



ALLIANCE *for*
REGIONAL
STEWARDSHIP

Regional Indicators:
Telling Stories, Measuring
Trends, Inspiring Action

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FORWARD

How do you know whether your region is making progress, if you do not measure change?

What if the region is changing but the public does not know what is happening?

How can all the parts of a region be viewed as a whole?

What can stimulate regional leaders to take action?

These are some of the basic questions addressed by regional indicators.

Regional indicators are a set of specific measurements, pieces of information, which provide a picture of a place over time. They are a tool to measure what a region looks like and report on how things are changing. Regional indicators can tell a simple or more elaborate story but at the most basic level, they indicate where a region is and how it has been doing.

One important aspect of indicator projects is that besides being technical reports for analysts and policy makers, they provide data in a form that makes sense to the general public. This powerful communication aspect of regional indicator projects was what convinced Long Island leaders from business, academia, labor and the civic sector to support the development of a regional index. Under the expert guidance of Doug Henton and the Alliance for Regional Stewardship's John Gardner Academy, the Long Island Index was developed and is now in its third year.

From the beginning, the goal of the Index, as determined by its Advisory Committee, was to be a catalyst for innovative regional thinking and action. However, for this to happen, there needed to be wide dissemination and telling of the story. The media- newspapers, television and radio- and elected officials and civic and business leaders were all important to have involved and help convey results and tell the story. Often this part of a regional indicators project demands as much time and effort as the development of the technical indicators themselves.

From our perspective as a family foundation, the Long Island Index has been a success. The development of regional indicators has added value by bringing the community together, creating a useful informational tool and providing a means for measuring the region's quality of life. Our Board of Trustees would certainly encourage other family and community foundations to consider developing regional indicators for their communities. □

Nancy Douzinas

President, The Rauch Foundation • Garden City, New York

Member, ARS Board of Directors

INTRODUCTION

In May 2003, at the Alliance for Regional Stewardship's (ARS) National Forum on Regional Stewardship in St. Louis, Missouri, a group of individuals met to discuss the formation of a Regional Indicators Affinity Group. Beginning in October 2003, the group started meeting each month, either at the semi-annual National Forums or via web-based teleconference. During these meetings, the group addressed a variety of issues surrounding the use of regional indicators, including the gathering of data, the selection of indicators, the production of indicator reports, and using indicators to motivate change in the region.

In conjunction with the Regional Indicators Affinity Group, ARS conducted a survey of regional indicator initiatives. ARS received 21 responses to the survey (a 32% response rate); selected data from this survey are included in this monograph. The complete data collected can be found on the ARS website in Appendix A.

Additionally, ARS developed a matrix of indicators, gathered from 25 regional indicator reports. This matrix was designed to determine which indicators are used by a majority of indicator initiatives. A summary of this matrix can be found in Appendix B; the full matrix can be found on the ARS website at www.regionalstewardship.org/indicators.

ARS would like to thank the Center for Urban and Environmental Solutions at Florida Atlantic University for their support of this project, and Dr. Allan Wallis of the Graduate School of Public Affairs at the University of Colorado-Denver for his advice and guidance. □

PART I: WHY DO AN INDICATORS REPORT?

Are there identifiable “best practices” around the use of indicators? While many regions — particularly those starting or actually conducting indicator projects — look for best practices, it is often a challenge to find them.

Every region is unique — and yet, no region is different. Regions are dealing with all the same issues — transportation, housing, economic and workforce development, environmental concerns, education, social equity; but every region is unique in the way these challenges manifest themselves and in their capacities to deal with them. Regions are increasingly turning to indicators as a way to measure their progress on these issues. This monograph is an effort to characterize the current state of practice in the use of regional indicators.

What are indicators?

There are numerous definitions of indicators, according to the organization using them. For our purposes, indicators are representations of measurable data which show changes over time. According to CommunitiesCount.org, a program of the King County (Washington) Indicators Initiative, “Generally an indicator focuses on a small, manageable, and telling piece of a system to give people a sense of the bigger picture.” Indicators are used to measure trends in social, economic, and environmental systems, and help people to see the bigger picture through small details.

Data, even when presented as a trend, are not necessarily an indicator. For example, changes in population do not make up an indicator — though this information is often included in indicator reports. However, population changes combined with information on the reason for those changes (immigration, brain drain, non-affordable housing) can be considered an indicator.

Many practitioners define indicators as measures of the performance of a system (e.g. a region’s economy). Under this definition, trends for population growth are not indicators because they are not measuring performance.

In some cases, indicators may be an aggregate of trends. For example, an indicator for civic engagement may be developed by combining the trends of voter registration, voter turn-out, volunteerism, and philanthropic giving.

The prevalence of indicator reports amongst regional organizations

There are numerous regional organizations in existence today. These organizations vary by size, location, purpose, and sector. The purpose of these organizations may differ, but their focus is the same: the welfare of the region. These organizations include corporations and business, universities, nonprofit organizations, the public sector, and others.

Of the 21 respondents to the ARS Regional Indicators Survey, 13 were nonprofit organizations. Other respondents included three government agencies, two higher education organizations, and three business-led organizations.

Motivation for developing and disseminating indicator reports

Indicator reports are developed and disseminated for a variety of purposes. These purposes may include raising awareness of the region, measuring progress toward set goals, setting the stage for further investigation of particular trends, and/or motivating regional action.

According to a survey conducted of regional indicators initiatives, over 85 percent of respondents reported that they conducted their first regional indicators project to raise awareness of the region and to affect/motivate action. 81 percent did so to establish baseline measures, while 52 percent wanted to track progress on goals. Other responses included providing reliable source of consistent data, defining the region, inspiring local data collection, and framing/detailing the understanding of region.

There is an ongoing discussion within regions regarding two fundamental purposes of producing indicator reports. Some regions choose to use indicator reports in an attempt to motivate change. These reports often include in-depth analysis and recommendations based upon the indicators about where the region should “go.” Value judgments are made, and a stance taken on what needs to be done for improvement.

Other regions, however, feel that producing reports that include action recommendations is not advisable — that by doing so the organization(s) responsible for the report will be viewed as having an “agenda.” Instead, these projects focus on providing accurate, objective data. By doing so, they become known for their reliability, and local organizations come to depend on them for their information.

Some organizations have chosen to combine these two approaches. During the first few years of reporting, they focus on providing accurate data on the “state” of the region. Once baselines have been established, they then take the opportunity to “drill down” around selected indicators, particularly those that suggest problematic trends.

Supporting the development of indicators work

One of the first challenges faced by an organization that has decided to produce an indicators report is determining how to pay for it. While it is true that indicator projects are not without costs, those costs vary widely across efforts. The costs can be impacted by a number of variables, including:

- What individuals or groups are involved in the project
- What data are available, and what needs to be gathered
- How in-depth the project is: number and variety of indicators; level of analysis

- Publication of the report
- Dissemination efforts

Indicator reports may be self-funded by the lead agency doing the work, or may be funded by an outside organization. Often, the project may rely on multiple sources of funding.

The project's budget process can work two ways. Some regions begin by determining what their budget is, and developing the project around it. Others develop a vision of what they want the project to look like — and to accomplish — and then use that vision to approach partners and supporters. Many organizations find unique ways to complete the process — either in the development or dissemination of the report—that help to lower the costs.

Quite often, support comes in forms other than dollars. Sharing data, providing staff to help run or interpret data, or assisting with dissemination efforts are all ways in which partnering organizations and individuals can help support indicator projects.

PART II: PROCESS

Defining regional boundaries

When regions develop indicator initiatives, they must develop a set of boundaries that define the region. However, this is not as easy as it sounds. It is often difficult to decide on where the boundaries are, or if there is in fact a single boundary. Depending upon the individuals and organizations involved in the process, there may be many suggestions as to where those boundaries lie.

The boundary(ies) of a region should relate to the performance of the region — and more specifically to its actionable trends. Unfortunately, those trends often suggest multiple boundaries. The boundaries linked to watershed indicators may be very different from those associated with educational performance. Very few regions wish to include multiple boundary definitions in their reports.

Often the boundaries are determined by what data are available, and the geographic units outlined by that data — i.e. municipalities and counties, the jurisdiction of the agency doing the report, the membership of a particular organization. When multiple organizations are involved, this issue can become confused. Perhaps more importantly, boundaries can often be defined by the service area of the sponsoring organization — it is they who frequently determine what should be measured, and how.

The responses to the ARS Regional Indicators Survey regarding the definition of boundaries were widely varied, as expected. The most frequently used method was to use boundaries that had already been set by the organization engaged in the project. Jurisdictions (towns or counties) were the second most frequent set of boundaries, with availability of data being the third. Other responses included the area served by the airport, stakeholder consensus, neighborhood boundaries, and in the case of New Orleans, the coverage of media outlets. In certain situations, the boundaries were case-specific, depending on the indicator being reported.

Regional Shift: South Florida in Transition

Center for Urban and Environmental Solutions, Florida Atlantic University,
Fort Lauderdale, Florida
www.soflo.org

The Center for Urban and Environmental Solutions' (CUES) regional indicators research is one of four initiatives that comprise the Center's Regional Programs. The purpose of these programs is to advance the development of a regional perspective in South Florida. Through the indicators reports, the region is defined, critical themes and issues are identified, and it is demonstrated how the seven counties of the region are socially, environmentally, and economically interconnected.

CUES has published two reports identifying and tracking environmental, social and economic trends in South Florida. The first report, *Imaging the Region: South Florida via Indicators and Public Opinion* (2000), defined the principal region-binding forces of place, economy, and people and illustrates how their interactions powerfully affect each other. This report is organized by the overlap of three region-binding forces, or lenses: Place and Economy, People and Economy, and Place and People. These enable the reader to see the many ways that the region functions as an integral whole.

The second report, *Regional Shift: South Florida in Transition*, published in May 2004, is a streamlined report that highlights significant ways in which the region has changed in the 1990s and early 2000s, expanding on major themes from the earlier report. One major transition identified in this report is the northward movement of South Florida's challenges and opportunities. While *Imaging the Region* focused on the three core counties — Miami-Dade, Broward and Palm Beach — which make up one Metropolitan Statistical Area, the focus is expanded in *Regional Shift* to include seven counties along the east coast from Monroe County to Indian River. The seven counties are becoming increasingly interconnected by their shared environment, interconnected economic enterprises, and social and cultural activities — and have been identified by Enterprise Florida, the economic development agency of Florida, as one region. *Regional Shift* continues to identify trends in each of the three region-binding forces — Place, People, and Economy — for the expanded region. A third iteration, to be published in the last quarter of 2005, will focus on those indicators most closely linked to sustainability and economic prosperity.

These publications are a kind of “report card,” suggesting areas where the region exhibits strength, as well as areas where challenges need to be addressed, and ultimately we hope they stimulate regional action on important issues. There-

fore, the reports are distributed at many functions and to various business, government and civic stakeholders who are in a position to act. For example, they are distributed to chambers of commerce, economic development councils, regional planning councils, and to the numerous people and organizations that are part of CUES's fluid regional network. CUES staff gives presentations about the report and distributes them to various organizations; for example, the Urban Land Institute. In addition, there was significant coverage of the report in both the print and broadcast media. A website is maintained with updates and is publicized through the CUES newsletter.

CUES is now beginning a dialogue with the community about regional indicators through the South Florida Regional Resource Center (SFRRC). Through the SFRRC, CUES hopes to further raise awareness, learn about the concerns and priorities of the people, and “implement” findings. Currently, this project is in the exploratory phase of implementation. CUES intends to work with the SFRRC, which is already involved in doing regional work, on transportation planning in Miami, a market study for the SR7 collaborative in Broward County, and additional transit-related projects.

Selecting indicators

How regions select the indicators they report is expressive of the dynamics characterizing the organization(s) doing the reporting and the dynamics shaping the region. While many indicators are used across multiple regions, such as voter registration or unemployment rates, others will clearly be expressive of the unique character of the region. The environmental indicators for Minneapolis, Minnesota will be very different from those in Austin, Texas. An indicators project in Silicon Valley might report on gazelle firms in Silicon Valley, while a project in Puget Sound might include information on salmon runs.

In each region, indicators ideally will be actionable. That is, the indicators used would identify trends that could be affected by actions. The median cost of housing is a difficult trend to change through regional action; however, the percentage of children who are immunized can be addressed through local initiatives. Actionable indicators give the region a target to work towards together.

The choice of indicators will also be influenced by the individuals involved in the decision making. Regions use a number of different methods to select those indicators that they will report on. According to the Regional Indicators survey, 71 percent of reporting regions used an advisory board, while 52 percent answered that in-house staff selected the indicators. Other methods included community surveys or meetings, working groups or steering committees, surveys of local leaders, and surveys of other indicator reports.

The Regional Indicators survey found that 95 percent of responding regions selected their indicators by determining what data were available. It is often much easier to report already existing data than to gather new information. Meanwhile, 81 percent chose indicators that were easy to understand, and 81 percent chose indicators that clearly related to pre-defined goals for the region. Other responses included the desire to demonstrate a trend, reflection of citizen priorities, impartial or objective data, and attractiveness to local media.

As efforts increase to create a national indicators initiative, researchers are dealing with the fact that very few indicator projects use the same indicators. A study of 25 regional indicator reports, which together contained over 250 indicators, found that only one indicator — a measure of median housing costs — is used in at least 90 percent of projects, while only five more are used in at least 75 percent of projects: 1) population trends, 2) violent & property crime rates, 3) unemployment rate, 4) transit ridership, and 5) days in violation of air quality standards.

The Long Island Index: Strategic Use of an Advisory and Technical Committee

The Rauch Foundation, Garden City, New York
www.longislandindex.org

What is the Long Island Index?

The Long Island Index is a compilation of 30 indicators (measurements over time) of the economic, social and environmental well-being that report on how Long Island is faring as a region. These 30 indicators identify and track community conditions and measure progress toward shared goals. The Long Island Index incorporates best practices from other successful indicators projects across the country. An Advisory Committee comprised of leaders from the business, labor, education, civic, and nonprofit communities developed a framework of desired goals for the region. Working together with a Technical Committee with expertise in Long Island's demographics, economy, education, health and transportation, indicators were created to track the region's progress towards its goals on an annual basis.

Role of the Advisory Committee

The Advisory Committee of the Long Island Index consists of community leaders from Long Island's academic, business, labor and nonprofit sectors. As a diverse group that reflects Long Island's population, economy, and its varied communities, the advisory committee exemplifies and models the process of coming together for Long Island's future. Through their understanding of the issues and dialogue, the advisors help construct the best Index product to assist creative problem solving for Long Island.

Responsibilities of the Members of the Advisory Committee

1. Act as a source of ideas
2. Participate fully in the activities of the Long Island Index
3. Serve as spokespeople for the findings of the Long Island Index

Role of the Technical Committee

The Technical Committee of the Long Island Index consists of economists, demographers, statisticians and other regional experts in transportation, health, education and the environment. Through their understanding of the data available in each of these areas and research methodology, the committee members help produce the best indicators and public opinion research possible that tell an important story about how the region is faring.

Responsibilities of Members of the Technical Committee

1. Provide Research Expertise
2. Participate Fully in the Activities of the Long Island Index
3. Serve As Spokespeople for the findings of the Long Island Index

Lessons Learned

Utilizing separate Advisory and Technical Committees for an indicators project can be highly beneficial, but does add a level of process to the project that some might find onerous. We have found that the benefits received far outweigh the effort required.

Legitimacy and Credibility

An actively engaged Advisory Committee adds instant legitimacy to the product and the project if you have a truly representative committee. Likewise, a technical committee adds credibility to your data since you have already used regional, credible experts to conduct the research.

Strategic Advice

It is incredibly useful to have a “kitchen cabinet” of advisors drawn from the Advisory Committee to turn to for strategic advice throughout the project cycle. They offer excellent advice and are bought into the decisions and will support them in front of the rest of the committee.

Continuous Communication

To ensure the active involvement of the committee members throughout the project cycle, they must be kept in the loop at all times.

Spokespeople

Make use of committee members’ expertise for PR and communications efforts

by referring reporters to them, inviting them to appear on TV and radio shows, quoting them in press releases and having them write Op Ed pieces. It not only promotes them and their affiliation—it also adds credibility to the indicators project.

Using public opinion data

When developing indicator reports, over 60 percent of regions use public opinion data. Public opinion data can provide a basis for interpreting the significance of trends. Those regions that used public opinion data did so in order to present a picture of the region as seen through the eyes of the public, or to further enhance quantitative data. These data were usually gathered by either conducting a survey, or employing public opinion data developed by another organization.

Use of peer regions

To help provide additional context for the performance of their region, some organizations have found it useful to compare their indicators to those in peer regions. By comparing indicators, regions can develop a sense of their own progress in relation to that of their neighboring regions, similar regions across the nation, and the nation as a whole.

Many regions, however, shy away from incorporating peer comparisons into their indicator process, because of a prevailing belief that doing so might undermine support for the project. Elected officials, business leaders, and civic representatives often do not want to be compared to their counterparts, for fear that the region will not measure up—and will not attract new citizens and businesses.

Use of public participation in development and interpretation of indicators

Many regions engage in an extensive public participation process to develop their indicators. The reasoning behind and value of such participation varies by region. Often, the purpose of public participation is directly tied to the purpose of the indicators project. Public participation may be a way to raise awareness about the region as an entity, or about the issues facing the region. It may be a method of developing “buy in” into the project. It may be an attempt to motivate change, or may occur because the project follows on a regional visioning process that was also participatory.

The value of such participation also seems to vary based on the objectives for developing the project and the strategies for making its dissemination more “impactful.” If the underlying goal for the project is to motivate change in the region, then public participation is essential. However, if the purpose of the project is merely to provide information, participation may not be as critical.

Taking Indicators to the Next Level:

Truckee Meadows Tomorrow Launches Quality of Life Compacts

Truckee Meadows Tomorrow, Reno, Nevada

www.quality-of-life.org

In 1993, *Truckee Meadows Tomorrow* (TMT) went through an extensive public participation process to involve over 3,000 people in the selection of the quality of life indicators for the Washoe County region. Since that time, this community-based organization has developed a number of programs to go beyond annual reporting and to use coordination and collaboration to make a measurable difference in the community. Quality of Life Compacts bring community organizations together for collective action around a specific indicator. Measurable results reported by the compact partners show that compacts are an effective tool to help individuals, businesses, local governments and organizations measurably improve quality of life.

The Quality of Life Compacts Program

TMT formed a Quality of Life (QOL) Compact committee in the spring of 2001. The QOL Compact was conceived to form collective action around select indicators. Washoe County approached TMT about forming a Quality of Life Compact between the two organizations that would serve as a model program to encourage other organizations and businesses to form compacts with TMT to improve the indicators over which they had influence.

With direction from the County Commission, select county staff members met to develop a compact initiative with representatives from TMT. Brainstorming helped to bridge communication among the government departments. Staff members who would be responsible for implementing the projects from the various departments were involved in the process from the outset.

On July 24, 2001, the Board of County Commissioners adopted an Action Plan to implement a Quality of Life Compact between Washoe County and Truckee Meadows Tomorrow over a one-year period. The Action Plan identified the compact's vision, "to improve our community's natural environment," which was to be achieved through the following five goals with stated strategies and measurable results: (1) Reduced Vehicle Trips, (2) Waste Reduction, (3) Energy Conservation, (4) Water Conservation/ Quality, (5) Public Education. The Action Plan challenged the County to fund and implement programs that met these five goals. The Compact involved diverse departments and employees with multiple goals.

Results and Performance of the Washoe County QOL Compact with TMT

TMT was fortunate to have an outstanding partner for its pilot Compact effort.

Washoe County worked diligently to show what a difference one organization could make. They were equally conscientious about documenting the process and their results. Measurable achievements have been realized for all five goals, thanks to the cooperative efforts of TMT and the County.

TMT's newly updated mission is to serve as an authority, change agent and advocate in improving the community's quality of life through collaboration and partnership. QOL Compacts have proven an effective tool to help individuals, businesses, local governments and organizations get their arms around the idea of measurably improving quality of life in our region. The compacts spell out what TMT means by "quality of life," delineate exactly what steps will be taken to make improvement, and identify how results will be monitored. To continue to grow the concept, TMT is developing a workshop on QOL Compacts for community leaders. TMT sees QOL Compacts as an ideal tool to continue to "connect the dots" between organizations as well as community efforts in order to achieve real change in the region.

Complexities of data management

Data management can be one of the greatest stumbling blocks for indicator projects. Finding data that is uniform and comprehensive can often be difficult. The challenges to data management include:

- *Uneven data.* The data available from different geographic units may not be uniform. For example, school districts in the same region may collect different data.
- *Irregular time intervals.* When different data are released at different intervals, making comparisons can be difficult.
- *Frequency of data.* Major new data are not typically available on an annual basis which affects how often indicator reports can be issued.

Regions conducting indicator reports must determine the level of effort that they are willing to undertake to locate and synchronize data. While a low degree of variance is acceptable, the majority of data must be consistent throughout the report.

Dissemination

The method of dissemination of an indicator report can significantly affect the impact of the report upon the region. Most regions that have completed indicator reports suggest — whether through experience or in hindsight — that plans for dissemination should be built into the front end of a project during the design phase. Within these plans, it is also suggested that regions include those whose participation is critical into the planning process — such as the media, or a local business that is in the position to assist with regional initiatives.

Most organizations use multiple forms of dissemination, in order to reach the greatest number of people. The more people who see the report and find the data to be of value to them, the more likely it is that action will be taken to improve a quality being reported upon.

The Regional Indicators survey showed that 95 percent of regions use public presentations or a speakers bureau to disseminate the report. Ninety percent use a web-based report or distribute a hard-copy report, and 81 percent utilized newspaper coverage. Other methods of dissemination included abbreviated hard copies, radio or television coverage, e-newsletters, CDs, and membership meetings.

The Boston Indicators Project

The Boston Foundation, Boston, Massachusetts
www.bostonindicators.org

The Boston Indicators is a project of Greater Boston's civic community coordinated by the Boston Foundation in partnership with the City of Boston/Boston Redevelopment Authority and the Metropolitan Area Planning Council. Its goal is to engage the general public, civic and community-based institutions, media, business, and the public sector to understand and act collaboratively on Greater Boston's key challenges and opportunities.

The Project relies on and reflects the intense participation of many hundreds of public agency and nonprofit organization staff, academic experts, advocates, and engaged citizens who contribute their perspectives, their data, and expertise. It also encourages feedback and suggestions from the thousands of visitors to its interactive website, now being used extensively by individuals to inform themselves about the life of the city and region and by staff in the nonprofit, business and public sectors for program development and evaluation, community and strategic planning, education, advocacy and fundraising.

Background

The Boston Foundation and the City of Boston launched the Boston Indicators Project in 1997 with roughly a dozen representatives of local comprehensive community building initiatives challenged to produce quantitative measures of progress and to document "intangibles" such as neighborly trust and leadership capacity. Later, individuals from community organizations, academic experts, officials from City departments, and the regional offices of federal agencies such as the EPA and HUD joined the working sessions. By the end of 1998, more than 300 people were participating in shaping the indicators framework or contributing data. The Boston Indicators Report relies on both quantitative and qualitative data, building on the work of local, state and national data providers as well as on

research conducted by area universities. The final product is a hybrid that reflects the demands, available data sources and idiosyncrasies of each sector, with an effort to provide a comprehensive understanding of the sector's overall structure and major goals, accomplishments, opportunities and challenges.

The Project released a draft report at a Boston Citizens Seminar hosted by Boston College with about 250 people in attendance, a panel of civic leaders, a presentation on the indicators, and facilitated small-group discussion. Subsequently, the Project distributed more than 700 additional copies of the draft to senior government officials, state legislators, and interested organizations and individuals, holding open the framework for a year to gather and incorporate comments and suggestions. The first complete report, *The Wisdom of Our Choices: Boston's Indicators of Progress, Change and Sustainability 2000*, was released in the fall of 2000. Eventually, 7,500 copies of the 300-page document were distributed. Following a period of intense refinement of the indicators framework through convenings and research, the Boston Foundation and its partners released the 2002 indicators report, *Creativity and Innovation: A Bridge to the Future*, as a dynamic, interactive website: www.bostonindicators.org.

A Two-Pronged Approach

Democratizing Data

In recent years, the Project has begun to follow two distinct tracks. The first draws on the wealth of research and information available, producing an updated Boston Indicators Report every two years to measure change in the ten sectors tracked by the report and providing the data behind charts and graphs as well as links to other data-rich sites. This track also involves gathering data, improving online tools to access the data behind the indicators, developing training curricula, and updating the project's interactive website. The Project also runs a series of community trainings to help neighborhood residents and others learn to use data effectively.

Alignment on a Shared Civic Agenda

The other track involves developing a Civic Agenda for Boston that draws from the stated goals for each sector as well as from cross-sectoral convenings as well as a series of forums designed to explore some of the Report's findings, and use the information to plan for the future. The Civic Agenda will consist of achievable outcomes linked to the Project's long-term, high-level goals. This effort will also incorporate current organizational, institutional, public and private-sector goals to express and encourage alignment on behalf of the Civic Agenda.

Measuring the impacts of indicator reports

Many regions do not engage in any systematic evaluation of the impact of their indicator report. It is usually quite difficult to measure impact, for even when change occurs in the region, it is not usually possible to determine whether that change occurred as a result of the indicator report, or another factor(s).

An increasing number of regions, however, report increased awareness in the region of critical issues covered by the indicator report. This awareness is often measured by column inches of newspaper reporting, citation of the report, TV news coverage, etc. Regions also report seeing interest group(s) mobilized around specific actions, and benchmarking of progress toward identified goals or a regional vision.

Most organizations believe that the impact of indicators increase when reports are issued at regular intervals. When this happens, the reports become the “institutional awareness” of the region.

Varying levels of impacts can be seen as a result of indicator reports. At the lower level of impact, an indicator report might serve to raise awareness of the region and its challenges. A good measure of this increased awareness is media coverage—something that is usually well-documented by those organizations conducting indicator projects. At a higher level, an indicator report may serve to motivate groups to address those trends that are problematic—for example, a group may choose to focus on a lack of affordable housing. At the highest level, an indicator report may actually help lead to mobilizing people to act.

Certain regions are also using indicator projects as a foundation for other related activities. Once indicator projects have been completed, the data provided can then be used to develop futures scenarios, to conduct regional visioning, or to tell stories about the region.

Quality of Life Progress Report

Jacksonville Community Council Inc., Jacksonville, Florida

www.jcci.org/statistics/qualityoflife.aspx

The Quality of Life Progress Report began when the Jacksonville (Florida) Chamber of Commerce and the Jacksonville Community Council Inc. (JCCI) began looking for a way to more accurately understand and monitor the community's quality of life. Over the last 20 years of annual reports since its inception in 1985, the Quality of Life Progress Report has developed into a regional roadmap for community improvement.

Background

Jacksonville/Duval County, Florida became a consolidated city/county government in 1968. From the beginning of the project, "local" indicators covered all of the 840 square miles of Duval County, which includes urban, suburban, and rural areas, as well as four independent municipalities within the county. The Jacksonville MSA includes five counties, with a 2003 estimated population of 1.2 million.

The first report contained 83 indicators within nine Elements of the Quality of Life: the economic environment, public safety, health, education, the natural/physical environment, mobility, the governmental/political environment, the social environment, and the cultural/recreational environment. With one exception in the natural environment element, the indicators were reported on a county-wide basis.

In 1991, the indicators were reviewed thoroughly and targets for the year 2000 were set for each indicator. In 1995, a second indicator document was created titled the Community Agenda, which covered the five-county MSA.

In 2000, JCCI conducted a citizen-based study on *Improving Regional Cooperation*. At the same time, a volunteer committee reviewed all of the indicators, identifying which had a quality-of-life impact that was regional. This resulted in creating regional indicators (measuring five-county statistics), and many other indicators included regional data as part of the context of the indicator.

The report has undergone a number of changes since then. In 2002, the two indicator sets were amalgamated into one document, with the stated goal of providing a guide for building a better community in Northeast Florida.

Regional changes

The stated purpose of the Quality of Life Progress Report is to provide informa-

tion valuable for community members to understand important aspects of their quality of life and to offer a sense of direction for additional research, planning, advocacy, and action toward positive community changes and a means of assessing progress toward these desired changes.

For an indicator to result in community change, it must identify a need for action. The 2000 *Improving Regional Cooperation* study brought the region together to examine these issues, and resulted in changes in economic development (the now-renamed Jacksonville Regional Chamber of Commerce operates a successful, six-county economic development marketing partnership) and in transportation planning (the restructured and expanded First Coast Metropolitan Planning Organization acts as a much more regional organization.)

Other organizations have heard this regional call as well. Health and human services planning and funding is being coordinated on a regional basis. The St. Johns River Alliance brings the Upper, Middle, and Lower Basins together for shared work on improving river quality and protecting this natural resource. And the region is starting to explore expanding regional partnerships in higher education.

Lessons learned

Some of the lessons learned in working with regional indicators include:

1. Some issues require regional understanding and action. Traditional local-government boundaries are often too small to address the pressures of population and economic growth efficiently or effectively. Indicators which show the geographical scale of these issues and their interplay can serve as a wake-up call that the problems are greater than one local jurisdiction, and that the solutions will require inter-jurisdictional cooperation.
2. The greatest barriers to regional action are not structural. Distrust, fear, resistance to change, and negative history serve as far stronger deterrents to regional understanding and action than legislative charters. Indicators serve as neutral data around which solutions can be built.
3. Not all issues are regional. Regional data may mask significant county-level or sub-county differences.

Supplementing Regional Indicators with Scenario Planning

The Great Valley Center, Modesto, California

www.greatvalley.org

Since 1998, the Great Valley Center (GVC), a nonprofit organization working in the 19 counties of California's Great Central Valley, has published a user-friendly, data-intensive indicators series on economic, social, and environmental issues to provide reliable information about the region.

Each year in a five year cycle, GVC releases a new report on one of five topics: the Economy, Environment, Community Well-Being, Health or Education. All of the data is also available on GVC's website, www.greatvalley.org.

GVC Indicators reports have been used for multiple purposes. Yet despite significant outreach success, GVC found that entire communities were often missing from regional discussions, meetings and debates on issues such as land use and local public policy.

As such, GVC set a goal for 2003 to broaden the base of people talking about important public policy issues — such as those covered by the indicators. To that end, GVC unveiled a large scale, multiyear initiative called “The Valley Futures Project.”

Scenario Planning Narratives designed to Supplement Traditional Indicators

With initial support from the William and Flora Hewlett Foundation, GVC used a process known as “Scenario Planning” to develop a set of multiregional tools that could provide a foundation for a regional public policy dialogue on education, land use, leadership and the environment about goals for the Valley in 2025. As a discipline, scenario planning takes complicated issues and creates compact, accessible stories that unashamedly act as discussion starters.

GVC's work on developing indicators continues to this date, but the goal of scenarios was to supplement the indicators by:

- Engaging a larger audience in issues of infrastructure investment and long-range planning.
- Presenting new information about the impact of current decision-making on the region's future based on tracked indicators.
- Building a regional foundation that could support a statewide transportation planning process.
- Creating a regional framework of potential outcomes to feed into the statewide planning process.
- Support decision-makers in questioning their broadest assumptions about

the way the world works so they can foresee decisions that might be missed or denied.

How the Scenarios Differed from Indicators: Stories are Easier to Grasp

The ultimate product was an ambitious package of 12 five-minute radio dramas and text narratives, three nine-minute films and a high school discussion guide. The scenarios were designed to serve as a gateway, conversation-starting tool for laypeople, high school students and community groups.

Working with a team of more than 100 local citizens representing a broad range of constituencies, the Great Valley Center, Valley Vision and the Global Business Network facilitated a series of “scenario planning” workshops in Summer and Fall 2002 in three subregions: the North Valley, the Sacramento Region and the San Joaquin Valley. The goal was to imagine what the Great Central Valley would be like in 2025.

The project has received widespread attention throughout the Valley. Media coverage, workshops, a kickoff event, and the release of online, printed and recorded materials have begun to engage Valley residents in longer-term views of local and regional outcomes.

A variety of outreach tools were created during spring and summer 2003 to engage as broad an audience as possible in the stories and in thinking long-term about the effects of today’s decisions. These tools include booklets, films, compact disks, youth curriculum, discussion guides, a DVD, and a project website (www.valleyfutures.org)

Media Reaction

Local newspapers have been very supportive of the project. In explaining their reason for becoming involved with the effort, the editors of the *Chico Enterprise-Record* stated that they wanted to “spark discussion . . . about the future.” To date, more than articles and letters to the editor have been generated in 11 different papers, totaling to more than 3,300,000 media hits.

In October 2003, the California Chapter of the American Planning Association awarded the *Modesto Bee* an award of merit for their series “Shaping the Valley,” based on the scenarios.

PART III: CONCLUSION

While the purposes and practices of indicator reporting vary widely from region to region, the ARS indicator survey reveals some clear commonalities across regions that can help us to develop an initial idea of “best-practices” for indicators:

1. Whether the purpose is to raise awareness, motivate change, or provide information on progress, it is important that the indicator project provide accurate and trustworthy information and have the broadest possible “buy in.”
2. In order to be relevant, indicators must measure the results of definable regional actions — whether the goal is to measure the results of those actions or to influence actions or both.
3. The definition of regional boundaries is a crucial first step in the definition and collection of indicators. Generally, a single regional boundary adds clarity and usefulness to the project. A single boundary can, however, make data collection more difficult.
4. While broad categories of indicators—such as demographics or indicators regarding economic vitality, the environment, education levels, and social services—are common to most indicator projects, the specific circumstances of a region must drive the selection of specific indicators.
5. Both the cost and complexity of an indicators project and the need for “buy in” from the region make the recruitment of a broad group of regional actors and public involvement important components in carrying out an indicators project.

Indicators reports are used to paint a picture of a region and often tell a compelling story. They can be a powerful tool for raising awareness, measuring progress, and motivating change. Despite the lack of a formal theory regarding regional dynamics that would allow the identification of a single set of universal indicators, indicators are highly effective tools for regional organizations.

APPENDIX A

Regional Indicators Survey Results

ARS received twenty-one responses to the Regional Indicators Survey; below is a summary of the results.

Section 1 — Development

1. For purposes of your indicators work, how did you determine what the boundaries of your region should be? Check all that apply.
 - a) Boundaries were the same as those we used for all of our organization’s work — 47%
 - b) Boundaries were determined by how available *data* was reported (e.g., census) — 33%
 - c) Boundaries were determined by *jurisdictions* (e.g., county or town boundaries, etc., even if parts of a jurisdiction didn’t seem to be in the region) — 38%
 - d) Other — 43%
 - MSA was an empty “niche”
 - Case-specific
 - Reach of data
 - Stakeholder consensus
 - Agency region definitions
 - Area served by airport
 - Neighborhood boundaries

Many respondents stated that they used more than one of these options. The most common method was option “A” alone (24%), followed by the “Other” option alone (14%).

Do you feel comfortable with these boundaries, or is this something that you feel really needs refinement? Of 16 responses, 13 (81%) felt comfortable.

Do you divide your region into sub-areas, and if so, how (e.g., core area and surrounding area, etc.)? Of 19 responses, 14 (74%) said that their region was subdivided into sub-areas. Most frequent responses:

- Counties (6)
- Individual cities (4)
- Geographic subregions (3)
- Core and suburban area (2)
- Urban and rural
- Neighborhoods

2. What process did you use to select your indicators? Check all that apply.
- a) Done in-house by staff — 52%
 - b) Utilized an advisory board — 71%
 - c) Other — 48%
 - Community survey or meetings (5)
 - Working group or steering committee (3)
 - COG
 - Survey of local leaders
 - Examination of other indicator reports

The most common response was option “B” alone (29%), followed by all three (24%).

3. What were your criteria for selecting indicators? Check all that apply
- a) Easy to understand — 81%
 - b) Data available — 95%
 - c) Clearly relates to goals for the region — 81%
 - d) Identifiable with unique qualities of the region — 62%
 - e) Demonstrate a trend — 76%
 - f) Other — 43%
 - Reflecting citizen priorities (3)
 - Picture of region (2)
 - Impartial/objective (2)
 - Attractive to local media
 - Policy-relevant
 - Reliable
 - Affordable

The most common response was all five (48%). The most common “other” response was that the criteria was that the indicators should be reflective of community values, or be “what the public wanted.”

4. Did you use public opinion data as part of your report?
- a) No — 38%
 - b) Yes — 62%

What was your reason for using public opinion data?

- Gather additional data (3)
- Present picture of region (2)
- Determine public issues of concern
- A contrast to quantitative data
- Augment data with community perspective

How were these data generated?

- a) Our organization conducted a survey — 25%
- b) We employed public opinion data developed by another — 33%

5. Usually indicator reports are organized into sections of closely related data. Was your report broken into specific sections?

- a) No — 5%
- b) Yes — 95%

How did you organize groups of individual indicators into categories? Nearly all the reports use their own combination of topics; only one response used the “standard” 3 E’s. The most common topic areas were:

- Economics/Finance/Business
- Social/People
- Environment
- Education
- Children/Youth
- Health

A number of the respondents said that the indicators were grouped according to a comprehensive plan or set of goals.

How does this organization of indicators help explain how your region works/performs?

- Provides overall picture (4)
- Makes the report easier to read (2)
- Helps region to track goals (2)
- Helps community focus on key aspects of QOL
- Closely aligns with policy/advocacy areas
- Represents categories valued by region’s citizens

How does the organization of your report assist in the dissemination of your findings?

- Easy to read/use (4)
- Focus on different sections (2)
- Target different audiences (5)
- Outline bigger picture
- Relate to goals/objectives of region

Section 2 — Evolution/Current Use

6. When did you release your first regional indicators report?

The earliest indicators report was released in 1985.

Have you issued more than one indicator report?

15 (71%) of the reports have undergone more than one iteration.

7. Who took the lead in your first indicator project? Check all that apply.

- a) Our organization originated and carried out the idea of an indicator project — 71%
- b) Our organization started the idea but then partnered with other organizations to carry it out — 24%
- c) The idea for an indicator project came from another organization who approached us to be a partner — 14%
- d) Other — 24%
 - Chamber of Commerce brought forward idea for report
 - Teamed with regional university to develop data
 - Individuals convened and worked together
 - Organization created/spun off from community environmental council
 - Citizen-driven effort created organization

The most common response was option “A” alone (48%), followed by “Other” (14%).

If you have now completed more than one indicator project, have your partners in carrying out this work (including dissemination of findings) changed?

- a) Our partners haven’t changed — 15%
- b) We have lost partners — 23%
- c) We’ve added new partners to the process — 77%

The most common response was option “C” alone (54%), followed by options “B” and “C” together (23%).

Please provide us with a list of partners that you have worked with on your indicators project(s).

Partners listed include local universities, local government, regional planning agencies, the local United Way, news agencies, local nonprofits, and utility companies.

8. What was the purpose/objective for doing your first indicators study? Check all that apply.

- a) Raise the awareness of the region — 86%
- b) Establish baseline measures — 81%
- c) Track progress on goals — 52%
- d) Affect/motivate action — 86%
- e) Other — 14%
 - Provide reliable source of consistent data (2)
 - Frame/detail understanding of region
 - Inspire local data collection
 - Define the region

The most common responses were options “A,” “B,” “C,” and “D” together (33%), as well as options “A,” “B,” and “D” together (33%).

If you have done more than one, what is the purpose/objective of later studies?

- a) Raise the awareness of the region — 62%
- b) Establish baseline measures — 24%
- c) Track progress on goals — 62%
- d) Affect/motivate action — 62%
- e) Other — 19% (Digest of recent studies & analysis; regional accountability; detail critical issues; each year add a different focus area)

The most common response was options “A,” “B,” “C,” and “D” together (20%).

If you changed your purpose/objectives from first study, why did they change?

- Set new targets/benchmarks
- Add new issues
- Increase community involvement & start goal-setting process
- Closer look at trend lines
- Focus on turning data into action instead of publishing report card

9. We'd like to know what impacts you feel your report(s) helped generate:

- a) Raised awareness of critical regional issues — 90%
- b) Helped mobilize interest group(s) around specific actions — 76%
- c) Provided marketing tool for the region — 48%
- d) Helped benchmark progress toward identified goals or vision — 76%
- e) Other — 33%
 - Provided impartial information from neutral source
 - Organize the collective thinking [and action] of a large and varied group of stakeholders
 - Communication tool for different stakeholders to work w/one another
 - Started conversation about importance of indicators
 - Decision makers used to help visioning process
 - Provided data for grants and decision-making

The most common response was options “A,” “B,” and “D” together (33%).

If you are able to measure whether your report is having its intended impact, how are you doing so?

- Surveys/evaluation forms (4)
- Effect on trendlines/progress towards goals (3)
- Use of data and analysis by advocacy organizations and individuals
- Movement from purely anecdotal measures to quantifiable measures
- Measure website hits
- Interview community leaders
- Report distribution and requests for copies
- Quantity of media coverage
- Citation by others

10. Looking at this list of ways you could disseminate report findings, which do you find most useful:

Types of Dissemination	Method used (check all that apply)	How Useful (rate from 1-4 with 1 as extremely useful and 4 as not very useful)
Hard copy – full report	90%	1.6
Hard copy – abbreviated report	29%	1.5
Web-based report	90%	1.74
Newspaper coverage	81%	2.35
Radio/TV coverage	38%	2.13
Public presentations/ speakers bureau	95%	2.0
Other (specify)	14%	n/a

The other types of dissemination listed were E-newsletter, CD, and membership meetings.

11. Do you know who is using your indicators report?

Users listed include government agencies, chambers of commerce, nonprofit organizations, private companies, funders, and town planners.

12. Please indicate your key funding sources (financial support and in-kind)

Source of Support	Financial Support	In-kind Support
Foundations/grants	57%	0%
Public/Government	52%	29%
Private	29%	10%
Other (specify)	29%	19%

Other sources listed include civic leader contributions, non-profits, hospitals, and academic support.

13. Is there anything else that you would like to share with us regarding your development and/or use of an indicator survey that you think would be useful to other organizations doing this kind of work?

Responses include:

- The importance of maintaining momentum — with volunteers, funding, etc.
- Care must be taken when using data that was collected for other purposes — it is important not to extrapolate too much from it.
- End users must be included in the development process from the beginning.

APPENDIX B

Regional Indicators Matrix Summary

In our study of regional indicator projects, we examined 25 different regional indicator projects, with a combined total of nearly 250 indicators. Of these indicators, only 24 were used in over 50% of the projects. The following is a breakdown of those indicators by category:

Demographic Indicators

Within demographic indicators, “Population Trends” was used in 20 (80%) of the projects. Ethnicity/Age Diversity was used in 16 (64%).

Economic Indicators for Business Vitality

No indicators in this category were used in more than 7 (28%) of the projects.

Economic Indicators for Employment and Income

Within this category, a large number of indicators were used frequently:

- Unemployment rate (seasonal) — used 19 times (76%)
- Job growth/labor force growth/employment trends overall (high & low paying industries), labor force participation rate — used 18 times (72%)
- Employment by sector/industry cluster (technology/non-technology), public/private sector (top sectors by gain/loss) (by city) — used 18 times (72%)
- Poverty (adult/children/families/seniors) (geographic concentration) — used 16 times (64%)
- Job growth (loss) by sector/industry cluster (technology/non-technology), diversification — used 15 times (60%)
- Average/median household/family income — used 15 times (60%)
- Average hourly/annual wages (also for farm workers compared to other workers), growth in real wages (clusters vs. non-clusters, technology vs. non-technology) — used 13 times (52%)

Economic Indicators for Technology & Innovation

No indicators in this category were used in more than 9 (36%) of the projects.

Economic Indicators for Working Landscapes

One indicator, “Acres of open space/protected open space (includes farms as well as major protected habitats), land at risk, land trust holdings,” was used 13 times (52%).

Economic Indicators for Housing and Urban Land Use

The most commonly used indicator in all the reports, “Affordability Index (% who can purchase median-priced home, households spending 35%+ on housing, income required for median priced home), median home price/value,” was used 24 times (96%).

Additionally, the following indicators were used frequently:

- Urban footprint — extent of urbanization, population density, rate of undeveloped land conversion for urban uses, efficient land reuse — used 16 times (64%)
- Rental Affordability Index (by income, households spending 30-35%+ on housing), rental rates, vacancy rates, hourly wage needed — used 16 times (64%)

Economic Indicators for Transportation & Mobility

- Transit ridership (passenger bus, commuter rail, demand response) — used 19 times (76%).
- Average commute time/commute speed — used 15 times (60%).

Social Indicators for Education & Training

- SAT performance of students, School Academic Performance Index, Similar School Rank — used 16 times (64%)
- High school drop out/attrition rate, graduation rate — used 13 times (52%)

Social Indicators for Young Children and Families

None of the indicators in this category were used in more than 9 projects (36%).

Social Indicators for Health, Human Services and Public Safety

- Violent & property crime/arrest rates — used 20 times (80%)
- Health status (mortality rates, causes of death, communicable diseases, chronic diseases, suicide rate) — used 14 times (56%)

Environmental Indicators for Natural Resources

One indicator, “Urban footprint — extent of urbanization, population density, rate of undeveloped land conversion for urban uses, efficient land reuse,” was used 14 times (56%).

Environmental Indicators for Air and Water Quality/Use, Energy, Solid Waste

- Days in violation of federal/state air quality standards, bad air days, ozone exposure – used 19 times (76%)
- Per capita water usage, urban water usage — used 14 times (56%)
- Solid waste generated/recycled/diversion — used 14 times (56%)

Civic Engagement Indicators – Citizenship, Community Participation & Culture

One indicator, “Voter participation of registered/eligible voters,” was used 16 times (64%).

See the full results of this analysis on the ARS website at www.regionalstewardship.org/indicators.

Appendix C

ARS Regional Indicators Affinity Group Participants

- Lenore Alpert, Catanese Center for Urban and Environmental Solutions, Florida Atlantic University, Fort Lauderdale, Florida
- Jim Brooks, West Michigan Strategic Alliance, Holland, Michigan
- Charles S. Bourgeois, Montréal International, Montreal, Quebec
- MaryBeth Burton, Catanese Center for Urban and Environmental Solutions, Florida Atlantic University, Fort Lauderdale, Florida
- John Claypool, AIA Philadelphia, Philadelphia, Pennsylvania
- Kathy Covert, Federal Geographic Data Committee, Reston, Virginia
- Don Cowles, Hope in the Cities, Richmond, Virginia
- Kevin Fayles, Envision Utah, Salt Lake City, Utah
- Kevin Flanery, Regional Leadership Coalition, Louisville, Kentucky
- Ann Florie, Region 2020, Birmingham, Alabama
- Jamie Greene, ACP – Visioning & Planning, Ltd., Columbus, Ohio
- John Hall, Arizona State University, Tempe, Arizona
- David Hamilton, Roosevelt University, Chicago, Illinois
- Peter Hawley, American Planning Association, Washington, D.C.
- Sharon Huntsman, Sacramento, California
- Tom Kingsley, Urban Institute, Washington, D.C.
- Shareese Kondo, University of Arkansas at Little Rock, Little Rock, Arkansas
- Kellie McDonough, Atlanta Regional Commission, Atlanta, Georgia
- Steve Michon, FutureWorks, Arlington, Massachusetts
- Donna Morris, Hampton Roads Partnership, Norfolk, Virginia
- Joan Peros, Freedom 21 Santa Cruz, Santa Cruz, California
- Jay Peters, West Michigan Strategic Alliance, Holland, Michigan
- Douglas Petty, The Great North Alliance, Minneapolis, Minnesota
- Karen Raihill, Tampa Bay Partnership, Tampa, Florida
- Andrew Reamer, The Brookings Institution, Washington, D.C.
- William Snyder, Social Capital Group, Cambridge, Massachusetts
- Vic Suhm, North Texas Commission, Dallas, Texas
- David Swain, Jacksonville Community Council Inc., Jacksonville, Florida
- Donald Sylvester, MetroNeighbors, New Orleans, Louisiana
- Kala Venugopal, California Center for Regional Leadership, San Francisco, California
- George Vradenburg, Vradenburg Foundation, Washington, D.C.
- Jim Walker, Central Texas Indicators Project, Austin, Texas

The Alliance for Regional Stewardship (ARS) is a national nonprofit that works to help America's regions effectively pursue economic, social, and environmental prosperity. ARS helps leaders in the civic, business, government, nonprofit, and foundation sectors cross organizational lines to work together across geographic and political boundaries.

ARS was founded in May 2000 as a national network of leaders from metropolitan areas around the country. Elected officials, regional business leaders, and nonprofit organizations with regional missions realized they needed a place to learn about best practices and lessons learned from other parts of the county. ARS has attracted leaders from over 150 metropolitan and rural regions, both in the United States and around the world.

ARS has a number of ongoing programs and activities, including:

- John W. Gardner Academies
- National Forums on Regional Stewardship
- Regional Stewardship Awards
- Monograph Series
- Regional Stewardship Visitors Program
- RegionLink.org

For more information on the Alliance for Regional Stewardship, please visit our website at www.regionalstewardship.org



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