

*Proceedings of the*

**COLORADO FORUM**

*on* **NATIONAL** *&* **COMMUNITY**

**INDICATORS**

*22-23 November 1996*

*Sponsored by*

THE COLORADO TRUST

REDEFINING PROGRESS

THE WHITE-HOUSE INTER-AGENCY WORKING GROUP ON  
SUSTAINABLE DEVELOPMENT INDICATORS

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For additional copies of this proceedings document, or to order a copy of the *Community Indicators Handbook*, please call Redefining Progress at 1.800.896.2100. A two hour video of Colorado Forum Highlights will also be available.

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# THE COLORADO FORUM AGENDA

## DAY ONE

FRIDAY, NOVEMBER 22, 1996

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- 8:30** Welcome and Introductory Remarks
- Doug Easterling, Colorado Trust
  - Alan AtKisson, Redefining Progress
- 8:50** Panel: "**State of the National Indicators Movement**"
- Patrice Flynn, Independent Sector
  - Walter Corson, George Washington University
- 9:30** Questions and Answers - Dialogue with participants
- 10:00** Break
- 10:15** Panel: "**State of the Community Indicators Movement**"
- Kate Besleme, Community Indicators Network, Redefining Progress
  - David Swain, Jacksonville Quality Indicators for Progress, FL
  - Kristi Corash, Healthy Mountain Communities, CO
- 10:45** Questions and Answers - Dialogue with participants
- 11:15** Panel: "**Making the Link (National-Local)**"
- Dan Chiras, Sustainable Futures Society
  - Terri Bailey, National Neighborhood Indicators Project, Piton Foundation and Urban Institute
- 12:00** Boxed Lunch
- 12:30** Presentation: "**Proposed National Indicators of Sustainable Development**"
- David Berry, White House Inter-Agency Working Group on Sustainable Development Indicators
- 1:00** Small Groups: Discussion and Critique
- 2:15** Highlights from Small Groups
- 2:45** Panel: "**Making Data Make a Difference: Putting Indicators to Work**"
- Patricia Scruggs, Independent Consultant, Portland, OR
  - Jim Carrier, Denver Post
  - Hal Kane, Worldwatch Institute (*Redefining Progress as of January 1997*)

- 3:30** Topic Workshops
- 5:00** Cash Bar
- 6:00** Closing Banquet
- Host and Opening Remarks: Former Governor Richard Lamm
  - Presentations from Workshop Sessions
  - Keynote: Tony Hodge, Canadian Roundtable on Environment and Economy
- 7:30** Adjourn

## **DAY TWO**

SATURDAY, NOVEMBER 23, 1996

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- 8:30** Working Session: “**The National Indicator Agenda**”
- Opening presentations followed by small group break-outs

### SAMPLE QUESTIONS:

How can national indicator efforts support local ones, and vice versa?

How can efforts in one community help other communities?

How can we create more public acceptance, demand, and use of better measures of long-term integrated wellbeing?

- 12:00** Lunch
- Small group input will be synthesized by facilitators during lunch
- 1:00** Full Group Consensus-Seeking on a Proposed Agenda for Action
- What specific steps can we take, separately and collectively, to advance the indicators movement?
- 3:00** Adjourn to Informal Networking and Information Sharing
- 5:00** Closure

*\* Please note that minor changes were made to this schedule during the course of the conference*

# INTRODUCTION: FRAMING THE MOVEMENT

On November 22 and 23, 1996, the Colorado Trust, Redefining Progress, and the White House Inter-Agency Working Group on Sustainable Development Indicators held a conference in Denver, Colorado to discuss the current state of national and community indicators. For many attendees, the gathering appeared to mark the emergence of a movement. What started out in the planning stages as a small 50-person event blossomed, in just over three weeks, to a conference with over 175 people from all parts of the country.

There was something special about this conference. Sponsors and participants agreed that one of its greatest strengths was the diversity of backgrounds and community projects represented. The "Colorado Forum" brought together people from social services, environmental groups, economic development organizations, and educational and research institutions. There was a sense of shared enthusiasm, growing momentum, and mutual support as people told their stories and sought ways to enhance each other's efforts.

The goals for the Colorado Forum were to:

- Learn the lessons of the past -- how to develop indicators with long-lasting significance
- Ask questions
- Learn from one another
- Provide community-level input to the federal

government's national sustainable development indicators

- Find ways for national and community-level efforts to support each other

This conference -- like many of the community indicator processes represented there -- was highly participatory. The combination of plenary talks, round-table discussions, and break-out working sessions provided ample opportunity for people to share information, ask critical questions, and evaluate where the movement has been and where it is headed.

These proceedings are an attempt to synthesize the dozens of conversations among the speakers and participants. This document highlights the energy, ideas, and agreements that occurred over these two days -- a time during which people from many types of organizations and communities came to recognize the importance of sharing information and developing a collaborative approach to evolving this growing movement. For many, the results of coming together were creatively engaging, inspiring, and most importantly, hopeful.

It is the sponsors' hope that these proceedings will serve as an additional guidepost for existing and emerging efforts to direct our communities on a more healthy and sustainable course.

# BACKGROUND

Efforts to create new indicators, or measures of well-being, are springing up all across the nation, in every type of community. Indicators are being used by institutions, written into policies and statutes, and even linked to budgets. The indicator movement, like the parallel movement toward community visioning, is evidence of a civic renaissance in the making.

Indicators are not new. The community indicators movement grows out of the broader social indicators movement which began in this century and has seen three major peaks in activity:

- In 1929, President Hoover pulled together a group of scientists to report on recent social trends in the United States, with the aim of formulating national policies based on those trends. Their report, published in 1933, marked the first peak.
- The second peak, in the 1960s, was the emergence of a self-described "social indicators movement" focused on measuring individual and family (rather than institutional and governmental) well-being. It included the introduction of "urban quality indicators," but the use of these measures faded in the 1970s.
- Finally, thirty years after that, Vice President Gore's *National Performance Review* set out to create a government that "works better and cost less," capping a general trend toward results-oriented government and management that includes an explosion of new indicator projects at every level. Community indicators had begun to re-emerge starting with Jacksonville, Florida in 1985 and the Sustainable Seattle project in 1991. Today, there are nearly 200 projects around the U.S., and many more in other countries.

Reflecting on this history, past peaks in the movement appear to have been very top-down, while

this one seems to be more community-based and independent of national-level trends. It is a groundswell of local and regional efforts to measure the health, quality of life, or sustainability of communities, however they are defined. No matter what terms are used to describe these efforts, they have several motivating factors in common:

- First, they share a recognition that many critical aspects of community life (both positive and negative) are not being adequately considered by leaders or citizens, because they're not getting the right feedback about what is happening in their communities. As a result, communities may not be steering themselves in the right direction.
- Second, most communities still rely on "old-fashioned" economic indicators (like housing starts) that fail to capture the entire picture of community well-being, and leave unexamined the root causes of social, economic, or environmental problems.
- Finally, many people share a sense that action to change a community's course needs to be based on sound information and a democratic process, including a broad base of citizens.

Indicators are a fundamental tool for raising awareness, building participation, and catalyzing change. Indicators are part of a larger process to help communities develop a positive vision for their future, and to assess the issues that affect their vision. Indicators are not an end in themselves; they are a means to an end, that of creating healthier communities. And the process of creating indicators is just as important as the indicators themselves.

"The sign of a truly educated [person] is to be deeply moved by statistics." *George Bernard Shaw*

# DAY ONE

## A. EXPLORING THE QUESTIONS

The Colorado Forum consisted not just of speaker presentations, but of question and answer periods, small group discussions, and reports back to the plenary body. This report provides a synthesis of all these conversations. It organizes the material into summaries by topic area, instead of by chronological order of the conference agenda. This more innovative approach captures common themes and shared experiences, and explores the questions we should be asking ourselves as practitioners. The many issues discussed during the two day conference tended to revolve around two key questions:

1. How do we make indicators work at community and national levels, as well as levels in between?
2. Within the movement, or community of practitioners, what are key process and substance issues we must address?

Within these two groupings, further questions were explored: How do we identify the movement? Is it a "movement"? What is our agenda? How do we develop a simple language for communicating indicators? How do we involve diverse interests? How do we get the media to pay attention? The list goes on....

By the end of the second day, participants began to explore a common agenda for the movement. They identified areas where they all clearly shared common concerns -- for example, safeguarding the data on which all indicators depend, developing more effective ways of presenting indicators to the media and the public, and sharing information with each other in a more systematic fashion. They examined a set of guidelines for indicator development (see Appendix Three the *Bellagio Principles*) and all but endorsed them. And they shared perhaps the most valuable asset they could give each other: Their stories. The framework for reporting on this two-day gathering is organized around the following key questions:

- Who are we?
- Why are indicators important?
- What is our agenda? What are our goals?
- What are our guiding principles, our process?
- What is the methodology by which we determine and use indicators?
- How do we make indicators useful to decision-makers and the public?
- How do we continue to keep people's interest?

Each section below draws on input from speakers and participants, and the common questions that were raised during the two days. Highlights from individual speakers follow in a separate section.



## B. HIGHLIGHTS OF THE FORUM

### WHO ARE WE?

SPONSORS: The people involved in indicators, like the participants of this conference, span the political, cultural, and community spectrum. *We come from social and healthy community efforts, environmental and sustainable development projects, community and economic development initiatives, as well as justice and equity issues. The reason we come to the table, and the reason we participate in this movement, is our deep concern for the future of our communities. We all share an interest in developing indicators as a way of guiding our communities toward health and sustainability.*

During small group sessions on Day Two, participants described the identity of the movement as:

- People from a variety of disciplines, yet also still seeking to be more diverse.
- People and organizations that recognize that current measures of progress are inadequate.
- Practitioners working in communities of all shapes and sizes using indicators as a tool to promote change.
- A combination of research ("data") people and community organizers and advocates.
- People who believe there is a relationship between social, environmental, and economic well-being — people looking at the whole instead of the parts.
- People who believe that monitoring and assessing systems can promote positive change toward sustainability.

"I am not engaged in an indicators movement, I am engaged in a movement of people who are taking back their communities. Indicators are a tool. They don't exist outside the fabric of which the work is going on and in which the work is being dreamed of by people in the community." *Terri Bailey, Piton Foundation*

### WHY ARE INDICATORS IMPORTANT?

Indicators help us set goals. They describe problems, shape policy debates, hold people accountable for results. By framing the objectives, they steer a community in a particular direction.

To be important, indicators need to be useful. They need to result in cleaning up rivers, putting people to work, and feeding poor children. At a minimum, indicators can help create change by focusing attention on critical issues. At their best, indicators can help mobilize communities and draw people toward a common vision. Indicator projects create not only new information, but new relationships among participants that can lead to new work toward common objectives.

### Speaker and Participant Comments

Conference participants agreed that indicators are:

1. A tool for exploring issues.
2. A vehicle for changing behavior.
3. Early warning signs.
4. A mechanism for viewing issues holistically.

Indicators, however, are merely a tool for action. While the development of indicators is an important beginning, it is the process by which indicators are used, discussed, and interpreted that results in change.

PATRICE FLYNN: When thinking about how and why we need indicators, we should think about what indicators are used for. Indicators are meant to push the boundaries, and to try to say something new. What is new with this movement of community and sustainability indicators is that it is pulling ideas together that contribute to dialogue. They are showing relationships among issues and attempting to uncover the core issues that keep rearing their heads.

WHAT IS OUR AGENDA?  
WHAT ARE OUR GOALS?

"Our goal is to promote positive change for long-term human and ecosystem well-being and community health." *Mission statement of Small Group #1, Day Two*

Speaker and  
Participant Comments

DAN CHIRAS: What is the focus of our work? We may agree that we need to unify, but we will have a lot of work ahead of us. We must keep our eyes on the prize. The prize is not more numbers and graphs, but creating a sustainable society. It is about change -- understanding change and making change at all levels. It is about corporate, personal, and institutional change.

"Until we can articulate what matters, we will not be able to measure it. And what we measure is important, because what we measure is what gets looked at, and in turn, gives people a way to respond." *Patrice Flynn*

PATRICE FLYNN: I believe our goal has to do with change. We are experiencing many changes -- global, economic, social, political, etc. Changes in our concepts of values and community. If we can identify the purpose of this movement, we will create the conditions by which people are released to do what they need to do to contribute.

More specifically, participants defined the agenda of indicator work as a means to:

- Make indicators a tool that is useful to communities.
- Document and tell the stories of our communities, or put a face on what we value.
- Create a foundation for non-partisan political debate that builds on lessons from the past.
- Share information, catalog efforts, and sup-

port the development of strong resources for indicators.

- Provide a forum to discuss and share indicator methodologies and data.
- Build relationships and support between national and community indicator projects.
- Promote and institutionalize new indicators of progress that include environmental, social, and cultural measures, as well as economic ones.
- Work with and influence funding and decision making based on sound indicator data.

WHAT IS OUR PROCESS FOR  
DEVELOPING INDICATORS?  
WHAT ARE OUR GUIDING PRINCIPLES?

The criteria for a sound process for developing indicators relates to how widely they are used, how effectively they influence change, and how well they build bridges. While the data from indicators is important, it is usually the dialogue they spawn which results in action. The following themes were emphasized by speakers and group discussions.

COMMUNITY INVOLVEMENT. The process for developing indicators should recognize the importance of community participation at all levels. Our primary role as catalysts in this process is to elicit a vision, and then to promote that vision with education and information as the links between stages. We should also define community in a broad sense, reflecting on the level (local to international) and the groups of people we seek to serve. A practical goal of the process is to make indicators useful and accessible to the public and decision-makers.

LINKING INDICATORS TO VALUES AND VISION. Indicators must touch people in the community, and be meaningful to their lives. Most participants felt that indicators should be tied to a set of community values or a shared vision for the future. Accomplishing this requires a process that is inclu-

sive, and that effectively translates values into measurable indicators.

**COMMUNICATING THE MESSAGE.** The importance of language: While an indicator should be linked to values or represent root causes, it also needs to be easily understood by the community and policy-makers. Language is key to communicating the message of indicators. Care should be taken in choosing terms like "sustainability," "quality of life," "healthy communities," or "well-being," that may or may not be meaningful to the community itself.

**USING INDICATORS TO DRIVE ACTION TOWARD POLITICAL CHANGE.** Legislators and other policy-makers have little time to understand the details of complex issues. Indicators can offer an opportunity to look at trends, comparisons, and relationships in a format that is useful for decision-makers. Decision-makers, however, are also motivated by stories, so indicators should have a personal face. (Examples can illustrate the importance of the indicator.) Indicators can also help to illuminate the relationship between how public money is spent and its impact on the trends affecting the community. Within the context of community policies, indicator projects should also recognize the influence of national and state policies.

**LEARNING FROM THE PAST, LOOKING TOWARDS THE FUTURE.** Since the community indicator movement is relatively new, now is the time to look at previous indicator movements for lessons. Furthermore, we should look to the future, encourage intergenerational participation and include youth and the elderly in our processes.

Speaker and  
Participant Comments

"We should invest as much energy in the interpretation of indicators as in their development." *Participant*

**KRISTI CORASH:** We engaged the whole community -- not just by holding public meetings, but by

meeting with people one-on-one, and in focus groups to solicit input. People were not interested in "doing" indicators, but solving problems. Our job was to tie the two together, to make indicators a tool for problem-solving.

**TONY HODGE:** First, start with the stories of the communities, the vision. Visions and stories can apply to all groups. You don't have to "get them to the table." Go to them -- go to the coffee shops, the ladies' stitching circles. Second, develop the measurement. Not everyone wants or needs to be involved in measurement. For instance, the professor at the university may be interested in measuring water quality, but the ladies in the stitching group want to know the result of measuring it, how it affects their stories. Third, evaluate our progress. Ask if people and ecosystems are doing better. Our work should lead people to judgments and decisions. We must recognize that in many cases there won't be the quality or quantity of data we would all like to reduce or eliminate uncertainty, but we must start somewhere.

"Process is the point. Using indicators is trivial compared to the process of developing them" *Judith Innes*

**KATE BESLEME:** It appears that indicator projects that start with a vision and clear goals and values, and then use indicators to set priorities and give feedback, are having the most success. We should look at them as models for our processes.

**PARTICIPANTS:** Ideas and experiences for getting people involved:

- Merely announcing a public meeting doesn't work. You need to personally invite stakeholders, go talk to them.
- Understand what motivates different groups.
- Understand the constraints of different groups: child care for young people, transportation for elderly.
- Schedule meetings and focus groups at times that people can actually attend, whether that's during workdays, evenings, or weekends.

- For those groups not yet at the table, have an empty chair for them, label it with the group's name that is not there, so you are cognizant of them being a part of the community process.
- Celebrate diversity and have fun.
- Address issues in terms of survival and long-term community health.
- Building involvement includes:
  1. Inviting diverse groups into your process
  2. Helping to build the capacity of groups so that they can effectively contribute.
- The process may differ depending on the scope of what you are doing -- creating community capacity, doing a long-term vision process, or developing indicators and assessment projects.

Highlights From  
the Questions and Answers

**Question: How do you link process to outcomes?**

- The indicator movement is not just about indicators, but about sustainability, and quality of life. We need to remember the big picture.
- Our aim should be to work with mainstream leaders, to involve them and hopefully modify their thoughts and actions.
- Process just for process sake can be dangerous; the process needs to guide people into action and outcomes.
- Start with a story that celebrates a community vision. Link the process to a vision and set of goals. Include people's stories, understand where people are coming from.
- We need to answer this question: "Through whose lens do we look at the data?"
- Broaden economic indicators and bring people from outside the power structure into the process.
- The process must include steps for action and reflection.
- Do not use indicators to which people cannot relate.
- Understand what you know and don't know, identify gaps, and use indicators to bridge gaps.

**Question: Indicators are useful when the information is important to the people they affect. But how do you get people involved in developing the indicators?**

- Getting community involvement from all types of people is important. Yet this involvement process occurs not in serial steps, but as a more organic process of getting the community to simultaneously take ownership. That's what motivates them to participate and take action.
- In many cases, the process of asking people's opinions -- e.g. holding focus groups -- resulted in developing new support from stakeholders. This was critical to the process and often required going to the groups directly, and not expecting them to attend public meetings or gatherings.
- When working with disadvantaged communities, bear in mind that they have been re-researched and researched. The data has been imposed on them. No one has been asking these people what they value, or what they think is important. If we must help them, we need to let them tell their stories. We have to understand what they want.

**Question: How did Jacksonville get business involved?**

DAVID SWAIN: Jacksonville Chamber of Commerce took a strong leadership role in our indicator project. It started with an understanding that quality of life issues were good for business -- to invest in the concept of improving the community to benefit citizens and businesses alike. In Jacksonville, the Chamber has a rotating annual leadership. In addition, the indicator project is set up as a volunteer committee where the incoming chair of the Chamber is the chair of the volunteer committee as well. This provides a direct link to the business community.

**Question: How do communities collect and publish data on such limited resources?**

- Jacksonville only has one person paid to gather data and summarize indicators. What takes time is the discussion that goes along with the indicators. Jacksonville operates with lots of volunteers (about 150). We have used the Chamber and their members to give direct donations to the project's unrestricted funds.
- In Aspen/Parachute the reality is that we don't have money to go out and pay for data. We get what is readily available, inexpensive, and easy to access.

**WHAT IS THE METHODOLOGY BY WHICH WE DETERMINE INDICATORS AND USE DATA?**

An effective indicator methodology recognizes the important role of the public in developing and interpreting indicators. Our projects should seek to develop a methodology with a purpose, and research should do more than just gather data. Our role is to develop a process of informing, interacting, and eliciting input that results in two-way communication and education. Common methodology themes include:

**WHAT TO MEASURE: ROOT CAUSES.** With what appears to be an infinite number of indicators, how do we determine and limit what we measure? It was noted that many current indicators measure the symptoms, and the key to making indicators meaningful to both decision-makers and the public was to "peel back the layer of onion" to find the root cause and relate these causes to the problems that grip our communities. Listening to and understanding the common threads of our stories can help us to determine what root issues are most important to our communities.

Making indicators meaningful will require moving from policy-makers that presume answers, to questions that nobody was asking.

**LOOKING AT BOTH SIDES OF THE COIN: DEVELOPING POSITIVE AND NEGATIVE INDICATORS.** Most participants noted that indicators tend to measure the decline of our systems, and very few measure the positive trends of our communities. Yet, to keep citizens and decision-makers interested in indicators we need to look at the positive as well as the negative trends. We need to celebrate our success and remind people what is good about our community.

**BALANCING THE NEED FOR STANDARDIZED AND AGGREGATE DATA WITH COMMUNITY VALUES AND CHARACTERISTICS.** Linking indicators to visions and values of communities helps to get attention and raise awareness. Yet indicators should also be measurable and backed by reliable data. Standardized data makes it possible to compare communities, and to aggregate or develop composite indices. Standardized data, however, can also be aggregated to the point where it loses its meaning at the community level, or no longer relates to community values. On the other hand, if not developed correctly, community indicators can lack credible scientific or reproducible data that is relevant to decision-makers.

**DEVELOPING NEW INDICATORS.** Currently, there seems to be a gap between available data and what communities would like to measure -- what they value. Perhaps one of the greatest challenges for the indicator movement will be to gather new types of data that begin to bridge this gap. Sustainable Seattle thought it was important to measure "Neighborliness" so they developed a survey. Now there is a baseline from which to build. If something is important to your community, even though the data is not currently available, develop a baseline and a way to measure it.

### Highlights From the Questions and Answers

**Question: With an infinite number of indicators, how do you develop a framework to make data relate to what you are trying to affect?**

- First develop a long-term vision with goals, then develop indicators that can be tied to those visions/goals.
- The indicator movement needs to embrace a set of guiding principles.
- Listen to people in the community: What do they view as important?
- Information must not only be interesting to the public, but relevant to decision-makers.
- An inclusive process is important in developing meaningful indicators.
- There is a need to measure root causes, not the outward manifestation of our actions.
- Perhaps building consensus is as important as influencing decisions. Indicators can influence decision-makers as well as build consensus among communities.

**Question: How do we agree on the types of indicators to use and how to use them?**

- Language is very important; it must be easily understood.
- Indicators need to be positive as well as negative.
- Getting the business sector involved is important. Public interest should be balanced with business needs.
- All sectors of the community need to contribute to indicators, they should not be just performance measures for government.
- There are two level of indicators, macro and micro. What is used depends on what you are trying to do.
- We need to recognize that not all people or groups are interested in participating. Sometimes it takes someone to release data and

start the discussion that will allow criticism to draw others into the process.

### HOW DO WE MAKE INDICATORS USEFUL TO DECISION-MAKERS AND THE PUBLIC?

Indicators should not merely be numbers, they should tell a story. The methodology for developing indicators should be viewed within a system. It should link the design of indicators to the kinds of information that is appealing to media, community members, and decision-makers.

We should link indicators to diverse audiences -- people that do, could, or should have an interest in the well-being of their community. Our work should reach "the media, policy wonks, technocrats, and the general public."

Walter Corson presented two lists for making indicators useful: One for broad public policy, the other for the community level.

#### MAKING INDICATORS USEFUL FOR PUBLIC POLICY *[From Albert Adriaanse, Environmental Policy Performance Indicators]*

- Aggregate: Capable of being combined into composite indicators.
- Time sensitive: Able to show a trend.
- Related to cause and effect.
- Policy relevant.
- Verifiable and reproducible.

#### MAKING INDICATORS USEFUL AT THE COMMUNITY LEVEL *[From Maureen Hart, Guide to Sustainable Communities]*

- Relevant to sustainability.
- Understandable to the community at large
- Developed and accepted by the people of the community.
- Link economy, society, and environment.
- Focus on long-range view.
- Advance local sustainability, but not at the expense of others.

- Based on reliable information.
- Based on timely information.

#### Speaker and Participant Comments

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Many participants felt that while indicators should be useful to decision and policy-makers, ultimately indicators must relate to the individual: Our own personal action and behavioral change.

Indicators that relate trends to our own actions seem to be more easily understood by communities. One possible way to communicate the relationship between community indicators and individual behavior is the idea of ecological footprints -- a measure which talks about the relationship between our actions and the resources it takes to support them.

Showing relationships or linkages among indicators helps to make them useful.

A composite measure can combine several indicators. For example, a composite index for wildlife could include indicators on mammals, birds, fish, etc.

Another method may be to superimpose measures on one another, or compare similar issues like the format of Vital Signs, to show linkages.

Mapping or visual displays of information is easy to communicate issues. Use "story" or "results mapping" to examine how a community has changed as a result of an effort -- the level of community inputs, products of services, who it affects, the actual outcome.

**HIGHLIGHTED EXAMPLE:** School children attending the Lakeside School in Seattle, Washington are developing indicators to determine whether the school is achieving its own mission. They have an Indicator Web Page charting such things as water and paper use. In addition, they have established a similar indicator program with

their international sister school. It is an example of indicators used as education and empowerment, as well as research.

#### Highlights From the Questions and Answers

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**Question:** There is a problem with "perceived vs real" issues. Is what matters the same as what we can measure?

- We must think about new ways of quantifying data and not fall into the trap of just using what is easy to measure.
- We should try to avoid getting buried in details of numbers and look at measures that capture concepts and holistic thinking.
- There are different types of measures, indicators, benchmarks, performance measures, etc. Each tends to represent a different level of detail and use. Be clear about what is used.
- We need to establish new baselines of information for qualitative issue such as "sense of belonging." Survey tools have been very successful in gathering such data.
- Looking at root causes can help to distill the number of indicators into manageable numbers.
- We seem to be afraid to tackle some of these root causes, especially consumption of resources and inequitable distribution. This is likely due to the fact that no one has been elected on that type of platform.
- Indicators for capacity building and cooperation are very important, yet we have few examples.
- There is a fine line between simplifying indicators so that they are easily understood, and watering them down so much that they mean nothing.

#### HOW DO WE CONTINUE TO IMPROVE AND KEEP PEOPLE'S INTEREST?

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Effective indicator projects continue year after year to develop meaningful trends of their community. Yet, keeping the interest of the public, funders, and

community leaders can be difficult. Speakers and participants shared their experiences.

#### Speaker and Participant Comments

DAVID SWAIN: One key to our success is making the indicators responsive to what our community feels is important. Every year we have made adjustments to indicators, using a citizen involvement process. Over the years they have changed. It also takes time to get a useful set of indicators. It was only after five years that they were prioritized, not indexed as a group. Targets were set five years later. Another thing we did was to communicate the indicators in a highly visible way with volunteers awarding gold stars for those doing well (there is a need to celebrate) and red flags for those in decline.

KRISTI CORASH: The importance of networking -- getting together with others has been extremely valuable. Sustainability projects and healthy community initiatives need to have better ways to get together on indicators.

#### PARTICIPANTS:

- Have lots of footnotes, quote each other, keep the dynamics going.
- Cooperation and collaboration is important, especially because many issues interrelate. We need to develop formal networks of indicators projects to have a stronger voice and to support one another.
- Our process must also build community capacity to interpret and use indicators. Capacity building will make the indicator process more effective and increase our ability to develop and implement plans that are clear and can accomplish our goals.

#### Highlights From the Questions and Answers

##### **Question: How do we keep people involved in indicators over time?**

- Indicators should be used continually, not just when there is a crisis.
- Keep the process inclusive. Spend as much time talking about the indicators and what they mean to the community as you do gathering and synthesizing the data.
- Indicators that connect community values with data for decision-making seem to have long lives.
- Develop a good marketing piece --go beyond complex charts.
- Look at how values and indicators relate to how we spend money (public and private). The link between indicators and funding helps to keep people's attention.

#### HOW DO WE INVOLVE THE MEDIA?

Many indicator projects seek to involve the media to inform the public about both the process of developing indicators and the interpretation of the data. Getting the media's attention, and making complex issues, like indicators or sustainability, easily understood by the general public is no easy feat. Jim Carrier, of the Denver Post, shared his insights as a newspaper reporter and journalist on how indicator efforts might better involve the media.

There are two types of stories, fact-based (i.e. thirty-two died in crash) and anecdotal (a person representing your story). While fact-based stories may be more "news-like," anecdotal ones tend to be of more interest to local readers. Whatever your type of story, certain things can be done to make information from your indicator project more likely to be used by newspapers, and the general media.



Every story needs a hook, something to catch our attention. Hooks for indicators might be personal stories, the time of the year (i.e. releasing information on New Year's), or conflict.

Don't be afraid of using conflict to sell your story. Even though many indicator projects are seeking win-win situations, most of us became interested in indicators because we did not like what was happening in our communities. [The status quo of measuring progress was in conflict with what we were seeing.] So use conflict to capture the attention of the media. The media talks about conflict because it is easy to do. Don't be afraid to show that indicators represent conflict. Conflict sells, win-win doesn't.

Think about the lead for the story, what will capture readers' attention and how they could relate to it. For the most part, the media is a parochial machine. So think in provincial ways.

- Put your story in local, simple terms -- What do people talk about in the coffee shops?
- Be more concrete and specific.
- Be sensational. There are degrees of sensationalism and sex appeal -- yours should be appropriate to the story line.
- Be catchy. There is nothing wrong with the top ten, worst ten, etc. People digest and remember this type of presentation.
- Make it easy to read. Use graphics and facts.
- Provide the story. Over 75% of what is in the newspaper on any given day comes from some one else.
- Create an event, hold a press conference.
- Make it bite size. Many stories we get are too long.
- Make it personal. Relate your story to people in the community. Be willing to pitch emotion.

Speaker and  
Participant Comments

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Ethnic media is another media in our community that we often underutilize. Our experience is that they are interested in these (indicators and quality

of life) issues and are responsive when asked to provide input.

Tap into broadcast media by using skilled interns seeking experience. This is especially feasible in small and mid-size cities where local broadcast media tend to have small budgets and need local stories.

We have had good luck with the media when we prepared the story for them, to the extent of providing it on disk as well as on paper.

Ask media owners or editors to sit on the board of your indicator project.

Radio is often overlooked and tends to have more space to fill.

#### HOW DO WE PRESENT DATA?

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*We rely on indicators to tell a story about our community. How we present information on indicators is very important in how they are perceived, interpreted, and used by the public and decision-makers. The issue of presenting data was explored by Hal Kane, of the Worldwatch Institute in Washington, DC, and co-author of the annual publication Vital Signs. He summarized the importance of presentation with the following remarks.*

*(Hal joined Redefining Progress in January, 1997)*

Indicator reports are really history books. We often use them to think about our future. But they show trends of the past. They have to be used in the context of that history, with other, non-statistical information and stories that complete the story that the indicators tell.

Developing indicators is not enough. In fact, developing or gathering data is just the beginning. Most of the work comes in preparing the data for presentation and in writing. But what is even more important still is what comes after the data and writing is published. This is the interpretation and

reading of the indicators by various audiences. They may have the hardest job because they have to translate the indicators into their own view of the world and to have the indicators make sense according to their own values. If they don't do this, then they will be unlikely to use the indicators as a starting off point for a dialogue about their community or the future.

Because of this, the data has to be presented in a way that will make those people think and make them care. It has to be both accessible and also grabbing.

Worldwatch's annual *Vital Signs* book has done this. While it contains international data, it can be applied to indicators at the national and local level. Our experiences in producing *Vital Signs* include:

- Be concise and direct in your presentation. In *Vital Signs*, each subject has a total of two pages -- one page of text that provides history and explanations of the issue, and the facing page that contains two or three graphs and the corresponding data. When you open the book to look, you see an entire subject contained in a two-page spread.
- Group indicators in ways that allow people to see the connections among them. For example, many global agricultural trends increased through history until the 1980s where they began to decline. Taken separately, these graphs contained useful information. But grouped together and interpreted in their own context they became much more meaningful, revealing relationships among indicators and what was really happening in global food production.
- Use a simple and parallel structure for your report. The reader should quickly become familiar with your writing so that they are spending their time processing the information, not trying to understand the format.

#### Speaker and Participant Comments

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Try to present causal images -- linkages between and within sectors and issues that show cause and effect (i.e. the relationship between poverty, employment, and drug use.)

Look for a balance between favorable and unfavorable indicators.

Recognize that different types of data may need to be presented differently. Air quality may be put on a scale with numbers, but social data may need a different type of graphic to best represent it.

#### ROADBLOCKS ALONG THE WAY

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While participants shared many optimistic lessons, they also raised practical issues which helped to ground discussion in the reality that developing community indicators is hard work. Those issues which were repeated by participants included:

- Administrations prefer things in neat boxes. Sustainability indicators tend to blur the lines.
- Many people are impatient and want quick results, yet, indicators tend to move slowly. This makes it difficult to keep people interested.
- Data can also be used in non-constructive ways to place blame instead of educate.
- When our economy or other aspects of our community is relatively good, it is hard to get people to focus on projects like indicators.
- While it is important to keep the tension between what we now measure and what we value, tension is something political leaders want to avoid.
- We have a fear of looking locally. It is easier to criticize the actions in the rain forest than to look at ourselves.
- In essence, what we are talking about are two primary indicators: Consumption of resources, and inequity of their distribution. Politically these are issues that are absent from much of the public dialogue.

## C. SPEAKER HIGHLIGHTS

Speaker highlights contain additional comments relevant to the framework described in the previous section. They are not complete transcripts of talks, rather messages that the sponsors and speakers felt were important in forwarding the indicator movement. Speaker highlights are listed in order of the conference agenda, with the exception of the talk on national indicators which immediately follows.

PATRICE FLYNN,  
INDEPENDANT SECTOR

What I am going to do is put out some new ideas to consider regarding the indicators movement. The pieces are not new, per se. What is new is my attempt to pull ideas and concepts together to contribute to the serious dialogue on social and economic indicators.

A movement is stirring and growing that has pulled us together. It is coming from an increasing dismay with the current methods of measuring activities in our society. A unifying theme that the GDP does not measure what matters to most people. There seems to be a call for progress towards measuring non-economic goals and activities, such as improving health care, preserving the environment and sustaining core values; on putting a value on clean air and water, sentient citizens, and reliable infrastructures; on quantifying activities in the informal sectors of our society. We need a language bigger than our current lexicon to talk about what we value.

I want to share with you my thoughts and experiences by asking several questions I believe are important to this movement. As a movement we should ask ourselves:

1. What is our mission? What is the purpose or vision?
2. How is it different from indicator movements of the past?

3. What is the guiding principles that will identify the movement?

"It is not in our nature to work towards petty goals. By creating a vision we all believe in, I trust that the practices, behavior, and organizations will appear that are congruent with our goals." *Patrice Flynn*

What is our mission? What is our purpose? If this is a social movement in which we are all apart, then it is necessary to have a conversation about our mission. Just what is our mission? I believe it has something to do with change. We are experiencing many changes -- global, economic, social, political, etc. Changes in our concepts of values and community. If we can identify the purpose of this movement, we will create the conditions by which people are released to do what they need to do to contribute.

How is it different from indicator movements of the past? Part of developing our purpose is to understand our past -- to learn from the history of past indicator movements, to identify what is the same and what is different about this one. The broader social indicators movement began in this century and has seen three major peaks in activity:

The first came in 1929 when President Hoover pulled together a group of scientist to report on recent social trends in the United States. The second peak, in the 1960s, known as "The Social Indicators Movement," sought to measure individuals and family, and end-products rather than inputs into central systems. Finally, thirty years after that, Vice President Gore's National Performance Review sat out to create a government that "works better and cost less."

What are the guiding principles that will identify the movement? If indeed our mission has something to do with change, then I suggest we also explore the phenomenology of change. Not just how we measure change, but in terms of our own behavior and how we coalesce and move with this

social movement. Let us look at history as a valuable teacher in exposing lessons learned from previous indicator movements.

I propose the use of standards or guiding principles to assist with the development and use of indicators. For example the indicator process should:

- Be an inclusive movement in terms of disciplines, and in terms of sectors. To push us to look at class.
- Fund both research and on-the ground efforts. "Don't just fund the art, fund the artists."
- Encourage cohesion and to think more inter-dependently. Collaboration rather than competition.
- Look at lessons from various operational models. Not to look at hierarchical or Darwinian models that don't work. We should learn from the lessons of recent organizational behavior models that have been successful in adapting to change.
- Develop guiding principles that allow for change and chaos to emerge. Ask how we fit in and best contribute. Understand what we keep cycling back to -- quality, justice, poverty, etc. We need to learn what it is we keep returning to in order to address the real issues (problems) of our society.
- Find a language we can all use.

To help us find a language and a set of principles we can use, I turn to a wonderful poet, David Whyte, who works with corporations as they traverse in this new global marketplace. It can help us traverse as well. Several years ago I attended a workshop where David used the following poem written by David Wagoner. The poem is a response of an elder when a young Native American asks, "What do I do when I'm lost in the forest?"

### Lost

*Stand Still. The trees ahead and bushes beside you  
Are not lost. Wherever you are is called Here,  
And you must treat it as a powerful stranger,  
Must ask permission to know it and be known.  
The forest breathes. Listen. It answers,  
I have made this around you,  
If you leave it you may come back again, saying Here.  
No two trees are the same to Raven.  
No two branches are the same to Wren.  
If what a tree or branch does is lost on you,  
You are surely lost. Stand Still. The forest knows  
Where you are. You must let it find you.*

*By David Wagoner, Chair of Poetry, University of Washington*

David Whyte's interpretation of the poem provides many lessons for what we face. First, we must be alert. The elder says, "Stand still. The trees ahead and the bushes beside you are not lost." If we as a movement are not awake, we will perhaps repeat history by failing to make indicators a part of the statistical infrastructure.

One way to pay attention is through silence. The elder continues, "The forest breathes. Listen. It answers.." We must look inward and not roll down the path of numbers, data, models, composite indices, and on and on. If not, we will fail to see the trees from the forest. If we stop the internal chatter, we have a chance of perceiving the complexities of the world and listening to each other. We will allow ourselves the ability not to have easy answers.

### INTERLUDE

One theme among speakers was the need to be deliberate in our actions — To slow down and learn from the past, take time to listen to others, and reflect on what we have accomplished and where we are headed. Alan AtKisson offered us a new indicator to deliberately slow down and think about where we are going. It is called "Personal Miles per Hour"— Miles traveled the course of the day and divide by 24 for average miles per day.

WALTER CORSON,  
GEORGE WASHINGTON UNIVERSITY

Many community indicators are based on the goals of sustainability which are often described by definitions such as:

- A condition in which activity that meets current needs does not compromise the ability of future generations to meet their own needs

OR

- A condition that maintains the well-being of human and ecological systems and assures their long-term viability.

Broadly defined sustainability covers ecological, environmental, economic, ethical, social, cultural, political and government concerns; each of these areas include a number of dimensions.

There is a growing interest in measuring "quality of life," "sustainability," or "progress." In other words, a growing interest in indicators.

Communities, states, provinces, and nations are defining indicators and setting goals, for example, Jacksonville, Seattle, Oregon, Minnesota, Colorado, British Columbia, Canada, and the Netherlands. These efforts have been initiated by government agencies, chambers of commerce, and citizen groups, among others. Many successful efforts at the community level have involved broad participation of a variety of stakeholders.

Indicator projects have varying emphases – some stress economic factors (jobs, economic diversity), some emphasize environmental quality, others focus on social indicators or measures of human health, but most projects cover both the human and the natural environment.

Some indicator projects have developed goals and then selected groups of indicators to assess progress toward those goals. Some projects have set numerical target values for their indicators, to be achieved by specified future dates (Oregon Benchmarks, Minnesota Milestones). Most pro-

grams have collected indicator data for several years and focus on trends -- on whether the indicator values are improving or worsening.

"We need to think more about causal models – making our indicator choices related to the causes. What we read about in the media are primarily "resultant" problems. We need to measure the causal effect of these indicators." *Walter Corson*

Where data is available for several years, a performance measure can be calculated in terms of how the indicator value for the most recent year compares with that of earlier years. They are often expressed as a percentage of the "best" or most desirable value of the past. Measures of performance and progress include:

- Unindexed Data: e.g. most recent crime rate per X people.
- Baseline Index: e.g. most recent crime rate compared to a past base year
- Performance Index: e.g. most recent crime rate compared to the previous "best" year
- Comparative Index: e.g. most recent crime rate compared to best and worst rate for other jurisdictions.
- Sustainability Index: e.g. most recent crime rate compared to rates estimated to be "fully sustainable" and "totally unsustainable."

To make data more meaningful to the public, indicators for a given sector (such as the economy) can be indexed to some standard or base value, and then combined into a single composite index for that sector. For example, the Miringoff-Fordham Index of Social Health is a composite measure that includes sixteen indexes of social indicators. By combining indicator data in each sector, one can derive composite performance indexes for the environment, the economy, and the society, somewhat like the often-cited Index of Leading Economic Indicators for the U.S. economy. In addition, separate indexes can be displayed together on two-dimensional graphs that are easy to read and to show trends.

It is useful to define indicators that measure both highly visible problems such as unemployment, crime, and pollution, and less viable underlying causal factors such as rapid population growth, inequalities of wealth and inefficient technologies. Analysis of links between these two types of indicators can help examine correlation and cause-and-effect relationships between factors such as unemployment, poverty, and crime.

Questions to think about during the conference and in developing community indicators:

- How can we best promote collaboration among indicator efforts?
- How can experience with indicator projects at the community and state level contribute to indicator selection at the national level, and visa versa?
- How can we achieve broad public participation in indicator selection and goal setting?
- How can we make indicators more useful and accessible to policy makers and the public?
- How are indicator projects actually being used to affect policy and improve quality of life?
- How can we best measure the effectiveness of public and private social programs?
- How can we develop indicators that measure integrated, holistic problem-solving? i.e. measurements of communication between different agencies and organizations to address common problems.

In summary, indicators are increasingly being used to monitor environmental, economic, and social conditions and to assess performance and progress at the local, regional, and national levels. If combined with adequate public support, political commitment and resources, programs employing indicators and targets could help reverse ecological and societal deterioration and move communities and societies toward a more sustainable future.

#### KATE BESLEME, REDEFINING PROGRESS

Redefining Progress has been examining over 130 community indicator projects around the United States. We sent out a survey to ask these projects questions about their process, their needs, and lessons they have learned. Here is a brief overview and a few highlights of the results from the survey.

Indicator projects are being used by communities to measure progress towards visions and goals. These projects are thriving, looking for direction and cautious about reinventing the wheel. Some efforts are mature, well-established, and have released reports (about half), others are nascent initiatives just getting off the ground. Some were developed through broad, community-based process while others reflect the work of a single organization/ agency. The diversity of groups using indicators demonstrates the flexibility of indicators as a tool for decision-makers and the public working toward a common goal and shared purpose.

Community indicator projects tend to characterize their approach with concepts like sustainability, quality of life, and healthy communities. Each is a conceptual framework for gathering and presenting information in a way that is useful and understandable to the community.

“Indicators are nothing more, nor should they be anything less, than an information base for a larger advocacy and action strategy that utilizes resources which already exist in a community.” *Kate Besleme*

Of the projects surveyed, the following 'top three' projects served as a model:

- Sustainable Seattle Indicators
- Oregon Benchmarks
- Jacksonville Quality of Life Indicators

While there is no single common approach to developing an indicator project, there are common themes that each project shares.

- A future focus and concern about making links among issues.
- A focus on a clearly stated purpose which fits into a framework of general purposes: public education, policy background, performance evaluation.
- A process has successfully brought together diverse stakeholders. (Over 60% had business/business groups at the table)
- A process that creates new profiles of community conditions in ways that draw attention to negative trends/problems that could be damaging.

Why aren't indicators turning into action? Despite these successes, many community indicator projects are awaiting expected actions. We need to remind ourselves what indicators can and cannot do. They don't substitute for action. It is the process of developing and discussing indicators that encourages action.

DAVID SWAIN, JACKSONVILLE QUALITY INDICATORS FOR PROGRESS, FL

The Jacksonville Community Council began as a pioneer in the field of developing quality of life indicators at the community level. We began, in 1985, in collaboration with the Jacksonville Chamber of Commerce, to develop a set of indicators that went beyond the usual economic indicators. They also went beyond social indicators, so we called them "quality of life" indicators.

The process we designed, which we've written up in a Replication Kit (a how-to manual for use by other communities), relies on six, key "P" words:

1. PARTICIPATION. The JCCI Quality of Life project is driven by citizen participation. Citizens defined the original nine elements of the quality of life, the criteria by which indicators were to be selected, and the indicators themselves. In 1991, citizens met to set priorities among the indicators and targets for each for the year 2000. Annually, a

citizens committee reviews all the indicators and the updated information in each annual update.

"This is not the kind of project that can be created once and then updated by rote year after year. Each year, our volunteer Quality of Life Committee has fine-tuned the indicators." *David Swain*

2. PATIENCE. JCCI sees the Quality of Life project as part of a community building process. Before positive change can occur, people must be aware of the condition of their community and have information about trends. Acquiring trend data takes time. Advocacy must await citizen awareness and understanding.

3. PROCESS. From a community-building perspective, the annual process of updating and disseminating Quality of Life information is as important as the product itself. Citizen involvement in the process is the key. In the long run, this transforms the annually published documents from the product of an organization called JCCI into a body of knowledge owned and used by the community.

4. PERSISTENCE. For patience with a participatory process to work, there must be persistence. This means commitment to the longitudinal nature of trend-line indicator data collection. It also means ensuring the ongoing adequacy of financial and staff resources to make the process work.

5. PRAGMATISM. People can think up many wonderful indicators — that can't be measured. To be successful, an indicators project must be willing to accept, at least in the short term, the inevitability of working with the indicators of the possible, that is, those for which some form of measurement can be achieved (more on this below).

6. PERFECTION. Despite the need for pragmatism, there are aspects of an indicators project that should demand perfection, because they can be controlled. The thoroughness of research and the validity of the indicators should be without ques-

tion, or the integrity of the project will be in jeopardy, and the needed community buy-in won't occur. The quality of published documents should be high, not in terms of looking glossy, but in terms of being easily understood and having gut-level meaning for ordinary citizens as well as decision-makers.

**IMPROVEMENTS TO DATE.** As a pioneer, JCCI has found that its initial process and product have benefited from continual improvement. Some have had to be dropped, a few others have been added, and some have been redefined to better reflect community values or to accommodate the way data are collected.

Only after five years of watching indicator trends develop were our volunteers ready to set priorities among elements and indicators, and to set targets for where they thought Jacksonville ought to be by the year 2000 in relation to each indicator trend line. Once targets were set, in 1991, each year's volunteer committee was able to look at trends and assign "gold stars" for those clearly moving in the "right" direction and "red flags" for those clearly moving in the "wrong" direction or stuck and far from their targets. The stars and flags have provided an invaluable tool to help citizens and decision-makers focus in on what to celebrate and what to work on improving.

Given the purpose of informing citizens and decision-makers, JCCI has looked to the media as important players. However, until recently, JCCI has had difficulty interesting the media in more than one-time coverage when each annual update came out. This year, for the first time, the local newspaper took a more in-depth look at the update released on November 20. One reason was timing. Public education is an important issue in Jacksonville at the moment. The media, with the guidance of city and Chamber of Commerce officials at the release press conference, focused on the education indicators.

Over the years, the Quality of Life updates have begun to do more than provide information. They are now being used for advocacy purposes by the Chamber, nonprofit organizations, city government, and JCCI itself. In other words, after more than a decade, the project is beginning to mature as a vehicle for community building.

**IMPROVEMENTS FOR THE FUTURE.** JCCI still isn't happy with what we've achieved. We're now planning a major expansion of the project to a whole new level. Once pioneers, we're now becoming students of the other communities (and nations and international organizations) that have created similar projects across the country and the world. They have learned something from us and created, in many cases, better mousetraps. Now it's our turn to learn.

In the next few years, we're going to do a major overhaul of our indicators. In particular, we want to apply the concepts of sustainability, of healthy communities, and of benchmarking to our own quality of life concept and see how they interrelate and how they fit in our community.

We have plans to advocate locally to institutions that collect data to get them to collect the particular data needed for some of the indicators we'd like to use but haven't been able to measure. We'll be setting new targets, perhaps for the year 2010, although there is some desire to have more short-term targets, perhaps for five years.

We also are developing a plan to export and adapt our process for use at the neighborhood level in Jacksonville. One of the difficulties of a community-level indicator process is that differences within the community are obscured.

To make all this happen will require an expanded commitment of staff, resources, and most importantly, citizen involvement. We anticipate turning our annual-review committee into a higher-profile, ongoing task force of citizens, who will participate in the planning and implementation of our expanded efforts.



### A SPECIAL NOTE ABOUT MARIAN CHAMBERS

Although JCCI has been the institutional pioneer for community Quality of Life indicators, it was really one person, Marian Chambers, who, as JCCI's executive director, had the vision to conceptualize and the commitment to realize this project. After retiring from JCCI in 1994, she continued to be involved nationally and internationally as a consultant in this area. Unfortunately, she was diagnosed with cancer in June 1996 and died on October 14. She is missed greatly by many people in many places. JCCI has dedicated itself to continuing her wonderful work, both in Jacksonville and in the world community.

### KRISTI CORASH, HEALTHY MOUNTAIN COMMUNITIES, CO

I would like to share our experience in creating indicators for the Colorado communities of Aspen, Glenwood Springs, and Parachute, with a population of about ten thousand people. Our effort is part of the Healthy Communities Initiatives of the Colorado Trust. And indicators are just one part of the project, but an important part. As we share our experience with other healthy community projects, we often hear a lot of "ah-ha's" from people as we talk about common processes and concerns. I hope that these lessons will also be of value to you.

**OUR PROCESS.** We went through a large visioning project for the region, where groups in the three communities got together. We went to local organizations for input, but didn't quite know what to do with the information we received. We came up with great ideas but found they were hard to measure (i.e. the number of trick-or-treaters). Finally, we found indicators we could measure, and put together a report. We then took it to the local media. They were very helpful since newspapers in small towns tend to be hungry for any kind of

news. We turned the report into a presentation and took it to community groups. We solicited feedback about what they liked and didn't like.

To get a variety of input we went to groups and organizations instead of holding public meeting. People were surprised that values between the communities were so common, because on the surface they seem very different. After we completed the community visions we needed to pull it all together, to gauge the whole community. That is where the indicators came in.

When first developing indicators, we found a lack of data and inconsistent data that proved to be a major problem. Governments were not always easy to access for information. For example, at the county level there are nine municipalities and four schools districts. We wanted to measure voter participation rate, but found out that municipalities don't have to keep that information. We also wanted to measure turnover rate in the community so we went to schools to find out how many kids were there three or more years. Only one out of four schools collected such data. In other words, agencies only collect what they are required to do, which is not always useful to the community.

In addition to the lack of data, there was inconsistent data which made it difficult to aggregate information. What we finally measured was based on what was available and what we could easily access for little or no cost. Hopefully this indicator movement can address the data problems and help to build an understanding as to the need for better data.

### DAN CHIRAS, SUSTAINABLE FUTURES SOCIETY

My dream is of a national and unified effort -- at the national, regional and community level. Partly that dream has to do with the urgency I feel. I don't have to remind you that today, one quarter million people will be added to the world population; I don't have to remind you that 140 square miles of

tropical rain forest will vanish, or another ten million tons of carbon monoxide will be put into our air. It produces the urgency for a unified national movement to address what is happening to our environment, and thus our communities.

National and community indicators projects have been largely autonomous efforts, even though both have been spurred by very similar forces -- notably, a growing interest in forging a sustainable future and a very clear realization that human and financial resources at all levels of government are limited. Gathering and publicizing data on the important social, economic, and environmental trends at all levels from local to global can help society move toward a sustainable future and can assist local, state, and national governments in making crucial financial and programmatic decisions in what appears to be the beginning of a long and enduring period of austerity.

I personally think that there is much to be gained in uniting the two movements, although the task will not be easy. One of the benefits of joining forces is that it could result in a more unified effort to develop a sustainable future. Tracking similar trends related to sustainability could therefore result in a nationwide movement that would increase the rate at which change is achieved. A more unified effort could start a groundswell of action all focused on achieving a very important goal: Sustainable development. It could, in fact, help reshape our nation's psyche (beliefs and ethics, for example) as well as its governance and infrastructure.

A united effort would also help those of us working at the national level to understand the local and regional trends that are obscured by national trend data. For example, although the book *State of the Nation* on which Richard Lamm, Walter Corson, and I are working shows that the nation's water consumption is on the decline, this is not the case in specific parts of the country. Thus, it is important that we gain some local- and region-specific data to target programs for areas in which they are

most needed. We need to target what we measure, and make it easier to collect meaningful data. Pulling together would help to change what gets measured and data that is useful.

United efforts could also help improve data gathering nationwide. In our experience, there is little data on sustainable economics. If there are many customers for this type of data, one can hope that someone would have the wherewithal to start collecting it.

But thoughts of working together raise many important questions.

- What would this "union" look like?
- Who would coordinate it? Who would serve as a liaison between the different players?
- To what extent should local indicators projects follow in the footsteps of national indicator projects? Or should the national indicators projects follow the local indicators? Or should they work together to create a set of core indicators essential at both levels?
- What would be missed at the national level that might be covered at the local level and vice versa?
- Should indicators be fashioned around quality of life or sustainability?
- How will we deal with the issue of population and economic growth?
- Can we reach a consensus on whether growth in these areas promotes or detracts from sustainability?
- Will local communities feel co-opted by a prescribed set of indicators or will this actually make their task easier?

This isn't a movement about creating more numbers and graphs. It is a movement about knowledge, vision, understanding. And all the little minutia is not going to help with the understanding of where we have been, where we are going or what we can be. We're seeking knowledge. The more we focus on root causes the fewer indicators we will really need to understand our vision. There are thousands of things that are important, but only a handful of causes." *Dan Chiras*

The establishment of indicators will clearly help stimulate discussions concerning sustainable development. It is my belief, however, that these efforts will be meaningless unless we pay a great deal of attention now to creating mechanisms for indicators to be widely considered and used.

Indicators are not just about collecting data and displaying more numbers and trends. They are about shaping the future of our nation and our communities. They are about vision and possibilities. But we need to be certain that our efforts do not end with published reports that gather dust on shelves and have little effect on public policy, corporate affairs, and personal action.

In closing, this is an evolutionary process. We need room for experimentation. We need to be easy on ourselves.

TERRI BAILEY,  
PITON FOUNDATION

“We need to be heard. There are people making decisions about our lives and our communities that have never met us, that have never come to us, but think they know what we are about. Our stories need to be heard. Our indicators need street images.” *Terri Bailey*

A "piton" is a mountain climbing device to help pull you up and over rugged terrain. Our job at the Foundation is to help organizations and people get over the mountain, or get out of the way. We recognize that communities have incredible resources, and helping them build their own capacity to tap these resources is vital.

The National Neighborhoods Indicators Project, grew out of efforts going on in cities -- informal networks that came together about three years ago to see if there was a need for something more, a way to involve others. I think of myself as someone not engaged in an indicators movement, but a movement of communities taking back their cities

and towns. Indicators are a tool that assist in taking back our communities.

#### RELEVANT ISSUES FOR THE INDICATOR MOVEMENT:

- Movements have history -- they come from somewhere. From where has this movement come?
- They have an ethic. This one appears to be community-building.
- They have stories.

#### WHY DECIDE TO ORGANIZE, IF WE ARE ALL GOING TO CONTINUE ANYWAY?

1. LEARN. We all need to learn from each other. Things are moving fast and need to talk to each other more, take lessons from others instead of repeating ourselves. We need to ask ourselves what can we all collect to start the conversations?

2. TEACH. We have something to teach at the community level. We need to change the image of cities in this country, to show the variety of what happens and when. We need to direct the national trends to be meaningful. If we continue to aggregate to big picture we lose sight of how issues affect our communities. We should take street images and let people know what is happening.

3. BETTER DATA. We didn't decide what is being used. Most of what is measured is driven by deficit and national needs. Information policy is set nationally. It doesn't tell the stories about assets or arts and cultures. There is no value on non-monetary issues. We look at problems, not solutions. There are many outcomes and things happening that are more than crime victims. There are assets and resources in the poorest community. We need to influence what data is collected.

4. BE HEARD. Finally, we have to be heard. People have an enormous amount of distrust about government. Trust is based on what we can see, feel, or touch. There is a movement going from national to state and local and no one has asked us or allowed us to tell our stories. We will be asked to

make decisions on information that has been told to us. Our stories need to be told. They need to be a part of the process that determines indicators.

PATRICIA SCRUGGS,  
RESEARCHER AND CONSULTANT

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Over the past several years, I have taken a look at indicators as a part of developing visions and strategic plans for sustainable community efforts. In doing so, I have researched about three dozen state, regional, and community indicators to help clarify both content and process questions that many communities face while developing their own initiatives. Over time, my thinking in this area has evolved into what I call a 2x3 matrix for sustainability indicators.

The purpose of this matrix is to ask the questions that will make sustainability indicators meaningful to a community. The first phase contains three questions that direct the broader process of developing community indicators. The second phase focuses on making indicators meaningful to the community for which they are developed.

Stage I:  
Preparatory Stage

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Before you dive into developing indicators, you may want to clarify your expectations. This entails asking some basic strategic planning questions about process and outcomes.

- WHY ARE YOU DEVELOPING INDICATORS?  
What outcomes do you expect the indicators to achieve? Is it targeted -- to measure performance of specified organizations and agencies? Is it community-based -- to cause dialogue and action that changes the behavior of all those who impact an indicator or set of indicators?
- FOR WHOM ARE YOU DEVELOPING INDICATORS?  
Is it meant to reach and be used by the general public, or directed at certain groups such as government decision-makers?

- HOW WILL INDICATORS BE USED?  
What are and aren't they intended for?

Two examples, Portland, OR and Seattle, WA might illustrate how different answers to such questions can result in different outcomes. Both have developed a set of statistically measurable indicators or benchmarks. Both have intentions to modify behavior. Portland has adopted a subset of the Oregon Benchmarks. They were chosen and refined *by and for government and public agencies*. They are a tool to *measure performance*. The action or behavior they intend to affect is primarily that of the government. There are approximately one hundred Portland/Multnomah County benchmarks, many of them with technical measures.

By comparison Sustainable Seattle Indicators were developed by a community group with broad-based representation -- *"by citizens, for citizens."* These indicators are a tool to educate and inform the public by using *"bits of information that reflect the status of a larger system."* The action these indicators intend to modify is public, private, and individual behavior. They focus their indicators on *"reflecting something basic and fundamental to the long-term health of the community, something that can be understood by the community, and would have appeal to the general public."* There are forty Seattle indicators, most of them in language with which the public can readily identify.

I believe that performance measures such as the Oregon Benchmarks are useful tools in helping to make specific programs (usually government) accountable and result-oriented, but they are more narrowly focused than sustainability indicators. Therefore, benchmarks should be viewed as complements of, not substitutes for, broader sustainability indicators.

Stage II:  
Developing the Indicators

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Once you determine the intent of your indicators, then the work of developing indicators begins. This

can be an involved and lengthy process. I believe that successful indicators are ones that are understood and used by a wide array of community groups, including individuals. In other words, they should matter to each one of us.

1. ARE THEY SIMPLE? As indicator species are to a habitat full of other plants and animals, so should sustainable community indicators be a pointer to directions and trends in a region. They should also be written in language that is self-explanatory and easy to remember.
2. DO THEY RELATE TO COMMUNITY VALUES? Sustainability indicators should focus on that aspect of an issue with which people identify. For example, in the Northwest, the salmon represents more than just a diminishing species. It represents a way of life. It has an inherent value associated with the region. I believe the combination of values and data is powerful. Data helps us to understand trends and justifies what we do, but values can be the catalyst that get us to act on the information.
3. ARE THEY MEANINGFUL TO INDIVIDUALS? Sustainability indicators should relate to individuals as well as the community as a whole. Indicators should measure the ability to sustain quality of life -- "how well" not just "how much." Take for example, per capita income. Alone this number has little meaning. A \$30,000 per year income in rural Midwest America can mean something very different than the same amount in Boston or San Francisco, let alone Mexico, India, or elsewhere in the world. What does this income buy? Is it enough to adequately house, cloth and feed you? A better indicator might be the ratio of the average wage to average housing prices. Individuals can relate to such measures and better understand how they relate to their community.

"Sustainability indicators should be few in numbers and easy to remember so they are meaningful to communities. After all, the word indicate means to "denote, show, insinuate." It does not mean complete or comprehensive." *Patricia Scruggs*

My research has lead me to the conclusion that to promote sustainability, indicators are needed that are understood by a wide array of people. They should inform the public in ways that stimulate them to take action that collectively will affect that indicator.

JIM CARRIER, DENVER POST

It is my goal to develop, for the Denver Post, an alternative indicator to the GDP to be published quarterly in the paper. However, I would like to focus my remarks on how to get the media involved with indicator projects in general. People often try to make the newspaper or media into something it is not. It isn't a school for education or a social reform agency. It basically covers what is "news," nothing more. At best we are a mirror of our community. Something you should take advantage of.

First, let me explain a little about the media and how to access them. The media is made up of the owner, a businessman who has a news staff he doesn't trust. And if the paper is big enough, it has an editorial staff. All three are possible doorways into the media. In a small town they are likely to be the same person. There is often little connection between the editorial and news staff.

There are two types of stories: Dog bites man, and man bites dog. We have both of these with indicators. With any story you need a hook and a lead for the story. The story itself should:

- Be concrete, specific.
- Be sensational -- there are degrees of sensationalism, use one best for your story.
- Be catchy. There is nothing wrong with the top ten, worst ten, etc..

- Make it easy to use -- graphics, facts.
- Provide the story. About 75% of what is in the newspaper any given day comes from someone else.
- Create an event, hold a press conference.
- Make it bite size.
- Make it personal, relate it to people or businesses in the community.
- Use simple language. The media is skeptical of new terms. Talk to the media like you talk to your children when you go home at night.

Another way of getting the media involved is to have them be a part of an event. Civic journalism appears to be a new trend. It is where the newspaper itself becomes part of the process. The newspaper for example might create a forum, hold meetings, and report the outcomes important to the community.

HAL KANE, WORLDWATCH INSTITUTE  
AND CO-AUTHOR OF *VITAL SIGNS*

I would like to share the experience in creating the book *Vital Signs*, global indicators for sustainability. We have talked a lot about the lack of data, but compared to almost any other part of the world, the United States has a wealth of data. And compared to global data, which is lost if even a small segment of the world lacks data, we are really lucky in the United States about how much data we have. We can now use it for great indicator work.

Having this data is only the beginning, though. It is like having one of the components of a stereo system but not the others. Adding analysis and interpretation and research and collaboration add other components of the system. The sound produced in the end, though, can never be better than the weakest link in the system. If all the components of a stereo system are good, but the speakers are not, then the sound will not be good. The presentation of indicators are the speakers. So all the parts of the work, from the research of data to the graphic layout are important.

"The quality of your data is in a sense only as good as your presentation of the information. In many ways it is like a stereo system. You can have fantastic components, but if you have cheap speakers, the quality of the output is poor." *Hal Kane*

Indicators do not always tell us about the quality of life. I just returned from Fiji where, by almost any measure or standard, it is very poor. The income is low, the roofs of houses are made of tin scrap, space to live in is small, etc. But I think I heard a lot more laughter there than I hear in the United States (and especially in Washington D.C.). People seemed to stand up straight and carry themselves well. Although their houses are tiny, they are always clean and well presented. They have a great sense of humor and seem to always be able to solve problems. They know a little bit about everything. Interpreting indicators in Fiji is very different than the measures we use in the U.S. If smiling faces were progress, Fiji would be rich. But these things are not captured by our indicators, and numbers cannot normally be put on them.

I think these will be some of the challenges for the future. Making indicators tell a fuller story, and making them able to deal with important subjects that resist numerical work, and presenting them in ways that reach people's hearts and guts.

RICHARD LAMM,  
FORMER GOVERNOR OF COLORADO

"I think that at long last our society is begging to realize there are things we don't know, and that we need indicators or yardsticks to try to see whether or not we are making progress on certain things." *Richard Lamm*

On a visit from my brother Tom and his son Danny, Tom and I went jogging while Danny watched a baseball game on television. Upon our return, Tom asked, "What's the score, son?"

Danny answered "3 to 2."  
 "Who's winning?" asked my brother.  
 "3" replied Danny.

He was absolutely right. He gave the correct information. I recognize how hard it is to do certain functions to which there are no yardsticks to tell if you are going in the right direction. The beginning of wisdom, it is said, is when you know that you don't know.

All of us can make a good case with numbers, with data and statistics. It can be a lot of smoke and mirrors. For instance, one can prove that the average person in Miami, Florida is born Cuban and dies Jewish. We not only need indicators to determine whether we are winning or losing, we need them to help us look differently at things.

Cruses said once that "The real voyage of discovery was not in seeing new lands, but seeing with new eyes." Seeing with new eyes certainly seems to be something this movement may need to do. We need to start thinking about a whole range of issues differently than we have in the past. Perhaps it is the next round of human development. First we had hunter-gatherer, then agriculture, the industrial revolution, and recently, the information age. But we are heading into an era when we need to link ideas, see them sustainably. And indicators are a tool to help us see differently, holistically.

It is absolutely essential that we begin to look at things differently. Trends that were once considered positive, almost desirable, can now be viewed with concern. The first U.S. Census in 1790 stated that there were four million people. In two hundred years, we have had six doublings of our population. Only two more doublings will put us near the population of China. Can we support that?

We need a new wisdom a new way of looking and thinking of things. Amory Lovins says that there is more oil under Detroit than Texas. Under each of our homes is an oil well. And how you insulate, heat and light that home plays a role. Thinking

about things in a sustainable manner, understanding the links and connecting them is important. In twenty years from now, I hope we can look back and see how important this new way of thinking has been. I encourage all of us to continue our efforts.

TONY HODGE, CANADIAN ROUNDTABLE  
 ON ENVIRONMENT AND ECONOMY

I would like to thank the sponsors of this conference and the excellent work they are doing. I am humbled to be here among a group of people with so much commitment. It is refreshing and inspirational.

I am also going to tell a story. In 1989, I went to my first workshop on sustainability indicators. The meeting was set up like many conferences. The facilitator said the first thing we need to do is to define sustainable development. So for two hours we would argue about the definition. When it was apparent that we were not getting anywhere, the facilitator stopped us and broke us up into small groups to decide a list of important indicators. Some would say air quality, others employment, still others disparity of income. It was clear that sustainability indicators were broad and varied and required more work than a single conference.

The biggest example of an indicator project that I know was the one completed by Alberta, Canada. They spent a million and a half dollars to come up with indicators for sustainable development. First there were eight hundred indicators, then they culled the list down to a few hundred and then finally to sixty. When I asked how they determined which sixty to use, the response was simple -- it was the ones for which Alberta Statistics had data. I thought why didn't they just go there first.

About the same time the Alberta Treasury Board became interested in results-based management and developed their own list of indicators. Did they talk to the costly sustainability effort just complet-

ed? No. Yet, several months later a report called "Measuring Up" came out. Now both reports are sitting on the shelf.

### New Measures of Progress

Since the 1940s, I count seven attempts to come up with indicators to displace or augment the GDP and other traditional economic measures. These measures expand economic issues to include social, quality of life, and environmental indicators that together tell us about the well-being of our communities.

In 1934, Luis Mumford wrote about society's progress. He said, "There is a new attitude towards space and time. The magnitude has become greater. Modern culture launched itself into space and gave itself over to movement. Romanticism for numbers grew naturally out of this interest. In time keeping, trading, in fighting. Men counted numbers. And finally as the habit grew, only numbers counted."

Why are we here? While it is called an indicators meeting, I don't think we are here just because of indicators for the sake of indicators. The key to what we are doing is to harness the power of numbers without losing sight of their purpose.

The role of all of us is as a change agent. We want to change the way decisions are made and actions are taken. Indicators assist with change by doing three things:

1. They communicate early warning signals to decision-makers so they know when to make changes.
2. They help to ensure accountability.
3. They facilitate and give credit when credit is due

"We are after a new way of seeing change — a lens for looking at the world. Seeing things differently is the first step to doing things differently." *Tony Hodge*

A lot of what we are talking about is common sense. But there are dangers. There is a danger in trying to bite off the whole "doing of it," as in doing sustainability. Our part in indicators is not in doing. It is in the planning cycle. Planning processes look at issues: Evaluating them, implementing them and then monitoring and providing feedback to cause change. The monitoring and evaluation is often left off the planning process.

Visioning processes for issues like sustainable development often include lots of people, mostly volunteers, giving hundreds of hours to develop a vision. By the end of the vision, they are too tired to then develop a monitoring or evaluation plan to know if their visions and actions made a difference. Yet, without an evaluating or monitoring progress, the public and decision-makers do not have the information needed to make changes. It is important that monitoring and evaluation is thought about at the beginning of the process. If you ask those questions upfront, your planning process will be more complete and even perhaps different than if you waited until the end. Thinking about the monitoring can change the way you define the vision. So part of what we are doing here is introducing something, that instead of being the last thing, should be thought about all along the process.

Four rules for success to overcome the impasse of indicators:

**FIRST RULE.** It is absolutely essential to commit to a value base and use it for making judgments (i.e. sustainability principles).

**SECOND RULE.** We have got to learn to articulate both the good and the bad. For example, a company that may dump toxics into the river, also provides jobs and supports the community baseball team.

**THIRD RULE.** We need to bridge. Bridge in a whole bunch of ways. Include diverse groups, integrate issues. The core of sustainability is its ability to bridge.



FOURTH RULE. Recognize the process/substance link. We have to think about the substance, our end products, in a way that helps our process.

I have concluded there is no point in collating massive amount of data. I have a test that requires only three questions:

1. Will it help me to know how people are doing in a region?
2. Will it help me to know how ecosystems of the region, and the areas in which the region has interaction, are doing?
3. Will it help me to know whether or not the activities are being successful in supporting human and ecosystem well-being?

What do these three questions mean? Well, if you were a benevolent dictator, what would you want to know? You would want to know how your people are really doing at an individual level. "Quality of life" measures take us one step removed from what really matters -- how people, our ecosystems, and activities are working. We need to know not just economic activities but education, volunteerism, housework. That is the level to which we have to bring indicators.

Bringing them down to such a level, requires articulation as to your reasons for decisions, and why and how you make judgments. The usefulness is not only for today's decision-makers, but for the future. We are creating the history by which they can make informed decisions. The point is that I know why you made a decision a certain way, not that I agree with your decision.

While the labels we use to describe our efforts may be different, what is important is that our work leads to human and ecosystem well-being.

In summary, GDP was created as a way for measuring national income. It was developed to get a handle on a deficit economy. It doesn't deal with human well-being, it doesn't bridge issues or build capacity, let alone look at the ecosystem that is the foundation to economic activity. What we need is to look at this differently. We need to look at the fundamental measures -- people, ecosystems and activities.

There is extraordinary power in sustainability indicators. There are both substance and process elements. Furthermore, it is driven by a sense of fairness and integrity.

## D. NATIONAL INDICATORS

In 1995, the Interagency Working Group on Sustainable Development Indicators (SDIG) was formed to develop a set of indicators that would measure national progress toward sustainable development. The goals of sustainable development used by the Working Group were based on outcomes from the Earth Summit, and a close relationship with the President's Council on Sustainable Development. The Working Group uses the Brundtland definition of sustainable development -- "Development that meets the needs of the current generation without compromising the ability of future generations to meet their own needs."

The Interagency Working Group seeks to:

- Engage participants in the indicator process by the agencies that affect or are affected by these issues.
- Build relationships between community and national indicator projects.
- Identify issues where communities want help from the Federal level.
- Keep open and parallel communications -- to promote better cooperation and support for sustainability between federal, state, and local efforts.
- Build awareness of the importance of government data.

DAVID BERRY, SUSTAINABLE DEVELOPMENT  
INDICATORS GROUP, COUNCIL ON  
ENVIRONMENTAL QUALITY

Each of us plays a role in this indicator movement. The Federal Government people here today represent an Interagency Working Group on Sustainable Development Indicators. At the national level, we are impressed by the level of work being done at the community level. We are interested in how our national effort can support the work within communities.

WHAT IS THE NATIONAL INDICATORS PROJECT ALL ABOUT? First we asked ourselves, why do we need indicators? It was apparent that we need to measure progress towards sustainable development in the United States. We also need to help people make informed decisions about economic, environmental and social issues in order to support policy-makers in federal, state, and local governments, businesses, and non-government organizations.

Data, as well as issues of scale are different between national, regional, and local levels. There are types of information important at the national level, that may not have much meaning at the local level. We must recognize the relevant scales from which we are operating.

WHAT IS THE FRAMEWORK ON WHICH THE SUSTAINABLE DEVELOPMENT INDICATOR EFFORT IS BASED? The Working group served as an umpire in the process of developing an inclusive framework. We couldn't wear an advocacy hat and still keep the credibility needed to work with so many agencies. We believe that indicators help bring together various constituencies with little knowledge or respect for one another's agenda.

Our framework was based on the inclusion of economic, environmental, and social activities -- clarifying the relationships between areas, linking current benefits to long-term assets, and identifying processes that most affect future capabilities.

This framework has three aspects that interrelate:

1. Endowments (the assets, both good and bad, that we have inherited and will pass on to future generations).
2. Process (as activities that affect the endowments -- driving forces and decision-making that transform endowments).
3. Outputs and results (the outcomes of processing our endowments).

The national sustainable development indicator project concentrates on the whole picture, the interconnectedness of various issues. Traditionally, we are

distracted from thinking about the whole picture because our eye has been on immediate and narrowly-focused results or outputs. With this project we asked agencies what was important to the whole.

Our experience is that in your effort, you must choose a process that works for you. We considered a large number of candidate indicators, and then scanned for indicators that met a variety of criteria including implications for long-term sustainability and the availability of data. This framework and the indicators are a work in progress; there are bodies of data that we don't have, yet are critical for measuring sustainable development.

**HOW WERE THE INDICATORS CHOSEN?** For about one year, the SDIG gathered many indicators. If representatives from an agency thought it should be in the hopper, then we put it in. The results were about four hundred and fifty candidate indicators which all had the federal government's seal of approval. Most of the indicators had already been recognized in an international forum, the President's Council on Sustainable Development, EPA, The U.S. Forest Service, etc.. Then we looked at which ones tell us what we really need to know, which ones indicated progress towards sustainability. This step narrowed down the list to about one hundred indicators. Finally, through conversations with federal agencies, corporations, non-governmental organizations, and young people, we whittled the list to the thirty-two proposed indicators in your conference packet. These thirty-two indicators include a combination of actual data and placeholders for critical issues where data doesn't exist but should be gathered. The selection criteria included indicators that:

- Were national in scale.
- Detected significant changes in endowments.
- Addressed high cost issues or high benefit opportunities.
- Measured driving forces or outputs.

The list contains indicators in a 3 x 3 matrix that addresses endowments, process and outputs. (See Appendix Four for a complete list.) These indicators assess what will be handed down to future

generations. They do not make judgment on what is good or bad, but rather what we should be paying attention to.

- economic endowment
- economic process
- economic output/results
- environmental endowment
- environmental process
- environmental output/results
- social endowment
- social process
- social output/results

Because various people were in the conversations to develop these indicators, they began to see the connections among issues. The process allowed agencies to look toward the future and opportunities for collaboration. Because of this, we are getting real information and understanding what is important to the nation as a whole, rather than to individual agencies. For example, representatives from the Department of Justice and Health and Human Services consistently stated the most important thing for the nation is to take care of our children, making indicators of education among the most important. Environmental and economic agencies were asking for more participation from social agencies because they saw the connection to community and people.

Our next step is to broaden the process within the federal government. To continue getting input, and at the same time sharing information with government agencies and a broad range of constituencies about indicators and sustainability. We will also be learning from community indicators efforts – hearing from you. We will look for disaggregated data useful to communities as well as to our national effort. We intend to link all the data to our web site so people don't have to go from agency to agency to collect different data.

The web site is [www.hq.nasa.gov/iwgsdi](http://www.hq.nasa.gov/iwgsdi)

## PARTICIPANT TABLE TALK ON NATIONAL INDICATORS

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Immediately following the presentation on National Sustainable Development Indicators by David Berry, conference participants were asked to discuss the proposed framework, the recommended indicators, (see Appendix Four) and the relationship to community indicator efforts.

### Comments About the Overall National Framework

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**ADVANTAGES OF THE NATIONAL FRAMEWORK.** People felt that the national framework was off to a good start. They applauded the holistic approach taken to link economic, environmental, and social issues together into a single framework. The national framework model appeared to be useful in broadening the vision of a sustainable society. Participants generally felt it would have an impact on decision-makers if the agencies agree to use it.

Most participants like the idea of measuring endowments, process, and outputs -- not just outputs. The framework allowed one to consider where indicators fell into the process. The framework made a good attempt at trying to link our foundation of resources (endowments) to our actions (process) and outcomes (results). This was an improvement over many existing indicators that do not make this distinction or recognize the various roles each indicator plays in moving toward sustainability.

**CONCERNS WITH THE NATIONAL FRAMEWORK.** There was much concern that the framework was very weak on social and cultural issues.

Most participants had a difficult time with language used in the framework. They felt there was too much jargon and it was too bureaucratic to make sense at the community level.

There appeared to be a lack of a broader vision or set of sustainability principles to which the national framework and the indicators were linked.

There was a lack of understanding of what was meant by sustainability.

Most people felt like the national indicator framework was developed by a top down process with little conversations at the community level.

### Comments About the Specific List of National Indicators

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In general, many participants felt it was difficult to assess indicators because it was not apparent as to the use of the indicators.

Indicators needs to be linked to the inherent value or vision of where you want to go.

The root causes, i.e. endowment and process, are most important to measure, while output is the least important. Indicators need to be more root cause, not effects, so that resource allocation will be more direct.

Indicators seem to be related to what data was easily available, rather than what might be the best measure for the particular category.

If possible, keep indicators value neutral but relate them to principles of sustainability. Some indicators appear biased toward certain populations (i.e. crime). Perhaps it is better to look at what causes crime, education, poverty, distribution of resources, etc.

Many people indicated that the national indicators would be more useful if they had a clear focus on the future.

While most participants felt thirty-two indicators were about right or a few too many, minority of people felt that thirty-two indicators were not enough.

Specific indicators mentioned for addition:

- Housing affordability.
- Cultural activities.
- Voter participation.
- Consumption.
- Education.
- Volunteerism and civic participation.
- Equity and distribution issues.

Indicators that should be modified or removed:

- Crime -- Why not use root causes of crime poverty, education, income distribution, etc..
- Too many environmental indicators.
- Population -- not clear what it means: Is more population good or bad? Has lots of latent judgment behind it.

While national indicators make sense at a broad level, they do not make much sense at the community level.

ADDITIONAL QUESTIONS CONCERNING INDICATORS.  
What level of detail would the indicators measure?  
Would they include disaggregated data by gender, class, race, etc.?

How can we measure something such as air quality that has meaning nationally as well as locally?

How will indicators relate to timelines and targets?  
Are they looking ten, twenty-five, or fifty years out?  
Who determines targets for these indicators, are they determined by long-term sustainability?

#### Comments About the Relationship of the National Indicators to Community Efforts

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National groups need to listen to the communities. Indicators need to be developed through a two-way dialogue between the Interagency Working Group and communities. They should go to community meetings, understand their format and data needs.

Let community stories help to form national indicators. Learn what lessons these stories have and how can they be translated to national indicators.

Hold community-level focus groups to further test national indicators.

The need for federal data seems to be different from local needs. The key is to learn how each level can complement and help each other. Each level does not have to be duplicated.

Share the selection criteria and list of all indicators with communities. While the number of national indicators should remain limited, the broader choices should be available to communities so they can pick and choose those that are most applicable to them.

The primary contribution of the national level work should be to gather and synthesize data for indicators at the national level.

#### Conference Sponsors Comments About the National Indicators.

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There is a need for those of us involved in indicator efforts to contact the federal agencies that we work with to share with them the importance and need for national sustainability indicators. We need to encourage all agencies, and especially those dealing with social concerns to join the national effort.

## E. EVENING DEMONSTRATION ABOUT ACCESSING THE MEDIA

The media may be a strange breed to us. They seem to thrive on conflict and controversy, bypassing the celebrations of good times. They like big names and numbers, quick results and flash. Things that often don't have a lot in common with indicators. But there is a role for media in our movement. A very important role. But we must learn from them in order for them to learn from us.

The evening presentation from the media break-out session showed us what an "indicator story" might look like from a reporter's or editor's point-of-view. Each of the three sample stories, presented as skits at the final banquet, highlight the "dos and don'ts" of working with the media. Points to be stressed are noted in italics.

### STORY LINE # 1 A SURE WAY NOT TO GET THE MEDIA'S ATTENTION

**Reporter:** Hello, Daily Bugle.

**Citizen:** Hello, my name is Marge. I want to tell you about a really interesting story I think you should publish as soon as possible.

**Reporter:** What's that Marge?

**Citizen:** We just finished a study on a new social indicators report, and what we discovered was -

**Reporter:** A social what? *(a title/storyline not clear, not likely to catch a readers eye )*

**Citizen:** A social indicators report of this area, and we discovered that population has increased 3%. That is a total of 273,000, and in addition the school population has increased even more than that, it -

**Reporter:** Uh-huh...

**Citizen:** It has increased 9.75% over the last decade, that means 11.3 % of - *(No personal story-line, abstract)*

**Reporter:** Marge, what's the story here?

**Citizen:** It is really interesting,

**Reporter:** To who?

**Citizen:** Well we have these graphs

**Reporter:** Graphs?

**Citizen:** Yes, they show this data on one axis and another issue on the other axis and - *(too complex)*

**Reporter:** Look, I got to go. Bye.

### STORY LINE #2 STARTS OFF GOOD, BUT GOES DOWNHILL FAST

**Reporter:** Hello, Daily Bugle

**Citizen:** Hello, I am calling from the World Organization Wondering about Major Assaults Against Nature.

**Reporter:** Does that stand for something?

**Citizen:** WOW MAN *(something catchy)*

**Reporter:** That good. What's going on?

**Citizen:** There is a major global action alert. *(Alert=Conflict, Controversy)*

**Reporter:** Tell me about it.

**Citizen:** The best way to access it is on-line at panic.com *(catchy again)*

**Reporter:** What is the story?

**Citizen:** It is really important, you got to put it on the front page above the fold.

**Reporter:** Well, what is it?

**Citizen:** It is in Costa Rica *(far away)*

**Reporter:** Costa Rica?

**Citizen:** Yes, it seems that gnats -

**Reporter:** Gnats? *(not personal or with little human appeal)*

**Citizen:** Yes. Gnats that are growing in humming-birds bills may be dying.

**Reporter:** You said your name was Bill?

**Citizen:** No, that's where they are dying

**Reporter:** Is there a researcher there from Denver?

**Citizen:** No, it has nothing to do with Denver. *(no local story)*

**Reporter:** Is there any local angle to this?

**Citizen:** No, but..

**Reporter:** Thanks anyway. Bye.

STORY LINE #3  
A BETTER WAY TO GET A STORY

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**Reporter:** Hello, Daily Bugle

**Citizen:** Hey, I got this story that I really think you will be interested in.

**Reporter:** I hope so, I have had a string of losers today.

**Citizen:** Well, its about an eight year old girl.  
*(Personal story line)*

**Reporter:** Yea, go on, I have an eight year old girl.  
*(A storyline readers can relate to )*

**Citizen:** She is a daughter of a famous movie star and - *(Glamour factor)*

**Reporter:** You mean her [the movie star], what about her?

**Citizen:** - and a well-known political figure *(Local factor)*

**Reporter:** I didn't know he [political figure] had a love child. What about this eight year old girl?

**Citizen:** Well this eight year girl -

**Reporter:** Does she have a name? *(Personalized feature)*

**Citizen:** Yes, Mabelline. She died of Asthma yesterday

**Reporter:** Yesterday? Wait a minute, does anyone else know about this? *(What is in it for the paper)*

**Citizen:** No its an exclusive, I have shots of the parents weeping. *(Photos or graphics to communicate storyline)*

**Reporter:** Really?

**Citizen:** Yes. And the kid's class, the entire class of eight years old, are going to trick-or-treat at the CEO of Public Service. *(Business relation sports and business drive distribution)*

**Reporter:** The CEO of Public Service?

**Citizen:** Yea, the kids feel that it was the pollution of Public Service that caused her Asthma. *(Bottom line of story relationship to other lives)*

**Reporter:** Wow! Can I get this stuff delivered to me right away?

**Citizen:** Sure.

**Reporter:** Thanks, what a story.

# DAY TWO

## F. DEVELOPING A FRAMEWORK FOR THE INDICATOR MOVEMENT

### RAP SONG: IT'S ALL ABOUT PROCESS

The thing about process is, its an art,  
And you need to include everybody from the start,  
Openness, creativity, energy, and tension,  
A diverse experience must be your intention.  
Start with a story, that a real must,  
Our first story must be about trust.  
When evil people roll into town,  
Keep your ideals high or they'll bring you down.  
Learn from each other, discuss what's true,  
Its all about us, not just about you.  
Process, process — circles and rings,  
End with an indicator that really sings.  
In your work what is success,  
Is it product, or process?  
Its got to be both, so lets act and reflect,  
First you listen, and then you select.  
The true meaning of what gets done,  
Is better decisions for everyone.  
Change for the better is what we're after,  
But let's not forget to share some laughter.

Approximately sixty participants spent the second day of the conference pulling together ideas and experiences shared during the many sessions of Day One. The purpose of Day Two was to establish common ground and a framework in which to move forward, and to share community experiences and enhance the network of indicator efforts.

The morning was spent in two sessions: One as a large group to review highlights of Day One and to discuss the *Bellagio Principles* as a possible framework for community indicators, and the other,

small group break-out sessions to develop a framework for indicators projects that identifies steps that could be taken separately and collectively to advance the indicator movement.

### SUMMARY OF BELLAGIO PRINCIPLES AND GLOBAL CONNECTIONS

The *Bellagio Principles* (see Appendix Three) are built on over a decade of sustainable development activity, starting with the Brundtland Commission in the mid 1980s; the efforts of countries such as the Netherlands, Norway, and Canada; and the Earth Summit in Rio de Janeiro in 1992. During this time, there was comparatively little activity in the United States.

Following the Earth Summit, the United Nations formed the Sustainable Development Programme to monitor the follow up to Rio. One objective was to help bridge work completed by other United Nations programs, including the Development Programme (UNDP) and the Environment Programme (UNEP). A scientific committee developed a list of indicators to measure the progress towards sustainability which were approved over a year ago. In addition, each country at the Rio Summit signed on to file an annual report to UNSD concerning their sustainable development activities.

One problem that arose from this work was the identification of huge international data sets used by organizations such as WHO, FAO, the United Nations, etc. They contained large amounts of information, but were incompatible.

All of these activities have led to the development of the Bellagio Principles in the Fall of 1996. When sustainable development activities at the global level gained momentum about five or six years ago, no one sat down to develop guiding principles to



answer questions like those posed in this conference: Why do we need indicators? What are appropriate bounds or scope? What are essential elements of design or selection criteria?

In summary, the Bellagio Principles revolve around ten basic guidelines. The following summarized some key points of what we tried to communicate when developing the principles.

- Any assessment process must start with a vision and a set of goals to guide you along the way.
- In thinking about what should be included, recognize the importance of looking at the whole system, not just the parts. Cover both positive and negative aspects.
- There needs to be reference to time and spatial dimensions and the ability to look long-term, so human and ecosystem health can be maintained well into the future.
- While it is important to look at the big picture, we must also have a focus we must bring our process down to earth and use current priorities as a starting point.
- It is critical to have a guiding organizational framework that works for you, otherwise the process can become scattered. There is no single framework for every community, each must choose their own. Whatever you choose, stick with it. The framework should be able to understand what is needed for today's priorities and be strategic -- able to identify what is missing or what might be needed in the years ahead.
- Every process should have a strong reference to equity and disparity issues.
- Indicator processes should include openness, accessibility, and broad participation.
- Process should establish the ability to develop trend data, institutional capacity, and relationships among NGOs and governments. If the process cannot be carried out year after year, the effectiveness is compromised.

## SMALL GROUP DISCUSSIONS

The participants of day two were divided into two groups to hold parallel discussions on how to move forwards and how to develop a game plan for next steps. To do this, the groups explored three key question:

1. Who are we?
2. Where are we going and what are we doing?
3. How do we get there, what are our next steps?

To help focus the discussion, each group examined the three questions as they related to:

*The design and presentation of indicator data so that they are most accessible and meaningful to the public and useful to decision-makers at all levels.*

*The creation of "vital interaction" between national, community, and levels in between.*

*The identification of information and knowledge that could improve both national and community efforts.*

*The refinement and exploration of social indicators at all levels of our society (upper and middle income, as well as poor communities).*

*A better definition of what is meant by and how we use indicators.*

*The gathering of ideas on how to translate into action*

## RESPONSES FROM GROUP #1

### WHO ARE WE?

- We are a group responsive to global and community crisis.
- We recognize that current (economic) indicators are inadequate and trends are in the wrong directions.
- We are organizations working on indicators.

- We are practitioners working in communities of all shapes and forms that use indicators as a tool to promote change.
- We are change agents of all types -- resource linker, resource provider, solution provider, and catalyst.
- We are a combination of research and "data" people and "advocates."
- We are the core of people who, while needing to bring others in, will be responsible for promoting and evolving the indicator movement.
- Midwives of the millennium.

#### WHAT IS OUR MISSION / GOAL?

- We are people who are aware and concerned about the whole and the connection between human well-being and ecosystem well-being.
- In doing this we need to think about and consider others that need to be included or involved in discussions and activities.
- We are diverse people trying to promote a sustainable world/society (livable, improved, quality of life, etc.)

#### OUR GOAL

"To promote positive change for long-term human and ecosystem well-being and community health" (*noting that the economy may need to be more implicit, or ecosystems defined in other terms*)

#### WHAT IS THE FUNDAMENTAL PROCESS BY WHICH WE FUNCTION?

- Our process recognizes the importance of community participation at all levels of our process.
- Our primary role is to elicit a vision and then promote a vision, with education and information as critical elements within and between these stages.
- We define community from a broad perspective, reflecting the level (local to international) and the groups of people we seek to serve (business, non-profits, governments, citizens)
- We define the use of indicators as tools for dis-

cussion and change, early warning signs, constructive confusion.

- Our practical working goal is to make indicators useful and accessible to the public and decision-makers at all levels.

#### HOW DO WE ACCOMPLISH OUR GOALS? WHAT DO WE DO, AND WHAT DO WE DO NEXT?

To make indicators more use useful and accessible to the public and decision-makers at all levels. Community well-being (sustainability) indicators defined, developed and assessed from the bottom up with the Federal government being responsible for compiling and communicating at a national level.

#### Next steps:

- Work with the federal level.
- Work with each other at the community level.
- Work with others not currently involved in indicator movement (expanding the circle).

#### Federal Level

The federal government needs to include community well-being in the overall goal of the indicator work. Design of process, definition and assessment of indicators need to be from the bottom up so that indicators are useful to communities as well to state and federal agencies and organizations.

The federal government should take the lead in compiling indicators, and helping to promote common data. Data should not only be aggregated at national levels, but disaggregated at community level.

Caution: There needs to be a balance between not losing individual variation, and the efficiency of developing a template or overall model.

There is a need for comparative data.

Offer communities an extensive menu of indicators and let community pick and choose, and add to them.

Have data available in a single web site -- not under each federal agency.

Assess data to find out what's missing and then find what's missing.

Keep it simple yet at a level that still makes it meaningful (KISS + principle).

Include international data that impacts the U.S. and U.S. communities.

"We're not about data, but about using data." *Participant*

#### Working With Others

Outreach for resources, especially money -- to academia, states, foundations, business, etc.. To join together and network for outreach.

Advocacy -- Building alliances and coalitions to save data and information.

Working with other community groups to help use indicators and broaden the discussion (rotary, etc.).

#### Working With Each Other

Need to understand how national and international trends affect our local work -- each indicator effort should get a copy of *Vital Signs*.

There is a need to translate "sustainability" to the local/neighborhood level.

Process training -- Developing a virtual or continual guidebook for developing indicators. Also in a loose-leaf binder for easy expansion.

Develop a national network of community indicator projects.

Connect community indicators to national and global indicators and trends -- getting more to the root cause and to recognize the contextual information useful to communities.

Marketing and public relations for indicators and their use.

#### Useful to All

Regional data bases and coordination. Develop a resource directory that includes:

- Who has what data?
- Who has what skills?
- Who's doing what?
- Lessons learned
- Persuasive actions and arguments that clearly articulate the need for indicators
- Budgeting help

#### RESPONSES FROM GROUP #2

##### WHO ARE WE?

- People who work on indicators.
- People who believe that monitoring and assessing systems can promote positive change toward sustainability.
- People who are not satisfied with the status quo or trends in our communities.
- Change agents looking for tools.
- People who believe there is a relationship between social, environmental and economic well-being.
- People who believe that knowledge and information can empower change.
- Common people as well as "data" people.
- People looking at the whole.
- Concerned and involved people.
- People who measure and assess progress in whatever arena we're in.
- People willing to muddle toward solutions and invent tools as we learn, trying new things all motivated by a deep conviction and love for people and the planet.
- Many disciplines -- although we could be more diverse.
- Connection between politics and sustainability -- interested in the full impact of choices.

#### WHAT IS OUR AGENDA?

- To create a foundation for political debate that builds on lessons from the past and is non-partisan in nature.
- To make culture, civic participation, and social elements a more deliberate part of the sustainability indicator movement.
- To make indicators a tool that is developed by and useful to communities.
- To document our success stories and lessons learned.
- To strategically support local, state/regional capacity building to sustain indicator projects -- including government, NGOs and other partners, and linkages that can illustrate the importance of indicators.
- To create a process with open involvement that isn't "us or them" and that welcomes constructive critics.
- To share information, catalog efforts and organization, create a web site, and support the development of strong resources.
- To find and expand "kindred spirits" and others that should be a part of the collaboration of resources and information.
- To provide a forum to discuss and share indicator methodologies and data.

- To expand social and cultural indicators.
- To promote and institutionalize new indicators of progress.
- To work with and influence funding and decision-making with government, financial institutions, and foundations.
- To consciously create excitement in the indicator movement.
- To put a human face on data -- to tell stories that are meaningful to people in communities as well as decision-makers.
- To build support between national and community efforts.

#### HOW WILL WE ACCOMPLISH OUR AGENDA?

- Define goals and objectives shared by indicator efforts (using this conference as a start).
- Use the *Bellagio Principles* as a foundation for our work -- a clear sense of endorsement to use these principles as a foundation.
- Develop a commitment from communities to continue and improve collaboration and communication with each other.
- Organize efforts within the movement around various needs.

## G. CLOSING SESSION REACHING AGREEMENT AND MOVING FORWARD

There was agreement by all participants that the issues discussed during the conference should be used as a framework to guide the indicator movement forward. This framework would outline goals and principles that are flexible. It would help define outcomes and best practices that are useful to those working at various levels, as well as guidelines for establishing an inclusive indicator process.

In addition to the outline developed by the two groups, participants augmented the framework with the following comments:

- There is a need to develop a solid conceptual foundation so the political community and others do not view this work as vague or mystical.
- There is value in having a common mission or ideology, but we should keep it as non-partisan as possible.
- We need to include indicators that monitor disparities in wealth, access to resources and political power, etc.
- There was basic agreement to, without formal acceptance of, the *Bellagio Principles*.
- We need to think about the people who did not attend this conference -- what are their issues and needs. We should work to bring them into the process.

“There was incredible convergence among the groups. The two rooms seem to be thinking along parallel lines independently. This makes us all more comfortable in moving forward.” *Participant*

### OVERARCHING PRINCIPLES OF AN INDICATOR FRAMEWORK

While many specific elements of an indicator framework were discussed, there were also some overarching principles that were considered.

Specifically, a framework for a community indicator movement should:

- **BE STRATEGIC AND LONG-TERM.** Community processes should look at human and ecosystem well-being in terms of generations as well as years.
- **LOOK AT THE WHOLE PICTURE.** Use a systems approach to developing both the process and substance of an indicator project.
- **INCLUDE A BROAD RANGE OF ISSUES.** Focus on the causal elements and the roots of community concerns, including disparity issues.
- **EMBODY AN INCLUSIVE PROCESS.** Invite all sectors of the community, and be cognizant of different needs and different ways to elicit input.

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