MEASURING PROGRESS:
COMMUNITY INDICATORS AND THE QUALITY OF LIFE

David Swain, DPA

Associate Director, Jacksonville Community Council Inc.
2434 Atlantic Boulevard, Suite 100
Jacksonville, Florida 32207
indicators@jcci.org

April 2002

ABSTRACT

As communities and local governments have become increasingly concerned about quality-of-life issues, community indicators have become a widely used tool to measure the status of the quality of life and progress being made toward improving it. Indicators provide a vehicle to understand and address community issues from a holistic and outcomes-oriented perspective. They are useful, within the context of an overall community-improvement process, both as a planning tool, based on a community's vision, and as an evaluation tool to measure progress on steps taken toward improvement. Their usefulness is maximized when they are both directly tied to public-policy and budget decision making and when the community feels a sense of ownership of the indicators through direct citizen involvement with them. This article summarizes major approaches and issues in the national and international community-indicators movement and then focuses on the experience of the Jacksonville (Florida) Community Council Inc., a pioneer and leader in the community-indicators movement.

INTRODUCTION

Ultimately, public policy makers and public administrators who toil in fields as diverse as children's services, welfare reform, arts and culture, and infrastructure are all concerned with maintaining and improving the quality of life within their political jurisdictions. For some time, governments have increasingly been urged to evaluate the results of their efforts. Most frequently, this has meant measuring public-service outputs (or inputs) for purposes of management efficiency and political accountability. More recently, however, a movement has

emerged that seeks to assess wellbeing in a more holistic way by measuring quality-of-life outcomes.

Although this approach is being developed and used effectively at national and international levels, it seems to be taking hold most firmly at the community level. Good reasons exist for this. If, as Tip O'Neill, former speaker of the U.S. House of Representatives, recognized, public life ultimately happens at the local level, people's quality of life as well is determined, or at least strongly influenced, at this level. In addition, individuals have the best opportunity, at the local level, to meet together to define mutual goals and to take mutual action toward a better collective future.

MEGA-ISSUES

Community indicators movement

As the community-indicators movement rapidly expanded since the mid-1980s, it has emerged from several differing starting points. Four "sub-movements" still retain distinct identities in some ways because of differing origins, assumptions, and purposes. The dynamics of these differences revolve around several mega-issues:

▪ the choice of conceptual metaphor used to define community wellbeing, progress, and improvement for purposes of the indicators project;

▪ the choice of sponsoring organization for the indicators project, either within local government or from the larger community; and

▪ the definition of the indicators project's purpose, either to elicit, articulate, and work with the community's existing vision of community wellbeing and improvement or to challenge the community to modify its vision based on alternative, perhaps externally defined concepts of wellbeing.

Each of the four sub-movements is introduced below, with reference to the issues raised above:

Quality-of-life indicators: Pioneered in Jacksonville, Florida by the Jacksonville Community Council Inc. (JCCI) in 1985, this approach starts with the concept of existing economic indicators and seeks to expand them to include indicators of all other important aspects of a community's quality of life. JCCI's concept was influenced greatly by the visionary thinking of its executive director at the time, Marian Chambers, as well as the internationally known futurist Hazel Henderson.

Besides advocating measures that transcend the traditional economic indicators, their thinking was critical of the economic indicators themselves, for two reasons. First, they count as positive for the quality of life all money transactions, whereas some of these can be seen as decidedly negative (e.g. money spent on environmental cleanup of pollution that could have been prevented). Also, they do not count the value of non-monetary activity, such as homemaker and

volunteer work, which are decidedly positive for the quality of life. The national-level Gross Domestic Product (GDP) has come in for the most direct criticism, and several efforts have emerged recently to calculate more quality-of-life-friendly alternatives for both the national and local levels. The first of these was the Genuine Progress Index (GPI), developed by Redefining Progress (see *www.rprogress.org*).

JCCI was also influenced by its initial institutional partner in developing community indicators, the Jacksonville Chamber of Commerce. The Chamber, in the course of its economic-development activities, was finding that CEOs of potential business prospects were asking pointed questions about educational quality, race relations, and environmental quality as well as workforce capability, investment opportunities, and infrastructure. These CEOs were asking for quantifiable information about Northeast Florida's quality of life that, at the time, was not available. Meanwhile, JCCI, a nonprofit, community-based "think tank" seeking community improvement through direct citizen learning and advocacy, was seeking ways of understanding and measuring community progress on a wide variety of issues with which it was concerned. The coalescing of these complementary needs led to the development of the first quality-of-life indicators project, by a large citizen-volunteer task force convened by JCCI, with active participation and financial support from the Chamber.

Over the years since 1985, JCCI has updated its indicators annually, has upgraded its indicator set several times, and has expanded its indicator-related purposes (see the second major section of this paper for more detail; see also *www.jcci.org*). During the same period, many other community indicator projects, in North America and around the world, have adapted JCCI's model in a wide variety of ways to establish indicator projects in their own areas (see *www.rprogress.org* for a listing of community indicator projects with web sites).

Sustainability indicators: Pioneered by Sustainable Seattle in 1993, this approach starts from an environmentalist perspective, viewing the community as an organic microcosm functioning within the global ecological system of planet Earth. Sustainability thinking then expands the perspective, recognizing that human wellbeing is influenced by social and economic, as well as environmental factors, and seeks to measure indicators in all three areas, but usually with emphasis on environmental indicators.

Because of its ecological perspective, the sustainability approach recognized early the importance of understanding the interconnectedness and linkages among various aspects of human wellbeing. Beyond identifying linkages among environmental, social, and economic measures, this approach has recognized the importance of identifying linkages over time and space. A trend that appears positive in the short term may, if prolonged, turn in the long term into a negative trend (e.g. unlimited urban growth). Similarly, a trend that appears positive in one geographic area may, in fact, be having a negative impact on another geographic area (e.g. downstream water pollution).

As with the quality-of-life approach, the sustainability approach initially developed by Sustainable Seattle (see *www.scn.org/sustainable*) has been adapted for use in many other community indicator projects (see *iisd.ca/measure/compindex.asp* for a global listing of sustainability indicator projects at community, national, and international levels). It has also

been highly influential in efforts to develop indicators at both national and international levels, especially under auspices of the United Nations. The 1992 "Earth Summit" conference in Rio de Janiero and the resulting activities worldwide in response to its "Agenda 21" for local sustainable development (see, for instance, *iisd1.iisd.ca/rio+5/agenda/riodocs.htm*) represented a milestone in the development and use of sustainability indicators. Another important conference, called Habitat II, was convened in 1996 in Istanbul. It focused on issues of urban sustainability and recognized the importance of community-indicator projects to guide development and measure progress (see *www.unhabitat.org*).

Healthy-community indicators: The term "health" is used most commonly in reference to the physical/emotional/mental wellbeing of individuals. However, those involved in public health in the U.S. and around the world have recognized a broader concept of "community health." A third approach to community indicators has found fertile ground in this public-health concept. As with the previous approaches, understanding of the scope of "health" has expanded holistically to include economic prosperity, social wellbeing, environmental quality, public safety, and other elements of collective health in a community. Yet, as with the sustainability approach, healthy-community indicator sets tend in some cases to emphasize measures closely related to the initial concept—in this case, health in the more traditional sense.

A large number of healthy-community projects emerged during the 1990s, many with institutional support in the United States from the National Civic League and the Health Forum and from the World Health Organization internationally (see *www.who.int/hpr/archive/cities/index.html*). In the U.S., this segment of the movement has spawned a Coalition for Healthier Communities and Cities (CHCC), which inclusively connects interested healthy-community projects nationwide (see *www.healthycommunities.org*).

Benchmarking indicators: Benchmarking projects emerged during the 1990s as yet another approach to indicators. The State of Oregon took the lead in this approach with the *Oregon Benchmarks* project in 1991. This ambitious initiative sought to take some of the holistic, outcome-based concepts of the other community indicators approaches and apply them to an entire state, working from within state government. It emerged from a large-scale strategic planning process, so its purpose was only indirectly to influence specific public-policy changes.

Oregon's initial effort produced over 250 indicators, later reduced to less than 100 (see *www.econ.state.or.us/opb*). As political winds shifted, the project has had some ups and downs. Along the way, it has had some success in spawning companion benchmark projects in local political jurisdictions around the state (see, for instance, *www.p-m-benchmarks.org* for the Portland area's project). The State of Minnesota emulated Oregon's example with *Minnesota Milestones* in 1992, most recently updated in 1998, (see *www.mnplan.state.mn.us/mm*). Beyond these, statewide benchmarking has not caught on among most other states.

However, in both state and local governmental realms, another form of indicator measuring has been around since early in the 20th Century. **Government performance indicators** have focused until recently on measures of the efficiency and productivity, within specific jurisdictions, of service delivery and management. Beginning in the 1980s and 1990s, influenced by movements to measure "customer outcomes" and to "manage for results," some

governments have begun to measure more broadly defined indicators of the outcomes of public services and policies. These still are more narrowly defined than holistic community or state outcomes because they focus on the outcomes of specific governmental activities. Yet, they substantially narrow the gap between traditional performance indicators and benchmarking indicators. The Governmental Accounting Standards Board (GASB) is doing work now, consistent with these trends, designed to broaden how governments think about performance measurement.

The choices made by indicators projects concerning their conceptual metaphor, sponsoring organization, and purpose have tended to influence the direction these projects have taken at the community level. The following generalizations oversimplify the reality in any one community but suggest patterns that are real.

Quality-of-life projects have tended to:
- select a broadly defined and balanced set of indicators;
- be sponsored by chambers of commerce, community-based organizations, or other non-governmental bodies; and
- focus advocacy on improvements which the community has already come to recognize as important and around which some degree of consensus has already been established.

Sustainability projects have tended to:
- select a set of indicators with greater emphasis on environmental measures;
- be sponsored by community-based organizations or other non-governmental bodies; and
- advocate for community improvements consistent with the principles of sustainability, as a means of changing perceptions and creating consensus on the desirability, even necessity, of these improvements.

Healthy-community projects have tended to:
- select a set of indicators with greater emphasis on health issues;
- be sponsored by health-care institutions, public-health agencies, community-based nonprofit organizations, or combinations of these; and
- focus advocacy on improvements that the community has already come to recognize as important and around which some degree of consensus has already been established.

*Benchmarking* projects (and government performance-measurement efforts) have tended to:
- select a set of indicators that measure extended outcomes related to public services;
- be sponsored by a governmental entity at either the state or local level; and
- focus advocacy toward guiding public-policy (and perhaps budgetary) decisions that determine or at least influence public-service outcomes.

Of course, the four approaches are not mutually exclusive in practice. For example, some notable sustainability projects are sponsored by governmental entities, especially in nations such as Canada, New Zealand, and some European countries. In the U.S., the State of Maine published since 1993 annual outcome *Measures of Growth*, which are defined as "performance measures and benchmarks to achieve sustainable long-term economic growth for Maine" (see *www.mdf.org/megc*). At the local level, Santa Monica, California's municipal government tracks

sustainability indicators and uses them to help guide policy and budget decisions (*see pen.ci.santa-monica.ca.us/environment/policy/indicators.htm*). In the Seattle region, governments have become directly involved in both sustainability and healthy-community projects, while the original Sustainable Seattle has remained a private, nonprofit effort.

Community improvement process

The common thread among all these approaches is the goal of improving human wellbeing, now and in the future. At the community level, and perhaps more generically, the process of collective activity leading toward improvement may be described in terms of the following simplified systems model:
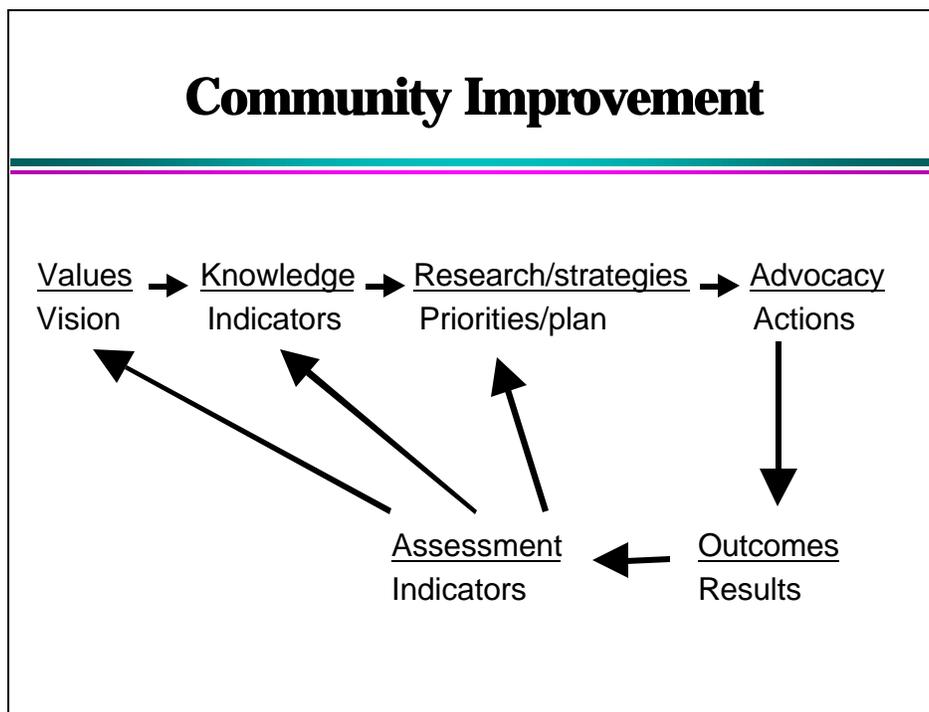
Figure 1. Community improvement process diagram.

Vision: The impetus toward community improvement originates with how a community values itself and what vision it has for its future. All communities have some sort of vision and at least some shared values, although these may not be consciously articulated. Some communities have sought to define and express their visions through complex collective processes and impressive documents.

Indicators : For an improvement effort to emerge, some knowledge must exist about the current situation. Indicators tell graphic stories (figuratively and actually) about specific aspects of life and wellbeing in the community. If tracked over time, they offer a moving picture of community trends in the recent past. These trends can be followed for understanding. They can also be

compared with the community's vision. The resulting comparison of reality with vision can become the basis for determining improvement goals.

Indicators alone, however, are insufficient to instigate action for improvement. In particular, they often reveal little about the underlying causes of the trends they display. Nor do they usually provide clear direction toward how to accomplish improvements. The most important roles indicators can play at this stage are to raise consciousness among citizens and decision makers, to reconfigure priorities among issues most deserving of community attention, and to shape the agenda for public consideration of action and allocation of resources.

Planning: Once an issue has "arrived" on the community's agenda, action must be preceded by planning. This planning may include research into causes and solutions and development of strategies and priorities.

Advocacy and action: The results of the planning, along with some key indicators, may become the basis for advocacy efforts. These might include public campaigns by citizens organizations and interest groups, as well as formal lobbying and decision making within the halls of government. Presuming success in advocacy, some form of action follows, whether through a new initiative, program, or organization, or perhaps through implementation of a new law or ordinance.

Outcomes: The actions produce results, both immediate outputs and broader, longer term outcomes. From the perspective of the community's vision and the indicators that guided its planning, documenting and understanding the outcomes are of paramount importance. They form the basis for measuring success, or at least progress.

Assessment: As articulations of the vision and the basis for community goals, the indicators play a second important role by providing the basis for evaluation of the results. If the planning, advocacy, and action have been consistent with the vision and indicators, the outcomes will reveal progress—or lack thereof. Either is a valuable lesson for a community. Successes deserve celebration, while disappointments deserve attention toward greater improvement.

Feedback: Since the real-life, community-improvement process is incremental and iterative, the primary value of assessment is to set up another round of improvement efforts. Most frequently, the assessment feedback loops back to the planning stage in search of better understanding of causes and development of more effective solutions. In some cases, unexpected results may lead a community to rethink its indicators or even to question its vision.

Relating issues to process

How a specific indicators project relates to the generalized model of community improvement depends on its sponsorship and purpose and, of course, on the unique dynamics of its community's political and civic culture.

Sponsorship: A project with community-based sponsorship has the potential advantage of being perceived as representing "the voice of the people." If the sponsoring organization's process has

been open and broadly participatory, the resulting indicators may gain credibility through the community's "buy-in" and "ownership." Such buy-in can be very important in moving successfully from indicators through planning to advocacy and action.

On the other hand, a project with local-government sponsorship has the potential advantage of being directly "plugged into" the community's formal public decision-making process. This may facilitate planning and short-cut the advocacy process, leading more directly toward the allocation of resources and action.

The examples of Jacksonville and Santa Monica illustrate the strengths and weaknesses of each approach to sponsorship. Jacksonville's community-based, quality-of-life indicators project has gained credibility through community buy-in because of the carefully facilitated citizen-based process used (along with high quality staff research to back it up). However, the Jacksonville indicators have no direct conduit into the public decision-making process by the City of Jacksonville or other governmental entities in the region. This has frustrated some citizens, who would like to see an "official," structured process that responds directly to indicators needing community attention with specific public decision making for improvement. Instead, the indicator information is disseminated and exists in the community, waiting until some institution or interest group responds to the compelling stories told by the indicator trend lines. Citizens involved in the Jacksonville indicators project are currently exploring ways to create a more structured bridge from indicators to planning, advocacy, and action.

In contrast, Santa Monica's sustainability indicators were developed within city government and formally adopted by the City Council. They were intentionally positioned to have an "inside track" of influence on public decision making. Despite the fact that the indicators have, in fact, had direct public-policy impacts (e.g. by increasing bus ridership and expanding use of alternative fuels for vehicles to reduce pollution), Santa Monica officials have found that many citizens are distinctly uninformed about and disengaged from the indicators. Some of the city's elected officials have interpreted the weak sense of community ownership as a lack of political support. This has raised questions about the project's future, which city officials are seeking to address by searching for ways to build citizen buy-in.

With Jacksonville citizens reaching out for a way to connect indicators more directly to public decision making and with Santa Monica city officials reaching out to citizens in search of community buy-in, the answer for optimal sponsorship would appear to be some sort of public-private collaboration or partnership. Such collaboration ideally would combine the strengths of independent citizen and interest-group involvement in the community with the strengths of structured planning, decision making, and performance measurement by government.

Some useful conceptual thinking is being done in the U.S. context about how to develop more effective "strategic alignments" among citizen engagement, governmental planning and operations, and performance measurement and reporting (read "indicators") (see especially the paper by Paul Epstein and colleagues found at *www.citizensleague.net/cl/SLOAN/cover.htm*). This thinking recognizes the importance of indicators as both planning and assessment tools to measure the outcomes of strategic alignment in action in a community. It also raises possibilities

for usefully integrating benchmarking approaches to indicators with quality-of-life, sustainability, and healthy-community approaches.

Purpose: Indicators are not objective in any important sense of the word, although many of them may derive from "objective" data. Rather, they are selected based on values, from among reams of available data, with conscious purposes in mind. Even the most limited purpose of developing and disseminating indicators—to inform—is laden with values because certain items of information are selected from among many as being more important to share and understand.

An indicators project that adds a purpose of seeking community improvement to a purpose of informing inevitably leaves objectivity further behind as it seeks to define what "improvement" means. The very terminology used—quality of life, sustainability, healthy communities— reveals the subjective, value-laden nature of indicators projects.

One reason the sponsorship issue is important is that it raises the question of "whose subjectivity" is to be acknowledged and followed. Quality-of-life projects have tended to start with tasks of identifying how the local community defines its collective "quality of life" and of selecting measures on which it can agree when the quality of life is clearly getting either better or worse. In this context, participants can define community goals for indicators and measure degrees of progress over time. Healthy-community projects have generally followed similar logic but with differing terminology.

This approach to purpose has the advantage of grounding the indicators in the community's articulated or unarticulated vision—its basic set of collective values. The approach is based, however, on some major assumptions. One is that the community, in fact, shares a common set of values at the vision level that, if articulated, would represent a consensus view of community members. A second is that a community's vision includes all the important parameters of "actual" quality of life or community health, in both the short and long term, and taking into account external influences and interconnectedness.

If the second assumption turns out to be inaccurate, a community's vision may be insufficient as a guide toward "true" quality of life or community health. This raises the potential value of having the sponsors introduce into a community-indicators project an agenda or purpose derived from an external source. The intent would be to "educate" the community about critical aspects of the quality of life or community health that might otherwise be overlooked and to encourage action toward improvement that might otherwise not be contemplated locally.

To the extent that quality-of-life and healthy-community projects involve some "visionaries," they may succeed in stretching the boundaries of their community's vision through their selection of indicators to measure. However, sustainability indicators projects have more consciously and directly tended in this direction.

Following Thomas Kuhn, the concept of sustainability is like a paradigm, in that its adherents share a particular way of viewing and understanding reality, based on an internally consistent set of observations and values. Sustainability relies on an ecological frame of reference, seeking to reveal the interconnectedness over time and across space of all aspects of human existence and

the biosphere and to achieve a balance among economic, social, and environmental concerns. It promotes indicators that explicitly reveal this interconnectedness and promote this balance.

Applying sustainability to community improvement suggests the need for the community to understand and buy into this way of thinking as it considers its vision and indicators. In contrast, the concepts of quality of life and a healthy community do not require acceptance of a particular view of reality or set of observations and values. Instead, they encourage citizens in a community to articulate and be guided by their own, perhaps unique vision.

In practice, sustainability indicators projects have not overtly imposed new ways of thinking on communities. However, they have tended to challenge certain communities to think differently and to modify collective behaviors accordingly. Meanwhile, the concept of sustainability is gaining increasing visibility and acceptance around the world—more so in some areas than in others. However, sustainability, as a conscious way of thinking, still does not consciously guide the vision of most communities, perhaps especially in the U.S.

The purpose of challenging communities to modify their visions to be consistent with the principles of sustainability calls for the indicators project's sponsoring organization to play an advocacy role. On the other hand, sponsors of a quality-of-life or healthy-community indicators project may successfully play an "honest-broker" role. Both may be valid roles, but they relate to the desire for community buy-in quite differently.

In terms of democratic civic process, playing the honest-broker role leads to legitimate results as long as consensus is achieved. Playing the advocacy role, however, raises questions about legitimacy. If the sponsors of sustainability indicators projects are acting as interest groups themselves, rather than as neutral conveners of interests, who is to say that the community should buy into their sustainability viewpoint over the viewpoint of other interests around the table?

Such questions have rarely been addressed directly by indicators projects and probably deserve further attention. In the long run, the rising tide of sustainability consciousness may lead more and more communities to incorporate sustainability thinking into their mainstream visions, signaling some degree of success for the advocacy efforts now underway.

Already, influenced by the sustainability approach, some quality-of-life and healthy-community indicators projects have consciously sought, in their own ways, to incorporate sustainability thinking. This has occurred primarily through processes of identifying and recognizing important **linkages** among indicators, over time, and across space. Linkages among indicators may be either *reinforcing* or *undermining*. For example, employment growth might help to reduce the crime rate, but it might also undesirably increase the average commuting time. Linkages may also be *one-directional* or *two-directional*. Employment growth and average commuting time may strongly influence each other, while employment growth may strongly influence the graduation rate but not vice versa.

Looked at another way, indicator trends may be linked *over time* and *across space*. In particular, some indicators, such as employment growth, may be seen as positive in the short term but may

turn negative in the longer term. Indicators sensitive to such dynamics would take into account the potentially negative results in the long run. Similarly, some indicators may produce positive results locally while imposing negative results in adjoining locales. For example, concerted crime prevention in one area may simply shift the crime to other areas. Indicators sensitive to these dynamics would take into account the potential for "exporting" negative results to neighboring communities.

JACKSONVILLE'S EXPERIENCE

Jacksonville, Florida pioneered in the development of community indicators and has the longest continuous track record of work in this area. Its initial model has served as a guide for adaptation in many other communities in the U.S. and around the world. More recently, the sponsor of this project, the Jacksonville Community Council Inc. (JCCI), has been involved in a multi-year process of upgrading its own work, based largely on lessons learned from the work of other communities. Today, Jacksonville's project remains on the cutting edge of the community indicators movement.

Jacksonville's experience has evolved within the framework of the "mega-issues" considered in the first part of this paper. In the process, it has dealt with a large number of mid-level issues, with which most indicators project must contend. This second section uses Jacksonville as an example to illustrate these issues.

Community involvement: Deciding whether and how to involve the community, including individual citizens as well as institutions and interest groups, is critical. As suggested above, achieving community buy-in can be very important for a project's success. Developing and maintaining an indicators project using extensive citizen involvement requires different organizational infrastructure than would be needed if the project were to be implemented entirely by research/planning staff. Successfully conducting this kind of process requires having access to a convenient, neutral, functional convening space as well as a staff capacity for effective group facilitation and consensus building.

As a community-based organization dedicated to community improvement through citizen learning and advocacy, JCCI is ideally positioned and capable to meet these needs. Its staff realized early on that community involvement around indicators requires a great deal of time and patience because of the considerable learning curve required prior to making well informed, consensus-based decisions. For example, the indicators upgrade process that JCCI conducted in 2000 consumed almost 90 meetings in about six months (nine work groups on different elements of the quality of life meeting about nine times each, plus several steering-committee and overall task-force meetings). In Jacksonville's case, JCCI's consistent investment in citizen involvement has paid off handsomely by raising the credibility and community acceptance—and use—of the indicators.

Not all communities have organizations like JCCI, well positioned and ready to take on a community-indicators project. While Jacksonville has been fortunate in this regard, viable organizational alternatives exist in other communities, whether they be the chamber of

commerce, local government, local United Way, or another institution or civic leadership group. Local governments may also be able to perform this function, but, as suggested above, the dynamics tend to change considerably.

Research: An indicators project also requires the staff capacity to do research. Without researched information to guide thinking and decision making, the citizen-involvement process cannot succeed. Initial research needs may be broad and conceptual, as project participants seek to define the values and aspects of wellbeing that they believe are important to measure in their particular community. As the process moves along, research may focus on identifying potential measures for indicators that can effectively articulate the conceptual content on which the participants have agreed. After the indicators have been identified, research zeros in on collecting data for the specific measures adopted.

With so many community-indicators projects already in existence, many lists of possible indicators are available for review and consideration. Many indicator sets can be found on the web sites of projects, and a few sites, such as *www.sustainablemeasures.com*, provide lists of indicators from a number of sources. While consideration of such lists is a valuable way of avoiding "reinventing the wheel," applying a cookie-cutter set of indicators to a particular community may be unsatisfactory because of the unique values and situations in each. For instance, an important indicator in the Sustainable Seattle set measures numbers of salmon—an indicator that would be meaningless in Jacksonville, whereas Jacksonville's measures of pollution in its large, tidal St. Johns River would not be useful in a community like Phoenix.

Research needs may not end once the indicator set has been developed. If the project chooses to track indicator trends over time and to report periodically to the community, ongoing data collection will be required, and additional research may be needed as certain indicators are reconsidered, improved, or added.

As a community "think tank," JCCI is fortunate to have capable research staff in-house. However, as a citizens organization, JCCI limits its research capacity to supporting its citizen-based efforts. It does not conduct primary research or "crunch numbers." Given this situation, the indicators project was designed to report indicators for which data were already publicly available from some source. While this has limited the project to measuring indicators for which the community already recognizes the need to collect data, it has also added a task to the process—citizen advocacy challenging institutions in the community to provide data for important indicators where such data are lacking.

Data difficulties: Probably every indicator project has encountered difficulty with data, especially those seeking to track trend lines over time. Since the Jacksonville project made an initial commitment to select indicators that can be measured annually and to release annual update documents, JCCI staff have had to deal with these data-collection difficulties every year. A primary problem is noncomparability of data from year to year because of decision making that changes the definitions of data collected, stored, and reported. Some of these changes result from legislative action (e.g. a state legislative change in the official definition used for the high-school graduation rate). Some come from administrative decisions or glitches (e.g. a spike in reports of child abuse and neglect when state officials got caught up on documenting a multi-

year backlog of cases). Others result from technology-driven decisions (e.g. a change from manual to computerized recording of fire and rescue response times).

In Jacksonville's experience, one-time discontinuities can sometimes be clarified simply by displaying breaks in trend-line graphs. In other cases, staff have sought data to recalculate the entire trend line according to the new definition. In a few cases, JCCI volunteers have decided to discontinue indicators that have become insufficiently meaningful or useful to retain.

Selection criteria: When the Jacksonville project first started, its volunteer leadership established a set of criteria to use in selecting meaningful and useful indicators. During the indicators upgrade process in 2000, these criteria were expanded to reflect the growing sophistication of the project. The criteria currently are as follows:

- **Importance**: The indicator measures an aspect of the community's quality of life which a diverse group of people in the community would agree is important, in relation to the community's vision.

- **Policy relevance**: The indicator measures an aspect of the community's quality of life concerning which the community can achieve positive change through public decision making and policies at the community level.

- **Responsiveness**: The indicator responds relatively quickly and noticeably to real changes in the quality of life, as revealed by changes in the direction or slope of the indicator's trend line.

- **Validity**: If the indicator's trend line moves either upward or downward, a diverse group of people in the community would agree on whether the quality of life is improving or declining.

- **Understandability**: The indicator measures an aspect of the community's quality of life in a way that most citizens can easily understand and interpret, in relation to their own lives.

- **Clarity**: The indicator uses clear measures that filter out extraneous factors. For instance, dollar indicators are reported in deflated, constant dollars; per-person rates are used where appropriate to factor out population growth; and raw numbers are used where total magnitudes are important.

- **Outcome orientation**: Where possible, the indicator measures a community outcome—the actual condition of the quality of life (e.g. the crime rate). Alternatively, it measures an outcome of the community's response to a quality-of-life issue (e.g. police response time) rather than the input of the response itself (e.g. number of police officers).

- **Asset orientation**: Where possible, the indicator measures a positive aspect of the community's quality of life (the community's assets rather than its liabilities) so that an increase in the indicator's trend line reveals community improvement (e.g. the high-school graduation rate rather than the dropout rate).

- **Anticipation**: The indicator anticipates future quality-of-life conditions rather than reacting to past trends. A "leading" indicator (e.g. cigarettes sold) is more useful than a "lagging" indicator (e.g. lung-cancer deaths) because it allows a proactive community response.

- **Availability, timeliness, stability, and reliability**: Data for the indicator are readily available and affordably accessible annually from a credible public or private source. If the data come from multiple sources, staff can readily compile and calculate the indicator numbers. Data are consistently collected, compiled, and calculated in the same way each year.

- **Representativeness**:   Taken together, the indicator set, and the indicators within each Element*, cover all the major dimensions of the community's quality of life.

* Note: The Jacksonville indicators are presented in nine Elements, which include Education, Economy, Natural Environment, Social Environment, Culture/Recreation, Health, Government/Politics, Mobility, and Public Safety.

These criteria reflect the Jacksonville project's commitment to a broadly inclusive, balanced definition of the quality of life and to a citizen-based, consensus-based process of defining the quality of life consistent with the community's vision and understanding of its own values. One of the most important criteria is policy relevance. Some projects include indicators measuring such aspects of the quality of life as climate and spiritual wellbeing. The Jacksonville project excludes such indicators because they are not susceptible to improvement through community-level collective action. The criteria selected for a project planning to use a different kind of process or a project seeking to change systemic thinking in a major way might select slightly different criteria.

Geographic scale: The geographic scale for which indicator trends are to be reported depends on how "community" is defined, as well as by the scale(s) at which data are available. In Jacksonville's case, an initial decision was made to report all indicators at the scale of Duval County, the core county in Jacksonville's metropolitan area.

Jacksonville is governed by a large city-county consolidated government, and, in 1985, most of the region's urbanized area was still contained within Duval County. Thus, some logic existed for focusing on the county level. Rapid regional growth during the last two decades has rendered this logic increasingly anachronistic for at least some of the indicators. Focusing at the county level also required making another assumption that has since been questioned. It presumed that the quality of life was distributed similarly across the entire county, so that reporting "average" trend lines at the county level would accurately reflect the quality of life for most or all citizens. In reality, of course, significant differences exist from area to area and neighborhood to neighborhood.

During its 2000 indicators upgrade effort, JCCI revisited the geographic-scale issue. Some indicators have been designated to be reported at the regional (MSA) level, and for some, data are being reported for sub-county areas. This increasing flexibility with geographic scale has enriched the Jacksonville indicator set and made it more meaningful and useful for its citizens

and decision makers. (JCCI also tracks a second set of indicators, focused on health and human-services issues, which have been regional in scale since they were established in 1995).

Lessons to be learned from Jacksonville's experience appear to be that determining geographic scale is important and should be done consciously, that the most meaningful and useful scale may differ among communities and also among indicators within communities, and, therefore, that flexibility in thinking about geographic scale is beneficial.

Data v. perception indicators: The Jacksonville project made an early decision that some of the indicators would be based on citizen opinion polling rather than on "objective" data sources. The reasoning behind this decision was that, in some ways, people's perceptions of their quality of life are as important, or perhaps even more important, to document than the reality in which they live. Crime provides a useful example. The Jacksonville indicators report, side by side, an indicator of Uniform Crime Report rates and an indicator with responses to an annual telephone-survey question about whether people feel safe walking alone at night in their neighborhood. Thus, the indicator set measures both actual crime and people's fear of crime, both of which may affect their quality of life, but perhaps in different ways. Some aspects of the quality of life cannot be measured at all with objective data but are important enough to warrant inclusion in a community-indicators set. Among the Jacksonville indicators, two examples measure whether people perceive racism to be a problem in the community and the degree to which they perceive the quality of local elected-official leadership to be "good" or "excellent."

To be accurate and useful, opinion polling must be conducted using sound statistical and surveying methodology, which can be costly. JCCI, as a local, nonprofit organization, has not had the funding necessary to buy such surveying. As with its other data collection, it has relied on community sources. In this case, JCCI is fortunate to have the annual survey donated by a local opinion-polling firm. Relying on such largesse has its limits, however. While the project has identified certain indicators for regional reporting, it has not been able to expand the telephone survey beyond Duval County. Still, including perception-based indicators has added an important dimension to the Jacksonville indicators that has come to be valued by the community.

Setting goals: During its first five years, the Jacksonville project was content to track and report trend lines, as they gradually increased in length. Once the directions of trends began to become visible, the JCCI volunteers began to think in terms of goals—"What level would we like each indicator's trend line to achieve for our community to enjoy a high quality of life?" The next question was, of course—"Compared to what?"

Initially, JCCI thought in terms of goals based on geographic comparisons, reflecting a desire for Jacksonville's trend lines to be superior to those in other comparable cities or to the average for the state or nation. JCCI staff responded by seeking to develop the data necessary to make "apple to apple" comparisons. For most of the indicators, this exercise proved to be impossible. Jacksonville is in too many ways unique, not just because of its consolidated government, and too many of the indicators are also unique, not just because some are based on a unique telephone survey.

One example of an indicators project based on geographic comparisons is the "Strategic Assessment" published for the St. Louis Region by the East-West Gateway Coordinating Council, a council of governments (see *www.ewgateway.org*). Its most recent, third edition was released in 1999. Except to the extent that some of the indicators themselves measure change over time, this document provides a comparative snapshot, comparing the St. Louis region with other major regions in the U.S., without any trend lines.

As volunteers in the Jacksonville project thought through the implications of comparative goals based on geography, they came to the conclusion that a more important comparison would be with Jacksonville itself, over time. This solidified the concept of measuring longitudinal progress and provided the basis for a commitment to set a community goal or "target" for each indicator.

In 1991, a large volunteer task force, meeting numerous times in nine work groups, established a Target for 2000 for each of the indicators in the Jacksonville set. The work groups had available trend data through 1990, so, by design, they were setting ten-year goals. JCCI staff provided a quantity of additional information to guide the goal setting, including straight-line projections of existing trends, comparative data from other places where available, and goals or standards already adopted locally or at the state or national level. Although the decision making was informed, ultimately it required judgments. As they considered each targeting decision, the volunteers were asked to consider two potentially conflicting questions: "Ideally, at what level should the indicator's trend line be?" and "Practically, what level can the indicator's trend line be expected to achieve within ten years?" The intent was to arrive at consensus agreement on a target for each indicator that stretches the community beyond continuing "business as usual" toward achieving significant improvement, while maintaining the credibility of a goal that is at least potentially attainable within the next decade.

This target-setting process served the Jacksonville project so well that it was largely replicated early in 2001 to set new targets. The primary weakness in the first effort turned out to be the time period chosen. With hindsight in 2000, JCCI came to understand that many of the targets set in 1991 were far from the mark of feasibility. Therefore, the new process was designed to set targets for only five years out (to 2005), a time period more in line with typical strategic-planning timelines. This change may both improve the quality of the targets and increase their usefulness for community planners and decision makers.

Setting the targets changed the community's perception of its indicator set as being not just a source of information but also a guide toward community improvement. Beginning in 1992, the annual citizen-review process of the indicators has included assessing the progress of each indicator in relation to its target. Indicators that each year's volunteer committee feels are moving positively toward their targets are awarded a Gold Star, while those moving decisively in a negative direction are assigned a Red Flag. These designations are reported in each annual update document. Adding the targets, gold stars and red flags to the previous documentation of trends substantially increased the project's visibility, credibility, and usefulness, reinforcing the community's sense of buy-in to the indicators and their outcomes.

As the Jacksonville project embraced the concept of setting goals, it rejected another option, considered briefly, to amalgamate the trend results of all the indicators into a single **index** figure each year. While an index could provide a quick, easy way to understand whether or not the community's overall quality of life has been improving over time, it cannot help citizens and decision makers to understand what specific aspects of the quality of life need attention toward improvement. The targets, along with the Gold Stars and Red Flags, do provide such guidance and thus tend to reduce the appeal of an overall index. Some national assessments, such as Money Magazine's "Best Places to Live in America" index, do calculate an index for simplified comparison among geographic areas. Since the Jacksonville project had already decided against geographic comparisons as the basis for goal setting, establishing a Jacksonville quality-of-life index did not appear useful.

Identifying linkages: For the Jacksonville project, the most challenging effort, apart from creating the project at the beginning, has been understanding and applying the concept of linkages among indicators and over time and space. From a citizen perspective, a specific, clearly defined indicator can generally be understood, as can the relationship between that indicator and its goal at a certain point in the future. However, understanding the web of interrelationships that determine important linkages is much more complex. Yet, the premise and logic of the sustainability approach have made abundantly clear that these linkages can be ignored only at the peril of diminishing the quality of life.

As JCCI sought to identify linkages for its indicators during 2000, it quickly realized that, since everything ultimately is linked to everything else, working meaningfully and usefully with the concept of linkages requires isolating particular, key linkages for each indicator that are considered "very important." The importance of a linkage was agreed upon based on two criteria:

- whether the linkage is especially important for citizen understanding of the quality-of-life implications of the indicator; and

- whether it is especially important to guide public decision making, so that "tunnel vision" does not overly narrow the scope of consideration before decision.

Even more so than with the setting of goals or targets, the process of identifying very important linkages requires a substantial initial investment in staff research, thinking, and analysis. In the Jacksonville case in 2000, a staff researcher worked for over three months developing a set of guidance sheets, one for each indicator. These listed potential very important linkages, described the nature of each linkage (reinforcing or undermining, one-direction or two-direction) and suggested a rationale for each one's selection. The volunteer group process that followed used these sheets only for guidance, often adding to and deleting from each list, based on their own collective understanding of the indicator, its quality-of-life implications, and the need to recognize certain interrelationships. For the citizen volunteers, this was an extraordinarily mind-bending but ultimately very rewarding exercise.

To create a group dynamic with diversity of perspectives that would facilitate linkage-oriented thinking, JCCI staff manipulated membership on the volunteer groups that identified the

linkages. A series of nine work groups had just completed a thorough review and revision of the indicator set. Members of these work groups had self-selected based on interest and experience in each of the project's nine Elements of the quality of life. For the second phase of the 2000 process, identifying linkages, the memberships of the original work groups were intentionally scrambled. The results were remarkable, as participants, each having intimate experience with the indicators in one element, were brought together to think in terms of relationships among all of the elements and indicators.

Reporting results: The benefit of developing and tracking indicators depends on their being understood and used, which, in turn, depends on their being effectively reported to the community. When the Jacksonville project began in 1985, reporting meant publication of a written document. The initial report was, in fact, a reference document. For each indicator, it contained the indicator's definition and documentation of methodology used to calculate it, trend-line numbers, a graph, and caveats and explanations. This document has been very useful for decision makers, planners, and researchers and still is published annually, expanded now to include target and linkage information, as well as Gold Stars and Red Flags, as determined each year.

Early on, JCCI realized that another kind of report was needed to reach citizens and community groups. Imprecisely named an "executive summary," this second written report contains each indicator's title, trend-line numbers, a simplified graph, the target, Gold Stars and Red Flags as appropriate, and simplified statements of explanation and linkages. It has been published annually since 1988.

Since completion of the 2000 revision of the indicators and identification of linkages, the desire has surfaced for a third printed report—a short "report card" that condenses the essential information about indicator trends and targets to brochure size. JCCI is considering how to implement this suggestion with the release of the 2001 update documents.

Meanwhile, electronic communication and the Internet have revolutionized the concept of reporting. For the last several years, JCCI has been able to place its reference document on its web site (*www.jcci.org*). While this has greatly increased its visibility and use outside of Jacksonville, most local users appear still to rely on the printed documents. JCCI's thinking on the most effective vehicles for reporting continues to evolve.

Marketing indicators: Since the Jacksonville project began, copies of the reference document have been disseminated annually to public and private decision makers, planners, and researchers, as well as local libraries and other repositories of information. Copies of the "executive summary" are distributed by mail to JCCI's individual members (currently about 700), to any and all interested citizens and organizations on request, and through presentations to community groups. The Chamber of Commerce also uses it for marketing to business prospects.

The report has been released each year in conjunction with a press conference. As a result, the project receives substantial attention from the media once a year but usually only briefly. Frequently throughout the year, however, working media communicate with JCCI staff, seeking information about specific indicators related to news stories on which they are working.

Occasionally as well, indicator graphs turn up in print media as filler pieces of interesting information.

Over the years, JCCI has sought to engage the media to run more in-depth pieces on larger issues that emerge from certain indicators or clusters of indicators. Except when such an issue has risen to "hot button" status in the community, the media have not been receptive to this approach.

JCCI volunteers involved in the indicators project have not been satisfied with the level of local understanding and use of the indicators. As a result, in 1998, they adopted a multi-year vision for the indicators:

> *By 2002, JCCI's indicators reports will be the premier source of local, summary-level information on the quality of life in Jacksonville. Each annual update will be the community's report card, containing vital, valid, and relevant information, which is actively used to inform the community, guide decision makers, ensure public accountability, and promote a continuously improving quality of life for all citizens.*

Along with efforts already completed to revise the indicators, identify linkages, and set targets for 2005, the multi-year work plan that was designed to implement the vision includes initiating a major, marketing effort, which will be the next and final stage in JCCI's upgrade effort. The effort is expected to include a combination of at least the following strategies:

- improving the traditional methods of presenting, releasing, and disseminating indicators information, as well as developing new, innovative approaches, especially through increased use of the Internet, both as a repository for and source of information and as a forum for interaction about the indicators, their meaning, and how the community should be responding to them;

- more focused work with local media to draw their attention to the indicators as sources for their news coverage, not only for breaking news stories but for investigative and other in-depth reporting on community issues;

- direct-contact efforts to ensure that public and private community leaders and decision makers are aware of and regularly refer to the indicators information in their work; and

- efforts to give greater community visibility to significant indicator trends by identifying "responsible organizations" that have the potential to influence the direction of certain indicator trend lines and to reward these organizations publicly, as warranted, for helping to achieve clearly positive trends.

JCCI believes that this effort will require an ongoing commitment of creativity, time, and resources.

Making a difference: The most frequently asked question about indicators is "What difference do they make?" The community-improvement model presented above suggests that indicators

alone probably make little difference but that when combined with effective planning, advocacy, and action, all based on a community vision, they can make a major difference. The most recent salient examples in Jacksonville have revolved around issues of public education, surface water pollution control, race relations, and economic growth.

Perhaps the most dramatic example has concerned public education. Concerns over several years about trends in public-education indicators, such as the high-school graduation rate, led JCCI to conduct a major, citizen-based study called Public Education: The Cost of Quality. Following the 1993 release of the study, JCCI volunteer advocates worked with school officials for over three years, seeking implementation of the study's many recommendations. Their efforts met with resistance, leading to frustration. As the indicators continued their negative trends, increasingly concerned top business leaders issued a public "manifesto" in 1997 calling for reforms consistent with the JCCI study recommendations.

By 1998, community pressure had become sufficiently strong for the elected Duval County School Board to respond by establishing a New Century Commission to involve the community in an extensive, in-depth, open process resulting in detailed recommendations for reform. The commission's process and results were consistent with the original 1993 JCCI recommendations and directly addressed the issues raised by the negative indicators. In 1999, the School Board hired a new superintendent with the understanding that the commission's recommendations would become an important guide for his administration. The system has been engaged in implementing them since, and insufficient time has elapsed to assess the degree of success. Although several of the key indicators have continued to move negatively, reason exists to be hopeful that positive change is in the offing.

CONCLUSION

The example described contains important lessons that serve as an appropriate conclusion for this article. Indicators can, in fact, influence action and positive change in a community. The range of public-policy areas that may be positively impacted is limited only by the choice of indicators.

However, indicators do not influence public-policy outcomes simply by existing, in isolation of what else is happening in the community. They do so, either directly or, more often, indirectly, as an integral part of a complex community-improvement process that operates over long periods and involves many players, public and private. The contributions of indicators are most evident in the planning phase and again in the assessment phase of a community's process of seeking improvement. The more consciously indicators are tracked, and then applied to the planning and assessment processes, the greater chance exists of bringing about meaningful positive change in a community, regardless of the policy area.

The most important issue for communities to confront, as they seek to use indicators, is that of purpose. At the least, communities need to define their indicators to be consciously consistent with a consensus vision of a "good" or "better" quality of life for their community. Their purpose would thus be to improve the quality of life as they understand and envision it.

Otherwise, planning, advocacy, action, results, and assessment based on the indicators might be misdirected toward "improvements" that the community may not actually desire or need.

Indicators may also offer the opportunity to adopt a broader purpose that stretches the community's existing vision, whatever it may already encompass, toward a wider understanding of wellbeing based on the concepts of global sustainability. Given the compelling nature of and increasingly indisputable science behind the logic of sustainability, communities concerned about their quality of life would be well advised to consider this frame of reference as they agree on and articulate the vision that will guide their indicators.