

Canadian Index of Wellbeing 2011 Update Report *for the* CIW International Advisory Network

1. Summary

This year was a pivotal one for the CIW. The project moved to the University of Waterloo (uWaterloo) in January, with very little ramp up time following the release of the final of the eight domain report on the Environment in April, and then the release of the first full composite index, a mere six months later in October. The high profile release of the Composite Index provided much media attention and global reach, and in many ways, solidified our existence at uWaterloo and our role as leaders in alternate measures of wellbeing at the OECD. By year end, the CIW was embedded in the culture of the Faculty of Applied Health Sciences (AHS); in fact, their Christmas card to alumni, funders, and other partners mentioned “wellbeing” on the front cover.

It was a highly active and rewarding year, and in the end, hopefully met the expectations of the CIW Advisory Board, the CIW Canadian Research Advisory Group (CRAG), and International Advisory Network, renewed the enthusiasm of the Community Foundations of Canada (CFC) to partner potentially with CIW as our knowledge mobilisation arm, and resulted in our pilot community group, the Resilience Collaborative, recommending policy changes to Simcoe County Council. This was all accomplished with one full time staff member (L. McKessock), a part-time Director at the University (B. Smale is also a professor of Recreation and Leisure Studies), occasional assistance from the Dean’s office staff related to communications and fund development, shared co-op students to upgrade the CIW website, and short-term contract media/communications experts to assist with releases.

Our learning for 2011 is definitely the power of being associated with a leading research-focused university, like uWaterloo. We noticed a major difference in the way media approached the CIW this year. There were no questions about CIW methodology and they were more interested in the key messages. On that point, the CIW Advisory Board has noted the importance of continuing to hire external experts to assist with releases.

A Funders’ Alliance grant is giving the CIW the needed time to establish itself in its new home and uWaterloo and find long term sustainable funding. Overall, the CIW is very well positioned for a sustainable future in the Faculty of Applied Health Sciences at the University of Waterloo.



2. CIW Progress in 2011

In this section, using a template provided by one of our funders, the CIW project will be explored in terms of achievement of stated objectives and anticipated outcomes.

- 1. To develop, test, measure and monitor progress in eight main areas or domains: Living Standards, Time Use, Healthy Populations, Environment, Education, Community Vitality, Democratic Engagement, and Leisure and Culture.**

Progress

On April 7, 2011, the CIW released the last of its eight domain reports on the Environment. Report author, Alexis Morgan, was invited to uWaterloo to give a lecture, entitled “Canada’s Environmental Path: Jeopardizing our Country’s Long Term Quality of Life?” The Honourable Roy Romanow was also on hand to handle media interviews. This release officially marked the end of the development phase of the CIW and our focus quickly moved to generating the first report of our signature product, the CIW Composite Index. The CIW Composite Index combines the 64 headline indicators (8 headline indicators drawn from the 8 domain reports) into a single number that can be tracked over time. With a very well thought-out communications strategy in place, the CIW released the Index October 20, 2011, a mere six months from the release of our eighth domain report. The CIW will continue to monitor and compile the headline indicators and release composite index results annually in October.

Challenges or Unexpected Opportunities

The challenge was how to communicate the results of an academic methodological paper to “mainstream” Canadians, including policy shapers and decision makers, media, and the general public.

Learnings

The solution was contracting a small team of external communication experts well versed in the language of social justice to help write a user-friendly highlights report, media materials, and to act as a sounding board for CIW staff as they designed the infographic and video. Media monitoring showed that the CIW had a reach of over 34,000,000 “hits”. If the CIW had spent money on advertising, we would have needed to spend \$1.3M to generate this level of reach. This was beyond our expectations. The CIW Advisory Board, pleased with these results, has recommended that the CIW continue to use external communications support.



- 2. To foster a CIW Network that includes Canadian and internationally recognized indicator and policy experts, voluntary sector organizations, community leaders, and national champions.**

Progress

The CIW's international strategy hinges on its relationship with the OECD's Global Project on Measuring the Progress of Societies. In 2011, the Honourable Roy Romanow sent letters to OECD Secretary General, Angel Gurría, and OECD Chief Statistician, Martine Durand, renewing our commitment to the OECD Global Project and bringing them up-to-date on CIW progress with the Composite Index. Mr. Romanow received congratulatory letters back from both, and Mr. Gurría provided a quotation for the CIW website. The CIW continues to have great presence on WikiProgress, and our October release was featured prominently. Outcomes of our outreach to OECD this year were many. The CIW was invited to participate on the Global Progress Research Network (GPRNet). This group includes leaders in alternate indicator development including Stiglitz, Sen, and Fitoussi, and leaders in other countries working on wellbeing indicators. The CIW has been asked to contribute to the next OECD World Forum, scheduled for October 2012 in India. In addition, through our OECD connection, we continue to field requests for information from other countries embarking on similar initiatives. The Australian National Development Index (ANDI) requested a box of 50 CIW Composite Index highlights reports and a DVD of our video. As well, they featured the CIW in their business prospectus, and one of their leaders, Dr. Mike Salvaris, agreed to sit on the CIW International Advisory Network. We also received requests from two foundations in Germany. In one case, they interviewed five CRAG researchers, and for the other, Bryan Smale and Linda McKessock provided information.

Challenges or Unexpected Opportunities

In 2011, the CIW noticed an increase in the level of awareness of the need for alternative measures to GDP. With the release of the CIW Composite Index, this created an opportunity to put the CIW back on the international radar screen as leaders in the development and deployment of wellbeing measures.

Learnings

Here at home, our CRAG researchers continued to rise to the occasion, being on call for media during our releases, writing papers, and giving presentations. We worked hard this year to keep this group engaged during the transition to uWaterloo. We learned that this group is definitely onboard for the long term.



3. To maintain and expand a cross-Canada network of local users and champions that is engaged with the development and usability of the CIW.

Progress

With the move to uWaterloo, and the focus on releasing the Environment Domain and Composite Index reports, the CIW wisely chose this year to maintain and strengthen existing users and champions, rather than actively seeking new ones. In particular, the CIW worked with the Community Foundations of Canada (CFC), the Association of Ontario Health Centres (AOHC), and Simcoe County's Resiliency Collaborative (RC).

Challenges or Unexpected Opportunities

The CIW's biggest challenge is responding to requests in a helpful way, sometimes directing people to other organisations, while not veering from our set direction. The CIW must be realistic about what we can and cannot do. Ultimately, the CIW needs to develop a manual to guide users so that they can be self-sufficient in choosing indicators and analyzing trends to inform their planning.

Since the CIW Composite release, we have also seized some new opportunities. The CIW has been approached by the City of Guelph to assist them with their Community Wellbeing Plan, by Waterloo Region's Vital Signs (CFC), and by the Ontario Trillium Foundation. Our 2012 strategy will be to link these three requests to further the CIW goal to disaggregate CIW data to provincial and then municipal levels to inform local planning and to provide communities with a means to share best practices with one another.

Learnings

We have learned that it is more effective to manage a smaller number of partners than to try to please everyone. We have a local partner for a pilot study and a partner (CFC) keen to help us with knowledge mobilisation in communities across the country. Picking the right partner is key.



4. To implement a variety of communications strategies including website, list serve, op-ed editorials, online surveys, ongoing sharing of specific CIW information and networking through info@ciw.ca, and speaking and workshop presentations.

Progress

Communication and public capacity building of the CIW continues to be integral to the development of the CIW. This year, outcomes and accomplishments exceeded our expectations. This area of endeavour takes a great deal of work and at the time of each domain release, the work is very labour intensive. The CIW expanded its range of web-based materials in 2011 in an effort to enhance public education. Listed below are the new communication materials we released this year. Our infographic and video have been very well received and has left people asking for more. We have made great strides this year and will continue to add web tools to make the CIW “come to life”.

- **Environment** domain report (including Ideas for Positive Change), April 2011;
- **How are Canadians *Really* Doing? Highlights: The Canadian Index of Wellbeing 1.0** (user-friendly report on the CIW’s first release of the Composite Index), October 2011;
- **The Canadian Index of Wellbeing – Technical Paper: Canadian Index of Wellbeing 1.0** (methodology behind the Composite Index), October 2011;
- **Video: How are Canadians *Really* Doing?** (4.5 minute video explaining the purpose of the CIW and challenging Canadians to “start the conversation”) October 2011;
- **Infographic: How are Canadians *Really* Doing?** (clickable layered graphics on the website to visually represent the CIW overall, the domains, and the indicators for each); and
- Redesign of CIW website www.ciw.ca from external web host to uWaterloo server.

Please see section 3 for a full list of the varied ways we got the word out.

Challenges or Unexpected Opportunities

One of the challenges of being at uWaterloo (as with all universities) is the requirement to have all CIW media releases vetted by uWaterloo media relations. It also means that our releases go out under the uWaterloo Canada News Wire (CNW) account rather than a separate CIW account. Our external media advisor has suggested that this might result in some media missing our story if, for instance, they just scan by account name (uWaterloo). Another challenge is trying to be self-sufficient on campus with web design and support services. We have shared access to a co-op student each term, but the level of web design skill is variable.

Learnings

It is clear that the CIW strategy to hire outside communications (i.e., writing, media relations) to assist with key releases works well. While the CIW is fortunate to have some Communications support from AHS, CIW communications requires specialized understanding of social justice language and a current understanding of which journalists are sympathetic to our message. The CIW Advisory Board has therefore requested that the CIW continue to hire external communications expertise.



5. (a) To ensure a successful transition plan for a permanent and sustainable home for the CIW; and (b) To increase membership in the CIW Funders' Alliance now and through the transition to a new home.

Progress

- a) The CIW completed the move to its permanent home at uWaterloo.
- b) The CIW is very fortunate to have the ACF and Lawson Foundation continue to fund the CIW through the transition period. Upon arriving at uWaterloo in January 2011, the CIW gave AHS Director of Advancement, Meredith McGinnis, the prospect list identified for us through Ketchum Canada and the CIW staff has been available to assist AHS with fund development. To date, AHS has hosted two fund development receptions (April 7 at uWaterloo and October 20 in Toronto) to coincide with our major releases. Ms. McGinnis also presented her fund development strategy (which includes strategies for both short term and endowment funding) to the CIW Advisory Board on October 19th. While AHS was not able to secure any new funding in 2011, Dean Elliott stated her commitment to finding sustainable funding for the CIW at the CIW Advisory Board meeting Oct 19th. In addition, CIW staff is always on the lookout for funding opportunities.

Challenges or Unexpected Opportunities

AHS has two major funding priorities: the CIW and a new School of Public Health and Health Systems (SPHHS). The SPHHS launch happens in April 2012. In addition, the CIW must compete with other projects from across campus for large donations. This year, it meant that even though RBC has always been considered part of our Funders' Alliance, now that we are on campus, we have to compete with other unit for their funding.

Learnings

Fund development does not appear to be any easier at uWaterloo than it was at ACF. The reality is that there are few large donors out there and many competing good causes. Continuing to build relationships with potential funders is still a sound approach and will eventually pay off. The CIW is also working on some revenue generating ideas, and will apply for funding through standard university granting agencies and other channels to offset some project costs in the shorter term.

3. Opportunities to Share Knowledge

Over the course of 2011, there have been many opportunities for sharing the knowledge we have acquired with a wide range of CIW target audiences:

University of Waterloo Awareness and Capacity Building

- Roy Romanow keynote *"Celebrating the Canadian Index of Wellbeing's New Home in the Faculty of Applied Health Sciences at the University of Waterloo"*, Waterloo, April 7, 2011
- Alexis Morgan (CRAG member) lecture *"Canada's Environmental Path: Jeopardizing our Country's Long Term Quality of Life?"*, uWaterloo, April 7, 2011;
- Bryan Smale, guest lecturer, *"Canadian Index of Wellbeing: The Leisure and Culture and Healthy Populations Domains"*, uWaterloo, Social Determinants of Health course HSG 260, June 2011; and
- Alex Michalos (CRAG member) lecture *"Building the Canadian Index of Wellbeing"*, Faculty of Applied Health Sciences Hallman Visiting Professorship Lecture Series, uWaterloo, September 28, 2011.

Academic Presentations/Papers

- Smale, B. (2011, March). *The Canadian Index of Wellbeing: Data challenges*. Canadian National Collaborative Data Infrastructure Project, Canadian Association of Research Libraries (CARL) Research Data Symposium, Toronto, ON.
- Smale, B. (2011, June). *Canadian Index of Wellbeing: The Leisure and Culture and Healthy Populations Domains*. Social Determinants of Health, HSG 260, University of Waterloo, Waterloo, ON.
- Messinger, H., & Smale, B. (2011, June). *The Canadian Index of Wellbeing: An overview of evolution, structure and objectives*. 45th Annual Conference of the Canadian Economics Association, University of Ottawa, Ottawa, ON.
- Smale, B. (2011, September). *The Canadian Index of Wellbeing: Data challenges to celebrating collaboration and innovation*. Featured speaker, 2011 Canadian Research Data Summit: Mapping the Data Landscape, National Research Council and the CIHR, NSERC, and SSHRC Tri-Council. Ottawa, ON.
- Smale, B., (2011, May). *The Canadian Index of Wellbeing: The contribution of leisure and culture*. Thirteenth Canadian Congress on Leisure Research, Canadian Association for Leisure Studies. St. Catharines, ON.
- Smale, B. (in review). *The critical role of leisure and culture within the Canadian Index of Wellbeing*. Journal of Zhejiang University (Humanities and Social Sciences). [Note: this was an invited paper in lieu of the key note address at the 2011 International Leisure Development Forum in Hangzhou, China].
- Hyman, I., Mercado, R., Galabuzi, G.E., Patychuk D. (2011). A Critical Review of Social Exclusion and Inclusion Indicators: Implications for the Development of a

Canadian Framework. In *Social Statistics, Poverty and Social Exclusion: Perspectives from Quebec, Canada and Abroad*. Les Presses de l'Université de Montréal. Montreal.

- Muhajarine, N., R. Labonte, and B. Winquist. (in review). Healthy Populations in Canada. *Canadian Journal of Public Health*.

Government Awareness and Relationship Building

- His Excellency, The Right Honourable David Johnston, mentions CIW in speech posted on GG website, and makes a 3 minute taped message for CIW event celebrating the CIW at uWaterloo, April 7, 2011;
- CIW presentation by Alexis Morgan (CRAG Member) to the Simcoe County Council, organised by the Resilience Collaborative to coincide with the CIW Environment Domain report release, April 8, 2011;
- Ms. Sylvie Michaud, Director General, Education, Labour and Income Statistics Branch, Statistics Canada is designated as CIW contact;
- Letters from Roy Romanow to the Honourable John Baird, Minister of Foreign Affairs and the Honourable Jim Flaherty, Minister of Finance, Government of Canada, suggesting Canada should take a leading role (with Australia, New Zealand, Italy, UK, France, US) in supporting Phase 2 of the Stiglitz-Sen-Fitoussi (SSF) Commission, October 4, 2011;
- Op-ed by Roy Romanow and Monique Bégin, "The real story on Canadian wellbeing", *The Hill Times*, Oct 31, 2011;
- Former Prime Minister Paul Martin requests information on Environment domain for a speech and two interviews in which he mentions the CIW, Toronto, November, 2011;
- Roy Romanow keynote, *Securing the Future of Medicare: A Call to Care*, Canadian Health Coalition, Ottawa, November 30, 2011.

Public Awareness and Education

- Launch and release of the CIW's First Report, ***How are Canadians Really Doing?*** in June 2009 with good national media coverage supported by the CIW Network and a new website www.ciw.ca;
- Roy Romanow keynote, *Accelerating the Third Revolution in Public Health Care*, Association of Ontario Health Centres International Conference, Toronto, June 10, 2011;
- Malcolm Shookner (CRAG member), CIW presentation to event at Lakehead University (Orillia campus) called *Re-Searching Wellbeing: Finding a New Place to Start Policy*, organised by the Resilience Collaborative to coincide with the CIW Composite Index report release, from Toronto via video feed, October 20, 2011;
- Roy Romanow keynote, *Beyond GDP: How Canadians are Really Doing*, Royal University Hospital Foundation, Saskatoon, October 26, 2011;



- Bryan Smale blog, *In difficult times, we still need to protect our cultural identity*. Vital Signs, Community Foundations of Canada. Published online and available at: <http://canadasvitalsigns.wordpress.com/2011/10/17/in-difficult-times-we-still-need-to-protect-our-cultural-identity-ciw-director/>
- Bryan Smale blog, *During tough economic times, our leisure is even more important*. Leisure Information Network. Published online and available at: <http://www.lin.ca/2011/12/during-tough-economic-times-our-leisure.html>
- Mark Anielski presentation entitled “Measuring returns to wellbeing” at National Recreation Summit in Lake Louise, October 2011; and
- Simon Langlois, Université Laval blog on [Wellbeing](#), November 2011.

International Awareness and Mentorship

- Australia: [Establishing an Australian National Development Index: What Kind of Australia do we want?](#) Business prospectus mentioning CIW along with other global initiatives.
- Germany: [Measuring progress and well-being: Achievements and challenges of a new global movement](#). Report authored by Christian Kroll (London School of Economics) and published on October 7, 2011 by the Friedrich Ebert Foundation, Germany to inform the German parliamentary commission on measuring well-being.
- OECD: Wikiprogress blog, [The real story on wellbeing: A Canadian example](#), October 26, 2011.



4. Summary of Project Plans for 2012

With the release of the first composite index, the CIW can turn its attention to reporting regularly on a full array of wellbeing indicators, and to extending its research capacity, building usership, and promoting policy application. The CIW is therefore structured into two interconnected pillars: (1) **research**, and (2) **communications/knowledge mobilisation**.

In 2012, **Research** will focus on disaggregating the CIW data to the provincial level, mapping regional variability, and updating the CIW national indicator set to the most current year for which data are available (2010). This year will see the start of a Working Paper series to increase the volume of CIW academic published work and to dig deeper into the inequity of vulnerable sub-populations. This is an ambitious plan that has led to the hiring of an Associate Director of Research (Ph.D. level, part time as Senior Research Associate from January to July and full-time thereafter), and two research assistants (graduate student RAs) each term. Part of the research mandate will be to search for Tri-Council and other project-based funding, part of the requirement of being at uWaterloo. This funding will supplement the Faculty of AHS fund development plan being managed by Meredith McGinnis.

In addition, the City of Guelph recently approached us, because the consultant the City hired last year to work on their Community Wellbeing Plan identified the CIW as its organising framework! We have agreed to develop a subjective Community Wellbeing Survey for May/June 2012. While not all of the CIW indicators are relevant to a community-based subjective wellbeing survey, the survey will include a few of the national survey questions used in the CIW indicator set so that we can make direct comparisons.

In 2012, **Communications** will focus on ensuring that knowledge generated through research is translated and transferred to the public in an accessible fashion and contributes to dialogue and change through public engagement. For the October 2012 composite index release, the CIW is planning a two-stage approach. Stage 1 will be the release of an updated to 2010 Composite Index report that provides some analysis on the impact of the recession on Canadian wellbeing. Stage 2 will be another release a week later, with provincial level data. This will result in a double media hit and further visibility in provinces, particularly Québec, where CIW coverage to date has been slim. A preliminary set of interactive maps will be developed on the CIW website for the provincial release. As well, a co-op student (MA level) with expertise in social media will be hired for the summer term, to ensure the CIW builds its online presence in 2012. CIW Advisory Board member, the Honourable Monique Bégin has already indicated her interest in writing for the French audience and several CRAG members have expressed interest in contributing as well.

In 2012, **Knowledge Mobilisation** will focus on first steps in developing a manual that will show community-based users how to take the CIW framework and use it as a tool to collaborate and share best practices to increase wellbeing for their citizens. We now have renewed interest from Community Foundations of Canada (CFC, Vital Signs) in partnering



with the CIW Canada-wide. With new CFC CEO Ian Bird at the helm and Governor General David Johnston active as their Patron, the CIW is on the cusp of exciting collaborations. We also will continue to work with a few Community Health Centres (our Barrie/Simcoe pilot, and perhaps a rural CHC). We are convinced that these two key organisations are the best partners to ensure that the CIW gets broad uptake across the country within the next few years. Realistically, the agenda cannot be pushed any faster as disaggregating data to provincial and local levels – and/or identifying and compiling data at these levels – needs to happen first. This is on our research agenda for 2012 and 2013 and may take some work, as some indicators will not be available at the local level, and the CIW will have to explore the use of proxy indicators (e.g., visitation to national parks might be substituted at the local level by data on the use of municipal parks and trails). The milestone for 2012 is sitting down with our partners and mapping out a strategy and timeline, and drafting some of the user manual so that it can be completed once local indicators have been determined.

This year, we will also forge ahead with our government relations work to increase awareness among MPs. We have had inquiries from both the Liberal and Green Parties since our October 2011 release. CIW staff, in consultation with the CIW Advisory Board, will lay out a strategy for next steps. We are pleased to welcome Lynne Slotek back, part time, as Associate Director of Knowledge Mobilisation, to advance this work.



5. Success Stories

Usership Success Story

A small but strong leadership group, called the Resilience Collaborative (RC) led by the Barrie Community Health Centre, the County of Simcoe, the United Way of Simcoe, Lakehead University (Orillia campus), Public Health Unit, an Environmental Network, and a Children and Families Coalition, has broadened to become a community-based/cross-sectoral social, health, and environmental planning group for the area. In 2011, the RC hosted two events, one to coincide with the release of the Environment domain report and the other to coincide with the Composite Index release. In each case, the CIW supported their events by supplying the RC with advance confidential drafts of CIW documents so that this group could prepare a local Environment report, and by arranging to have CRAG members make presentations. On April 8th, Alexis Morgan presented CIW Environment findings to the Simcoe County Council. The RC then tabled their local Environment report and recommended policy changes that are currently under consideration. On October 20th, to coincide with the CIW Composite Index release, CRAG member Malcolm Shookner (via video feed from Toronto), presented Composite Index findings to an RC organised event at Lakehead University (Orillia campus) called *Re-Searching Wellbeing: Finding a New Place to Start Policy*. This group has a 2012 agenda that includes webinars, two community research projects involving students, a website, and working with Transition Towns. The CIW will continue to assist this group in whatever way makes most sense. They have turned into incredible ambassadors for the CIW. Whenever we receive requests for ideas on how to use the CIW at the community level, the RC fields these calls. The CIW intends to use the RC as a model for the development of a key component in a user manual.

Public Awareness Success Story

The CIW Composite Index release was hugely successful in terms of media exposure. As of November 22nd, the CIW's reach for 2011 was 33,957,558 through 389 separate news items. The type of coverage has been largely in print media, followed by broadcast, and some online/social networking, including an online *Globe and Mail* forum, handled by CIW CRAG member Marc Lachance, CIW Deputy Chair Monique Bégin, and CIW Project Manager Linda McKessock. Advertising value is estimated at \$1,312,676, which is the amount the CIW would have had to pay if we had advertised in print/broadcast media. The media campaign was very strategic in its development and execution. It required the support of a social justice media expert with connections to journalists that would typically cover this type of "soft" story.

Part of the media success was due to the very well received user-friendly materials created for October 20th. The foundation for the CIW Composite Index materials was the externally reviewed methodology paper, [The Canadian Index of Wellbeing – Technical Paper: Canadian](#)



[Index of Wellbeing 1.0](#), authored by Dr. Alex Michalos et al. for an academic audience. From this, a Highlights report, [How Are Canadians Really Doing? Highlights: The Canadian Index of Wellbeing 1.0](#) was written in the same engaging style used for the CIW Time Crunch report that met with great media exposure in June 2010. The highlights report included colour and graphics, and was geared to make the index understandable to the general public. The Executive Summary from that report and a very carefully crafted news release were given to the media to entice coverage. The [infographic](#), which brings the 64 indicators to life using pictures and percentages reflecting change, resides on the CIW website and is clickable from the home page.

The CIW also created a 4:15 min [video](#) with similar branding, entitled *How are Canadians Really doing?*, to explain the purpose of the CIW and inspire Canadians to “start the conversation” about the Canada they would like to see. In addition to residing on the CIW website, the video can be used in multiple ways (e.g., at conferences before introducing a CIW speaker, in fund development pitches, in high school and post-secondary curriculum).

The CIW website is the primary vehicle the CIW uses to communicate with all of our audiences (i.e., general public, policy shapers, government decision makers, and media). With the move to uWaterloo, AHS made the decision to bring the CIW website in-house. This involved recreating both the English and French CIW websites to work on the AHS server. Co-op students (shared with another AHS group) with programming skills were hired in the spring and fall 2011 terms to undertake this massive task. While there are some ongoing glitches that will be remedied in 2012, the CIW branding was maintained and the transition for visitors to the site was largely seamless.