SHARPENING OUR FOCUS

GUIDANCE ON WELLBEING FRAMEWORKS FOR CITIES AND REGIONS

Enabling Wellbeing

Guidance 2016

CarnegieUK
T R U S T

CHANGING MINDS • CHANGING LIVES

ACKNOWLEDGEMENTS

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CONTENTS

FOREWORD

The OECD and Carnegie UK Trust share the aim of improving wellbeing through better governance. At the global level, the OECD has been at the forefront of the development of wellbeing frameworks to measure social progress through its *Better Life* index and *How's Life in Your Region?* In the UK, Carnegie UK Trust has actively supported UK jurisdictions to develop wellbeing frameworks to guide their policy making.

Improving wellbeing in its broadest sense, encompassing social, environmental and economic outcomes, should be the key purpose of governments, at all levels. The mechanisms for measuring societal wellbeing are now well known at a country level and innovative governments have taken steps to embed this in policy making.

But the opportunities for improving governance through wellbeing frameworks are not restricted to the national level alone. Where you live matters. It affects your access to jobs, income, housing and your quality of life. Knowing about the difference in wellbeing between areas matters. It increases local policymakers' knowledge of their areas and population, which leads to better planning. It provides a starting point for tackling inequalities in opportunities that exist between and within regions and local areas. Where policy makers and analysts collaborate with local people to gather wellbeing data, citizens have a chance to say what matters to them. For example, in Toronto and Santa Monica, local authorities organised community groups to seek advice on which wellbeing dimensions the city should focus on. Regional and local wellbeing frameworks have the potential to make policy making more transparent and responsive to local needs, linking decision-making to sound and public evidence. This was the case in Genoa, for instance, where a well-being dashboard was introduced to guide the allocation of funds for social programmes within the city.

This *Guidance on Wellbeing Frameworks for Cities and Regions* provides insight from cities and regions that have been at the forefront of these developments, sharing lessons learned from developing wellbeing frameworks at national and local level. The guidance highlights the importance of local political leadership; the role of different levels of government, and how they can shape wellbeing at the local level. We encourage regions and cities to think about developing wellbeing frameworks and to share their experiences in order to promote wellbeing for all.
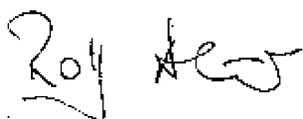
Rolf Alter
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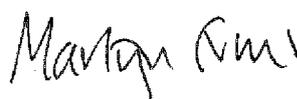
Martyn Evans
Chief Executive
Carnegie UK Trust

INTRODUCTION

Background

The OECD Better Life Initiative aims to support countries to better understand what drives people's wellbeing and what needs to be done to achieve greater progress for all. The initiative includes the measurement of a basket of indicators beyond solely the economic, to provide evidence to support the design of policies[1]. When measuring wellbeing, national averages often mask large differences within countries. So OECD has developed the *How's Life in Your Region?* initiative to provide a common framework and indicators to benchmark wellbeing in 395 sub-national regions[2]. This supports regions and cities to use wellbeing indicators in the design, monitoring and evaluation of policies. *How's Life in your region?* highlights the experience of regions that have used wellbeing strategies for policymaking.

The Carnegie UK Trust was established a century ago to improve the wellbeing of people in the UK and Ireland. In recent years, through research and practical activities, it has become a leader in measuring wellbeing and using it to influence public policy. In 2012, Carnegie UK Trust documented where wellbeing measurement was linked effectively to policy in case studies from selected OECD countries, in *Shifting the Dial: from Wellbeing Measures to Policy Practice*[3].

The Trust actively assists policy makers to develop wellbeing frameworks. It sees wellbeing as bringing together social, environmental, economic and democratic outcomes. Using this concept in Northern Ireland, the Trust established and chaired a *Roundtable on Wellbeing in Northern Ireland* to discuss wellbeing in the region and its links to policy. This resulted in a wellbeing framework

for Northern Ireland[4], laying out how to engage the public and tiers of government in using the wellbeing concept in policy.

Based on this shared understanding of wellbeing, the OECD and Carnegie UK Trust have come together to develop straightforward guidance for decision-makers on the benefits, challenges and possibilities of regional and sub-regional wellbeing frameworks in policy making. This guide aims to provide support to regional and city policymakers to bring together data and resources in a framework that has the capacity to shape policy for equitable and sustainable progress.

> ## BOX 1: DEFINITION OF LOCAL GOVERNMENTS AND REGIONS
>
> The local governments referred to in this guidance are regions and cities. The OECD classifies a region as the first tier of subnational government. They are called Territorial Level 2, and examples include the States in the United States, Provinces in Canada and Régions in Belgium and France. Cities in OECD countries are identified according to an economic definition as densely populated centres and their surrounding areas, linked to the city centre by high travel-to-work flows.
>
> Source: OECD, Defining Regions: http://www.oecd.org/regional/regional-policy/website-defining-regions.pdf

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1   OECD (2011). *Better Life Initiative: Measuring well-being and progress.* Paris: OECD Publishing. Accessed at http://www.oecd.org/statistics/better-life-initiative.htm

2   OECD (2014). *How's Life in Your Region? Measuring Regional and Local Well-being for Policy Making.* Paris: OECD Publishing. Accessed at http://www.oecd.org/gov/how-s-life-in-your-region-9789264217416-en.htm and accompanying website and web tool.

3   Carnegie UK Trust and IPPR North (2012). *Shifting the Dial: From wellbeing measures to policy and practice.*

4   Carnegie UK Trust (2015). *Towards a Wellbeing Framework: Findings from the Roundtable on Measuring Wellbeing in Northern Ireland.*

Figure 1: A Regional Wellbeing Conceptual Framework
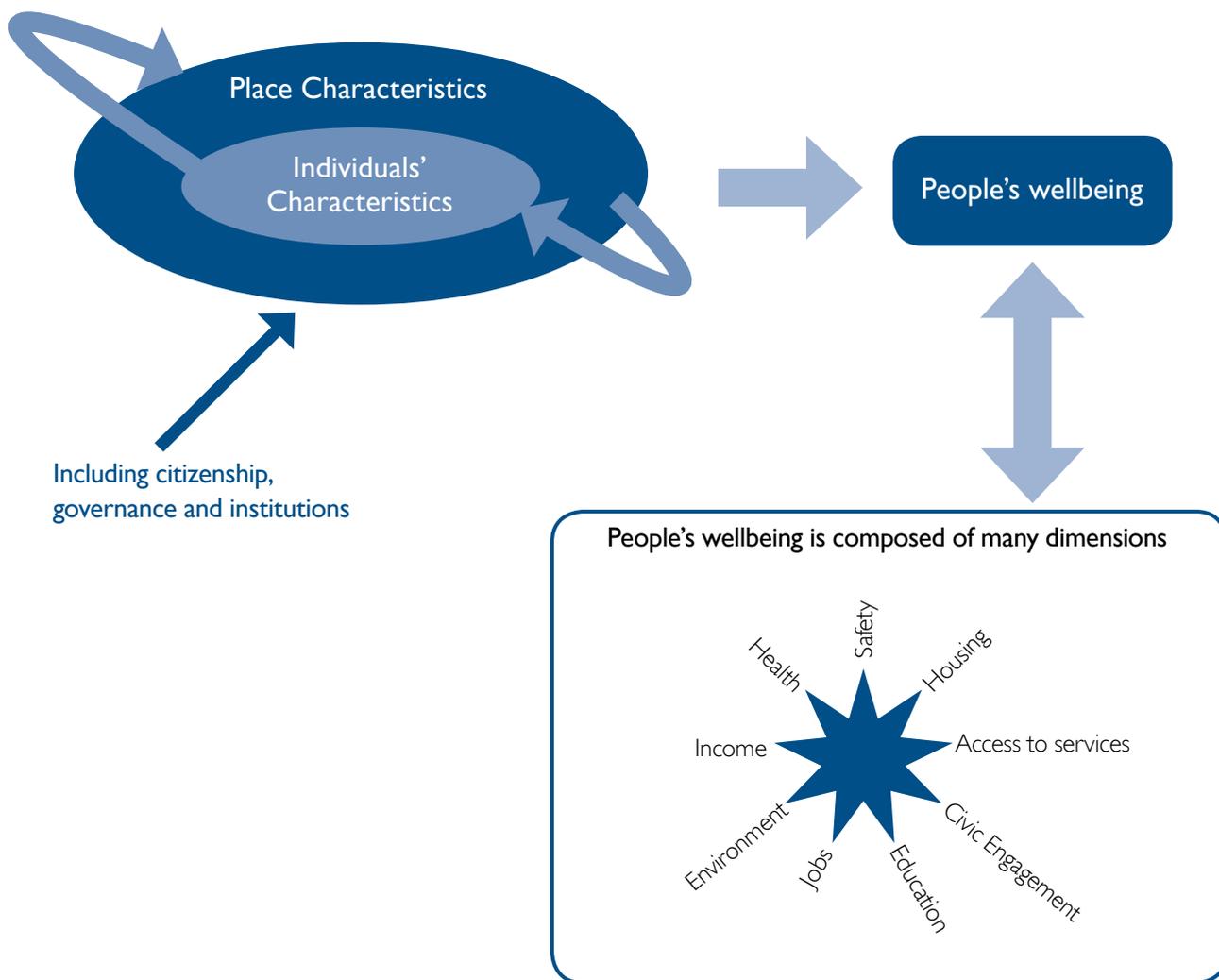
Source: OECD. (2014), *How's Life in Your Region? Measuring Regional and Local Well-being for Policy Making.*

What do we mean by "wellbeing" and "wellbeing frameworks"

Wellbeing is a widely used term that is open to various interpretations. In this guidance, we use the term to describe a way of understanding social progress. It is about far more than the health of individuals or how satisfied individuals are with their lives:

Societal wellbeing is a multi-dimensional concept that describes progress in terms of improvements in quality of life, material conditions and sustainability.

These three components of societal wellbeing form the basis of the basket of wellbeing indicators in the OECD's Better Life Initiative[5].

The Better Life Initiative developed wellbeing metrics at a national level that allow comparison between countries, but there is variation within, as well as between, countries. OECD's regional and local wellbeing conceptual framework has explored this further and it highlights the interaction between where people live and the other dimensions of wellbeing (see figure 1).

5   OECD. (2011), ibid.

How's Life in Your Region? identified nine characteristics of wellbeing (figure 1): income, jobs, housing, education, environment, safety, health, civic engagement and access to services. More recently, OECD has specified indicators for eleven wellbeing dimensions, adding in community and life satisfaction[6]. These dimensions have been chosen because they can help us understand the strengths and weaknesses of different regions and cities, but also because there are available indicators for measuring them across regions and cities of OECD countries.

This guidance illustrates how many cities and regions with an interest in promoting societal wellbeing have used the OECD Regional Wellbeing Framework as a starting point to develop their own framework and measures, which take into account local characteristics.

These local frameworks have a number of shared features:

- Purpose: They share the aim of understanding social progress 'in the round' and not prioritising one aspect of wellbeing over the others. Sometimes this is communicated in terms of a **mission statement**.
- Domains: They use sub-categories or **domains** of wellbeing, such as 'health' or 'education' to help people navigate the framework. Some frameworks go a step further and talk about **outcomes**, which are statements of the aims for social progress such as 'living long and healthy lives', and can be called **objective** wellbeing measures. In addition, in some cases to make the framework more complete, it might include recognition of how people feel about their quality of life or rate their happiness. These are **subjective** measures of wellbeing.
- Indicators: They measure progress towards the domains through a number of **indicators**. The number of indicators in a framework varies significantly, but usually there are up to 60 indicators.
- Communication: They **communicate** these visually through a dashboard often seeking to produce an overview of social progress on one page.

6   For more information, see OECD How's Life in Your Region Indicators Overview. Source: OECD Regional Wellbeing Database

From inputs to outcomes: the next step for wellbeing frameworks for cities and regions

Wellbeing frameworks provide an opportunity to move away from an inputs approach to an outcomes focus that shows the difference made by policy, programmes or services. Some wellbeing frameworks already do this but many use a mix of input and outcome indicators.

Outcome indicators measure the effect on people's lives rather than the inputs or activities that governments carry out albeit with the aim of improving lives. For example, public sector performance management may measure the number of police officers (input), while outcomes approaches would measure whether people felt safe in their neighbourhoods (outcome).

The mission statements for wellbeing frameworks are usually written with outcomes in mind, not processes. They reflect progress towards the region or city's definition of a better society, and indicators are chosen to measure change in these outcomes. Regions and cities have chosen indicators that are specific to their local context. For example, Southern Denmark has developed a wellbeing strategy to promote an "active, productive, and attractive" region, so one of its indicators is "An increase in the labour force by 5% per year" and another is "the number of people who think they think they use their abilities and talents in everyday life" (which is measured through a survey). In Community Indicators Victoria, in Australia, there are indicators for citizen engagement, such as, "the percentage of councilors who are female" and "the percentage of the local adult population who are members of a Decision-Making Board or Committee" (source: *Community Indicators Victoria, Data Framework*).

Preparing this guidance

Although *How's Life in Your Region?* has developed wellbeing indicators, simply picking these up and using them might be of limited value to policy-makers in cities and regions. That is because, firstly, wellbeing strategy and measurement will have more traction if it is developed in a participatory way, within the context of a region's priorities and aspirations. Secondly, in some areas the indicators recommended by *How's Life in Your Region?* aren't readily available, or not at the required level of disaggregation.

So regions or cities preparing wellbeing frameworks have to go through several steps. OECD describes this as a cyclical process of defining wellbeing objectives and related indicators, implementing policy and then adjusting measures (Figure 2).

However, implementing the wellbeing cycle of measurement is not without difficulties, for example it requires engaging stakeholders who have different objectives and capacities.

We have developed this guidance because we recognise the challenges faced by cities and regions that want to develop their own wellbeing frameworks to measure progress and prioritise resources. The guidance builds on *How's Life in Your Region?* by placing the concepts within a broader understanding of policy making.

To develop the guidance, we conducted a series of interviews in 2015/16 with 16 regions and cities, including some who participated in the *How's Life in Your Region?* project as regional case studies (see the Appendix for more details). In the interviews we explored the experiences of regions and cities that are developing and using wellbeing strategies, objectives and measures. The learning is captured in the guidance, which includes a checklist of the key points for local areas that want to develop their own regional or city wellbeing framework.

Figure 2: OECD Wellbeing Cycle of Measurement
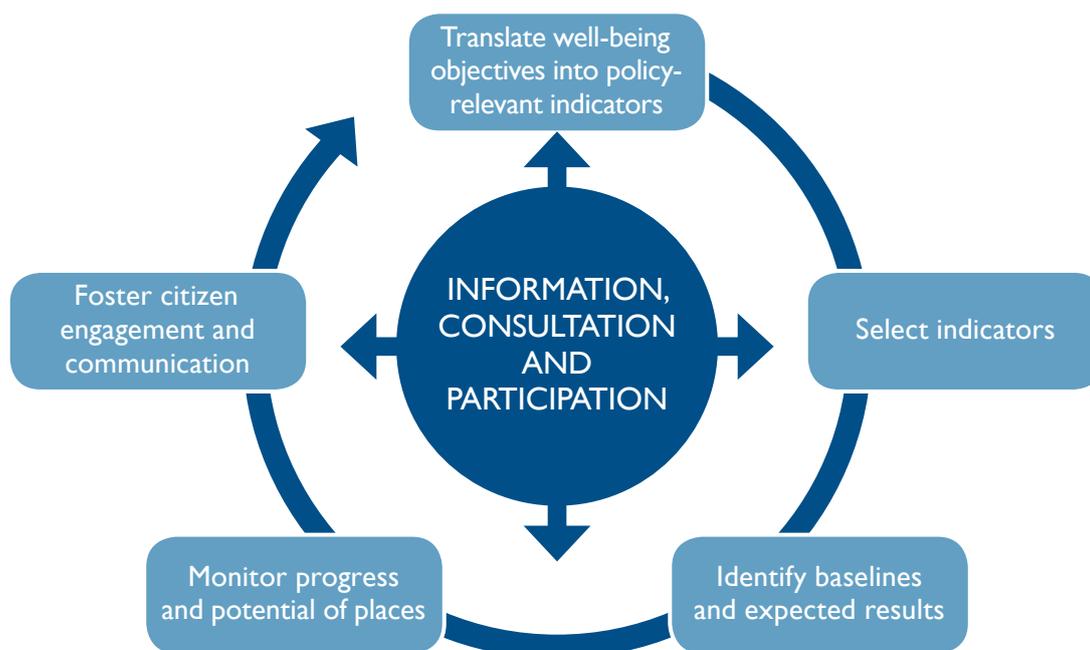
Source: OECD (2014), *How's Life in Your Region? Measuring Regional and Local Well-being for Policy Making*

Figure 3: Map of the case study areas

North America   Europe   Australia

🔴 **Set A**

1	Morelos, Mexico
2	Toronto, Canada
3	Santa Monica, USA
4	London, UK
5	Newcastle, UK
6	Wallonia, Belgium
7	Scotland, UK
8	Guelph, Canada
9	Southern Denmark
10	Somerville, USA
11	Genoa, Italy
12	Bologna, Italy
13	Melbourne, Aus.

🟣 **Set B**

a	Morelos, Mexico
b	Southern Denmark
c	Newcastle, UK
d	Rome, Italy
e	North Netherlands
f	Sardinia, Italy

Set A is regions and cities interviewed (13). Set B is the regions and cities with a *How's Life Your Region?* case study (6).

BOX 2: THE BENEFITS OF A WELLBEING FRAMEWORK FOR REGIONS AND CITIES

1. **Joined up government**: Wellbeing frameworks support cross-departmental working and provide a mechanism for governments to move away from more traditional sector-specific thinking.

2. **Informing policy development**: Wellbeing frameworks, which are outcome focused, provide a means of planning ahead and a lens for reflecting back on progress, which makes decision-making and spending more transparent.

3. **Citizen engagement**: Developing a wellbeing framework can catalyse a meaningful conversation with citizens about what matters to them where they live. It gives people, communities and non-government organisations an opportunity to express their priorities and later to see whether governments' are working towards them.

Why establish a wellbeing framework for a city or region?

Local governments of all sizes, from those responsible for 100,000 people to regions with several million people, are developing wellbeing frameworks. Where they are used, they support culture change in governance and public services: joining up government, promoting transparency and engaging citizens (Box 2).

Wellbeing frameworks support local government reform and improvement

Wellbeing frameworks have supported city councils and regional governments to make significant changes in their priorities and the way they govern.

Sub-national governments recognise they have a strong role to play in promoting the wellbeing of the communities and individuals they serve. To achieve this, they want to know more about what determines individuals' and communities' wellbeing.

The reasons city and regional governments start to define and measure dimensions of wellbeing range along a continuum from the desire to better understand citizens and communities, to the wish to measure the government's performance (see Box 3: Why Measure Wellbeing).

An impetus for many of these city or regional initiatives has been the desire for local elected leaders' or department directors' to learn about the differences between neighbourhoods, so they can plan services to address gaps or inequalities. For example, in Southern Denmark regional wellbeing indicators underpin regional policies, and illustrate the differences between municipalities and in Melbourne, Australia, wellbeing reports are available for all the 79 councils (see case study 5).

BOX 3: Why Measure Wellbeing in Regions and Cities

Making Sense	- Wellbeing is a multi-dimensional concept that takes into account the local context - A framework for gathering and organising available data.
Informing Policy	- Understanding what matters to citizens - Understanding the dimensions of wellbeing and how they might interact - Understanding how wellbeing is distributed within a city or region and flagging up differences between areas - Creating dialogue between government departments, overcoming silos and promoting joined up policy making - Developing plans which focus on making a difference (outcomes) - Measuring performance in terms of policy and programmes' impact on people (outcomes) - Promoting dialogue about plans and targets that have not been achieved.
Involving Citizens	- Focusing on people and communities, in addition to Gross Domestic Product - Promoting dialogue with citizens, and providing a mechanism for citizens to engage with policy making and government - Supporting the view that wellbeing is a shared responsibility, which lies with communities and individuals as well as the government.

CASE STUDY 1:
MEASURING GOVERNMENT PERFORMANCE IN SCOTLAND

The National Performance Framework in Scotland started with a change in government. It was the first time the new leaders were in power, and they wanted to innovate. They wanted to focus on the government's impact, and measure the outcomes of policy and associated actions.

At the same time, the Head of the Civil Service in Scotland was adapting the civil service's structures. He wanted to bring departments together and encourage more cross-government working.

These two drivers led to the National Performance Framework (NPF) for Scotland with the purpose of government articulated in seven high-level statements, and progress towards national and societal wellbeing measured by 50 indicators.

CASE STUDY 2:
STARTING A WELLBEING PROJECT IN SANTA MONICA

The city, municipality, of Santa Monica won the Bloomberg Philanthropies Mayors Challenge in 2012/13 for innovation, to launch The Wellbeing Project.

The City Council in Santa Monica wanted to "make a step-change" in its understanding of the community and how to support citizens. Santa Monica Council had a history of providing human services, but wanted to do even more following two incidents in the city leading to tragic deaths that affected all its residents. The City Council, looking to others for learning, saw a role in creating and using good quality data to achieve, and monitor, wellbeing impacts. So it initiated The Wellbeing Project, first defining what wellbeing was locally and then establishing wellbeing measures, collecting and analysing data to inform council-level decision-making.

Wellbeing frameworks have a role in retrospective as well as forward-looking planning. In Morelos, Mexico, wellbeing indicators measure the progress of the State's Development Plan. In Scotland, the wellbeing framework measures progress of the jurisdiction towards its long-term vision, and specifies targets for particular outcomes (see case study 1).

An important rationale for wellbeing is that it's an overarching concept that spans sectors and promotes joined up working between government departments. A city council department leader described it as the:

"ultimate umbrella...a framework in which everything else can fit"

This means wellbeing policy can assist designing solutions to issues that span more than one sector (see case study 5).

Several areas highlight the value of wellbeing measures and policy in terms of increasing dialogue with citizens about what matters, and even increasing the involvement of citizens in government. For example, in Wallonia, Belgium, citizens defined what wellbeing for all looks like. The regional government now measures progress with input from communities, which means more people are participating in monitoring the impact of government policy.

These further three case studies provide examples of wellbeing frameworks and measures interacting with communities and influencing wider regional and city level policy. We hope they and the other case studies encourage you to start on the journey of developing a wellbeing framework.

a. Using wellbeing to define and monitor city policy

CASE STUDY 3: GREEN AND GENDER POLICY MAKING IN BOLOGNA

In Bologna (population 375,900), Italy, the Department of Economic Programming and Development worked with 29 municipalities to develop a dashboard of wellbeing indicators, based on the Italian BES indicators, to support local level politicians and administrators to determine, and then evaluate, policy.

For example, in the "Green Budget", a situation analysis is undertaken annually, which includes some of the wellbeing indicators, "to make the right policies" (interviewee from City of Bologna).

Programmes of activity, with attached budgets, to meet the policy aims are agreed. The outputs and spending in the "Green Budget" are monitored over the year and a report fed back to the population. So, in this sector the wellbeing indicators act as pivotal links in a virtuous cycle of policy setting, budgeting, and monitoring leading to subsequent adjustments in policy and spending. There is a similar process for the Gender Budget: where the government works closely with relevant citizens associations.

The Department believes that wellbeing is everybody's business and to improve wellbeing many actors – such as citizens, community associations, municipalities, city and national government – need to work together. The process of using the BES dimensions of wellbeing and appropriate local indicators to measure change has increased the involvement of citizens in municipal level planning.

b. Using wellbeing to develop a sectoral strategy with cross government involvement

CASE STUDY 4: THE SCOTTISH JUSTICE STRATEGY

In Scotland (population 5.4 million) senior politicians and high-ranking civil servants wrote the National Performance Framework (NPF), to reflect the purpose of the Government to promote economic growth and the wellbeing of the nation. The Framework had an immediate impact on the structure of the administration in Scotland and is a performance measure for all government directorates.

It influences the formation of policy, too. For example in the Justice Division, the Director saw the value of the National Performance Framework outcomes approach and engaged the many people and organisations linked to Justice in Scotland in developing a "Justice Strategy for Scotland"[7] with the aim of contributing to a flourishing Scotland. The strategy focuses on the three outcomes in the NPF most relevant to the justice sector, and has established a measurement cycle. Firstly, justice outcomes were derived below each of the three NPF outcomes, then indicators where selected and now they are measured, and then analysed and fed back to the Justice Board which has oversight for the Strategy and progress of its programmes and delivery of its outcomes. The indicators are displayed in a **Justice Dashboard**.

Like the NPF and wellbeing frameworks in general, the Justice Strategy recognises the importance of working collaboratively across government, and highlights the need for all parts of the justice system to work together to achieve success.

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7   "Justice Strategy for Scotland", Scottish Government (October 2012)

c. A community indicators framework provides evidence for local government decision-making

CASE STUDY 5:
BALLARAT COUNCIL AND COMMUNITY INDICATORS VICTORIA

Community Indicators Victoria (CIV) began at Victoria University and now is based at the University of Melbourne. CIV measures progress across five domains of wellbeing, with underlying policy areas, using both existing administrative data and the specially developed survey it first ran in 2007 – the Community Indicators Victoria Survey. Victoria has 79 Councils or Municipalities and CIV cover all, producing wellbeing reports that allow municipalities to compare themselves with other areas. CIV is clear that the indicators are just that – they illustrate where problems, issues or successes might lie – but the users of the wellbeing reports and profiles, municipalities, then need to investigate why.

One council, City of Ballarat (population 93,500), has connected the CIV wellbeing profile to their policy by working in partnership with CIV.[8] They use it in health, community safety, early years, youth and older people's service design. It has provides them with a robust planning and monitoring framework, which is independent of any one political party.

Philanthropy organisations use CIV in funding decisions, when they are looking for the policy areas where they will create the greatest impact.

The CIV staff at the McCaughey Centre, University of Melbourne, are supporting voluntary and community groups and projects to use CIV data to measure their impact, plan and to identify project outcomes in terms of community wellbeing outcomes. This includes using wellbeing indicators to engage the wider community, and to increase the effectiveness of local interventions.

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8   Davern et al "Best Practice Principles for Community Indicator Systems and a Case Study Analysis: How Community Indicators Victoria is Creating Impact and BridgingPolicy, Practice and Research" (February 2016) published online in Social Indicators Research

The process of developing a wellbeing framework

Where regions and cities have started to develop sustainable wellbeing frameworks and measures, they are following several, common actions. Figure 4 and the accompanying checklist summarise those steps, which often are not sequential but overlapping and ongoing.

Figure 4: The steps to establish a wellbeing framework in a city or region
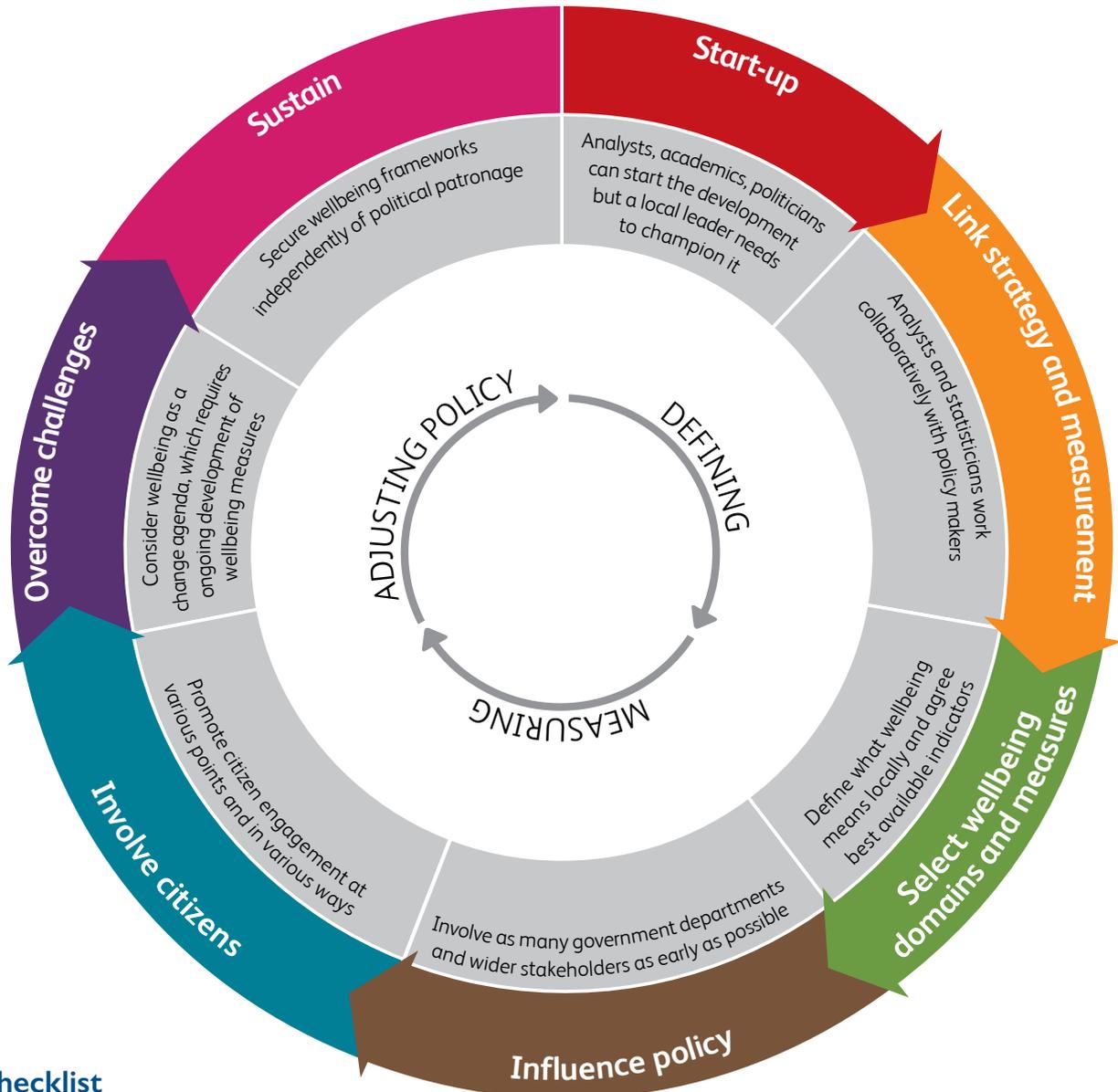
Checklist

☑ **Start-up a wellbeing framework**
Analysts, academics, politicians can start the development, but a local leader needs to champion it

☑ **Link strategy and measurement**
Analysts and statisticians work collaboratively with policy makers

☑ **Select wellbeing domains and measures**
Define what wellbeing means locally and agree best available indicators

☑ **Influence policy**
Involve as many government departments and wider stakeholders as early as possible

☑ **Involve citizens**
Promote citizen engagement at various points and in various ways

☑ **Overcoming challenges**
Consider wellbeing as a change agenda, which requires ongoing development of wellbeing measures

☑ **Sustain a wellbeing framework**
Secure wellbeing frameworks independently of political patronage.

CHAPTER 1. START-UP A WELLBEING FRAMEWORK IN CITIES AND REGIONS

Key Point 1: Government data analysts, academics, elected representatives or civil servants can all start the development of a wellbeing framework.

Key Point 2: A local government leader, such as the City Mayor, championing the framework increases the likelihood it will spread across government.

The starting point for developing integrated wellbeing matrices and policy varys: in some cities and regions it began in statistical offices; whilst in other areas it comes from a politician, for example the Governor in Morelos in Mexico (see case study 6) and the Cabinet Secretary for Finance and the Economy in Scotland.

In some areas, the wellbeing agenda has grown slowly over time. For example, in Toronto for more than a decade the Research Unit in the Social Development Division was collecting data on specific strategies at neighborhood level. Over time other divisions in the city administration became interested in this analysis, and Wellbeing Toronto began in 2010. It started by asking citizens about their concept of wellbeing and then developing ten domains of wellbeing, with underlying indicators.

Another example of a research unit starting the initiative is Somerstat in Somerville, America, where the Director had the idea of running a wellbeing survey, after learning about the "What Matters?" debate and the start of the Measuring National Well-being programme in the UK[9].

In Italy, too, developments have come through statistical offices. There, the Italian National Statistical Office (ISTAT) encourages municipal level wellbeing frameworks, based on the multi-dimensional, regional wellbeing framework, BES[10].

Where researchers or national initiatives start local wellbeing initiatives, high-level commitment from a local politician is important. The importance of the city council and its leader to the integration of wellbeing in local government is borne out by several examples, not least in England, Italy, Southern Denmark and the U.S. In Somerville, the Mayor's Office of Innovation and Analytics quickly involved the mayor with its idea to do a wellbeing survey.

A Deputy City Mayor who led on the development of a wellbeing dashboard started by ISTAT in Italy said:

"I think what is important is the political commitment of the mayor".

Leadership from the top – of the local, regional or city government – increases the chance that wellbeing measurement and strategy will fulfill its potential of going beyond GDP and focusing on a flourishing society. If wellbeing becomes just another project it won't be sustained or integrated into high-level decision-making.

CASE STUDY 6:
MONITORING THE STATE DEVELOPMENT PLAN IN MORELOS, MEXICO

The State of Morelos in Mexico is using wellbeing to promote social development, and the State Governor is leading this. After its election, the current regional government started to update the State Development Plan with key aims of tackling crime, consolidating the Rule of Law and improving wellbeing and quality of life. The Ministry of Finance has led the development of the plan and the development of its targets and progress indicators. The development of the plan included consulting with citizens, promoting more collaborative public policies, and an increasing ability to monitor progress towards the plan's development objectives.

9   Office of National Statistics, ONS, (2011) *Measuring What Matters.* London.

10 BES is the "Benessere Equo e Sostenibile" is a national initiative launched by The Italian National Institute of Statistics (Istat) and the Italian National Council for Economics and Labor (CNEL) for the identification of a set of indicators for measuring Italian "Equitable and Sustainable Well-being".

CHAPTER 2. LINK STRATEGY AND MEASUREMENT: PROMOTE COLLABORATION BETWEEN STATISTICIANS AND POLICY MAKERS

Key Point 3: When wellbeing analysts and statisticians work collaboratively with policy makers a wellbeing framework provides a structure for reviewing policy and progress.

Wellbeing frameworks are positioned inside and outside of government. Inside government, wellbeing frameworks in overarching or influential parts of government have the advantage of being able to reach out to multiple departments. Examples of centrally located initiatives include, the city council or mayor's office in North American (e.g. Somerville, Santa Monica) or European cities and the Social Development Division in Toronto. Although starting wellbeing frameworks in a crosscutting department may accelerate its uptake, it's still necessary to communicate with policy makers across government early in the process, to encourage them to become involved.

In many instances, governments are nudged and supported to develop wellbeing frameworks and monitoring by universities or statistical institutes (ISTAT in Italy; Walloon Institute for Evaluation, Prospective and Statistics, Belgium; University of Waterloo, for Guelph, Canada, and the University of Melbourne in Victoria, Australia). The partnership between IWEPS and Wallonia region is outlined in case study 7. In several cases the academic institutions have helped develop new, additional surveys to measure wellbeing, including subjective wellbeing.

Where wellbeing thinking and data comes from outside of government the challenge is to gain traction within government. This is important both for the development of wellbeing indicators and the feedback into policy. Analysts need to access baseline and monitoring data from across departments, and that is more difficult where data is not openly available, analysts are external to government or government departments aren't signed up to the initiative.

Analysts working in government facilitate close links between the statisticians and policy leads. For example, in Scotland, the National Performance Framework wellbeing analysts are in the Office of the Chief Statistician, which is seen as analytically robust, and this helps them access data from all government departments.

CASE STUDY 7:
PARTNERSHIP WORKING IN WALLONIA, BELGIUM

In 2009, Wallonia Region developed a Social Cohesion Plan under the framework of the Council of Europe, where the social cohesion of a region is determined by its capacity to promote wellbeing.

From the beginning of the Plan, the regional administration formed a close partnership with the statistical institute, the IWEPS. Together they developed indicators of health and wellbeing. From this work the regional government became interested in measuring more than economic progress. As a first step they gathered ideas about wellbeing from 16,000 citizens. What people said is important to them has been amalgamated into 30 domains of wellbeing, which are linked to the Social Cohesion Plan. The domains of wellbeing are measured using administrative, census and existing data and this contributes to the monitoring and evaluation of the plan. The result has been:

"policies which respond much better to problems"

"interesting and pertinent policies"

(Interviewee from IWEPS).

CHAPTER 3. SELECT WELLBEING DOMAINS AND MEASURES FOR CITIES AND REGIONS

Key Point 4: Start with a theoretical framework, but define what wellbeing means to local stakeholders and communities, and agree the best available indicators with a range of stakeholders.

A typical starting point for wellbeing policy and measurement is to develop a theoretical framework. This might come from existing conceptual models, such as the Health Map of Human of Habitat[11] used by Newcastle or the Council of Europe SPIRAL methodology[12] used by Wallonia. Also, a review of wellbeing policy and indicator development elsewhere can provide a basis for a new framework. The frameworks generally define domains of wellbeing the same as, or similar to, the dimensions in the OECD Regional Wellbeing Framework. Then indicators are sought which closely relate to those domains.

Although the theoretical framework underpins the choice of indicators, in many cases selecting the indicators is a pragmatic process. Few wellbeing initiatives have dedicated funding so they use indicators that exist already.

"what we are really trying to do is use existing data, well, because you know under austerity that's a thing we can't afford collecting loads and loads of new bits of information"

INTERVIEWEE LEADING
WELLBEING INITIATIVE IN A CITY

Generally, the available data is objective wellbeing data collected at community, municipal/city, regional or national level. To develop a more complete wellbeing measure, areas can supplement this with subjective wellbeing indicators. Regions and cities like Southern Denmark, Santa Monica U.S., (see case study 8), Wallonia, and Guelph, in Canada, have specially designed surveys or citizens' panels to gather and monitor this dimension. In Somerville, the U.S., the subjective wellbeing survey is the core of the analysis: where the results of the happiness survey are checked against census data to investigate what factors appear to be connected to happiness (see case study 9).

Citizens are consulted to a varying degree and at various times in regional and city wellbeing measurement. This varies from defining local wellbeing domains by asking citizens what wellbeing means to them (see case study 7 in the previous chapter), to direct engagement with citizens starting after the framework and monitoring has been established. (See chapter 5 for more detail).

Wellbeing indicators are displayed in different ways. Composite indices, developed by combining and amalgamating multidimensional data, provide a single unified view, but make it difficult to know what's happening in each of the wellbeing domains. Some indices provide a measure of wellbeing distilled down to one number (such as the "Index of Conditions of Wellbeing in Wallonia – ICWP"[13] and the Canadian Index of Wellbeing[14]). The composite index acts as an entry point to the data, and you can go on to explore the indicators that underpin it.

11   Barton, H. and Grant, M., (2006) A health map for the local human habitat, Journal of the Royal Society for the Promotion of Public Health, 126 (6) pp252-261.

12   SPIRAL is Societal Progress Indicators and Responsibilities for All http://oecd-we-wikitest-cs.cloudapp.net/data/dataset/spiral-social-progress-indicators-for-the-responsibility-of-all

13   "Indicators complementary to GDP – ICWB", April 2014, Walloon Institute for Evaluation, Prospective and Statistics (IWEPS)

14   Canadian Index on Wellbeing (2012) *How are Canadians Really Doing? Ontario, University of Waterloo* https://uwaterloo.ca/canadian-index-wellbeing/

CASE STUDY 8:
ESTABLISHING THE SANTA MONICA WELLBEING PROJECT

The Wellbeing Project began by researching wellbeing frameworks worldwide and developing a set of possible wellbeing dimensions for the city. It established an international expert group to review these, and associated indicators, within the local context. Then, community members reviewed the dimensions and indicators. Six dimensions were chosen for the wellbeing index, five on the conditions for wellbeing and a sixth, "outlook", which takes account of how people feel.

A mapping process was undertaken to identify which indicators had available measures and where new data (mostly from survey work) was needed. A new residents' survey, the City of Santa Monica Wellbeing Survey[16], was conducted to complement existing city administrative, programming, and social media data.

An ongoing task is changing the routine data the city collects to be more aligned with the wellbeing framework.

Alternatively, more detail can be presented through showing a range of indicators, for example in a dashboard[15]. The dashboard approach has been adopted by the OECD in its publication *How's Life? 2013: Measuring Well-being*. Many regions or cities express their wellbeing data using dashboards, which show the performance of individual indicators and, by inference, the domains or outcomes they relate to. Some examples of dashboards are the cities of Genoa (Italy), Newcastle (UK), and the regions of Scotland (UK) and Morelos (Mexico).

15   Wallace, J and Schmueker, 2012, *Shifting the Dial*, p8, box 1.2

16   First launched in September 2014.

CHAPTER 4. INFLUENCE POLICY: INCREASE THE IMPACT OF WELLBEING FRAMEWORKS ON CITIES AND REGIONS

Key Point 5: Communicate with, involve, and create buy-in of government departments and wider stakeholders as early as possible in the development of the wellbeing framework.

Wellbeing frameworks often lead to a discussion of "why": why a trend is occurring? Why has there been a change in an indicator?

This analysis of the story behind the statistics is an important influence on policy making. It moves the debate beyond a more narrow economic or service-specific focus; it helps policy makers understand the underlying conditions affecting communities' wellbeing and what might be triggers for problems; it enables more impartial decision-making.

The wellbeing measurement cycle can act as a scrutiny tool within government. For example, in Scotland if there is an improvement or decline in an indicator the policy-maker leading the framework will explore with the relevant government department the reasons for the change.

In several regions and cities, such as Morelos, Mexico, and Somerville, U.S. (see case study 9), a unit housed in the Ministry of Finance or Finance Department manages the performance or wellbeing framework. This makes it more likely the wellbeing framework will influence action, because of leverage over budgets.

Although a strong connection to budgetary process can facilitate the impact of wellbeing frameworks, not all governments or organisations start wellbeing frameworks from Ministries of Finance or have a strong influence over budgets. Then, ongoing dialogue, building strong relationships and partnerships are important in influencing policy and programming. This is apparent in several areas, including: Santa Monica where the Wellbeing Project is seeking to mainstream the initiative across all city departments; the partnership developed between the City of Ballarat and Community Indicators Victoria, which is located in a research centre at the University of Melbourne; and Southern Denmark, where the national statistics office, in consultation with the municipalities, is developing a Regional Growth and Well-being Strategy.

CASE STUDY 9:
WORKING WITH CITY DEPARTMENTS TO INFLUENCE DECISIONS IN SOMERVILLE, U.S.

In Somerville, over a decade ago, the Director of Somerstat was inspired to run a happiness survey. She quickly discussed this with, and got the agreement of, the Mayor.

Somerstat, in the Mayor's Office for Innovation and Analytics, tracks and interpret the city's data. This means Somerstat develops the city's budget, works in partnership with department heads, and is involved in their policy and programming discussions and funding allocations.

Where life satisfaction measures from the happiness survey can be correlated to a discernible factor(s), Somerstat shares that knowledge and can influence funding decisions. For example more resources were allocated to the Traffic and Parking Department when the survey indicated a strong relationship between parking and satisfaction with a neighborhood and the city.

CHAPTER 5. INVOLVE CITIZENS: CONSULT AND COMMUNICATE ABOUT WELLBEING FRAMEWORKS IN CITIES AND REGIONS

Key Point 6: Promote citizen engagement at various points and in various ways: in defining what wellbeing means; through presenting wellbeing data in a simplified format and providing online, interactive tools.

Some areas begin their wellbeing framework by asking the population what is wellbeing, and what affects their wellbeing. Cities, like Toronto, consulted existing, local non-government organisations, whilst others, like Santa Monica, sought the advice of community groups on the indicators the city should use to measure wellbeing.

The challenge for working with existing civil society groups and charities can be the extent to which they represent the wider population, especially in some areas where there are well-known advocacy groups, or even individuals, who might dominate the conversation.

Ideally, a widespread, in-depth consultation at the start of the process will prompt citizen engagement, as in Wallonia where the Statistical Institute held a extensive conversation with the population to define the domains of wellbeing. Population surveys heighten people's awareness of wellbeing strategies, for example, in Newcastle and Somerville.

The potential for citizen consultation to raise awareness about wellbeing is well recognised, but a limiting factor appears to be the commitment (of governments) to pay for it:

"we could do amazing things..involving citizens.. but don't have the resource to do it"

<div align="right">INTERVIEWEE FROM A
COMMUNITY WELLBEING INITIATIVE</div>

As well as consulting with citizens on domains and indicators, people can be involved once wellbeing frameworks have been developed. Cities like Toronto and Somerville promote greater awareness through developing feedback loops, where data and survey results are shared and discussed with communities. Making wellbeing data easily accessible increases government transparency, especially if the data is linked to decision-making, as in the case of Genoa (see case study 10). Increasing transparency of decision making increases the possibility for citizens to hold their government accountable and increases trust.

Presenting wellbeing measures on an ongoing basis in a simple, attractive, accessible manner promotes citizens' engagement in wellbeing policy. So cities are developing accessible approaches to reporting on wellbeing, with different levels of detail given to the public and to policy makers. Interactive websites like CIV, Santa Monica Wellbeing, London Ward Wellbeing Scores and the Wellbeing Toronto Tool all encourage users to "connect with their city" and on many you can compile live reports, view maps or small area wellbeing profiles.

Increasing citizens' engagement with wellbeing policy supports the view of many governments that the declining role of the state (for example in welfare service provision) heralds the need for communities and individuals to be more responsible for wellbeing. However, the experience of regions and cities with wellbeing frameworks is that promoting citizen engagement requires substantial planning and effort.

CASE STUDY 10:
REDUCING INTRA-CITY CONFLICT OVER RESOURCES IN GENOA, ITALY

Deputy Mayors in Genoa in Italy began a wellbeing initiative to create a dashboard of indicators to enable more impartial decision-making in the Metropolitan City's municipalities. The process was led by the Department of Welfare, Wellbeing and Public Dwelling to develop a more concrete and transparent basis for local welfare policy. The department wanted to make programming changes in light of the impact of the economic crises on citizens' welfare, but the welfare providers were resisting these. The key advantage of developing the dashboard is increased transparency of decision-making, reducing conflict between different districts where individual District Presidents have been prone to contest the expenditure on other districts. The framework also has brought together and made use of existing large, local databases.

The process of developing the dashboard, consulting with staff in the city's administration, social workers, trade unions, the non-profit sector, service providers brought together different stakeholders, spanning sectors and policy and practice.

CHAPTER 6. OVERCOME CHALLENGES: ESTABLISHING WELLBEING FRAMEWORKS IS A CHANGE AGENDA

Key point 7: Consider developing a wellbeing framework as a change agenda, which requires time and resources.

Key point 8: Ongoing development of appropriate wellbeing measures requires the generation of appropriate indicators that reflect changes in wellbeing and open access to sufficiently disaggregated data.

Many wellbeing officials, whether researchers or local policy makers, say that using wellbeing in policy requires a new way of thinking. Administrators and elected representatives jump to the conclusion that wellbeing is about personal life satisfaction or happiness, and might assume that wellbeing is the responsibility of the health department and not for them. So a challenge for implementing wellbeing frameworks is to persuade people about the wider dimensions of wellbeing:

"the biggest challenge is that it's more to do with cultural change and the hearts and minds change"
INTERVIEWEE FROM
LOCAL GOVERNMENT

In the words of one policy-maker, to promote wellbeing policy and measurement you should:

"Try to understand it as a cultural change agenda, rather than doing what you have always done"
INTERVIEWEE LEADING
WELLBEING INITIATIVE IN A CITY

Wellbeing measurement makes strong use of existing data. This provides several challenges:

1. Choosing what to measure. The domains of wellbeing and objectives of a strategy may have been decided, but the question remains as to what can best indicate progress towards the wellbeing objectives. There is the continual issue of how closely the (available) chosen indicators approximate to a real change in wellbeing (see case study 11).

2. Availability of data. It might be a closed culture in government acts to prevent the sharing of data; or, in one city, the country's privacy law was an impediment, whilst in another the national statistics authority (in the past) charged for data. Regions and cities get around these impediments by narrowing down their ideal list of indicators (for the wellbeing domains) to what is available, for free. An increased international push for open data in this decade has helped increase accessibility of data.

3. Depth of data. Regions and cities struggle to find data that is significantly disaggregated to their level, especially when cities want to look at differences between neighborhoods or municipalities. For example, in Toronto, Vital Signs, a national and city-wide initiative, reportedly finds it easier to access data than Wellbeing Toronto finds it to access community level information.

4. Impact on decision making. Regions and cities feel that the impact they have on wellbeing is muted by their lack of control over policy decision-making (for example health policy) or budgets, where higher-level government controls the expenditure on services that impact wellbeing.

"The main problem is that the region itself does not really have decision making power in many areas that matter for a good life"
INTERVIEWEE FROM
REGIONAL DEPARTMENT OF
STRATEGY AND ANALYSIS

This implies the impact of wellbeing frameworks would be increased if tiers of government (national, regional, local) had more aligned wellbeing aspirations and measures.

CASE STUDY 11:
MEASURING WELLBEING AT NEIGHBOURHOOD-LEVEL IN TORONTO, CANADA

In 2010, the city of Toronto's Social Development Department launched Toronto Wellbeing, which collates and analyses neighbourhood-level data under ten wellbeing domains.

Like other wellbeing initiatives, it struggles with attribution: that is, being confident that changes in an indicator over time are as the result of a policy change. For example, Toronto is measuring poverty levels, and it has a Poverty Reduction Strategy (which accounts for approximately 4% of its budget), but it is difficult to agree to what extent any observed change in poverty indicators is attributable to that strategy.

The question of attribution is one reason that Wellbeing Toronto thinks that tying the indicators to performance management can be problematic, and also because it can be interpreted as managing an individual's performance. However, now Wellbeing Toronto is well established, it is developing a monitoring system to measure policies and services against benchmarks.

CHAPTER 7. SUSTAIN: MAKING ADJUSTMENTS AND ENSURING LONGEVITY

Key point 9: Secure wellbeing frameworks independently of political patronage.

In an effective wellbeing cycle wellbeing indicators are monitored over time and fed back into policy and programmes that impact wellbeing.

Ensuring the longevity of wellbeing frameworks is a challenge. In many instances a prominent politician sponsors government frameworks, which provides momentum at the start of the process. However, in representative democracies political involvement is risky as the wellbeing agenda may come to be seen as the domain of one party and, by implication, not something to be pursued by opposing parties. Several case studies show that wellbeing needs to be secured independently of political patronage. At one end of the scale this is represented by the view that wellbeing initiatives should be data-driven, focusing on the delivery of accessible products, such as maps and profiles.

Another path to influencing policy in a non-partisan way (that could be combined with the research emphasis) is wellbeing becoming a shared vision for government, which stretches beyond one political party or politician. To achieve this, administrators, government civil servants, and politicians need to work closely together. For example, in Scotland the National Performance Framework began with the new government's desire to work towards an overarching strategic purpose, and a small set of (five) strategic objectives, coupled with the organisational changes such as the civil service moving from a department to divisional structure, focusing more on joined-up working to met the overarching objectives.

Such structural changes in systems of government can last beyond a political cycle and promote sustainability. Use of wellbeing in parliamentary structures, such as the committee system in the UK and its jurisdictions, also encourages sustainability.

An incentive for this is legislating to require governments to consider wellbeing, for example

through the *Community Empowerment (Scotland) Act 2015*. Wellbeing initiatives outside of government, like those in Australia, also use legislation as a hook to involve local government in wellbeing analysis. The *Municipal Public Health and Wellbeing Act 2008* (Victoria) requires municipalities to develop evidence-based policy and CIV has been able to meet the resultant need for evidence for local government planning.

Increasing the buy-in to wellbeing policy from a range of non-government stakeholders, including wider civil society and special interest groups, increases the chance of a sustainable framework. As stakeholders become committed to it, they are likely to want government to maintain and grow the wellbeing agenda, and may apply pressure in support of this.

CASE STUDY 12:
HOW A CHANGE IN GOVERNMENT AFFECTED THE WELLBEING AGENDA, IN GUELPH, CANADA

In Guelph, Canada, the city contracted the university department responsible for the Canadian Index of Wellbeing to develop qualitative and quantitative measures to assess the city's wellbeing and conduct a wellbeing survey. It was seen as a positive example of aligning a city's activities to achieve wellbeing. Guelph Wellbeing was a led by the Mayor, a political appointee. When an opposing party gained the mayor's seat, there was a backlash against Guelph Wellbeing, which was viewed as the domain of the previous incumbents and promoting expenditure in a time of austerity. Guelph Wellbeing hadn't been sufficiently embedded for it to continue at city level without a champion. Although some administrators in city offices and community organisations are still interested in using it, the initiative has stalled publically with the change in the local government.

CONCLUSION AND NEXT STEPS

The experience from across the world reflected in case studies behind this guidance is that implementing a wellbeing framework can have a transformative effect on governance.

People have various reasons for embarking upon the process of establishing a framework: some are interested in transparency or accountability, others in public sector reform and developing joined-up government, others in communities' definitions of wellbeing, and a few are drawn to the approach from its links to sustainable development.

In this guidance, we have outlined the steps to establishing a wellbeing framework for a city or a region, and here are the key points to remember about the process.

- **Start-up and leadership**: Government departments, non-government agencies, academics and others can all begin a wellbeing initiative, but for it to spread across government, it is important a senior leader champions the work.

- **Measurement**: Data analysts and policy makers should develop an area's wellbeing framework together. The statistics and the measurement are a means to an end – focusing on outcomes and understanding what makes for a better society – but it is important that the measurements are seen as robust.

- **Consultation**: it is important to bring citizens into the process through methods such as a widespread consultation about what wellbeing means to people and good quality communication about the wellbeing initiative.

- **Sustainability:** Involving citizens and having a strong external voice helps to insure that a wellbeing initiative continues even if the politician or administration that began it leaves office. If a wellbeing framework is secured independently of political patronage, e.g. in government legislation or structures, it is more likely to be sustainable.

Despite varying origins, there are many common themes in how the wellbeing frameworks are established. Central amongst these is the need for local political leadership. Wellbeing frameworks, on their surface, can be seen as indicator projects of limited interest outside statistical departments. But in practice, changing how we measure the progress of communities necessitates a change in our understanding of the role of governments and how we can affect change through complex systems. Political leadership is required to ensure that wellbeing frameworks 'stay the course' and are able to achieve a real and lasting change to the view of what matters to citizens and governments.

The use of wellbeing frameworks at national and local level is still very much in its infancy. Developing this guidance, we have learnt much about how to establish a wellbeing framework, but have found only limited examples of real-world policy change. The OECD and Carnegie UK Trust have been able to identify and explore a number of regional wellbeing frameworks but we are aware that there will be many more at earlier stages in their development and operating under the radar. We believe that it is vital that we hear from and learn from as many initiatives as possible. We want to continue to gather the evidence of where wellbeing is leading governments to focus on their impact and to become increasingly transparent and accountable to citizens.

So, to unearth instances of wellbeing frameworks working or beginning at all levels – community, local government, neighborhoods, cities and regions – we have established a 'crowdsourcing' system to collect international examples. Our hope is that we will uncover many more examples and be able to share emerging best practice with and between you over the coming months and years.

So please assist us in building a bank of good practice examples, and submit your wellbeing framework to http://www.carnegieuktrust.org.uk/project/measuring-what-matters/

APPENDIX

Senior people from the following organisations were interviewed for this guidance.

- Subsecretaria de Planeacion, Morelos Mexico Member of academia de ciencia y humanidad del estado de Morelos Dean of Colegio de Morelos, Mexico
- Social Policy Analysis & Research City of Toronto, Canada
- Community Data Group, Mothercraft, Toronto
- Director of RAND Cooperation Justice, Infrastructure, and Environment. Santa Monica, U.S.
- Assistant Director, City of Santa Monica
- The Intelligence Department in Greater London Authority
- Wellbeing for Life Development Lead City of Newcastle, U.K.
- Wallonia Regional Government, Belgium Wallonia Institute of Statistical Evaluation and Prospecting, IWEPS
- Divisional Director in Scottish Government, Scotland Head of the Performance Unit, Scottish Government
- Scottish Environment LINK
- Director, *Canadian Index of Wellbeing,* University of Waterloo, re Guelph, Canada
- Department of Strategy and Analysis, Southern Denmark
- Chairman of Regional Council of Southern Denmark
- Major's Office of Innovation and Analytics, SomerStat, Somerville, U.S.
- Professor Associato di Economia aziendale, Università di Genova, Dipartimento di Economia, and Mayor of Genoa, Italy
- Deputy Mayor of the municipality of Bologna, and colleagues, Bologna, Italy
- Istituto Nazionale di Statistica, ISTAT, Italy
- Director Community Indicators Victoria & Senior Research Fellow McCaughey VicHealth Unit for Community Wellbeing Melbourne, Australia

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ABOUT OECD

The Organisation for Economic Cooperation and Development is a unique forum where governments work together to address the economic, social and environmental challenges of globalisation. The OECD is also at the forefront to understand and to help governments respond to new developments and concerns, such as corporate governance, the information economy and the challenges of an ageing population. The Organisation provides a setting where governments can compare policy experiences, seek answers to common problems, identify good practice and work to co-ordinate domestic and international policies.

ABOUT CUKT

The Carnegie UK Trust works to improve the lives of people throughout the UK and Ireland, by changing minds through influencing policy, and by changing lives through innovative practice and partnership work. The Carnegie UK Trust was established by Scots-American philanthropist Andrew Carnegie in 1913.

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