

**Session Notes**  
**Regional Indicators**  
**September 19, 2005**

**Moderator:**

Michael Ruane, Executive Director, Orange County Children and Families Commission and Project Director for the Orange County Indicator Project

**Presenters:**

Michael Schuerman, Director, Research, San Diego Regional EDC

Richard Cummings, Great Valley Center

Trish Kelly, California Center for Regional Leadership

The focus of the session was on measuring regional competitiveness and quality of life using regional indicators based on the three E's, and benchmarking and tracking progress over time. Two projects were discussed for the San Diego Region and the Central Valley. An overview was presented of the California Progress Report, a partnership with CalCOG and its members to prepare a template for a region-based statewide indicator report.

**San Diego Quality of Life Report (see presentation)**

The premise of the project is that regions in balance across the three E's are at a competitive advantage. In updating the information from the previous report, San Diego learned that it continues to be out of balance, and that it has improved but not as much as the regional partners had wanted. The project uses a balance indicator which is unique. It looks at variance among the three composite scores for the economy, environment and equity and also considers the quality of the score, giving equal weight to the three E's. There is a lack of sustainability if the region is out of balance. San Diego scores well on the environment and is lacking in equity, especially housing.

There is an effort to link the information from the indicators to initiatives. For example, Transnet is designed to address transit equity (improving access to transportation), land conservation (the environment) and reduce congestion (productivity). The challenges for regional leadership are:

- Balance the E's
- Establish regional priorities
- Initiate collaborative solutions
- Evaluate progress

**Great Valley Center Indicator Reports (see presentation)**

There is a series of reports dealing with a variety of issues – a composite of core indicators and topics like the environment, civic engagement, youth, etc. There is a five year cycle, with a report issued each year and an update for each topic every five years. One big impact has been creating a regional identity for the Central Valley and showing the large disparities across many indicators for the Valley compared to the State. This has allowed the region to mobilize to improve issues identification and resource

leveraging, especially as the region is facing major growth-related challenges. The presentation addressed issues relating to preparation of the reports, dissemination, utilization, etc. Some points:

- The reports cover data in bite size chunks to make the issues accessible and to not overwhelm the reader
- There is a consistency in format and emphasis on user friendly presentations (graphs, maps, etc.) across the reports to create identity and improve usability by a variety of users
- The reports have become a valuable tool for media looking for background on stories at the local (county) level, and because the data is presented on a regional comparative basis it ends up informing people about the region and help creating a regional perspective

### **California Progress Report (see presentation and draft template)**

The presentation covered the evolution of the project, with indicators as a long-standing area of interest for the Regional Collaboratives and their partners. Their indicator projects were the subject of a statewide inventory conducted by CCRL in 2003. This project is a partnership with CalCOG and several of the State's councils of governments. The purpose is to develop a template for a region-based statewide report. A draft template which identified prospective indicators for inclusion in this report (based on a review of indicator projects and identification of key issues and best practices by the project team) was distributed to the session participants for feedback. CCRL will vet the draft with other key stakeholders at the State and regional levels and synthesize recommended ideas into a final template for presentation to the COGs in November.

### **Discussion**

Mike Ruane provided a background for the discussion by noting that it is important to have a statewide effort to develop metrics allowing for comparisons internally across regions. The key issue is competitiveness of our economic regions. The metrics contained in this report can allow us to track our weaknesses and help shape important public policy discussions, which need to be at the core of regional strategies. Action is needed based on data. There are lots of indicators; people like to keep score. These are objective measures, but there are values imbedded in what is chosen to measure. Care must be taken to not make the problem so overwhelming that people feel they cannot make an impact. Indicators should be chosen where there can be action to address an issue and progress can be measured.

### **Other comments**

One challenge for funders is that want to see outcomes, and improvements in the public eye. However, this is often hard to do as there are many factors affecting outcomes and it takes a while for change to take hold. The Great Valley Center tracks media and has a clipping service that notes every time the report is used. This is helpful for investors to see the value of the reports.

The indicator civic engagement process is an important way to engage the business community. It tends to create a neutral forum for raising an issue and the community owns the issue rather than an individual interest group.

CalCOG Director Rusty Selix, a project partner, noted that if there is a set of meaningful indicators across the State there can be comparisons and it can guide investments – we can look at what strategies and approaches are working better, what’s happening that is right. This will be valuable for other regions. The report needs to be built from the regions up. This information can also drive local policy decisions as well.

What happens to one E based on what happens in the other E’s (Sierra Business Council has tried to address this issue)?

Can you identify the trends and the public policy that is driving the trends? The gaps become a focus of a state policy agenda. Which direction has public policy gone and what is the impact? Why is it like that? There is an idea of a uniform test to evaluate public policy.

The purpose of the California Progress Report is to present a core set of indicators in an easily presentable way, collected region by region and made accessible.