



Measuring
Rural Community
Vitality

DUFFERIN COUNTY HEADWATERS COMMUNITIES IN ACTION INITIATIVE

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RURAL ONTARIO
INSTITUTE

I INTRODUCTION

Headwaters Communities in Action (HCIA) has long recognized the value of engaging the citizens of Dufferin County and the Town of Caledon in reflection on the wellbeing and needs of their communities. Over the past twelve years, HCIA has developed a reputation for being a credible community agent that shares, communicates and demonstrates expertise and knowledge through information sessions, research and community programs.

Beginning in 2005, HCIA began developing ideas around social prosperity and community wellbeing. Through extensive citizen engagement, a model was developed and tested for Foundations of a Healthy Community. The model became the foundation of the community wellbeing work (CWB) for a resident survey and report. In 2011, HCIA formalized this reflection in its release of the **2011 Community Wellbeing Report**. The report helped the community identify three areas for collaborative action: 1) food and farming; 2) area trails; and 3) supporting the non-profit sector, specifically around rural transportation (Cheuy, Fawcett, Hutchinson, & Robertson, 2017). Publishing the report and deciding on a 'community development' or program delivery direction formed Phase One of Headwaters' CWB journey. Phase Two began with grants from the **Ontario Trillium Foundation (OTF)** and **United Way Guelph Wellington Dufferin** to help build a better quality of life together through citizen education and engagement, and a collaborative action program.

From 2012 to 2015, the projects matured and developed into **Headwaters Food and Farming Alliance (HFFA)**, **Citizens of Headwaters for Active Transportation (CHATT)** and **DC Moves** (formalized in 2016). The Rural Transportation project was supported through community consultations and resource asset mapping. During this phase, it was transferred to Dufferin County as moving forward required further investment.

With the three projects maturing and new projects emerging, Phase Three began with the launch of the Community Wellbeing Refresh (CWBR) project in 2015 to update CWB results from 2011. In addition, HCIA sought to examine more closely the relationship between CWB and community development with support from the **Rural Ontario Institute (ROI)**. As part of ROI's **Measuring Rural Community Vitality Initiative**, the 2015 CWBR project hosted community consultations, enhanced the survey used to generate the initial 2011 report, conducted a new survey, analyzed data and released a new, updated community wellbeing report.

| NEEDS ADDRESSED

Through the 2015 CWBR project, HCIA examined how measurements of community wellbeing could be translated into concrete community projects that improve community wellbeing. By doing so, HCIA focused its time, energy and resources on projects that respond to the communities' needs. As is true for many doing rural community work, it is important that funders see how the organization meets real needs.

At a broader level, one of the project's desired outcomes was to develop best practices to share with other rural areas developing community wellbeing programs. While there are some existing frameworks for measuring community wellbeing, some rural communities may not find them well suited to their needs. For example, accessing such frameworks may be cost-prohibitive or they may not capture the unique ways that rural communities respond to change. Additionally, research at the intersection between community wellbeing and development is still in its infancy. This project contributed to that research with a special focus on best practices for rural communities.

| SOLUTIONS PROPOSED

In order to examine the relationship between community wellbeing and community development, HCIA built on the foundation of community wellbeing work they had started prior to the release of the 2011 Community Wellbeing Report. Prior to the release of this report, the Community Wellbeing Report Working Group considered a number of existing frameworks for community wellbeing before establishing their own definition based on five pillars: 1) Healthy People; 2) Dynamic Economy; 3) Sustainable Environment; 4) Vibrant Culture; and 5) Engaged Citizens (Cheuy et al., 2017). The working group then developed and conducted a citizen survey to obtain community members' input on what they valued and were concerned about in the community and how best to measure indicators of community wellbeing. HCIA subsequently held sector-based focus groups to further dig into and interpret the results of the citizen survey (Cheuy et al., 2017).

At the same time, HCIA's working group investigated other frameworks for community wellbeing that aligned with Headwaters residents' priorities to identify topic areas and indicators useful for their own report (Cheuy et al., 2017). Additional frameworks included the Canadian Index of Wellbeing (CIW), first published in 2011 and Vital Signs through the Community Foundations of Canada, first published in 2001. Both were developing and/or maturing at the same time. HCIA drew ideas from these frameworks but did not adopt them wholesale. Vital Signs was particularly helpful in providing examples of report design and layout (Cheuy et al., 2017). At the time HCIA was developing its homegrown framework, CIW had only been developed for the national level, although it has since been used in local community projects (Cheuy et al., 2017). Furthermore, the CIW tool was perceived as comprehensive and extensive, but somewhat cost prohibitive, especially for rural communities. While HCIA did consider the possibility of using the Vital Signs framework, the option was not viable for the Headwaters region, as Vital Signs is a trademarked process of

Community Foundations and there was not a local Community Foundation established in the region (Cheuy et al., 2017). Using insights from these frameworks and input from the citizen survey and other community consultations, HCIA developed its own framework, uniquely suited to the needs and values of the Headwaters community, based on the five pillars of wellbeing initially identified.

While many rural communities have not engaged in the work of measuring CWB, those that have done so have typically used the CIW or Vital Signs frameworks. However, by developing their own framework, HCIA focused on the intersection and integration of community wellbeing measurement and development, a point they described the other frameworks lacking. HCIA's goal was not only to measure community wellbeing but to take action based on the measurement and to learn how to integrate measurement into projects the community was already doing.

To understand how the CWB of the Headwaters region had changed since the release of the initial 2011 report, HCIA conducted an updated citizen survey which included new questions in the spring and summer of 2015 (Cheuy et al., 2017). Besides launching a citizen survey, HCIA hosted a CWB Summit on February 24, 2017, to engage community partners about their collaborative projects. Project groups such as the HFFA gave presentations about how their projects related to community wellbeing both qualitatively and quantitatively (Headwaters Communities in Action, 2017). They discussed how to integrate indicators of wellbeing into their specific projects. HCIA hired an external consultant to guide the summit. HCIA used data from the 2011 report and the 2016 report which included results from the 2015 survey, along with secondary data sources such as Statistics Canada, provincial, municipal and community data (Cheuy et al., 2017).

For its 2016 CWBR, HCIA kept the same five pillars of community wellbeing that it had developed for the 2011 report and added a sixth pillar: Community Assets. By taking the community's human, social, natural and financial/built assets into account, HCIA sought to understand and improve the community's resilience for the future. The addition of the Community Assets pillar was congruent with national recognition of the need for broader definitions of societal wealth with the release of the National Index of Comprehensive Wealth in December, 2016.

Timeline

While the initiative's workplan provided a starting point and direction for the project, it required recalibration in response to emerging realities from the outset. The team pushed timelines back when necessary while accomplishing essential work. They adjusted to allow for more research and data collection than originally thought necessary. In the meantime, HCIA's work with other partners advanced, particularly with the DC MOVES program. This was an unforeseen benefit to timeline changes. Overall, HCIA adjusted the project's timeline as needed by rolling out work in a more phased approach.

September 30, 2011

Community Launch event to release initial Headwaters Community Wellbeing Report (Cheuy et al., 2017).

2012-2015

Work on community projects around trails, food, supporting not-for-profit sector and rural transportation, with funding from OTF, United Way Guelph Wellington Dufferin and other partners. These projects developed into: Headwaters Food and Farming Alliance or HFFA (food) including the Farm to School Program; Citizens of Headwaters for Active Transportation and Trails (CHATT) and DC Moves.

2014

HCIA recognized need to refresh the Community Wellbeing Report (Cheuy et al., 2017).

October 9, 2014

HCIA AGM and community consultations at its annual general meeting to gauge enthusiasm for addressing wellbeing priorities.

Spring/Summer 2015

Dissemination of an updated citizen survey (Cheuy et al., 2017).

2015 to 2017

Formal and informal community engagement at events sponsored by HCIA partners and projects to deepen conversations around CWB and community development.

August 25, 2015

Collective Impact Session with Sylvia Cheuy of Tamarack Institute and HCIA to engage the community leaders in using a collective impact model to deal with complex problems and issues.

October 28, 2015

HCIA AGM examined community priorities and ideas to drive community development.

June 1, 2016

Measuring Community Vitality and ROI Project launch with Bryan Smale, CIW

- **October 28, 2016**
HCIA AGM with Paul Born on deepening community engagement and CWB survey results.
- **October 28, 2016**
Online release of “Community Priorities in Headwaters 2016: Increasing Community Wellbeing and Resilience,” (Headwaters Communities in Action, 2016).
- **February 2017**
Handbook of Community Wellbeing Research released including HCIA’s contribution in Chapter 8 “A Citizen-Led Approach to Enhancing Community Wellbeing”.
- **February 24, 2017**
Community Wellbeing Summit to engage community partners on the intersection between community wellbeing and their projects currently underway in the community.
- **May 11, 2017**
Ontario Healthy Communities Coalition for an online webinar with Rural Ontario Institute (Mark Cassidy), HCIA (Karen Hutchinson) and Huron Healthy Rural Lens (Sheila Schuehlelein) on “Measuring Rural Community Vitality”.
- **June 12, 2017**
2017 CIC Community Indicators Symposium by Community Indicators Consortium in Winnipeg by HCIA (Karen Hutchinson and Sylvia Cheuy) on “Deepening Community Wellbeing and Engagement in Headwaters Region”.
- **Spring 2017**
HCIA held a number of strategy sessions on the February 24th partner session. HCIA re-defined its vision, mission and activities in light of a number of factors including: funding and opportunity shifts; evolving issues; and, the emergence of new issues and information.

Budget

The project’s budget was \$25,000. Of that budget, ROI provided \$15,000, which was allocated for staff. HCIA used additional funding from the OTF grant that had supported the 2012-2015 community building work and subsequent projects. The United Way Guelph Wellington Dufferin also contributed to the project budget. Additional assistance was provided through project and partner resources.

Expenditures for the project included staff, costs for three events, and report design and printing. Community partners contributed time spent participating in meetings, ongoing engagement in project commitments and additional in-kind contributions.

Headwaters Communities in Action (HCIA) is a charitable organization that was formed by volunteers from many sectors of the Headwaters Region communities. The organization is a “convener of community conversations,” that provides citizens with information about community issues and provides support for collaborative projects to improve community wellbeing.

Headwaters Region is a rural area located north west of the Greater Toronto Area in Ontario. It includes Dufferin County, the Town of Caledon and sometimes parts of the Town of Erin. The population of the region is approximately 128,271. Residents value the region’s many watersheds and rural landscapes (Cheuy et al., 2017). For the purposes of the CWB Reports, statistical information only from Dufferin and Caledon was included.

| COMMUNITY ASSETS

The following are some of the community assets that contributed to the success of the project:

Past Community Work

Community assets were central to the success of the project. HCIA built on the legacy of community wellbeing and development work that preceded the project. The 2011 report provided solid foundations for framing community wellbeing that could be modified in light of emerging needs and evolving realities. At the report session, John Tory, former Headwaters Member of Provincial Parliament, recommended that the community should pick a few priorities to start working on. The community projects (food, trails and not-for-profit sector including transportation) that emerged and developed from the 2011 report became a critical part of HCIA’s work and a basis for the 2015 CWBR project. These projects included the **Food Program and Headwaters Food and Farm Alliance (HFFA)**, HFFA Farm to School (F2S), **Trails and Citizens of Headwaters for Active Transportation Team (CHATT)** program, and the Not-For-Profit Capacity-Building program, which encompasses **DC Moves**.

Partners

HCIA’s organizational structure lends itself to the mobilization of community assets. HCIA understands itself as a ‘backbone organization’, serving an important function for achieving collective impact across sectors (Cheuy et al., 2017). A backbone organization’s role is to support collaboration between partners across sectors by guiding “vision and strategy, supporting aligned activities, establishing shared measurement practices, building public will, advancing policy, and mobilizing resources,” (Tamarack Institute, 2017). As such, HCIA supports partners doing different types of work in the community on an ongoing basis. These partnerships have become extensive and include citizens at large, Dufferin County Social Services, Wellington-Dufferin-Guelph Public Health, Dufferin Board of Trade (and local businesses), the municipalities (both upper

and lower tier municipalities), Caledon Community Services, Upper Grand District School Board, Dufferin Caledon Separate School Board, Peel District School Board, County of Dufferin and so on. For this project, HCIA capitalized on these partnerships to dig deeper into the relationship between community wellbeing and community development. For instance, in discussion with its partners, HCIA considered what indicators of community wellbeing might be measurable in each of their particular projects. Establishing these links grounded their measures in concrete action. Partnerships were enhanced throughout the project by the opportunity to provide input on the future direction and strategic plan for HCIA.

Stakeholders

Stakeholders supported the project on a strategic level by participating in the Community Wellbeing Summit on February 24, 2017, and on an ongoing basis through their shared work with HCIA on the Food Charter and Action Strategy. While doing so, HCIA engaged their stakeholders, observing and understanding how the various groups worked. Some new community projects also evolved over the course of the wellbeing project. For instance, HCIA's non-profit initiative coalesced within 'DC MOVES', a program connecting Dufferin County social service agencies. In 2016, HCIA took a backbone role as lead applicant for the Partnership Grant Program to revitalize the Dufferin volunteer sector through the redevelopment of **Volunteer Dufferin's** website, resources and processes.

Community Members

More than 300 community members contributed to the successful outcome of the 2015 CWBR project by reflecting on their experience and knowledge through the citizen survey. An additional 200 engaged in community conversations to add their input to the CWBR.

Regional Connections

Dr. Bryan Smale's expertise was another notable asset to the project. Dr. Smale, Director of the CIW at the University of Waterloo, provided advice on the project and advocated for the addition of the Community Assets pillar. The project also benefited by tapping into assets of the broader, regional community. Specifically, staff from HCIA participated in **Parks and Recreation Ontario (PRO)** and the **2017 CIC Community Indicators Symposium** and the **Ontario Healthy Communities Coalition** webinar conference. This facilitated shared learning opportunities between the ROI's Measuring Rural Community Vitality Initiative projects and HCIA's use of ROI data in their research.

| RESULTS

The 2015 CWBR project achieved valuable concrete and difficult-to-measure results. The citizen survey garnered over 300 responses, allowing for comparison with data from the 2011 report. Budget constraints limited the level of engagement from various groups and the ability to create certain customized data reports available through frameworks such as CIWB. In addition, community conversations in conjunction with partner projects increased participation and community input to 500 persons.

The survey results stimulated further community engagement. After results were released, HCIA engaged in discussion with 73 community members and organizations through their Community Wellbeing Summit. The research and data collection took longer than anticipated, and HCIA adjusted its timeline accordingly. First, a number of opportunities appeared that were not in the original project vision, including attending conferences and writing a chapter in the handbook. Second, the depth of the work was unknown as it is iterative. Third, the new projects were part of the emergence that occurred during the project. Fourth, HCIA's Leadership Council and project managers embarked on a deeper strategic planning process than anticipated. This was another iterative result of the MRCV project to engage stakeholders and the February 24, 2017 strategy session served as a culminating/development event. As a result, the project developed interconnecting streams: CWBR, community development lens to CWB, individual project development (existing and new) and overarching development of CWB indicators for the project in development. An unintended benefit of these changes was that all partnerships advanced their work over the duration of the project. This included DC MOVES, HFFA development and launch of food charter, Farm to School expansion with an OTF grant and the Volunteer Dufferin reboot.

In 2016, HCIA released a document on their website summarizing the project's findings, entitled "**Community Priorities in Headwaters 2016: Increasing Community Wellbeing and Resilience,**" (Headwaters Communities in Action, 2016). The addition of "resilience" to the community wellbeing framework reflected HCIA's research on community assets and comprehensive wealth.

One aspect of the project that HCIA found challenging was linking the 2015 CWBR with Dufferin County and the Town of Caledon's strategic plans. Dufferin County's strategic plan calls for conservation promotion and environmental sustainability along with initiatives that improve the social determinants of health. County Warden Laura Ryan spoke to this at the 2016 HCIA AGM. While municipalities have embraced environmental and social goals and sustainability objectives, integrating CWB into strategic plans will take a longer phased approach. Going forward, partners could work on this approach in conjunction with HCIA and the CWB program.

Timing was a challenge in beginning this engagement. While HCIA normally reports to municipal councils each winter, it prioritized its food charter presentations to all councils in early 2017. Not wanting to overload Councils with presentations, HCIA scheduled their updates for autumn 2017. Logistics became another challenge in discerning where community wellbeing measurement could fit into municipal strategic plans. While the municipalities had done work around sustainability, other factors of community wellbeing had yet to be integrated into their strategic plans. Methodology changes also presented themselves. For example, the Town of Caledon moved from a Community-Based Strategic Plan (CBSP) to a Council Work Plan to guide their work until 2020.

Embedding CWB in municipal strategic plans will take time and sustained effort. HCIA continues to explore how it can partner with Dufferin County and the Town of Caledon, knowing that participation from municipal staff on HCIA committees has been vital. Both municipalities have dedicated on-going staff time and funding for this on-going work.

Overall, the project achieved its desired outcome, which was to examine the intersection of CWB measurement and community development. The project allowed HCIA the time and space to reflect on the impact community projects were having on CWB. It also facilitated a deeper examination of the intersection between community wellbeing measurement and development. For instance, HCIA and its partners thought through which indicators of community wellbeing they could measure for each of their community projects, and how they could integrate the work of measurement and development. Further, the project afforded HCIA the opportunity to engage in shared learning with other groups doing similar work through ROI and PRO conferences, as well as with groups using the CIW and Vital Signs frameworks.

In the process, HCIA and its partners enhanced their relationships by discussing how best to support one another and by building trust through engagement. The Community Wellbeing Summit on February 24th, 2017 was particularly impactful in giving community partners the opportunity to shape HCIA's strategic plan for 2017-2022. In the past, HCIA's Leadership Council typically engaged in strategic planning without this level of community consultation. One of the unintended benefits of the project was the engagement and contribution of partners in the strategic planning process. The process is moving toward conclusion, and will likely bear fruit in HCIA's 2017-2022 strategic plan.

Enhanced community partnerships are just one example of the project's social return. According to Hutchinson, the social return on the project is "an increased opportunity and capacity for the information, mobilization and engagement of people." The 2016 report can increase residents' understanding of the community and its future direction and can encourage them to make connections between community wellbeing and their own work.

On the whole, the 2015 CWBR project allowed HCIA to evaluate the impact of their community wellbeing work and understand how it can move forward. The project reaffirmed the centrality of community wellbeing work for the organization. HCIA can broaden the impact of its work by leveraging the knowledge and experience gained through the project in developing and writing best practices for integrating community wellbeing and development work in rural areas. They have plans to do this in the future. The organization's leadership is passionate about the importance of focusing on rural wellbeing, and cognizant of the contribution rural regions make to all Ontarians.

LESSONS LEARNED & ADVICE TO OTHERS

The 2015 CWBR project was a fruitful learning experience for HCIA, their partners, and the Headwaters communities broadly. Lessons HCIA learned throughout the process include:

- Spend sufficient time in research. Dedicate more time in the basic research phase of the project, thinking about the relationships and links between the pillars of a healthy community, their indicators and community development work.
- Look for connections between current and ongoing community projects, no matter how small, and see how they connect to community wellbeing.
- Focus on both CWB and community development. This project reinforced a definite connection between these two elements of community work.
- Develop a stable, established work plan and be prepared to be flexible. While the work plan helped frame the project, the plan needed to be responsive to emerging realities as the project unfolded. Community building work is iterative and needs to be flexible.
- Community wellbeing work is always evolving! The 2011 report was rich in detail and inclusive, while the 2016 report was more focused. This reflected an evolution in understanding how community wellbeing work can be carried out in the Headwaters communities.
- For communities embarking on a CWB journey, existing community wellbeing frameworks, including the CIW and Vital Signs should be examined and can be used to some extent. Although small communities may not have the budget for all of the measures and data associated with these frameworks, they may be able to link with them in helpful ways. They may also use national, provincial and regional reports as comparisons or for some data. In addition, the ROI provides data reports that are very useful. Ultimately, rural communities can make important links between their on the ground projects and overarching community wellbeing goals.

CONCLUSION

The 2015 CWBR project took HCIA's community wellbeing work to the next level by intersecting it with community development. The initial 2011 report served as an impetus for concrete community projects, and the 2016 report allowed residents and stakeholders to see how these projects affected community wellbeing. Further, the CWBR project linked indicators of a healthy community with current projects, creating ways to ensure community work responded to real needs on an ongoing basis. The 2015 CWBR project reaffirmed and reinvigorated the importance of CWB work for HCIA, shaping the direction of the organization's future work in service of Dufferin County and the Town of Caledon.

| CHECKLIST

Key Ingredients for Success

Considering doing a similar project in your community?

It may work well if your county/organization...

- Has/is a trusted organization that can serve as a “backbone” to bring community partners from different sectors together to embrace collaboration and a collective impact model.
- Has community partners engaged in ongoing community development projects (large or small).
- Has a relatively small core group of community leaders (~20) willing to commit time and energy to the project.
- Has passionate engaged citizens willing to work on community priorities.
- Does not have/is not a community foundation, in which case an existing framework like Vital Signs could be used, or does not have the budget for a framework like CIW.
- Has funding support for staff, events, and publications.

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The Rural Ontario Institute provided information gathered and summarized by Dr Suzanne Ainley of Ainley Consulting to Platinum Leadership to describe the community projects. All such descriptions have been reviewed and approved by the relevant community contacts.

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