls the types of indicator it believes can highlight and actively maintain positive trends and detect negative trends so that action may be taken to ameliorate problems.

"The quality of life is, admittedly, a vague and elusive concept. For the purposes of this study it refers to a feeling of well being, fulfillment, or satisfaction resulting from factors in the external environments. For many people, the quality of close interpersonal relationships, rather than the external environments, is the primary factor in determining happiness. Nevertheless, this project concentrates on the external environments, examining the quality of life from a community perspective."

A remarkably thoughtful document, these reports track nine areas that are considered germane to the quality of life (these are listed below). There is no attempt to provide synthetic indices for each area of public concern, and each area is tracked by numerous indicators. Several indicators measure public opinion, information for which is derived by an annual telephone questionnaire. These cover such qualitative issues as feelings of safety, belief that racism is a problem, rating of government performance, etc. The report acknowledges that this methodology demographically skews the responses, as there is a high rate of poverty in Jacksonville and the poor population frequently does not own a phone.

Most indicators are tracked on an annual basis, beginning in 1983. They all have targets for the year 2000. It is acknowledged that the indicators are not of equal importance in measuring the quality of life. Until 1991 the indicators were not weighted. As part of the Targets 2000 project in 1991, a "most important" indicator was selected from each area. One of these, from the area of education, was then selected as a top priority for community action during the 1990s: public high school graduation rate. This rate has vacillated over the 1980s, but has risen over the 1990s: it stood at 66.5% in 1988 and 84% in 1993. The target for the year 2000 is 90%.

The nine areas of public concern about the quality of life are ranked in order of importance as follows: education, the economy, public safety, natural environment, health, social environment, government/politics, culture/recreation, mobility.

In 1991 new task forces involving over 140 participants reviewed all of the indicators. Several were eliminated because of questionable validity or unavailable data, others were revised for clarity, several new indicators were added, including new telephone-survey questions.

It is notable that this is the only indicators project that has incorporated a "guidelines for the selection of social indicators" section in each report. It is exerpted later in this report.

Federation of Canadian Municipalities Quality of Life Reporting System

Representing Canada's largest cities, small urban and rural communities and 17 major provincial and territorial municipal associations, the FCM National Board of Directors sought to bring a community-based perspective to the development of public policy. This initiative is a concerted response, therefore, to the impacts of devolution and downloading of public services. Since municipalities have been hardest hit by recent developments in public policy, the goal was to collect information from the 16 largest urban governments to "monitor the consequences of changing demographics as well as the shifting responsibilities and fiscal arrangements."

The 1999 report established the baseline for these quantitative measures, and the report is expected to be produced annually, fed by regular input from each of the 16 municipalities. The QOL benchmarks are sorted into 8 areas for measurement: population resources, community affordability, quality of employment, quality of housing, community stress, health of community, community safety, and community participation. Each approach to the issue of quality of life is tracked by five to seven separate indicators.

At least one more indicator of strategic and sustainable well-being will be added to future reports, providing a measure of social infrastructure (referring to the contribution, capacity, and role of the "third" sector which is made up of organizations which are not-for-profit, non-governmental and frequently voluntary).

The three parameters for inclusion of information were that these measures be:

- Meaningful at the community level
- Available annually and on a nationally-consistent basis
- Easily understood

As they mention, in this pursuit virtually all roads lead to Statistics Canada. With the notable exception of the Census (conducted every five years) and The Small Area and Administrative Database (taxfiler data), Statistics Canada does not regularly provide much sub-provincial level information. Larger surveys, which are the basis for much of its information, frequently have sample sizes that are not large enough to provide reliable information for smaller geographic areas. Some of these surveys are not annual.

Nonetheless, the report mines available sources of relevant quantitative data for municipalities. These efforts mark the first time that a nationally consistent collection of local data has occurred. Its purpose is to make possible “a practical basis for Canadian governments to work together, a shared system of policy analysis, using consistent measures of cost, benefits, performance, and outcomes”. It is explicitly hoped that such a document will bring cooperation between governments through the mechanism of shared and mutual understanding about the local outcomes and impacts of national, provincial and municipal policies.

The political essence of this work is captured by the acknowledgement that “the incongruities of [economic] successes with the life experience of large segments of the population have resulted in a loss of public confidence in political leaders and public institutions, and in the Canadian federal system itself.” It is an effort to renew serious dialogue, and potentially planning, between political institutions on the basis of measures that in principle are meaningful for everyone.

The Toronto Community Agency Survey

In 1995 community-based agencies providing human services and supports were concerned about the significance of both federal and provincial budgetary cuts. They wanted to establish a way of empirically discussing the impact on the people whom they served. An unusual alliance between local governments and the Social Planning Council, and agreement by agencies to forego their own sectoral surveys, led to a comprehensive survey (almost a census) of all such known agencies in 1995 and 1996. An unusual alliance was also formed between the three universities in Toronto, so that a pool of volunteer students could be formed from the three social work faculties to increase response rates and help agencies with insufficient resources to participate in the survey.

Almost 1900 agencies were sent surveys in 1995, and almost 1700 in 1996. Excluding the childcare sector, the response rate was approximately 40% in each year. It is the largest such assessment of social infrastructure in the country.

It examines organizational as well as service- or function-related change by looking at both the agency overall as well as the programs it delivers. By so doing it provides a profile of this sector regarding the distribution of different types of agencies, the population and language groups they serve, their size, and the rate of closure. It also profiles changes in funding sources, human resources (both paid and voluntary), and programming.

A key purpose of this project was to document strategies for survival, examining the viability for different types of organizations of responses such as raising or introducing user fees, partnerships with other organizations and programs, increased use of volunteers, and relocation.

An extremely costly undertaking in both financial and human resource terms, this project has not been undertaken since 1997. It has, however, been used as a template for similar “inventories” of the third sector in communities throughout Ontario.

As a tool, it is most useful for agencies themselves: to plan responses to changing conditions, to work in coalition while planning new programming, and to advocate for more thoughtful change from their funders. Because of the geographic dimension imbedded in the survey, city councillors, too, have used these data to justify budgetary allocations and argue for improved planning in meeting constituents needs. Finally, it was a first step toward documenting how intertwined government decisions are and how risky the experiment of downloading can be if left unchecked and unevaluated. It concludes: “It is crucial that governments at all levels commit to restoring and preserving the stability of the full range of services provided by this sector. This requires, above all, adequate and stable funding levels so that all residents can find the necessary supports in the community to live full and active lives.”

Social Indicators in New York City

In spring of 1999, the Federal Reserve Bank of New York sponsored a conference titled" "Unequal Incomes, Unequal Outcomes? Economic Inequality and Measures of Well-Being". One of the presented papers was a review of a questionnaire that will now be undertaken every two years by phone, using a repeated cross-sectional sampling design of residents in New York City. Conducted for the first time in 1997, the Social Indicators Survey (SIS) used a random dialing technique to survey a sample of 2,224 New York City households. The survey was conducted in English and Spanish. Nearly half refused to participate, but the sample has been weighted to approximate Census Bureau data so as to be representative of all families in the city on major demographic and economic characteristics.

The United States has more economic inequality than virtually all other western industrialized nations and among U.S. cities, New York City appears to be the most unequal. As the authors of this presentation state: "Whether this inequality matters – whether it is or should be a shared concern for all New Yorkers – depends in part on its concrete manifestations."

They explain the reason for this, and other, undertakings which are so costly and time consuming. (Note: Though the authors do not indicate who finances this work, they are both listed in associated with the "New York City Social indicators Survey Centre of Columbia University".)

> " … A number of factors have combined to fuel a resurgence of interest in the use of social indicators to track well-being and inequality. Dramatic changes in welfare, health and social policies are raising questions about whether these reforms will reduce or exacerbate the trend toward greater inequality of income and of outcomes across groups. Meanwhile, the devolution of social and health policies downward, to lower levels of government, and outward, to new government and private entities, has increased the need for reliable measurement of outcomes at the subnational level."

The authors criticize social indicators based on aggregate data – such as poverty rates, infant mortality, child abuse or crime victimization reports – as insufficiently sensitive as measures of policy impact, and as indicators of well-being of populations at the subnational level.

The SIS measures include: *individual and family assets* broken down into human assets (health and disability, educational achievement), financial assets (net worth, debt, homeownership, equity), and social assets (access to capital in an emergency, reliance on neighbours, neighborhood support for children).

: *child outcome indicators* (child health and disability, child socio-emotional development, child school progress, adolescent risk behaviours). These are supplemented by measures that are predictive of child outcomes such as parental practices and organization of family routines.

: indicators of living conditions both economic (income, difficulty paying utility bills, income-related hunger) and social (housing quality and crowding, crime victimization, neighbourhood quality and safety)

: external supports (health insurance coverage, quality and safety of children's school, use of formal child care, financial and concrete assistance with child care, education, medical and housing and food needs from government, family, and community programs)

The New York City Social Indicators Survey documents how income inequality translates to other forms of inequality: not only health and educational attainment, but "inequality in socially controlled external supports and services —— from schools and health insurance to police protection…".

The SIS is designed to identify the effects of policy changes. For example: the effects of changing welfare eligibility rules and administration can be captured by using the population sample to identify families who are eligible for welfare in 1999 and families who are *in*eligible in 1999 but who *would have been* eligible under the 1996 rules.

The goal of the chosen methodology is to track whether well-being is converging or diverging for groups characterized by family structure, income and other features. An explicit goal of the project is to go beyond description of changes in well-being and inequality and link them to changes in public policies.

Index of Social Health

First published in 1995, this index is published each year by the Institute for Innovation in Social Policy at Fordham University in Tarrytown, New York.

It assesses the combined improvement or decline in 16 social indicators. Originally it examined the trends from 1970 to 1991, and the index continues to update these results. The indicators that comprise the index attempt to measure what is happening for children, youth, adults, and the aging. They include: infant mortality, child abuse, children in poverty, teen suicide, drug abuse, high school dropouts, unemployment, average weekly earnings, health insurance coverage, poverty among people over 65, out of pocket health costs of those over 65, homicide, alcohol-related traffic fatalities, food stamp coverage, access to affordable housing, gap between rich and poor.

The index number itself is not in relation to an ideal standard such as zero poverty or zero child abuse, but in comparison with the best that the nation has achieved. The purpose of the index is to measure progress or setback from actual achieved performance over the previous two decades.

In order to calculate the value of the best performance standard or threshold, the process relies on the construction of a model year. This is a statistical composite of the "best performance" in each of the 16 areas identified above, since 1970. Each year's performance is then expressed as proportion of the model year.

The best performance is scored at 10, the worst is set at zero. All other observations are scored within this 0 to 10- point scale, based on the relative performance of that year. If each indicator's score for a given year was the best score over the time period, the value of the index would be 100. Declining performance on one or more measure results in a lower index score.

Trends in the ISH are compared to trends in GDP per capita, measured on a year by year basis, in order to contrast social and economic progress.

This technique has been replicated in Canada by Satya Brink and Allen Zeesman of Human Resources Development Canada, covering the years 1971 to 1994. The report found that the peak performance years for the Canadian Index of Social Health was the latter half of the 1970s. As measured by the index, social health dropped in the recession of the early 1980s, plateaued at that level for most of the 1980s, then experienced a modest rise at the end of the 1980s. In concert with the recession of the early 1990s, social health again declined and had not gained ground at the time of the report's publication in 1997. The report also disaggregated the findings by age group (children, youth, adult and elderly) and province.

Index of Social Health for Canada (1997)

Disaggregates the index by age group (children, youth, adult and elderly) and province Peaks in late 1970s, drops in recession of early 1980s and plateaus at that level, with slight rise at end of 1980s, then falls again in recession of early 1990s. Has plateaued/declined since.

CIHI (Canadian Institute for Health Information)

With concern about the condition and vulnerability of medicare in Canada at an all-time high, more funding is seen as a crucial but insufficient mechanism to restore performance and confidence in the health care system. The question that remains is where that money is going now, and where new money should be targetted. As Health Minister Allan Rock put it : “I think it is obvious that when you're spending about $80 billion a year as Canadians do on health care, there's a need to know more about what we're getting for our money” (Globe and Mail, February 3, 1999)

The Canadian Institute for Health Information (CIHI) was set up as a response to the pressing need for nationally co-ordinated health information. An independent agency established in 1994, it took over management of many information programs from Health Canada, Statistics Canada and other agencies. In 1999 it got a huge boost in 1999 with a three-year $95 million project to revolutionize the health information system, by undertaking a new data-gathering system designed to improve health service.

Until recently, the only way to compare health services using publicly available data have been provincial break-outs of national data. With the development of such an information system, it is now possible to compare data at the community level, albeit only for 16 major urban centres.

CIHI provides data on 13 indicators that were endorsed at a national consensus conference among the 16 participating communities. It standardizes data to remove discrepancies arising from age or sex differences in the populations of the 16 participating cities.

Though CIHI has not yet produced reports for general consumption, Maclean's magazine produced a report on the health of health care services in Canada, comparing these parameters in the 16 urban centres across Canada. (Maclean's, June 7, 1999, The Maclean's Health report, pp. 18 – 30)

University of Toronto statistician David Andrews produced this "report card". Andrews converted raw data into grades on a scale from 60 to 1000 per cent. There are five categories, and individual indicators have assigned weighting. The five (and their indicators) are as follows: health outcomes (hip fractures a, pneumonia and flu); Services Provided (coronary bypass, hip replacements, knee replacements): Resources (physicians per capita, specialists per capita); Appropriateness (Caesarean sections, birth after c-sections, hysterectomies); Efficiency (possible outpatients, early discharge, preventable admissions).

Communities can compare results in order to improve performance by looking at poorer showings on individual indicators. "Improvement" can mean how to improve the efficiency of a procedure, how to improve waiting lists, or how to improve the effectiveness of treatment/procedure. The report card process moves assessment of health care beyond simply reporting that a procedure has been done in a particular hospital. Rather the hip replacement, for example, can be measured as to how long the replacement lasts before it fails, or how well one procedure and one device stacks up against another. This system of accounting could be used to ensure that less variation in standards of care, or used to focus on how to spend existing money more effectively.

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Appendix: Components of the Genuine Progress Indicator and the Index of Social Health

1. Genuine Progress Indicator

- personal consumption
- income distribution
- weighted personal consumption
- value of household work, parenting
- value of volunteer work
- services of consumer durables
- services of government capital
- cost of crime
- cost of family breakdown
- loss of leisure time
- cost of underemployment
- cost of consumer durables
- cost of commuting
- cost of household pollution abatement
- cost of automobile accidents
- cost of water pollution
- cost of noise pollution
- loss of wetlands
- loss of farmland
- depletion of nonrenewable energy resources
- other long-term environmental damage
- cost of ozone depletion
- loss of old growth forests
- net capital investment
- net foreign lending or borrowing

2. Index of Social Health

(i) Children:
- infant mortality
- child abuse
- children in poverty

(ii) Youth:
- teenage suicide
- drug abuse
- high school dropouts

(iii) Adults:
- unemployment
- average weekly earnings
- health insurance coverage

(iv) Elderly:
- poverty -- over 65
- out-of-pocket health costs - over 65

(v) All Ages:
- homicide
- alcohol-related traffic fatalities
- food stamps coverage
- access to affordable housing
- gap between rich and poor