

A Community Indicators System for Winnipeg

working together to achieve and sustain a high
quality of life for current and future generations

b u s i n e s s p l a n



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Executive summary

In 1999-2000, 3,200 Winnipeggers participated in United Way of Winnipeg's Journey Forward community engagement process by identifying Winnipeg's most pressing social issues and imagining what the community could accomplish if people and organizations worked together to address these issues.

The Winnipeggers who participated in Journey Forward wondered how the community would determine whether its collective efforts to address issues were making a difference. They also asked to be kept informed about the community's progress.

In response to this request, United Way partnered with the International Institute for Sustainable Development (IISD) to consider the feasibility of creating a community indicators system for Winnipeg that would measure and report on progress. Over the past two years, United Way and IISD engaged dozens of Winnipeggers in workshops and planning groups to consider the feasibility of such a system.

Based on its research and consideration, the current planning group is now recommending two things. First, that a community indicators system be established in Winnipeg and second, that a new, not-for-profit, charitable organization be created to develop and operate the indicators system.

The system will engage Winnipeggers in working together to achieve and sustain a high quality of life for current and future generations; in identifying the economic, environmental, cultural, social, and other priorities and issues that matter most to them; and in selecting the indicators that will measure change in their priorities over time.

The system will collect, analyze and interpret indicator data and report its findings back to the community to build Winnipeggers' knowledge about progress toward the shared vision for community, to inform their decisions, and to stimulate collaborative action.

Dozens of communities in Canada, and hundreds in the United States and elsewhere already have community indicators systems. A study by the United States Government General Accountability Office reports that such systems enhance collaboration to address public issues, provide tools to encourage progress, inform decision making and improve

Indicators initiatives can drive community change

"...the process of developing indicators can bring many different sectors of the community together, foster new alliances and relationships, provide all citizens with a better compass for understanding community problems and assets, and be used to drive community change."

Redefining Progress web site

research, and increase public knowledge about key economic, environmental, and social and cultural issues.¹

The community indicators system proposed in this business plan has been designed to achieve these benefits for Winnipeg and all Winnipeggers.

¹ United States GAO, *Informing Our Nation: Improving How to Understand and Assess the USA's Position and Progress*, November 2004, page 14.

Introduction

What are community indicators systems?

What are community indicators?

“Community indicators are bits of information that, when combined, generate a picture of what is happening in a local system. They provide insight into the overall direction of a community: whether it is improving, declining, or staying the same, or is some mix of all three...Indicators are gauges for a community, like the Dow Jones Industrial Average: just as the Dow indicates the direction of the whole stock market by tracking a small selection of stocks, indicators represent a whole community through a few factors, often selected by way of a community visioning process.”

Rhonda Phillips, Community Indicators, The American Planning Association, 2003, page 2.

Community indicators systems identify and track indicators that relate to the economic, environmental, cultural, social, and other priorities and issues that matter most to a community's members. To do this, community indicators systems engage community members in identifying the things they most value and in selecting the indicators (bits of information) that will measure change over time.

The system then collects, analyzes and interprets data for each indicator and periodically reports back to the community about its findings. Individuals, community groups, and organizations in all sectors use these reports to increase their knowledge, inform their decisions, and guide collective action to achieve the short- and long-term economic, environmental, cultural, and social progress that reflects their values and aspirations.

In this way, a community indicators system builds a community's capacity to address challenges and seize opportunities.

What is the value of a community indicators system?

A community indicators system provides balanced and objective measurements of the factors that contribute to sustaining community vitality and a high quality of life.

A community indicators systems' value is realized over time as data is collected, analyzed and interpreted to reveal trends; as cross-sectoral partners and community members participate in the system and use the information it generates to influence local policy and decision-making; and as a community's collective action results in progress toward its vision.

A study by the United States Government General Accountability Office (GAO), found that comprehensive key indicator systems

Who else has a community indicators initiative?

In Canada, dozens of communities have indicators initiatives. These range from the Fraser Basin Council to the Canmore Community Monitoring Program to Hamilton's Vision 2020, and Toronto's Vital Signs.

Redefining Progress, a public policy organization based in San Francisco, links over 200 community indicators initiatives in American communities (www.redefiningprogress.org).

The Winnipeg-based International Institute for Sustainable Development's Compendium of Sustainable Development Initiatives includes over 600 indicators initiatives around the world (www.iisd.org).

enhanced collaboration to address public issues, provided tools to encourage progress, helped inform decision making and improve research, and increased public knowledge about key economic, environmental, and social and cultural issues.

The GAO also reports that

These positive effects are a function of how different stakeholders use indicators (along with other resources and information) within the context of various political, economic, and other factors. Individuals, the media, businesses, non-profits, interest groups, professionals, and governments, among others, all may play a role in influencing ideas, choices, and actions.²

An example from Hampton, Virginia illustrates the benefit that an indicators initiative can have on a community. In her book *Community Indicators*, researcher Rhonda Phillips states that the City of Hampton created the Healthy Families Partnership — which includes public and private organizations such as hospitals, restaurants, businesses, and banks — in 1992 "in response to indicators that showed low community health."³ Since then

there has been a 26.8 percent reduction in child abuse and neglect in Hampton compared to only a 3.4 percent reduction in the larger region, and a 96 percent immunization rate for toddlers in Hampton compared to the state average of 73 percent...While there is no formal study of these impacts, several companies have relayed to the Healthy Families Partnership staff that they selected Hampton because of the program and the perception of a community willing to invest in its citizens, potential workers for these companies.⁴

² United States GAO, *Informing Our Nation: Improving How to Understand and Assess the USA's Position and Progress*, November 2004, page 14.

³ Phillips, Rhonda, *Community Indicators*, The American Planning Association, 2003, pages 10 and 41.

⁴ Ibid, page 41.

A brief history and rationale for a community indicators system for Winnipeg

In 1999-2000, United Way of Winnipeg facilitated a community involvement initiative called Journey Forward, which engaged over 3,200 Winnipeggers in identifying the most pressing social issues in Winnipeg and imagining what the community could accomplish if people and organizations worked together to address these issues.

As Winnipeggers talked about the issues facing their community, they realized three things: 1) issues are complex and interrelated, 2) organizations in all sectors are affected by, and trying to address, the same underlying issues, and 3) efforts by single organizations and individual sectors are important but insufficient to address the issues facing Winnipeg.

For example, an educator knows that hiring more teachers is important, but realizes that this will not be effective for children who come to school hungry. Health care providers know that hiring more doctors and nurses is essential but recognize that this will not be effective for a senior whose health is deteriorating because she sits at home day after day with no human interaction. Similarly, those working in the justice system know hiring more community police is critical but understand that this will not provide nurturing environments for young children who return home at night to an empty house.

These examples illustrate why the single focus of the sectoral approach, while important and necessary, is not a sufficient community response to the issues facing Winnipeg. If the community wants to improve, not just maintain the quality of life in the city, then it must find new ways to strategically coordinate the work of groups, organizations, and sectors. This will involve developing new approaches for creating partnerships that allow diverse groups to come together, and without abandoning their own missions and values, collaborate to address issues and seize opportunities to improve the quality of life in Winnipeg.

To be successful, these new ways of working together must be grounded in, and bound by, a shared community vision and supported by a solid base of credible information about how the community is progressing towards its vision. A community indicators system will provide the foundation for this to happen and will also respond to those Journey Forward participants who realized that the community needs some way to determine whether its collective efforts are making a difference and want to be kept informed about the community's progress.

Indicators are surprisingly powerful

“The indicators a society chooses to report to itself are surprisingly powerful. They reflect collective values and inform collective decisions.”

Donella H. Meadows, global strategist and farmer, as quoted in Sustainable Seattle's report, Indicators of Sustainable Community, 1998

In 2003, United Way partnered with the International Institute for Sustainable Development (IISD) to co-host a workshop to consider the value of a community indicators system for Winnipeg. The thirty-nine people who participated in the workshop confirmed their interest in a community indicators system and some volunteered to serve on a planning group to take the next step in developing a system.

At a second workshop in April 2004, participants reviewed foundations for a community indicators system, confirmed that there was value in the proposed system, and suggested that a small group develop a business plan.

Based on its research and discussions over the past year, the planning group recommends that a community indicators system be established in Winnipeg. In making this recommendation, the planning group believes that the proposed community indicators system will become an important part of Winnipeg's infrastructure.

The proposed system will build on the indicators work already being done by the three levels of government and a wide range of organizations in the private and not-for-profit sectors in areas related to their own work. In addition, the system will partner with organizations that already collect indicators data.

Because the community indicators system will be linked to and driven by a community vision, it will serve a unique purpose, make a unique contribution, and have several unique characteristics. For example, the system will be collaborative, cross-sectoral, and owned by Winnipeg as a community; it will be broad in scope and focus on vision rather than on issues. The system will also be non-partisan, independent from the influence of a single entity, and be perceived as being independent.

Elements of HCI's community vision

In this community. . .

We foster a sense of belonging among all people.

We encourage interaction and dialogue among citizens.

We embrace quality education and life-long learning as a foundation for individual and community success.

We create an economic climate where business and families prosper.

We hold a special place in our hearts for our children and our aged.

We value neighborhoods and other forms of associational life.

We expect safety and security for residents and visitors.

We protect and preserve the natural resources and environmental beauty which surrounds us.

We require accountability from our public institutions and officials.

We support a diverse array of arts, cultural and recreational opportunities.

We provide many modes of efficient and affordable transportation.

We nurture both body and spirit.

We see evidence of an active and involved citizenry in every aspect of community life.

We accept personal responsibility.⁵

One example of a community indicators initiative

While there are hundreds of indicators initiatives from which to select an example, The Healthy Community Indicators Initiative of Greater Orlando (HCI) has been chosen because it closely resembles the system recommended for Winnipeg.

HCI began in 1992 when a small group of people interested in solving community issues came together. This group engaged local residents and stakeholders in developing a vision for their community that reflects their unique concerns, hopes, and collective values as follows:

Greater Orlando, in the 21st century, is a place where individuals are valued and encouraged to use their unique talents and gifts to create an outstanding community. Our community proudly serves as an example of what is possible when people find common ground and work together.⁵

To measure progress toward this vision, HCI reports on thirty indicators that were selected by residents, civic leaders, business people, and technical experts. The indicators are clustered into four categories: nature, economy, society, and well-being.

Nature indicators include things like energy consumption and land use; economy indicators include things like income distribution and rental affordability; society indicators include things like class size for kindergarten to grade five and voting rates; and wellbeing indicators include things like community connectedness and learning for the future.

Every few years HCI publishes an easy-to-read, illustrated report on its indicators. For each indicator, the report includes an observation about the trend (decreasing, increasing, etc.) a description of what is measured, an interpretation of what the measurement means, and a suggestion on how the community should respond.

HCI's report is widely circulated in print and available on the organization's web site (www.hciflorida.org). According to HCI, people and groups throughout the Orlando area use the report for their own learning and planning processes.

⁵ The Healthy Community Initiative of Greater Orlando, *Legacy 2002 Greater Orlando Indicators Report*, page 3.

The proposed community indicators system for Winnipeg

What is a sustainable community?

In 1987, the World Commission on Environment and Development created what has become the most widely used definition of sustainable development:

development that meets the needs of the present without compromising the ability of future generations to meet their own needs

Communities that are interested in sustainability integrate economic, social, environmental, and other goals. Achieving these goals contributes to quality of life.

Guiding statements

Mission

To build the knowledge and capacity for Winnipeggers to work together to achieve and sustain a high quality of life for current and future generations.

To achieve this mission, the Community Indicators System for Winnipeg will engage Winnipeggers in an ongoing community process that will do the following:

- develop a shared community vision,
- measure, monitor and report on indicators of progress toward the community vision,
- build knowledge and inform community decisions and policy, and
- stimulate collaborative action to achieve the vision.

Values

The Winnipeg community indicators system will be community-based and non-partisan; will follow a collaborative, transparent process; and will provide information that is meaningful and relevant to individuals, families, neighbourhoods, policy makers, decision makers, program designers, program managers, and service providers.

The following beliefs and principles will guide the system's decisions and actions:

A holistic approach

A holistic approach that acknowledges the interconnections among economic, environmental, cultural, and social factors

Inclusive participation

Participation by all sectors and all interested groups and individuals

Diversity

Embrace the diversity within the community

Respect

Respect among those community members who participate in the community indicators system and use it to guide their decisions, policies, and actions

Independence and Interdependence

Recognition and respect for the independence and interdependence of sectors, organizations, and individuals

Collective responsibility

Collective accountability and collective responsibility for developing and achieving a shared vision for community

Sustainability and responsiveness

Sustainable, manageable processes that respond to changes within the community and build on existing indicators initiatives and capacities

Meaningful and relevant reporting

Timely, accessible and credible reporting to the community

Learning and capacity building

Commitment to continuous individual and collective learning to build knowledge and capacity for creating change over time

Focus on the future

Commitment to take action to create a positive future for subsequent generations

Outcomes and goals

To realize its mission, the community indicators system for Winnipeg has defined outcomes and goals as follows:

- Outcomes: the positive results that the community indicators system will achieve over time
- Goals: what will achieve the outcomes

Given these definitions, the system will focus on achieving three outcomes for the community. The outcomes and their related goals reflect the values that will guide all aspects of the community indicators system.

What is a Winnipegger?

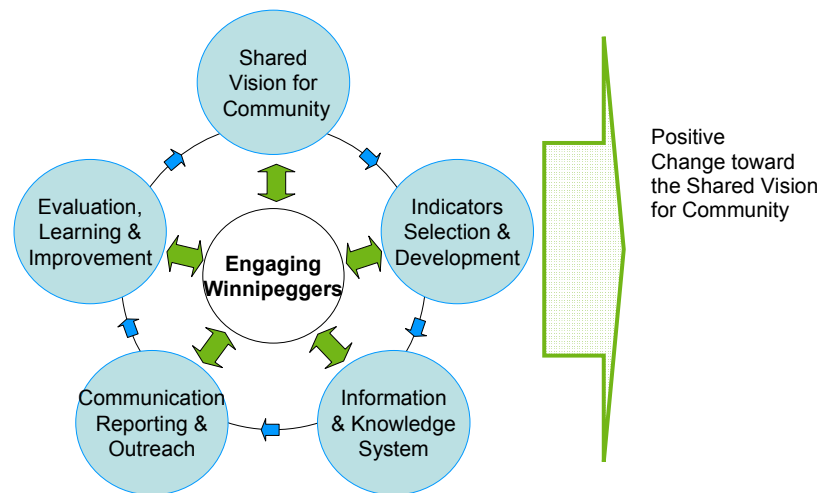
For the purpose of this initiative, “Winnipeggers” includes all members of the community whether they are the people who live and work in Winnipeg, their formal and informal associations, and the organizations that make up the public, private, and not-for-profit sectors.

Outcomes	Goals
#1. Winnipeggers have a shared vision for community	A shared vision for community that is developed, shared, and kept current by Winnipeggers
#2. Winnipeggers are informed about the community’s progress towards its shared vision	A community owned and driven partnership and process to establish and sustain a system of indicators reflecting the shared vision An information system created and maintained for keeping track of indicators Broad community knowledge about trends, what they mean, and how they are relevant
#3. Winnipeggers are working collaboratively to address challenges and seize opportunities to achieve their shared vision	The community responds to address challenges and seize opportunities

Operating model: how the system will work and what it will produce

To achieve its outcomes, the community indicators system will use the following operating model to engage Winnipeggers in working together to achieve a high and sustainable quality of life for current and future generations.

Community Indicators System Operating Model



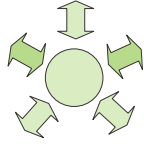
Why engage Winnipeggers?

“The strength of a community indicators measuring system lies in the involvement of citizens...Bringing residents together to envision their community’s future, establish specific goals, and select indicators for gauging progress can foster residents’ sense of belonging to their community and encourage stronger interest in outcomes.”

Rhonda Phillips, Community Indicators, The American Planning Association, 2003, page 10.

The operating model depicts a continuous process in which some things happen in sequence and others concurrently. Examples of the system’s work that will occur in the sequence depicted by the model include developing the shared vision for community before selecting and developing indicators. Examples of work that will occur simultaneously include developing indicators while the information and knowledge system is being established.

Over time as the system becomes well established, many parts of the operating model will be active at the same time.



Engaging Winnipeggers

Engaging Winnipeggers is an integral part of the community indicators system and is at the core of its operating model. For the purpose of the indicators system, “Winnipeggers” includes all members of the community whether they are the people who live and work in Winnipeg, their formal and informal associations, and the organizations that make up the public, private, and not-for-profit sectors.

To effectively engage Winnipeggers, the community indicators system will develop a strong and compelling brand identity and use marketing and communications to create and maintain a high level of interest in the system.

The first formal opportunity for engaging Winnipeggers will occur during extensive consultations to develop the shared vision for community.

The second opportunity will occur when the system reports back to Winnipeggers on the shared vision and invites feedback; the third engagement will occur when Winnipeggers are asked to comment on a draft set of indicators; and the fourth during the communication, reporting and outreach phase.

As the system develops and evolves, the nature of its engagement with Winnipeggers may become less sequential as various elements of the operating model engage with different groups of Winnipeggers, for different purposes, at different times.

Shared vision for community

Themes inform the selection of indicators

Toronto's Vital Signs initiative has selected housing as one of its theme areas and measures progress using four indicators: the percentage of household income spent on rent or a mortgage, the demand for subsidized housing, dependency on emergency shelters, and waiting lists for nursing homes.

Themes reflect the things that community members value most

When the Truckee Meadows Tomorrow indicators initiative in Reno, Nevada consulted with its community members, they selected six themes that were important to them: economic vitality, education, health, land use and infrastructure, the natural environment, and public safety and welfare.

Purpose: This part of the operating model is designed to engage Winnipeggers in developing a shared vision for community and in identifying themes that reflect Winnipeg's unique characteristics as a community and the things that people value most.

(To generate and maintain a sense of momentum, the visioning process will occur over a relatively short period of time in neighbourhoods throughout Winnipeg. The system will encourage all Winnipeggers to participate and will also involve targeted stakeholder groups such as youth, seniors, new immigrants, community leaders, and others.)

Outputs: This part of the operating model will produce four outputs:

- engaged Winnipeggers,
- a shared vision,
- underlying themes, and
- an understanding of how Winnipeggers will know if progress is being made toward the shared vision.

Key activities:

- Use the community indicators system's brand and its marketing and communications strategy to create a high profile for the system and generate interest in the visioning process.
- Define the level of community participation necessary to validate the engagement process and resulting vision.
- Identify targeted stakeholder groups.
- Identify community visioning processes that have occurred previously in Winnipeg, review the visions that resulted, and identify common themes.
- Develop and implement an engagement process that will do three things: 1) create the shared vision for community, 2) identify the underlying themes that are important to Winnipeggers and, 3) and reveal how Winnipeggers will know whether progress is being made toward the vision. (The themes will influence the selection of indicators that occurs during the next element of the operating model.)

The engagement process may include small group workshops and large group forums as well as web site and other survey techniques.

- Synthesize the results of the community engagement process by articulating three things in writing: the vision, the underlying themes, and how Winnipeggers will know if progress is being made toward the shared vision.
- Check back with Winnipeggers to validate the draft vision, themes, and ways Winnipeggers will know if progress is being made toward the shared vision.
- Finalize the vision, themes, and ways that Winnipeggers will know if progress is being made.

As time passes, the system will periodically engage Winnipeggers in a process to reaffirm or update the vision to ensure that it remains relevant and reflects changes in the community.

Indicators selection and development

Purpose: This part of the operating model is designed to engage Winnipeggers and experts in developing a set of indicators to measure Winnipeg's progress toward their shared vision.

Outputs: Indicators selection and development will have two outputs:

- a set of indicators to measure Winnipeg's progress toward the shared vision for community, and
- information on data sources.

Key activities:

- Conduct a literature review on other community indicator initiatives to identify the indicators they have used for similar themes.
- Establish criteria for selecting indicators. Criteria may specify the total number of indicators desired (likely between twenty and thirty), that the data must be available from existing sources, the frequency that new data must become available, etc.
- Develop a draft set of indicators in consultation with data experts.
- Engage Winnipeggers in commenting on, and prioritizing, the draft set of indicators.
- Finalize a set of indicators that is meaningful to Winnipeggers.

Indicators and action

"Indicators are not substitutes for action. But the process of developing indicators, researching them, studying the trends they reveal, and getting the community talking can stimulate a response, directly or (more often) indirectly."

Tyler Norris Associates, Redefining Progress, and Sustainable Seattle, The Community Indicators Handbook, 1997, page 39



Information and knowledge system

Purpose: This part of the operating model is designed to manage and provide the indicators information required by the system.

Outputs: The information and knowledge system will use information technology and data experts to create a data management system for collecting, analyzing, and interpreting the indicators information required for the next step in the operating model.

Key activities:

- Acquire computer software and hardware based on an assessment of requirements.
- Consider the level of detail required and determine how data for each indicator will be broken down e.g. for Winnipeg as a whole or by neighbourhood, by age group, etc.
- Collect data from secondary sources where possible. If data is not available from existing sources, use proxy measures or solicit sponsors to create the data through surveys and other means.
- Collect data to establish historical trend lines and current baselines.
- Analyze and interpret the historical data for inclusion in the system's first report to Winnipeggers. Interpretation will answer two questions: What is happening? and What does it mean? (Those who use the information provided by the system may consider the questions Why is it happening? and What should be done?)

(Each community indicators initiative develops its own guidelines and style for data analysis and interpretation. Appendix 1 provides one example of analysis and interpretation from the Healthy Community Initiative of Greater Orlando.)
- Collect, analyze and interpret data on a regular basis to show change over time.
- Use benchmarks where feasible to establish targets for progress toward the shared vision. Such benchmarks will be established using national averages (e.g. average police response times), national standards and measurements (e.g. the low income cut-off), or some other means.

Interpreting data makes it meaningful

Interpreting data is a neutral process that provides a context for those who use the information produced by an indicators system.

The Healthy Community Initiative of Greater Orlando interprets data by providing detail under three headings: what it means, what it connects to, and how to respond. (See Appendix 1 for an example.)

Toronto's Vital Signs interprets the results of its data analysis for the indicators in each of its ten theme areas. In its 2004 report, Vital Signs interpreted the trends revealed by the indicators for its housing theme as follows: "Toronto's housing market is changing. Home ownership is on the rise and there is an unprecedented vacancy rate in rental apartments. But for those with the least income, it is becoming more challenging to secure affordable housing."

Communication, reporting, and outreach

Purpose: This part of the operating model is designed to serve three purposes:

- engage Winnipeggers in participating in and learning about the system (build awareness, support, and knowledge),
- communicate the results after indicators have been collected, analyzed and interpreted, and
- engage Winnipeggers in discussing and using the indicators information to inform their decisions and actions and to stimulate collaborative action.

Outputs: Communication outputs may include the following:

- advertising and promotions to encourage Winnipeggers to engage in the system,
- indicator reports and bulletins,
- an interactive web site that allows Winnipeggers to access the database, reports, and display tools that illustrate trends,
- customized presentation packages for specific audiences, and
- media exposure.

Key activities:

- Develop a brand, brand strategy, and creative elements such as a logo.
- Develop and implement a marketing, communications, public relations, and outreach strategy that identifies the following:
 - who the system wants to communicate with (Winnipeggers collectively plus specific target audiences such as funders, partners, leaders in key sectors, neighbourhood groups, etc.),
 - why the system wants to communicate with Winnipeggers collectively and also with specific target audiences (to build awareness and support, engage participation, inform decisions and actions, etc.),
 - what messages the system wants to communicate to each audience, and
 - how the system will communicate to its various audiences (through printed materials, a web site, presentations and speeches, etc.).

Evaluation, learning and improvement

Purpose: This part of the operating model is designed to do two things:

- evaluate the system's efficiency, effectiveness, and accountability to ensure continuous learning and improvement, and
- assess the system's impact in the community.

Outputs: Evaluation, learning and improvement will occur on an ongoing basis within each element of the operating model. Periodically the results of this process will be summarized in the following outputs:

- a quarterly or semi-annual update report to the system's executive committee and board of directors on progress implementing the operating plan,
- an annual evaluation report on the system's progress and effectiveness including key lessons learned and recommendations for improvement, and
- an independent evaluation of the system's impact on the community to be conducted every three to five years.

Key activities:

Evaluation (Ask: What happened?)

- Identify and develop a few criteria for evaluating progress and effectiveness in each element of the operating model. Using the vision element as an example, key progress criteria might identify the state the vision is at (in development, in use, under revision). The effectiveness criteria might determine whether Winnipeggers think the vision is clear, relevant, inspiring, and effective in stimulating collaborative action to address challenges and seize opportunities.
- Collect information on each of the key process and effectiveness criteria using surveys, self-assessments, etc.
- Analyze the information collected for each measure.

Learning (Ask: How effective was it?)

- Use the evaluation results to identify lessons learned.
- Document the lessons learned.

Improvement (Ask: How do we apply our learning?)

- Identify key areas for improvement.
- Implement improvements and monitor results.

Report

- Produce the quarterly/semi-annual progress reports, annual evaluation reports, and independent evaluations in print and electronic formats.
- Distribute reports to appropriate audiences (the board, executive, technical advisory groups, funders, corporate sponsors, partners, etc.).



Positive community change toward the shared vision for community

By managing the ongoing process described in this operating model, the indicators system will achieve its intended outcomes:

- a community vision that has been developed, shared, and kept current by all Winnipeggers,
- Winnipeggers informed about the community's progress toward its vision, and
- Winnipeggers working collaboratively to address challenges and seize opportunities to achieve their shared vision for community.

Governance and partners

Governance

The planning group proposes that a new, not-for-profit, charitable organization be created for the community indicators system. In making this recommendation, the planning group was guided by the system's purpose and values and considered the following criteria:

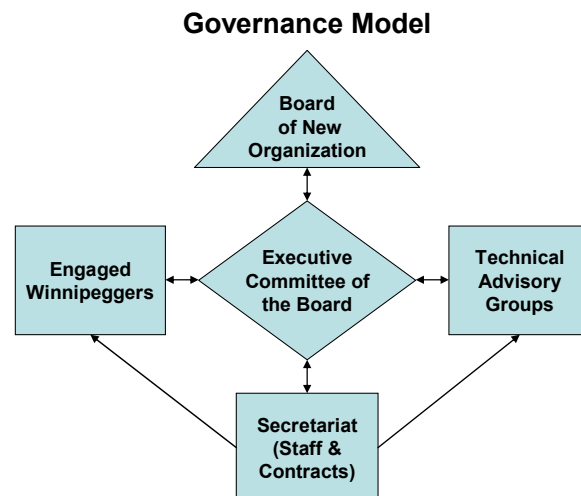
- accountability
- credibility
- participation
- capacity
- efficiency
- sustainability
- competence
- independence
- transparency

The new organization will provide the following benefits:

- assign governance to a board that is dedicated to one purpose, ensuring the system's success, and will take an active role in championing the system and engaging Winnipeggers.
- create high visibility, a unique position, and a positive image for the system,

As shown in the diagram of the governance model, the proposed organization will be led by a board of directors. The board's responsibilities will include developing policy, providing stewardship, and ensuring accountability.

An executive committee will provide strategic direction to both the board and technical advisory groups and will also actively engage with Winnipeggers through the technical advisory groups.



The technical advisory groups will include volunteers who are expert in indicators selection, data management, marketing and communications, and other fields that are critical to the successful implementation of the system's operating model, which is described in the following section of this business plan.

A secretariat consisting of a small staff and experts working under secondment from partner organizations and/or under service contracts will support the executive committee, the technical advisory groups, and the board. The secretariat will also engage directly with Winnipeggers.

In deciding to propose a new organization, the planning group also identified ways to keep the organization small and its overhead low. Accordingly, the planning group hopes that partner organizations will provide office and meeting space, administrative supports, marketing expertise, and other services on a cost-recovery basis or as in-kind contributions.

These financial details are presented in the start-up and operating budgets contained in the last section of this business plan.

Partners

The community indicators system's planning process has received support from all three levels of government, not-for-profit organizations, and foundations that participated in planning groups and workshop consultations.

To be successful, the proposed new organization will require continued support from these partners as well as from the corporate sector. The system will depend on its partners to provide support and funding; in-kind contributions of human resources, materials, and supplies; and in some cases, indicators data.

The organization will also be seeking partnerships with individuals willing to volunteer their time, knowledge, and skills to lead the new organization as members of its board of directors, executive committee, and technical advisory groups.

Start-up and annual operating budgets

The start-up budget shows the estimated costs and required revenue to establish the not-for-profit, charitable organization that will operate the community indicators system and develop the basic infrastructure that the system will require to implement its operating model. Actual start-up costs may be less than the amount budgeted if the system is housed within an existing organization.

The operating budget shows the estimated annual cost of operating the community indicators system.

Revenues include grants, sponsorships, cash and in-kind donations, and subscriptions. Targeted sources of revenue include government, corporations, foundations, not-for-profit organizations, and individuals.

Indicators Initiative: **Start-up Budget**

Expenses		Note
Incorporation costs: legal and registration fees	2,000	
Web site development	10,000	
Brand development	10,000	
Office furniture, equipment, hardware and software	76,000	1
Leasehold improvements	16,000	2
Contingency	10,000	3
	<u>124,000</u>	
Required revenue: cash and in-kind	<u>124,000</u>	

Budget Notes:

- 1 This includes furniture for two offices and a meeting room; two computers, a printer, and a firewall in a wireless network; software licences for Microsoft Office and data management software; and a fax machine.
- 2 Leasehold improvements are calculated at \$20/square foot for 800 square feet of space that will accommodate two offices and a meeting room.
- 3 The contingency is approximately 10% of the start-up budget.

Indicators Initiative: Annual Operating Budget

Expenses		Note
Salaries and benefits	115,000	1
Staff development and related expenses	5,000	
Contract services	60,000	2
Governance: board expenses, audit and legal	10,000	
Office and administration	68,000	3
Program costs	50,000	4
Contingency	<u>30,000</u>	5
	<u><u>338,000</u></u>	
Required revenue: cash and in-kind	<u><u>338,000</u></u>	

Budget Notes:

- 1 Salaries are for two positions: an executive director and administrative support. Benefits are calculated at 15% of salaries.
- 2 Contract services allows for experts working under contract in areas such as marketing and communications, data management, data analysis and interpretation, etc.
- 3 Office and administration includes office rent (800 square feet), accounting fees, equipment and supplies, telephone and Internet, printing, amortization of leaseholds and equipment, etc.
- 4 Program costs allow for expenses to implement each part of the operating model. These costs will vary from one year to the next. For example, in the first year the major program cost will relate to the community visioning process, in a subsequent year it may relate to publishing and promoting an indicators report or enhancing the system's web side to provide the public with on-line access to indicators data.
- 5 The contingency is approximately 10% of the operating budget.

Appendix 1: Data interpretation and communication

The following material, from the Healthy Community Initiative of Greater Orlando's indicators report titled *Legacy 2002*, provides an example of data interpretation and communication.

Indicator: Child Poverty

Status: Fewer of our children are living in poverty

Trend

Improving since 1996

What we measure

This indicator reflects the percentage of our children, 18 years old and younger, who are living in households that have incomes below a level considered the minimum necessary for economic sufficiency in our community.

What it means

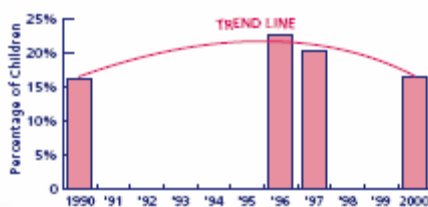
There has been a significant reduction in child poverty in our community. The rising tide of child poverty that began last decade seems to have reached a high water mark in 1996, at 22.6 percent. The most recent

Census data show that rate back down to 16.8 percent — almost exactly what it was in 1990. This is below the current national average of 19 percent. This trend is something to celebrate, both for its own sake and because of all the positive consequences that will result from it. It is a trend that we should sustain and accelerate.

At the same time, while the news is good, our current child poverty rate still translates to 35,989 children growing up without basic economic security and with significant social and health challenges. We should not relax our efforts to lift all our children from the unnecessary burden of growing up poor.

PERCENTAGE OF CHILDREN LIVING IN POVERTY

Orange County, FL



What it connects to

Child poverty is recognized as an important determinant of health and of success in education. Poverty has such a powerful influence on those trends because it is tied to situations where families lack adequate health care, adequate nutrition, and an intellectually stimulating environment. These factors often lead to academic failure and to a number of other problems, including substance abuse and violence.

Child poverty links to economic diversity, and the availability of good jobs. Child poverty is also linked to juvenile crime, mental well-being, and infant health. Those of us living in poverty are unable to afford homes and unable to keep up rent payments. As a result, we often are caught in a “mobility churn” and move our children to new homes and new schools frequently.

Information sources

US Census Bureau