Assessing, Benchmarking, and Evaluating Community Quality of Life:

*The Building Blocks of Successful Local Economic Development*

Kevin K. Brown

April 11, 1994

Undergraduate Thesis
Department of Urban Planning
Ball State University

Dr. James A. Segedy, Chair
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"Growth is not an end in itself, but rather an instrument for creating better conditions of life."

(OECD 1976)
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The Quality of Life / Economic Development Loop

A clean, appealing environment, a talented workforce, and responsive public services

which results in...

Attract and provide a base for...

Diverse, value-adding industries that provide well-paying jobs...

which...

Create opportunities for residents, reducing poverty and crime...

Generate revenues for excellent schools, quality public services, and public facilities...

(Oregon Benchmarks 1993)

Community QOL Monitoring Process

Assess and/or Re-assess needs. Look at all factors contributing to QOL.

Understand QOL Concept and its importance to Economic Development. Always be aware of new monitoring techniques and technologies.

Prioritize needs and issues. Which problems are most urgent?

Develop broad goals and objectives to meet the quality of life needs.

Establish measurable benchmarks, which affix concrete goals to objectives.

Evaluate performance or progress by comparing previous benchmark to goal benchmark.
Executive Summary

In today's highly mobile market, where communities routinely utilize monetary incentives to attract businesses, an area's quality of life has become the primary differentiation factor among communities vying for the same pool of businesses. In short, the only remaining factor that truly separates one community from another is its quality of life. It is critical that economic developers, planners, and public officials understand this direct relationship between community quality of life and successful economic development (see figure to the left). Because a high quality of life is so important for the attraction and retention of business and personnel, in addition to being of obvious interest to current residents, there is clearly a great need to better understand and monitor the unique characteristics or factors that make up a community's quality of life. In order to do so, each community should follow, in its most basic form, the Community Quality of Life Monitoring Process.

Within this process (as illustrated at the bottom of the facing page), the community must first understand the QOL concept, and realize its importance to successful economic development. The residents should then be involved in a grassroots effort to assess and prioritize needs. From these results, broad goals and objectives should be developed to meet the quality of life needs. In order to measure progress and performance, quantifiable benchmarks should be established, and attached to each objective. In this way, progress toward set objectives can very easily be evaluated in the future because each had specific concrete and measurable goals attached to them. The cycle begins again when the community reassesses needs.

This monitoring system allows communities to monitor their most valued assets, and to attain improvements in those areas in which they are not so proud. The process calls for vision, and translates this vision into quantifiable objectives, and eventually, attainment of vision. Participating in the Community Quality of Life Monitoring Process provides communities with a unique opportunity to "evaluate the past, guide the present, and plan for the future" (EPA 1972).
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Chapter 1

Background and Overview of Research

The concept of "Quality of Life" (QOL) is one that is familiar to most, yet difficult to firmly grasp or quantify. It is generally understood that this concept has something to do with our level of satisfaction or our standard of living. While the quality of life of residents is obviously a critical concept for community development initiatives, it seems equally important to the profession of economic development; it has recently been contended that a community's quality of life is pivotal in the attraction and retention of businesses and personnel. If these precepts are true, it is essential that planners, economic developers, and other public servants fully comprehend the total quality of life concept and its importance to a community's present and future well-being. More specifically, this thesis is primarily intended to address the following question:

*How can a community's quality of life be monitored to enhance local economic development?*

It is essential to understand the important terminology repeated throughout this report before discussing the additional subproblems of the research. The phrase *quality of life* (QOL), as mentioned earlier, seems to
mean different things to different people. However, broadly defined, the quality of life from a community (rather than individual) perspective includes all of the factors that make communities desirable: availability of employment, strong visual appearance, excellent recreational opportunities, affordable housing, and quality education, just to name a few. The phrase community or total quality of life (TQOL) will be used to describe this multitude of variables that contribute to community life. This entire package of quality of life factors that is unique to every community, and often promoted for economic development purposes, is called the community's quality of life profile (Kumcu and Vann 1991).

Economic development refers to "the process of creating wealth by mobilizing human, physical, natural, and capital resources to produce marketable goods and services" (So 1988). More specific to the context of this report, the goal of economic developers is to "foster the growth and retention of business activity and, through a healthy local economy, provide employment opportunities and a strong tax base" (So 1988). The term local in this context refers to the jurisdiction of the economic development entity; usually at the municipal, county, and on occasion, the regional scale.

Internal Monitoring is the constant process by which communities keep tabs on their own unique quality of life factors and profile (Myers 1987b).

The Community Quality of Life Monitoring Process specifically refers to the process of assessing, prioritizing, benchmarking, and evaluating system and cycle developed in this report.

Benchmarking is a means by which visions are developed and translated into measurable objectives and attainments (Oregon 1993).

Community development initiatives are an attempt made primarily by public or quasi-public agencies to promote a better life for the residents of the
community. These initiatives take many forms, often materializing as programs aimed at assisting specific populations based on need.

While many sources from outside the scope and scale of community planning will be reviewed, this research is not intended to define quality of life in a way that suits all fields of study. Rather, this concept shall be analyzed in a way that broadly defines total quality of life from a community and economic development perspective only. The historical overview and conceptualizing of community quality of life, its affect on economic development, and the implications for communities will be identified through the exploration of current literature. The problem and subproblems are further delimited by the research assumptions.

This research report is based on several assumptions. First, it is assumed that a high quality of life is desirable for residents of a community. Second, it is accepted that it is the role of the public servant, such as public planners and economic developers, to enhance the quality of life for residents of the community. Finally, it is assumed that it is desirable for a community to attract quality employment opportunities and retain existing local businesses, provided that those businesses are suitable to community needs and goals, and that the necessary infrastructure is in place.

Because the goals of this research is to provide economic development organizations with a means to monitor community QOL, the language and terminology is geared toward professional economic developers or planners. It is assumed that any "jargon" within this report is comprehended by the intended audience.
The broad objective of this research is to explore and analyze the concept of quality of life to understand how it can be managed to assist local economic development initiatives. However, several additional secondary objectives...
will also be met by the research. The first objective is to utilize the literature and research on the subject to provide a working knowledge and comprehension of the community quality of life concept. Through the analysis of the available research on the subject, some limitations in the QOL research and recommendations for future community QOL study should become visible. The second objective is to provide clear evidence as to the importance of a community’s QOL in the attraction and retention of businesses and skilled labor, which are certainly two critical goals of economic development organizations. After understanding that QOL is crucial for successful economic development, the next step is to identify which QOL are most significant in the attraction and retention of business and labor. With this knowledge, the economic development organization can more efficiently target funds and programs. Several critical issues pertaining to the management of a community’s quality of life will then be identified, linking quality of life theory to practice. Several key concerns will be distinguished as valuable to any community desiring to promote its quality of life. A descriptive case study of the Total Quality of Life Initiative will promote insights into the process of assessing, evaluating, and prioritizing needs. A closer look at a benchmarking system used in Oregon will shed light onto the process of establishing quantifiable benchmarks, which can be measured to assess progress and performance. Finally, the last objective is to illustrate how these separate steps form a QOL monitoring system, while also looking ahead to future improvements process. A breakdown of the report organization by related research questions is illustrated in Figure 1 to the left.

This thesis is applied research, the goal of which is to promote the practical application of the quality of life concept for both community and
economic development. The data collection method is primarily a qualitative content analysis based on the literature and research of the subject. By analyzing the available literature on the quality of life concept, it will be possible to understand the historical development of the research and its limitation for the evaluation and monitoring of community quality of life. In addition, the literature will also illustrate the importance of a community's quality of life for economic development. Much of this data, however, will be quantitative information which was collected from already-completed research. Several studies are present within the literature which provide quantitative data relative to factor and community rankings. A synthesis of all the literature will provide a basis for community action regarding the promotion and management of community QOL as a tool for economic development. A study of the Total Quality of Life Initiative (TQLI) will be conducted to serve as a model for the evaluation of community QOL. The TQLI, supported by the Indiana Department of Commerce and developed and implemented by Ball State University, was designed to help Indiana communities assess their quality of life needs and priorities. The case study will emphasize the critical analysis of process, method, and results. The use of QOL benchmarks will be explored through the description and analysis of the State of Oregon benchmarking system.

**Anticipated Significance**

It is desired that the results of this thesis will provide valuable insights to economic developers, planners, and others interested in making decisions for the public good. At this time, there is a limited understanding of the factors involved in a community's quality of life. Few economic developers are adequately informed of the importance of quality of life in the retention and attraction of business and labor force. As community quality of life becomes
an even greater incentive for the creation and retention of these employment opportunities, it is essential that those individuals who deal with economic development better discern this relationship; those that do not understand this relationship place their community at a distinct disadvantage. In addition, as community residents and their public servants desire to take steps to preserve and enhance their quality of life, it is crucial that they understand the key elements and concerns in the implementation of such an initiative, especially those steps involved with evaluating and monitoring the ever-changing QOL. A successful QOL study will promote a holistic approach to needs and priority assessment, and can enhance the residents’ sense of identity and pride in their environment. Finally, it is desired that this thesis will inspire planners, economic developers, and citizens, to work together toward a common goal: preserving and enhancing community quality of life.
Chapter 2

The Quality of Life Concept

The goal of this second chapter is to convey an overview of the QOL concept and related research, and to discern how this research may or may not be relevant to the measurement of community quality of life. More specifically, discussions will include an overview of the historical context of the concept, the main branches of QOL thought and research, the role of public perceptions, the issue of aggregation and disaggregation of QOL data, and the implications of the research to public servants interested in community-relevant QOL. This review and synthesis of literature on the subject of quality of life will provide a basis on which a working understanding of the concept can be developed.

One of the simple facts of life is that almost all important decisions, regardless of whether they are at national scale or everyday individual life, involve issues and factors that are not well quantified. Decisions cannot always be reached on the basis of hard statistical data or by well-published and validated research or theory. Surrounding such decisions is a cloud of uncertainty, abounding with intangible factors. Nevertheless, someone or some group must make the decision. (Dalkey 1972) For this reason, it is essential that those working for the public interest gain a better understanding of the albeit ambiguous quality of life concept and the factors that influence it.
An understanding that many factors and elements affect one's daily life and personal satisfaction (of which the most basic are food, shelter and clothing) has been prevalent throughout time. Yet, no one seems to know when or by whom the term quality of life was first coined. Most researchers believe that they first met the expression in the late 1950s through the popular media rather than scholarly journals (Szalai and Andrews 1980). The concept gained life as a separate research field in the early 1960s. In fact, President Johnson is quoted as saying the following in 1964 (Campbell 1981):

_The task of the Great Society is to ensure our people the environment, the capacities, and the social structures which will give them a meaningful chance to pursue their individual happiness. Thus the Great Society is concerned not with how much, but with how good—not with the quantity of goods, but with the quality of our lives._

The term gained notoriety with those in the social sciences only in the early 1970s. Even with this increased popularity, it seems that for decades the economic indices of Gross National Product, Consumer Price Index, and like derivatives, were the only indicators used to measure the health of the nation, and the smaller units within it. However, the realizations of pollution and the need for social and environmental indicators began to push the holistic concept of quality of life to the forefront in personal location and community decision-making. (EPA 1972)

**Three Branches of QOL Research**

Throughout the literature it is common that authors associate quality of life with one of three main branches of thought and research on the subject: psychological, economic, and popular. More specifically, psychologists (and a few sociologists) study personal well-being and happiness, economists
describe QOL based on wage differentials, and popular culture attempts to translate a community’s quality of life into livability indicators and rankings. These precepts are used by the professionals in their respective fields to measure quality of life through their unique techniques and perspectives. It is important to understand these branches of thought in order to identify limitations as they relate to the assessment and evaluation of community quality of life. While each field deals in part with this quality of life concept, each has a different focus and employs different measurement techniques. The table below summarizes the alternative approaches to quality of life research (see Figure 2 below).

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<td><strong>Measurement focus</strong></td>
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<td><strong>Statistical means</strong></td>
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<td><strong>In past has directed attention to...</strong></td>
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<td><strong>Political and/or economic implications of past work</strong></td>
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*Figure 2*

*Source: Myers 1988*
The most abundant amount of literature on the subject of quality of life seems to be within the genre of psychological and sociological study. It is commonly assumed within this field that quality of life can only (or only appropriately) be measured on an individual, person-by-person basis. With this understanding, an individual's quality of life is equated with his or her personal well-being. This well-being encompasses factors that provide and promote personal happiness and satisfaction in daily life. Much of the research deals with factors that may influence mental and psychological health, including marriage, quality of work environment, level of social support, and living arrangements (Campbell, Converse, and Rodgers 1976; Bryant and Veroff 1984; Abbey and Andrews 1985; Michalos 1983; House 1981; Converse and Martin 1985). Further QOL research within the psychological and sociological realms attempts to describe the QOL differentiation between persons belonging to different groups, such as comparing unique characteristics of QOL based on a person's gender, nationality, race, age, and even disabilities (Bryant and Veroff 1984; Slottje, et al. 1991; Campbell, Converse, and Rodgers 1976; Backman, Johnston, and O'Malley 1985; Farley and Allen 1987; Herzog and Rodgers 1981; Weisberger 1991; Brown 1988). There is very little in the way of community-relevant QOL research conducted within the psychological realm of study. A noted exception is a factor analysis of citizen satisfaction with elements of community QOL, conducted by Widgery (1982). The studied factors include aesthetics, media, recreational entertainment, neighbors, sense of security, economic conditions, government and community leadership, homes, family/friends, government and community services, educational system, climate, race relations, trees, employment, transportation, safety services, traffic and streets, hospitals, medical services, individual neighborhoods, and the greater area surrounding the community.
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Expertise on the subject of personal well-being and individual quality of life has historically been in the hands of psychologists and sociologists. These professionals aptly utilize more sophisticated and objective measures and techniques, such as regression models and factor analysis, than quality of life researchers in other fields. For this reason, political leaders often pursue quality of life studies that take this individual, personal well-being approach. It has a broad scientific literature and tested statistical methodology, and political leaders see this as a scientifically sound analysis for the community. In fact, most would agree that personal, individual well-being plays a significant role in community life due to the fact that individual people make up the community. However, the individual approach to studies of community quality of life actually diverts attention away from community matters in which the government and its agencies can produce real results (Myers 1988). In order for planning professionals and other public servants to make policy decisions regarding community needs and priorities, he or she must first ensure that the study is on a community-relevant scale (Myers 1988). It is clear, however, that the wealth of psychological data and experience with personal well-being and happiness, with few exceptions, is quite limited in this regard (Hovik 1990).

Myers (1988) offers an example in Austin, Texas as an inappropriate use of the personal well-being approach for community analysis and decision making. Two totally separate surveys were conducted of Austin residents almost simultaneously to understand community quality of life issues and trends, and two totally conflicting conclusions were generated. The first survey, AustinTrends, was aimed at gaining personal well-being information and inferring it for community-wide policy. This study found that personal life
satisfaction had been increasing over the years, and that everyone’s meaning of quality of life is essentially different. The study director promoted the highly political conclusion, based on the before-mentioned findings, that the quality of life concept should be excluded from future public planning decisions and growth management considerations. This meant that citizens were not to be consulted regarding their feelings about such issues as the staggering increase in traffic congestion and water pollution. In complete contrast, however, the second community study (which was conducted by Myers) was aimed at finding community consensus (rather than personal data on happiness) regarding the importance of different quality of life factors. Myers (1988) found an astounding level of consensus regarding six community factors, and concluded that quality of life studies of this type were excellent means of finding community consensus in order to guide local policy-making. It is obvious that the aggregation of personal psychological studies on quality of life is not very useful for defining or measuring community quality of life. This critical issue of aggregation and disaggregation will be discussed further later in the chapter.

Economists compare places in a highly deductive manner that applies substantial amounts of theory to small amounts of data (Myers 1988). Economists primarily use wage differentials to infer quality of life differentials between places (Hoch 1972; 1977; Rosen 1979; Roback 1982; Berger, Blomquist, and Waldner 1987; Power 1980; Blomquist, Berger and Hoehn 1988; McNulty, Jacobson, and Penne 1985; Myers 1988). The basic hypothesis for the economic point of view involves the notion of a disamenity incentive: businesses attempting to recruit workers to places that offer a less desirable quality of life must compensate the workers by offering higher wages relative to the quality of life differentials of competing places (Myers 1988).
Most wage differential studies describe nonmarketable goods and exclude income levels, cost of living factors, and housing costs (Myers 1988), with at least one noted exception (Blomquist, Berger and Hoehn 1988).

The use of wage differential studies as aids in local decision-making has been slow to "catch on" for several reasons. The methodology and statistical techniques are very complex and sophisticated, making the procedure and results very difficult for many local planners and decision-makers to follow. The technique also lacks a method by which a community can realistically (as opposed to theoretically) understand the importance of different factors affecting quality of life, in addition to the fact that many of these studies do not take a comprehensive view of these factors, identifying and analyzing only those found to be statistically significant (Myers 1988). The fact remains, though, that the disamenity compensation hypothesis provides a clear and generally accepted theoretical parameter for locational decisions. However, as noted previously, these decisions are, in reality, based on an individual's value of certain quality of life deficiencies or excesses, which cannot be scientifically quantified and inferred for a population.

Quality of life has often been described as a community's livability (Myers 1987a). The popular line of livability studies needs only the titles for introduction: The Places Rated Almanac: Your Guide to Finding the Best Places to Live in America, The Good Life Index: How to Compare Quality of Life Throughout the U.S. and Around the World, Finding Your Best Place to Live in America, Places Rated Retirement Guide, The 100 Best Small Towns in America, etc. These and other similar sources make up the bulk of the recent quality of life studies. Probably the most widely read of these is the Places Rated Almanac, which is updated quite often by authors Boyer and Savageau.
Most of these works attempt to compare and rank places (of different units, ranging from small towns to major metropolitan areas) based upon composites of objective indicators (Myers 1988). One notable exception is Compton's *The 100 Best Small Towns in America* which also uses subjective data via personal interviews conducted in finalist towns (Compton 1993). Authors of these books claim that the purpose is to assist those persons contemplating a move to another place. It is also claimed that some businesses use these sources to help facilitate locational decisions, and localities that are highly ranked often cite the source in development promotionals (Myers 1988).

More specifically, these recent attempts to bring the quality of life concept to the popular culture use statistical data on several elements thought to contribute to quality of life, weight them by importance, and devise an overall ranking of all the communities involved. However, there are several aspects of these studies that make rankings ungeneralizable to the individual. First, the relative weights are going to differ for every individual. For example, the mileage of bikeway may be twice as important to one person as it is to another. With this in mind, it is impossible for authors to accurately infer these weightings as generalizable to all readers. Second, these are not comprehensive studies in that they do not provide an exhaustive list of important quality of life factors, often excluding crucial QOL factors like traffic congestion and water quality (Myers 1988). In addition, those factors that are weighted cannot always be taken seriously when the survey was done for entertainment purposes and when those persons weighting the factors have no vested interest in the results. For example, in one study compiled by computing the mean weight assigned by the readership of the magazine (Smith and Nance-Nash 1993), *Lack of Hazardous Waste* received a 1.8 weighting—enough for a last place finish out of the 43 weighted quality of life factors. In contrast, *Many*
*Hospitals* received an 8.4 score (4th place overall), indicating that the readership view having many hospitals in a community almost 5 times more important for quality life than a lack of hazardous waste. Obviously there is much doubt as to whether the stated priorities would be reliable if the respondents were given the choice between an additional hospital in their community or 5 hazardous waste sites! This exemplifies the problem that these studies are generally for popular entertainment, and should not be taken seriously as anything other than the authors' perspective on quality of life and livability. In addition, a fundamental weakness of these studies is that an emphasis on comparison leads to a focus on a few common denominators, ignoring both residents' perceptions and unique local attractions (Myers 1987a). Finally, these statistics and indicators measure, at best, the quality of place, which is only one of many QOL indicators (Landis and Sawicki 1988). Who decides what makes a city livable? In the case of the popular livability studies, the answer is simple: the authors (Passell 1988).

A successful study of community quality of life must consider many factors affecting QOL. However, this analysis must be implemented individually for each community because the people of different communities share different values and priorities and will often have a drastically different consensus on the same issues. The ranking of communities based on the authors' weightings is clearly of no value to planners and local leaders, and can actually have a very negative effect on a community which receives a relatively low ranking. In such a case, the publicity of the low ranking can abate attempts to increase community pride even when the citizens had believed that the community was making great progress prior to the printing of the rankings. In addition, the rankings ignore the reasons behind statistical differences between communities, often assuming that the only important elements of study are the
The level of education is a good aspect to look at relative to this problem, due to the fact that education level is often highly weighted in studies that rank communities. But is the relative level of education within a community always a factor of the quality of life within it? A community with a strong Amish population will be given very low marks on this point because the Amish generally have fewer years of formal education. Yet, most would agree that this has nothing to do with the quality of the lives in the community. This example illustrates the invalidity of comparisons and rankings of different communities. Those interested in the public good must look beyond the use of only objective statistics as benchmarks of community QOL. As one planning director points out, “residents don’t need a bunch of statistics to tell them about quality of life in their town” (Landis and Sawicki 1988).

**ROLE OF PERCEPTIONS**

As the previous paragraph alludes, the public perception of the community’s quality of life plays a crucial role in its measurement and its reality. A community’s QOL is only as good (or bad) as the residents perceive it to be (Wish 1986). In other words, regardless of quality of life rankings based on “a national hedonic model which incorporates variation in both wage and housing expenditures” (Blomquist, Berger and Hoehn 1988), psychological studies, or livability indexes, it is the perception of the residents within the community that is the primary determinant of the quality of life. Further proof of this hypothesis is illustrated by the scenario that external community conditions could improve while the residents’ sense of well-being declines (Andrews and Withey 1976). For example, is not the perception that crime is increasing damaging to quality of life, regardless of whether the perception is fact or fiction? If the way we perceive things affects the way we live our lives,
then it is possible that the perception of issues and trends is more important than the reality. It is essential that the perception of residents be gathered and understood for any community quality of life study to be successful. In fact, many scholars believe that there should be a greater emphasis on the subjective and perceptual attitudes than any objective measures (OECD 1982).

Several experts maintain that the quality of life experience is actually the gap between aspirations and actual conditions (Myers 1987a; Cutter 1985; Campbell, et al 1976). Yet, what if the actual conditions are not the conditions that are perceived as reality by the residents? The quality of life should more likely be measured as the gap between aspirations (what a place ought to be) and perceptions of current conditions. The greater the gap, the lower the quality of life.

The aggregation and disaggregation of QOL data has tremendous influence on the success of QOL studies. It is crucial to understand that the aggregation and disaggregation of quality of life data can severely limit the usefulness of such data as a community decision-making tool. It has been established that most psychological studies of quality of life cannot be aggregated as a community QOL tool because the type of data being sought is different. This is a case in which the aggregation of data is not successful. The disaggregation of QOL information is also prone to many pitfalls. For instance, a state plan compiled via consistent, individual community plans has merit. However, the development of an individual plan based solely on aggregated data of a statewide plan is nearly useless. Because successful QOL studies cover a comprehensive list of issues and concerns, it should be possible to modify a successful model study to make it applicable to other hierarchies of defined population groups. For example, a QOL study for a small town
based on the perceptions of a small representative group may work well. However, it becomes increasingly more difficult for a small representative group to properly represent a community as the population of this community increases. In a city with many neighborhoods, several of which are more heavily populated than some small towns, it makes sense to modify the successful community QOL study to fit the individual neighborhood of a city. In addition, within the city there are no doubt completely different issues within different neighborhoods. While housing may be the issue in one neighborhood, the quality of streets may be of critical importance in another. With such a study completed for each neighborhood in a city, it is possible to aggregate the data for a city plan. However, without a plan for each of the neighborhoods within the city, it is meaningless to infer that a city plan represents the goals and perceptions of a single neighborhood.

While the three branches of QOL thought are not directly relevant to community-scale studies, the development of objective factors (as seen in livability studies) to indirectly define the concept holds great potential (Hovik 1990). Yet, perceptions are clearly essential for a true understanding of community QOL. In the case of false perceptions, the true facts must be brought to the attention of the public. Just as society is affected by both subjective and objective factors, a comprehensive term like quality of life must include perceptual and subjective elements in addition to a complement of hard, objective measures of some kind. In this way, the present community QOL can be compared to future QOL via both resident perception and physical reality. The successful quality of life study will include both subjective and objective elements (Andrews and Withey 1976; Wish 1986)—anything less would not be a full characterization of such a comprehensive concept (Hovik
1990). While some researchers indicate that this comprehensiveness obscures the potential of the use of the QOL studies (Mukhergee 1989), it is this holistic mindset that is so needed for policy-making on a community-wide scale. This comprehensiveness combined with popular interest in the QOL subject provides great opportunity for developing a consensus on issues related to community QOL (Myers 1988).
Chapter 3

Community Quality of Life as an Economic Development Tool

There are many factors or elements that influence the quality of life for the residents of a community. The collection of all of these factors makes up the community’s quality of life profile (Kumcu and Vann 1991). The attempt to list all of these quality of life factors, or “domains” (Andrews and Withey 1976), is a very difficult task. In an attempt to be inclusive, it is difficult to know where to stop or draw the line. While an inclusive list in full detail is impossible (and in all practicality, useless), it is anticipated that the list only need to adequately cover the major aspects and elements that pertain to community-level policy and perceptions (Dalkey 1972). In addition, while the items are often quite distinct, there is much overlap between them (Dalkey 1972). A list of factors has been compiled from a single source below. These

<table>
<thead>
<tr>
<th>Some Quality of Life Factors</th>
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<tbody>
<tr>
<td>affordable car insurance</td>
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<tr>
<td>affordable medical care</td>
</tr>
<tr>
<td>clean air</td>
</tr>
<tr>
<td>clean water</td>
</tr>
<tr>
<td>close to big airport</td>
</tr>
<tr>
<td>close to colleges</td>
</tr>
<tr>
<td>close to relatives</td>
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<tr>
<td>close to skiing area</td>
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<tr>
<td>diversity of local firms</td>
</tr>
<tr>
<td>far from nuclear reactors</td>
</tr>
<tr>
<td>good public transportation</td>
</tr>
<tr>
<td>good schools</td>
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<tr>
<td>high civic involvement</td>
</tr>
<tr>
<td>high marks from ecologists</td>
</tr>
<tr>
<td>near a big city</td>
</tr>
<tr>
<td>near lakes or ocean</td>
</tr>
<tr>
<td>near places of worship</td>
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<tr>
<td>plentiful doctors</td>
</tr>
<tr>
<td>proximity to minor-league sports</td>
</tr>
<tr>
<td>short commutes</td>
</tr>
<tr>
<td>sunny weather</td>
</tr>
</tbody>
</table>

**The Building Blocks of Community Quality of Life**

To the left is an alphabetical list of factors thought to be attractive QOL attributes by *Money* magazine subscribers.

Source: Smith and Nance-Nash 1993
and other factors, including both qualitative and quantitative statistics, make up the community's quality of life profile (Kumcu and Vann 1991). It is this profile, along with specially-highlighted individual or combinations of factors within it, that is promoted by public and private economic development organizations. These organizations highlight the factors that they believe will attract potential industries and/or accommodate resident industries. The promotion of these factors can be accomplished through advertisements in professional publications (like Site Selection magazine), news releases, sales promotion materials, presentations, and many other promotional activities. (Kumcu and Vann 1991)

Although it is obvious that a fine-tuned and comprehensive definition of quality of life is difficult, if not impossible, to develop, "it's not nearly so difficult to find widespread agreement among development and corporate real estate professionals as to its importance in many of today's site-selection decisions" (Venable 1991).

There is not a complete consensus among economic development professionals as to the importance of a community's quality of life in the attraction and retention of businesses and tax base. In fact, there seems to be little agreement on this point in the state of Indiana among economic development professionals. In addition to programs aimed at promoting business and labor force development, many organizations are primarily (if not exclusively) interested in the provision of infrastructure, grants, and other monetary incentives as a means to attract and create jobs and increase the tax base. Due to the narrowness of such a scope, there are growing criticisms that these economic development organizations have forgotten their duty to their constituents, whose goal is an enhanced quality of life, not growth (OECD
Regardless of whether there is any validity to this argument, if the community’s quality of life is demonstrated to be of utmost importance to business and labor locational decisions, it is crucial that economic developers understand that the quality of life concept is essential to the success of their organization, and thus to the community’s future (Moriarty 1980). Economic development professionals without this understanding place their communities at a distinct disadvantage.

The quality of life concept “has emerged as an increasingly visible political concern to elected officials and planners” (Fureseth and Walcott 1990). It seems that quality of life factors were of only marginal importance in development decisions only four decades ago. In the 1950s and 1960s, the concept of quality of life was not mentioned by name in sources aimed at describing factors influencing the plant location and site selection process. While it is not surprising that the exact term was not used, it is interesting to note that all of numerous factors that make up this concept were also overlooked by most experts. In fact, the only quality of life factor that was mentioned as a locational influence was the physical appearance of the community, which was briefly covered in only one of several facility location guides (Yaseen 1960). As further evidence that non-monetary intangibles were not considered to affect locational choice, Site Selection magazine reports that quality of life factors did not crack the top nine locational factors 30 years ago (Heenan 1991). Yet, since that time, quality of life issues have emerged as critical to site-selection decisions. Much of the emergence of quality of life as an increasingly important economic development tool is due to the leveling effects of federal and state tax structures (Waugh and Waugh 1988). Because most communities within the same state (or the entire nation perhaps) have the same basic economic incentives available to potential
businesses, it is a community's quality of life which can separate it from the crowd as an attractive place to locate. Because of this, quality of life has been ranked as the most influential location factor in Site Selection magazine since 1988 (Heenan 1991). In fact, respondents of the same survey in 1992 indicated that QOL issues are more important in site-selection decisions than they were even five years ago, attesting to the growing importance of a community's quality of life to the practice of economic development (Venables 1992).

This multi-faceted QOL concept, which is practically impossible to precisely delimit, is becoming an integral component of economic development and has bottom-line impact on site-selection decisions (Fusi 1989). Because businesses can locate almost anywhere, several experts maintain that a community's quality of life is the "premier consideration" for the corporate world (Special 1993). In the 1987 Geo-Life Survey in Site Selection, greater than 4 out of 5 corporate real estate professionals indicated that QOL was very important, especially in locating headquarters and Research & Development facilities (Fusi 1989). In addition, nearly 85% of development directors surveyed felt that QOL ranked among the top five factors in attracting new investment (Fusi 1989), and as mentioned earlier, QOL was ranked as the most significant site-selection factor in 1992 (Heenan 1991). This is further reaffirmed by the billions of dollars poured into the enhancement of QOL by local governments and businesses (Fusi 1989). The failure to enhance local quality of life can result in a situation in which businesses will find it necessary to pay special recruitment fees or disamenity incentives (Glaser and Bardo 1991). In addition, a community's quality of life will become even more important for business leaders considering relocation if the recent trend of a greater reluctance of personnel to relocate continues. (Malecki 1984; Brown-
ing 1980) The recruitment of these workers depends heavily on what the community can offer in the way of quality of life attributes. Simply put, “a good quality of life attracts good employees” (Marlin 1988). In accordance with this, Philip A. Newbold, president and chief executive officer of Memorial Hospital in South Bend, Indiana, shares his views on how the area’s quality of life gives his company the competitive edge when recruiting new talent (Special 1993):

*The quality of life here, particularly the low cost of housing, the excellent schools, and high-quality availability of affordable medical care, are all very attractive features for the professionals that we recruit. Many of these people are in short supply, and so these factors give us the competitive advantage over a number of other areas in the country that don’t have the same quality of life as we do.*

It is apparent that in the increasingly mobile and technologically advanced economy, quality of life is the determining factor in the attraction of new businesses and a skilled labor force (Fusi 1991).

Quality of life is a critical consideration in not only the attraction of new or relocating businesses, but also in the retention of businesses and employees already present in the community. It is as important to retain these existing businesses and employees as it is to attract new ones. In fact, the retention of resident businesses and personnel is of greater significance because they contribute so heavily to the established identity and employment base of the community. This identity and stability has been suggested as an important site-selection factor for businesses seeking new locations. In other words, retaining existing businesses and key personnel makes the community more
attractive to prospective new businesses. In any case, retention is a key component of any economic development scheme, the success of which is greatly dependent upon local quality of life.

A testimonial by Dave Jones, President and co-founder of Summit Group, Inc. (an IBM business partner) in Mishawaka, Indiana, can assist in illustrating the influence of a community’s quality of life on business retention. According to Mr. Jones (Project 1993):

*IBM wanted us to move after we'd been here for 8-10 years—there was just no way we were going to move because of the quality of life. It was the affordability of housing, the low cost of transportation, and our satisfaction with the schools our children were in, that kept us right here.*

Obviously the residents perceptions’ regarding the community quality of life and its fluctuation should never be disregarded in economic development practices. Just as a positive evaluation of a community’s QOL can greatly promote the retention of businesses, evidence suggests that negative perception can lead to a loss of a skilled labor force (Myers 1987b; Taylor 1987). For

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**Figure 4**

The chart to the right illustrates the correlation between moving plans, education level, and QOL perception for adults residing in Austin, Texas (aged 25-34). Most notably, it is apparent that a person who judges the community quality of life as declining is much more likely to outmigrate. Of those surveyed, the QOL trend seems to be of greater importance to those with a higher level of education.

*Source: Myers 1987b*
example, the perceptions of high crime and low quality education has resulted in the mass exodus of firms from central-city locations (Levy 1990). In addition, a QOL study of Austin, Texas found that highly-educated citizens were more likely to perceive a diminishing quality of life, and consequently plan a relocation, than were their less-educated counterparts (see Figure 4). Of those surveyed by Myers, 72 percent of persons with a graduate degree and 65 percent with a college degree perceived a QOL decline, versus only 35 percent of citizens with at most a high school degree. In addition, those surveyed were also asked to identify the type of industry (from a list) in which they were employed. According to Myers (1987b):

*The three industry groups with respondents most likely to perceive quality of life decline were high-tech manufacturing (65%), research and development (63.4%), and education (62.3%). The industry with respondents least likely to perceive decline was construction (46.3%), closely reflecting the lower education level of these workers.*

While the survey results indicate that the more educated and highly skilled workers are most likely to perceive a decline in community quality of life, “analysis of the data also suggests that skilled persons who perceive a decline are more likely to plan departure from Austin in the next five years” (Myers 1987b). It is clear that the correlation between planned departures and quality of life evaluations is a strong one; so strong in fact, that "such expectations are the strongest predictors of out-migration" (Myers 1987b).

Businesses certainly understand the need for retaining key personnel and the role of QOL in this process. Corporate executives are also beginning to understand the importance of quality of life on the productivity of workers. "The quality of [your employees] lives has a direct impact on your bottom line
through absenteeism, loyalty, turnover, productivity and health-care costs” (Taylor 1987), not to mention the estimated $20,000 it requires for search costs and relocation compensation per recruited employee (Myers 1987b). The data and previously mentioned testimonials suggest that a community must keep a close eye on the perceived quality of life within the community if it hopes to retain its best and brightest.

As has been mentioned on several occasions throughout the chapter, quality of life factors seem to be most important for the attraction and retention of high-technology industries (like Research & Development facilities) and their highly-skilled employees. This is especially important to understand due to the current “push” to recruit these nonpolluting industries and highly-paid personnel. Communities are increasingly aware of the need to attract “clean” industries that will not deteriorate community quality of life or diminish the attractiveness of their community, which would threaten the ability to attract more firms and businesses (Waugh and Waugh 1988). What is it about these types of facilities that makes their locational decisions so reliant upon quality of life?

There are several companies, particularly high technology research and development industries, in which access to raw materials and transportation costs are not major factors (Levy 1990). These companies are remarkably free to locate their production facilities almost anywhere in the country. (Schmenner 1982) For instance, Gateway 2000, one of the fastest growing mail order computer companies in the nation, is located in North Sioux City, South Dakota—with less than 2000 residents. So what is it that is the determining site-selection factor of these high-tech industries, if not skilled labor and transportation costs? Research indicates that quality of life factors
are the most influential aspects of the location of research and development facilities (Malecki 1984; Myers 1987b; Lund 1986; Lund 1979; Chapman and Walker 1991). As a case in point, nearly every R&D company responding to a Conference Board survey selected good quality of life as one of the three most important site-selection factors (Lund 1986).

One of the only limitations on the high-tech industries is that the facility must be located in a community that is attractive enough to lure highly educated employees to the area (McNulty, Jacobsen, and Penne 1985). If the community has a good quality of life, "they can probably attract engineers and scientists from other parts of the country to live and work there" (Lund 1986), even if the attractiveness of geographic setting or climate is not as appealing. With this in mind, communities should begin to examine and promote those quality of life attributes that are of most significance (Glaser and Bardo 1991). The question then becomes: which quality of life factors are the most significant?
Chapter 4

The Cream of the QOL Crop

The importance of quality of life factors in the attraction and retention of business and labor has been established. However, knowing which factors are most significant can assist economic development professionals in the development of more efficient and targeted funding schemes. The elements of education, recreation, natural environment, climate, cultural opportunities, and civic initiative have been suggested as the most significant QOL factors by various authors and studies.

Education is, without a doubt, a critical quality of life factor. More than half of the 300 development directors responding to the 1988 Geo-Life survey identified education as "the most significant QOL factor in site-selection decisions" (Fusi 1989). More recently, in a 1991 Geo-Life survey of local economic development organizations, more than one-third indicated that colleges and universities had been the most valuable QOL attraction in locating new corporate facilities, and one-quarter felt the same about K-12 education (Fusi 1991). According to Fusi, many communities have realized this connection and are making great strides in enhancing their local educational system. For example, Edward Shons, manager of Economic Development for Florida Power Corporation, reported that educational quality was considered a negative aspect of Florida's QOL in the past. However, recent development
efforts have begun to reverse this notion throughout the state through the educational use of lottery revenues, special "at-risk" programs, literacy and continuing education programs, and the returning of local school systems to their historical role as community leader in the education, social bonding, and recreation center for residents of all ages in the community. By enhancing the quality of the education systems, the state of Florida has developed what once was a liability into an economic development asset. (Fusi 1991)

Recreation, it seems, is also an important factor in creating a community's quality of life. Because of the numerous communities citing major recreational investments as improvements in their area's QOL, it is obvious that leisure-time activities play an important role in community QOL (Fusi 1989). Further evidence can be found in the 1991 Geo-Life survey (see Table below) in which 1 of every 3 respondents identified recreation as the most valuable QOL factor (Fusi 1991).

Environmental factors are extremely important quality of life factors affecting economic development. While environmental factors like clean air and water are often cited as locational determinants, the effect of a negative

![Chart](image-url)
environmental factor can be devastating to a local economy. An extreme example is that of a recent underground fuel leak in Fairfax County, Virginia (Baker 1991). While the oil company and the Environmental Protection Company are working around the clock, the conservative estimate is that it will take months to bring the largest leak under control, and up to ten years to clean up the entire spill. Currently, firefighters test the air in basements once a week to make sure the homes do not explode. (Baker 1991) This environmental problem will obviously have disastrous effects on any economic development in the area for at least a decade, and probably much longer as perceptions will take more time to "buy into" the reality of a clean and safe site.

Climate has also been identified as playing an important role in the quality of life, especially in popular livability and metropolitan ranking studies. However, it may only be a critical factor in extreme cases; either extremely gentle or harsh climates (Glaser and Bardo 1991). Even if it did appear to be a critical issue in locational decisions (which it does not), climate should not be of great concern by economic development organizations due to the fact that it is one of the few elements of quality of life that a community cannot affect.

Recent Geo-Life surveys have also indicated that cultural amenities play a major role in creating an appealing QOL. Improvements in this area might include the development of unique parks, museums, and performing arts centers. While the exact role of cultural amenities in the attraction and retention of business and residents is difficult to quantify, the fact that communities are spending millions of private and public dollars on such improvements does imply that the role of cultural amenities should not be overlooked when considering the significance of specific community quality of life factors. (Fusi 1989)
Finally, civic initiative and citizen participation are essential to maintaining and enhancing a community's quality of life. According to Marlin (1988), quality of life depends ultimately on developing a strong civic community to help maintain a balance between development (private enterprise) and amenities (culture, infrastructure, parks). Furthermore, Marlin maintains that civic participation, as the infrastructure of public enterprise, "plays the same role in ensuring good government that an entrepreneurial infrastructure plays in ensuring economic growth." Accordingly, a city without a strong civic community cannot plan for its future. (Marlin 1988)

Marlin presents a model of how civic action or inaction relates to the processes of both urban decay and civic pride. He believes that civic inaction leads to government failure, little enterprise, economic stagnation, and ultimately, poor quality of life. On the other hand, civic initiative leads to small business growth (enterprise), jobs, government performance, and a good quality of life. (Marlin 1988) Most startling is idea that a "well-developed community spirit" may be the greatest lure in the recruitment and retention of key personnel (Glaser and Bardo 1991). For without strong public participation, it is believed that a community will deteriorate, which is obviously not an attractive picture of the future for any new business contemplating a local site (Marlin 1988).

The 1989 Geo-Life Survey of corporate real estate executives indicates that nearly two of three executives preferred firsthand visits as the means of gathering quality of life information about an area for potential location, as illustrated by Figure 6 to the right (Lyne 1989). If those business executives searching for locations prefer firsthand observation of a community to any other form of QOL information gathering, it is obvious that the initial
perceptions and impressions of the evaluator are all-important. During this brief visit (or several visits) to a community, the executive will be influenced and persuaded primarily by what can be judged by a firsthand observation—the strength or weakness of a community's physical attractiveness and community image. This makes the community's image and aesthetic appeal two of the most important community assets (Heenan 1991). The community that showcases these qualities will be a step ahead of the competition.

While some believe that businesses value all elements of community QOL the same, it is highly likely that different industries have different quality of life priorities (Glaser and Bardo 1991). In other words, while a few factors or elements of QOL seem to be at the top of everyone's list, most QOL factors will be of differing importance to different business types regarding the recruitment and retention of key personnel. The different business types are often classified as distinct lifestyle groups for comparison. Some site-selection experts agree that different lifestyle groups have different locational preferences (Lyne 1989; Conway 1989) If this is the case, the community should target the group that it wants to attract in order to improve the quality of life.

**FIGURE 6**

<table>
<thead>
<tr>
<th>Which Means of Gathering QOL Data is Most Preferred?</th>
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<tbody>
<tr>
<td><strong>Firsthand Observation</strong></td>
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<tr>
<td><strong>Info. from area corps.</strong></td>
</tr>
<tr>
<td><strong>Customized QOL data</strong></td>
</tr>
<tr>
<td><strong>Generally available data</strong></td>
</tr>
<tr>
<td><strong>General reputation of area</strong></td>
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</tbody>
</table>

*Source: Lyne 1989*
factors most significant to that lifestyle group, and/or to target groups that fit the community's existing quality of life profile. In order to implement either of these alternatives, it is essential to understand the different lifestyle groups and the quality of life preferences of each.

Lyne (1989) and Conway (1989) describe seven different lifestyles: Career Starters, Family and Community Builders, Retiring or Retired, Sophisticates, Frontier People, Blue Collar Workers, and All-Americans. Career Starters are individuals who are likely to make a site choice to launch a career. They obviously tend to be young and future oriented. Important locational criteria for this lifestyle group include job opportunities, area economic trends and growth outlook, learning situations, facilities for advanced education, less-constrained lifestyle and an attractive area image. Family and Community Builders are upwardly mobile in socio-economic terms, and may be conducting locational analyses as a result of company-related transfers or new job offers. Due to their financial status and children, these people look at schools, housing, services, access, transportation, shopping, churches, local government, and civic institutions when analyzing locational choices. Retiring or Retired persons are planning for today or the near term, and are most attracted to locations with the “ideal” climate, medical services, cost of living, community environment, recreational opportunities, social programs, and low-cost public transportation. Frontier people are self-sufficient naturalists, conservationists, escapists and survivalists who relocate in order to gain more space or isolation. The person in this lifestyle group greatly values natural assets like mountains, forests, and land for crops and animals, and are often very willing to forego any services or conveniences. Blue Collar Workers are production-line, construction, or service personnel who tend to relocate based on economic trends or personal situations. Their
location decisions are usually based primarily on current job opportunities and wages, but also are influenced by opportunities for the spouse to work, good vocational training facilities, professional sports, and opportunities for outdoor recreation. The All-Americans' group is a combination or composite of all the other lifestyle types. These individuals usually analyze a wide variety of sites, and can easily adapt to different lifestyles. (Lyne 1989; Conway 1989)

While it is sometimes difficult (and often inaccurate) to classify persons into generalized categories, the orientation of the persons within these distinct lifestyle groups seems to make logical sense. While different people place emphasis on different aspects of community QOL, the evidence does suggest that certain quality of life factors tend to appeal more to persons within certain lifestyle groups. For example, the availability of 3 and 4 bedroom homes and a high quality public education system are QOL attributes that appeal to families making locational decisions. However, it is unlikely that these are the same elements that influence the location of retiring or retired persons. This kind of information can be very useful to economic development agencies.
Chapter 5

Linking Theory to Practice

The previous four chapters have dealt primarily with theory: theory of research, of the quality of life concept, and in its importance to economic development. While the last chapter provided useful information which was generic to all communities, its purpose was to educate and persuade. The purpose of this chapter, however, is to bridge the gap between theory and practice. This chapter begins to link the information provided in previous chapters to practical strategies for individual communities.

The attractiveness of a specific community can be influenced by the management of numerous quality of life factors (Kumca and Vann 1991). Some sources indicate that the task of the community is to enhance the quality of life factors that are most valued by the group targeted for attraction. For example, if the targeted group is the Family and Community Builders, specific QOL factors that are most significant to these groups should certainly be targeted for enhancement and promotion. In this case, factors like education, moderate to high-level homes, and recreation and civic initiatives should be promoted most heavily by the economic development organization. The community may also look at the existing assets and target groups based on those that match a specific lifestyle (or lifestyles). The strength of certain QOL factors may suggest that certain industries or groups of people may be most
attracted to an area. Most experts agree that the community should promote these specific assets to the corresponding groups.

These promotional activities have recently been developed by private entities like the Chamber of Commerce, and thus only private business interests have been genuinely represented. It is essential that the government take some control of the promotion of a community’s quality of life because the promotion and subsequent activity will form the new QOL profile of the community, which affects all residents, not just those with personal business interest (Kumcu and Vann 1991). In other words, the distribution of a disproportionate amount of funding or labor into specific aspects of a community’s QOL will more than likely change the community’s QOL profile. This can change the identity of the community, often times alienating longtime residents and destabilizing the community. Community leaders and citizens alike must be certain that they know whose objectives are being pursued in the marketing processes for economic development (Kumcu and Vann 1991).

The economic development organization must work with community residents and other public servants to understand the holistic picture of the community. The proper coordination of economic development activities is crucial to the success of the organization and community. In addition, community empowerment, or ensuring that the will of the residents is fulfilled, is essential to the perceived and actual quality of life within a community. The success of development agencies depends greatly on understanding the goals of the general public and coordinating activities with other public organizations.

If the development agency promotes economic development in the form of new businesses and jobs, the organization must be aware of other
community factors affected and influenced by such development. Western amenity towns have experienced this problem of uncoordinated development. Economic developers have enjoyed the relatively simple task of recruiting new jobs to the amenity-rich towns. However, the new workers have been flocking to communities that have no housing available (Gober, McHugh and Leclerc 1993). The success of economic development organizations and activities is dependent upon, among other things, proper coordination and comprehensive thinking.

In addition, the success of any public agency is directly related to how well that organization fulfills the goals of the public. As mentioned earlier, the changing of a quality of life profile for the purposes of economic development can be contrary to the wishes of the true constituency of the organization. For this reason, it is critical to understand that the power structure of the organization can determine how successfully the agency promotes the general welfare of all citizens, not just those with business interests. According to Kumcu and Vann (1991), “the way QOL profiles are shaped depends upon the prevailing economic approaches and the form of power concentrations within the local economy.” These authors develop 4 organizational structures (based on The Political Economy Paradigm by Johan Arndt, 1983) to help understand the effects of these power frameworks on community QOL: Anarchist, Guardianship, Oligarchic, and Democratic. Communities should take notice of the structure into which their economic development organization falls.

According to Kumcu and Vann (1991), the Anarchist organization is one in which the local community believe in a laissez-faire approach to economic development, and power is dispersed among all the interest groups. Under this organization, each interest group pushes to attain its desired community QOL profile and development is attained through piecemeal,
fragmented increments. The government is not expected to provide any holistic development regulation, rather to provide necessary support to private economic development interests. The Guardianship model retains the same laissez-faire attitude among the community, but involves the concentration of power in the hands of a few interest groups, rather than an equitable distribution. These groups are entrusted by the government as experts who can make proper decisions regarding the development of the community. Under this organization, there is little public participation, only closed-door meetings in which the small group of power-entrusted leaders make all of the decisions. The Oligarchic organization moves away from the laissez-faire approach, and begins to form private/public partnerships. These partnerships promote a holistic planning process as opposed to a fragmented approach, yet power distribution is not equal. The partnerships involve only a few community interests, usually the economic interest, to the exclusion of the other numerous community concerns. The common example of this type of organization is the Chamber of Commerce and its role in many communities. In these communities, the chambers are the primary economic development actors, yet do not truly represent any constituencies other than business. How then can Chambers of Commerce make unbiased decisions that will undoubtedly affect the present and future of the entire community. In such an organization, “many interest groups remain outside of the policy making...and most likely, do not share appropriately the QOL benefits, i.e., distributive justice may not be achieved” (Kumca and Vann 1991). Within communities with a Democratic organization there is a common belief that “Democratic coalitions among interest groups become a requirement of distributive justice to improve QOL factors and advance shared interest of groups living in the same community” (Kumca and Vann 1991). Within this organization there is
a broad empowerment of citizens based on some form of representative structure. With such a broad constituency comes a broad perspective of development priorities rather than the interest of one group being pushed to fruition. Organizing grassroots movements and educating the constituency are the keys to continually successful democratic power organizations. Communities should evaluate the organizational power in the local economic development ranks. This structure should be modified, if necessary, to best facilitate the achievement of desired community goals. (Kumcu and Vann 1991)

Quality of life is not a static measurement of livability. Rather, community quality of life is dynamic, always fluctuating and changing (Fureseth and Walcott 1991). Because of this, a community must be careful not to kill the goose that lays the golden eggs. A high quality of life attracts development, which can alter the quality of life. For example, a town may promote its small town character and identity in order to attract new businesses and residents. However, what will happen to this highly valued identity and character if the promotion is successful? This is an especially key point for small towns.

Development can destroy the very thing that attracted residents to the town in the first place. Columbus Junction, Iowa was the location for the huge IBP meat packing company (Farney 1990). IBP brought 1300 jobs—almost one for every man, woman, and child in this small, rural town of 1400. Yet, with this payroll and tax base increase comes a trade-off: “The intangibles that [once] defined the heartland town...have begun to die.” (Farney 1990) Rural areas and small towns like Columbus Junction must be especially aware of the side-effects of development. Rural, pastoral communities, once considered a hindrance to economic development in the past, are now very attractive for...
new investments (Fusi 1989). Nearly 40 percent of big-city dwellers would rather reside in rural areas and small towns by the decade’s end, and these persons maintain that they are willing to make substantial income sacrifices in order to live in this perceived healthier environment (Allen 1992). Big-business also appears to be heading to the rural areas. Some of the largest and most successful of these have paved the way for future corporations to move production to small, rural towns due in part to the belief that their superior lifestyles lead to higher productivity (Heenan 1991). What will happen to the quality of life of these small towns and rural areas in the next decade? While the answer to this question is unknown, it is clear that communities must be ready to protect their quality of life.

Economic development organizations play a critical role in the economic prosperity of communities. They provide many technical and support services for business and entrepreneurial development, while also seeking grants to develop the necessary infrastructure and a skilled labor force. However, economic development agencies need to better understand that the community’s quality of life is one of the greatest attraction and retention tools that they possess. To this end, the research illustrated in this chapter is evidence that, in all likelihood, the best plan for attracting and retaining businesses and a highly skilled labor force is to initiate community development programs aimed at enhancing the quality of life for existing residents. Stated simply, this type of community development leads directly to economic development. Not only does this scheme enhance the lives of the constituents of the organization, but it also develops the community as a magnet for future economic development.

As stated throughout the thesis, the way in which current residents
perceive quality of life cannot be ignored by economic development professionals serious about attracting quality businesses, jobs, and personnel (Myers 1987b). In fact, business leaders have very recently begun to survey the residents of potential locations to evaluate how those residents perceive the quality of life in the area. Favorable or unfavorable findings have been the major determinant in locational decisions (Myers 1987b).

The evidence suggests that economic development should be placed back into the hands of the public, empowering the general constituency to be the "check and balance" for economic development goals and activities. In addition, it is clear that the economic development organization must coordinate with other public agencies in order to be successful. Finally, greater emphasis should be placed on community development initiatives as the solution to community problems and economic development concerns. Not only does it enhance the lives of existing residents, but in so doing, is also providing clear evidence that a community desires to solve problems and make things better. Those looking for a place to start a business or start a family are looking for just such a community (Venable 1991). Targeted community development activities enhance the lives of community residents, while also making the community more attractive for economic development.

The results of a survey of almost 1300 firms conducted by the Joint Economic Committee of the U.S. Congress seem to sum up this relationship between community and economic development (Central 1979):

A city's quality of life is more important than business related factors...The results of this survey suggest that individual programs and policies which respond to a particular business need will probably be of limited success in encouraging firms to expand or attracting new firms if they are not part of a
comprehensive effort to upgrade the quality of life in the city.
One of the primary policy conclusions to be drawn is that
improving the city quality of life can have a significant impact
on decisions firms make regarding location and work force
changes.

It is clear that economic development professionals and organizations must promote strong community development initiatives. Not only do these improve the lives of the current residents, but it also promotes local economic development by attracting new business and retaining present businesses. QOL is becoming increasingly more important in today's economy, as businesses become more and more mobile and financial assistance is fairly consistent in all communities. Because QOL is such a critical aspect of local economic development, there is a great need to develop a method for continually evaluating and assessing the quality of life. Measuring the community QOL provides the opportunity to take a very comprehensive look at the community, understanding strengths, weaknesses, needs, and priorities. It also provides a benchmark from which to compare trends in an ever-changing community.

Dowell Myers develops a 5 step recommended method for the assessment of community QOL, referred to as "internal monitoring." (Myers 1987b):

1. The planner and/or economic developer should review the literature, both scholarly QOL research and local issues.
2. The planner should interview the leaders of community interest groups to survey what factors should be measured.
3. Objective data should be collected to form a present community profile and future trends of those factors deemed important to community quality of life.
4. A survey of citizens should be conducted to learn about the perceptions of community QOL. Such a survey should gain perceptions regarding community QOL factors rather than personal well-being.

5. A report should be generated to inform the public of the results.

This report and data should form the basis for an ongoing internal monitoring of community QOL. A community quality of life study which meets each of the before-mentioned criteria is highlighted as a case study in the next chapter.
Chapter 6

Case Study:
The Indiana Total Quality of Life Initiative

When attempting to develop a tool or method of assessing community quality of life, it is helpful to begin by examining a study which addresses this very issue and has already been conducted. The Total Quality of Life Initiative, supported by the Indiana Department of Commerce (Division of Community Development) and coordinated by Co-directors Dr. James Segedy and Scott Truex of the Department of Urban Planning at Ball State University, is just such a project. It provides a model of how a community's needs might be assessed, evaluated, and prioritized. This descriptive case study involves a description of the history and purposes behind the project, the project design and scope, the project goals, the 12 delineated QOL factors, the TQLI process, and future plans for the coordinating team.

The TQLI project was initiated as a result of the need to meet federal requirements while also promoting the Indiana Department of Commerce, Division of Community Developments goal of greater community-based support. The Division of Community Development was charged to develop a statewide community and economic development plan for the state of Indiana by early January 1994, as required by the federal department of Housing and Urban Development (HUD). This plan was aimed at promoting a more efficient distribution of federal CDBG funds to non-entitlement communi-
ties. In addition to fulfilling the requirements from HUD, the Division of Community Development at DOC also desired to evaluate their own funding criteria and grant allocation efficiency. The division leaders believed that too often the government tells the communities what is needed rather than listening to those that know their own community’s best interest. Also, grants are usually aimed at specific infrastructure projects, forcing communities to go after grants that may not be their highest priorities; the DOC wanted the money to go to projects that are most needed, like perhaps senior citizen or day-care centers rather than the traditional economic development alternatives. Finally, the DOC understood the relationship between QOL and economic development (see Figure 7 below), and hoped to encourage communities to look at their total quality of life when making all community and economic development decisions. These and other factors led to the devel-

**Figure 7**

The flowchart to the right describes the relationship between a community’s quality of life and its economic development.

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**The Quality of Life / Economic Development Loop**

- A clean, appealing environment, a talented workforce, and responsive public services
  - which results in...
- Attract and provide a base for...
  - Diverse, value-adding industries that provide well-paying jobs...
  - which...
- Create opportunities for residents, reducing poverty and crime...
- Generate revenues for excellent schools, quality public services, and public facilities...

Source: Oregon Benchmarks 1993
opment of the Total Quality of Life Initiative, coordinated by Dr. James Segedy and Scott Truex of Ball State University. Segedy and Truex, both faculty members of the Department of Urban Planning, headed the team which was to discern funding and community development needs and priorities for the entire state. The TQLI team created, according to Dr. Segedy, "a comprehensive needs assessment and evaluation system for locally-based community development activity" (Segedy 1994). The process of developing this system of evaluation is described at length in the case study itself.¹

The Total Quality of Life Initiative was developed as a pilot project. According to the 1993 Indiana Total Quality of Life Report, the study was designed to:

1. Stimulate involvement at the local level;
2. Help provide an understanding of the importance of quality of life in local community development decision-making;
3. Provide an information resource base for the local community;
4. Assist the local community with an opportunity to achieve consensus on quality of life issues; and
5. Serve as a representational sample of community development needs associated with Indiana communities.

As pointed out in the same source, the project was not designed to be:

1. Scientific, or comprehensive survey of community development needs of Indiana communities; nor
2. A basis for predictive modeling.

¹ This researcher was a member of the TQLI team as a student assistant. The information provided throughout the case study itself comes from my own knowledge and experience with the project, unless otherwise cited.
There are eight explicitly stated goals of the Total Quality of Life Initiative, as stated by the Facilitator's Manual. These goals form the underlying perspective about how local quality of life might be maximized (Segedy and Truex 1993):

1. Enhance the quality of each of the twelve quality of life factors.
2. Promote the localization of economies.
4. Develop existing community assets.
5. Develop community identity
6. Promote social equity.
7. Empower citizens to become involved in community life.
8. Find linkages and encourage community diversity.

Following some research into quality of life and relevant studies, the team decided that the data to be gathered must be divided into different categories. Not only would such a system help to organize the data, but it would also make the approach more understandable to the involved public than a long list of questions with no real breaking points. While overlaps do exist between the categories or factors, as one would expect with such a holistic notion as total quality of life, this does not in any way take away from the information gathered. The category itself is not as important as the information received. However, it was felt that delineating the entire concepts into subcomponents would help orient discussion. According to the Facilitator's Manual, the goal was to "stimulate open discussion, identify linkages, and reach consensus based on the basic principles of total quality of life" (Segedy and Truex 1993). The twelve factors identified as contributors to overall community quality of life were economic vitality, consumer opportunity, infrastructure, transportation, public services, health and safety, education, housing, natural environment, recreation, community character, and
community life. Because these 12 factors are the building blocks of the evaluation and assessment system, a brief description of each may prove helpful. Much of the description has been paraphrased from the Facilitator's Handbook, which was developed as a guide for the participating communities.

Economic vitality is probably the first factor that is considered when assessing community and economic development needs and priorities. Its prominence is for good reason; it is difficult to worry about other issues when faced with unemployment and low cash flow. Yet, economic vitality boils down to more than unemployment rates, wage levels, and the size of the local economy. The Facilitator's Manual refers "to its [the local economy's] maturity, its ability to withstand difficult conditions, and its ability to adapt to its environment" (Segedy and Truex 1993). Discussion of economic vitality within the study was focused upon the diversity (or lack thereof) of businesses in the local economy, their freedom from vulnerability to the national economy, and the level of support for local entrepreneurship. While economic vitality provides a critical foundation for the community, it is certainly not the only element which contributes significantly to quality of life.

The opportunities to purchase goods and services may be just as important as economic vitality to individuals in a community. If the residents are wealthy, yet are forced to drive long distances in order purchase the goods and services they desire, the quality of life will be diminished. Of course, the majority of citizens are less wealthy, but all residents have needs that must be met. These necessities and desires will be met by a business somewhere, so it might as well be met locally so that money does not escape the community. A strong understanding of consumer opportunities and needs in a community
can help highlight a niche for new businesses to fill. Filling the necessary gaps and providing superior consumer opportunities will enhance the overall community quality of life.

The term "infrastructure" refers to the physical foundation that allows a community to function properly. Public drinking water treatment plants and pipes allow households to exist without private wells, and thus protect them from potential contamination. Sanitary sewers and wastewater treatment plants prevent water pollution and disease. Storm sewers and retention ponds protect private property from flood damage. Each of these examples of public infrastructure contributes to the present and future quality of life of the community. If the infrastructure is overbuilt or underutilized, the local costs become prohibitive to local and potential residents and businesses. By the same token, infrastructure used to capacity (without reserve or extra capacity available) may stunt the growth of the community without sometimes enormous capital investment.

While streets are often considered part of the infrastructure of a community, it was delineated as a separate QOL factor because of its significance. Transportation is critical to not only the way a community interacts with the rest of the state, but also the way it functions internally. Of course, transportation is not limited to automobile traffic, railroads, and airports. Other modes or alternatives, such as bicycles and walking, are often overlooked elements of the transportation system that have great impact on our quality of life. What could be more important that the safety of children playing on a neighborhood sidewalk?
Public services, while distinct from public infrastructure, are also forms of public goods, or goods that benefit everyone. These public services include activities sponsored by the community at-large that would certainly be unattainable by a smaller group of individuals. Snow removal and street repair, garbage collection, and solid waste management are some examples of physical public services. Other services like building inspection, welfare assistance, child and adult daycare, and libraries are forms of human services. These and other public services are very important to the overall quality of life for all community residents. Public safety, like police and fire protection, and education services may also be considered as public services, but these overlap into other major category headings.

Public safety considerations are often thought of in terms of crime prevention and fire protection. These are obviously critical components of community health and safety, but are by no means the only integral elements. Pollution and environmental hazards, as well as public immunization and health code enforcement, are also important factors of public health and safety. An interesting note involving this category is the fact that there is an "actual hazard" and a "perceived hazard". The actual hazard may be based on crime or other statistics, while the perceived hazard is based on individual or collective perceptions relative to certain issues. It is critical to gain information about both the real and the perceived problems, as both greatly affect the quality of life. Finally, the level and availability of professional medical and dental care is an important piece of the health and safety mix.

Education is often cited as being critical to a community's quality of life. Education not only provides the needed job-related skills to residents,
but it also "helps people appreciate and take advantage of opportunities around them, gives expanded perspectives of the world, and makes them better citizens," according to the Facilitators' Manual (Segedy and Truex 1993). It is important to realize, however, that education is not limited to the formal education attained in the school system. Adult and continued education is also necessary to meet the changing needs of the workplace and to provide further opportunities to the residents, while the same can be said of youth programs such as 4-H and Scouts programs.

According to the Facilitator's Manual, "Everyone needs a place to live, and if that dwelling is unsatisfactory, quality of life suffers drastically" (Facilitator's Handbook 1993). The affordability and availability of different styles and locations of housing are important issues. The community must be made aware of trends in housing, such as tenure, vacancy, deterioration, and the location of new residential development. The social demographics of a community are integral to the housing needs as well. Historic Preservation and basic housing upkeep programs are also important housing issues.

The quality of the natural environment is one of the most obvious quality of life indicators. A community that has nicely developed riverfront areas and is visually appealing certainly contributes to the quality of life for residents. Less obvious environmental issues include the hazards of erosion, the pollution of streams and rivers, and the need to protect sensitive or unique natural areas.

Simply put, adequate recreational opportunities promote a higher quality of life. Recreation provides opportunities for physical improvement,
social activity, and community identity. Often, the community park system is utilized on a regional basis by residents in outlying or rural communities. More major recreational facilities, such as indoor arenas, softball complexes, or the local YMCA, can enhance the local economy by attracting a large number of persons into the community. It is important to understand that different people desire to take part in different types of recreational activities. A large portion of the community may want to participate in very active sports like basketball and tennis, while others would like to see the development of areas for passive recreation, like reading, walking, and picnicking. With such a diversity of needs, it is important to have a grasp of community priorities, always keeping in mind that facilities and activities should be accessible to special users and residents of all ages.

Community character refers not only to the image that outsiders have of a community, but also to the image that residents have of their own community. Do they have a sense of pride and identity, or are these slowly fading away? It is important to recognize what elements the residents cite as indicators of their community character. These elements must be preserved in order to preserve the community's sense of identity. Much of this identity is often derived from the historical developments and process that has made the community what it is today. It is critical to identify the aspects that make the community most proud. In addition, by recognizing the weak areas of the community of which the residents are not so proud, a list of needs and priorities is naturally developed.

The Community Life category deals primarily with aspects of community character, but focuses more upon social interaction and participation
in the local decision-making process. Interaction between neighbors and persons with common interests is an important aspect of quality of life. Social and public service clubs like Kiwanis and others provide a means for people to help others in an organized and focused manner. Community celebrations and festivals also are part of this community life, and certainly contribute to a community's quality of life. In addition, the extent to which an individual can influence public decision-making is key to quality of life. Neighborhood associations and public meetings provide a means from which this grassroots participation can begin. While this community life category may be the most difficult to define and the most overlapping, it may also be one of the most important.

The TQLI process began with the identification of 120 communities in the state of Indiana to serve as participants in the pilot project. The communities were not randomly or scientifically chosen; rather, the choices were based on a number of criteria: at least one community per county, a diverse geographical mixture, a mixture of cities and towns, and a wide range of community sizes should be represented. In addition, communities were chosen based on their probability of participation and success—the first-phase communities were to be “model” communities in the pilot program. The TQLI coordinating team, in conjunction with the Community Development Division of IDOC, determined the invited communities. Letters were sent to each of the "Hoosier 120" communities, via the town council president or mayor. This letter introduced the project and asked that the executive choose a local resident who could facilitate two to three community meetings. This facilitator would need to attend one of the regional training meetings to be adequately trained and supplied with the necessary materials.
The second phase of the project was the introduction and training of the community facilitator. Because this was a completely new community initiative, and because many facilitators were unfamiliar with their new roles, guiding and training the chosen facilitators was a critical step. In order to do so, all the needed materials were developed and placed into the TQL Workbook to be distributed to the facilitators. Each TQL Workbook included a Facilitator's Manual, which describes the entire process, the twelve quality of life factors, and the eight goals of the project. The manual also describes the role of the facilitator in great detail, and provides some helpful hints on how to conduct a community meeting. The TQL Workbook also includes 20 Citizen Focus Worksheets and 10 Community Profile Worksheets (these will be described further below). Finally, the Workbook contains the questions to be asked at the community meeting (See Appendix A). The 53 open-ended questions are provided to the facilitator on transparencies for use with an overhead projector at the meeting, where the answers on written directly onto the transparencies. In addition, a Facilitator's Guide is also in the Workbook. This guide provides the same format and questions as the transparencies with the exception that it provides some helpful hints to the facilitator for each question. These "hints" might include some sub-questions or finer points to direct discussion. All of these materials were presented to the facilitators at one of the eight regional training sessions held around the state.

Armed with the Workbook and its contents, the facilitator began the third phase of the project. The facilitator was asked to establish two working committees or community groups, due to the fact that two different types of information was needed. The first type of information needed was the more technical data regarding such diverse issues as infrastructure and school capacities. In order to get at this technical and quantifiable information, Com-
Community Profile Worksheets (or CPWs) were developed for specific community professionals to fill out. These were to be filled out by the municipal executive, the chamber of commerce, the economic development department, the school superintendent, the county health board, the community engineer, the building inspector, the County soil conservation officer, and a realtor. Specific questions regarding issues in their realm of expertise were posed in each of the different Community Profile Worksheets (See Appendix B). These were to be distributed to the proper persons prior to the first meeting. The second type of needed information was the more subjective ideas and perspectives of the average community citizen. Due the short timeframe and the relative inexperience of the facilitator, it was decided that a group of town representatives be chosen rather than try to conduct an open “town” meeting. The facilitator was asked and guided to form a citizen group that was representative of the town itself—probably including a high school student, a long time resident, a newly arrived resident, a business person, a farmer, a teacher, etc, but no more than 15 to 20 citizens in order to keep the meeting manageable. Each member of this citizens group was to be provided with a Citizen Focus Worksheet (or CFW), which was to be filled out before the first community meeting (See Appendix C).

The community meetings were to be held with both the professional/technical committee and the citizens committee. Each person was to bring their completed worksheet or focus sheet, which provided an introduction to the types of issues to be raised at this meeting. The two groups together, led by the chosen facilitator, complete the Workbook by responding to questions which focused on reaching consensus and prioritizing issues. They may refer to the completed CPWs and CFWs to interject relevant information. In addition, the TQLI coordinating team also provided a 16-page Statistical Pat-
tems & Trends Summary to each community for reference during the meetings. The completed transparencies, CPWs, and CFWs are all gathered together, placed into the supplied envelope, and mailed to the TQLI coordinating team at Ball State University.

Phase four began with the return of the completed Workbooks to the coordinating team. The team began compiling and analyzing the data from the 50 communities that participated. Each piece of data was entered into a database for organization, and transferred into a higher-level spreadsheet program to analyze the information.

Phase five involved the generation of the Community Profile Report, which summarized the results from the workbook assessments. Each participating community received a copy of their own Community Profile Report, and was invited to attend a meeting to discuss the results and provide input on the total process. Following the community input and review from Community Development Division staff, the 1993 Indiana Total Quality of Life Report was generated. The product of this final phase presents the results of the process, offers suggestions for statewide community development initiatives, and recommends future activities associated with the refinement and expansion of the TQLI process.

Within the 1993 Indiana Total Quality of Life Report, several recommendations are made as a result of this, the pilot run of the Total Quality of Life Initiative. Each of the 13 recommendations are based on observations and discussion of the results of the entire study. While each recommendation or objective is described in some detail, only major recommendation headings are listed on the following page.
1. There is a need for better clarification of the TQLI process and its relationship to other state initiatives.
2. The State of Indiana must support a broad spectrum of community development activities.
3. The State of Indiana must develop and implement inter-agency, cooperative programs facilitating community development activities for Indiana communities.
4. The State of Indiana must facilitate communication between and within agencies and local communities.
5. Successful community development is maintained through evaluation and updating of programs and projects.
6. The decentralization of community development programs will facilitate more effective local initiatives.
7. The majority of support should be directed toward serving the critical needs of Indiana communities.
8. Further develop programs to support economic localization, local value-added processes, local entrepreneurship, and local capital development.
9. Support environmentally sensitive and energy efficient economic and community development activities.
10. Educational programs must be integrated into community development programs.
11. The availability of diverse housing opportunities is a critical component of quality of life and community development.
12. Community character and identity is an essential component of community quality of life and community development.
13. Reevaluate the role of the state Main Street Program and other focused agencies.

**Future TQLI Endeavors**

The TQLI coordinating team has several potential projects lined up at this time. The team is currently revising and modifying the materials associated with the completed process so that any future rounds will be more efficient and successful. The team may also be developing a video to supplement the training workshop and to better describe the entire process to those
participating. A data resource bank for the state of Indiana may also be generated so that all of the received data can be easily accessed by the state agencies and the general public. Finally, the TQLI coordinating team is looking into developing a parallel instrument which would help us understand how "community" is defined. This may involve numerous studies of multi-community and/or countywide regions.

The Total Quality of Life Initiative provides a strong model of QOL assessment and evaluation. It is essentially a grassroots process, involving a small, yet representative sample of citizens of a community. It establishes a clear framework from which to define QOL through the twelve factors or categories. The study accumulates a tremendous amount of statistical and objective data, while at the same time compiling a vast amount of subjective and perceptual information from the residents. This combination of objective and subjective data provides a strong foundation for data analysis and a clear understanding of what has and is occurring in the community.

The pilot study is deficient as a model for the internal monitoring of community QOL in only a few areas. First, the study does not attempt to assess the perceived trends within the community. It would be very interesting and revealing to identify (through the subjective perceptions of the residents) areas in which there is an improvement or deterioration of quality of life. Secondly, the TQLI study is not easily transferred to communities that are larger than approximately 25,000 to 30,000 residents. Because the sample size for the citizens' committee is only 20 persons, the margin of error increases as the population of the community increases. It is fairly obvious, then, that this study would not provide valid results for a community of 100,000 or larger. Finally, the scale of this study places constraints on the level of
success and detail. First, the TQLI study, limited greatly by the timeframe, could only allow for a few community meetings in each town, with only a small representative group invited to attend. An individual community following the basic model developed by the TQLI coordinating team, however, could easily forgo these problems with more meetings over a greater timeframe. This, too, would allow for greater representation. The second problem associated with scale is that the study required that the coordinating team develop a set list of questions, and categorize answers. There was the great need to organize answers into common categories and benchmarks, due to the fact that the individual community data was to be aggregated to form statewide data. However, while public officials attempting to assess their own community QOL may be able to transfer relevant information and questions from the TQLI study, the analysis of the data will clearly be a different process. For example, the recommendations in the 1993 Indiana Total Quality of Life Report are fairly general due to the state-level scale. However, an individual community, using a similar model for assessment and prioritizing, can establish specific objectives to meet the needs. In order to measure progress toward these objectives, measurable benchmarks may be assigned to each objective. The process of developing a locally-designed system of benchmarks is described in the next chapter.
Chapter 7

Developing a Locally-Designed System of QOL Benchmarks

Providing efficient and effective services to the public is what government is all about. It seems that citizen expectation of government continues to rise, while at the same time the level of public funding diminishes. Government leaders seek to provide the necessary services with the highest level of success at the lowest possible cost. Consequently, there is a tremendous need for government officials to target the remaining pool of funding toward the problems which are the most injurious to the community at large. However, not only is it difficult for public officials to become aware of community (especially large communities) priorities, there seem to be no concrete means of evaluating whether targeted programs are truly successful. For these and other reasons, community residents find it difficult to evaluate government performance, and they often clash with a government structure which accepts little accountability for performance which is perceived to be substandard. The same holds true for measuring the change in the assessed quality of life issues. Once the community has assessed needs and priorities, and set objectives, how can they measure and quantify improvement in quality of life?

What communities need is a process to assess and evaluate the entire gamut of issues and elements affecting the lives of the citizens. Once this is
complete, there is a need to prioritize and develop objectives so that time and monetary expenditures can be targeted to the most urgent needs. The community must also set goals for the performance of these new initiatives, as well as the existing governmental services. These goals and objectives must be spelled out in concrete terms, allowing for both objective and subjective (perceptual) measures of performance. These same programs or services can then be reevaluated very easily and effectively sometime in the future because each had specific concrete and measurable goals attached to them. Such a system which allows the citizens of the community to assess, evaluate, and design their own system of goals, or benchmarks, is one which promotes an informed public and an informed government. Because of this system of private/public cooperation, and because measurable goals have been established, government officials have a strong list of community priorities, officials are held accountable to specific levels of performance, a more efficient use of funding is promoted, and superior services are provided.

The process of assessing and evaluating existing elements of the community quality of life, prioritizing needs, and developing objectives based on those results, has been discussed throughout this report, and detailed in the Total Quality of Life Initiative case study. The question now lies with the establishment of the quantifiable goals or benchmarks. What is a benchmark, and how does a community go about establishing such measures? Also, what are the factors or elements that should be benchmarked? A brief description and analysis of the award-winning benchmarking program used by the State of Oregon will answer these and other important questions.

Even though the Oregon system of benchmarking was developed for statewide use and scale, the process is transferable to individual communities wishing to develop their own unique benchmarking systems. After examin-
ing and understanding the process used in *Oregon Benchmarks*, local community leaders can begin to develop their own system. It is important to note that while the process and the specific benchmarks used in Oregon are deemed highly successful by many, each individual community must use this example as no more than a model, and must strive to develop its own locally-designed system of QOL benchmarks. Only those benchmarks agreed upon by the residents will be accurate measures of local quality of life factors.

According to *Oregon Benchmarks: Standard for Measuring Statewide Progress and Government Performance*, the purpose of benchmarking is to "translate vision and strategy into measurable attainments" (Oregon 1993). It is this philosophy that has led to many prestigious awards, most notably the 1992 Vanguard Award in recognition of "the first workable system in the country that makes economic development and human investment strategic planning real in the public sector" (Oregon 1993). The state began developing benchmarks as a means for linking concrete objectives and budget priorities to performance measurement. In addition, the residents found that this system promotes greater accountability from public officials because it "brings public accountability out of mere politics and into day-to-day governance, by calculating progress toward actual defined development results, rather than simply counting the number of program inputs--like dollars spent or 'services' provided" (Oregon 1993). The real trick, it seems, is in deciding which benchmarks can be used to measure progress toward the assessed needs and priorities of the community.

In *Oregon Benchmarks*, the 272 established benchmarks were developed to monitor progress and performance in three broad categories: People,
Quality of Life, and the Economy. However, quality of life, as described and promoted in this report, is a more holistic notion than is found in the Oregon Benchmarks. In essence, because people and the economy are critical components of quality of life, these three broad categories could be combined into one. At any rate, within each of the three categories, there are several stated goals, each subdivided into several more specific issues. For example, the objectives for the QOL category are to: 1) promote a clean and beautiful natural environment; 2) promote a developed environment which is convenient, affordable, accessible, and environmentally sensitive; and to 3) provide communities that are safe, enriching, and participative, with access to essential services. Following along with the first objective of promoting a clean and beautiful natural environment, we see that the objective is further subdivided into the five issues of air, water, land, plants/fish/wildlife, and outdoor recreation. Several benchmarks are then established for each issue. These are established in order to first assess current standings and levels, and then to measure performance and progress in the future. In other words, the first assessment provides a benchmark on which future assessments can be compared. Taking a closer look at the issue of outdoor recreation, we find that three benchmarks have been established to monitor change in levels of outdoor recreation. These benchmarks measure: 1) acres of primitive and wilderness public land in Oregon; 2) acres of multipurpose land available for recreation in Oregon; and 3) acres of Oregon parks and protected recreational land per 1,000 Oregonians. Having assessed the current measurements for these three benchmarks, the residents establish benchmark goals for the future. For instance, Oregon Benchmarks establishes a goal of 3 more acres of parks and protected recreation land per 1,000 Oregonians to be met by the year 1995. Action plans will be developed to plan for the
Milestones in Developing *Oregon Benchmarks*

1986 -- In *Emerging Trends 2010* the Oregon Futures Commission stresses the need for a comprehensive plan of Oregon's future.


June 1989 -- The Oregon Legislature creates the Progress Board, directing it to translate the strategies in *Oregon Shines* into measurable goals for Oregon.

May 1990 -- With the assistance of citizen panels, the Progress Board releases a draft of *Oregon Benchmarks* for public review.

January 1991 -- After extensive public reviews the Progress Board shapes and releases the 1991 *Oregon Benchmarks*.

June 1991 -- The Legislature adopts Benchmarks unanimously after review in 18 committees and directs the Progress Board to update the benchmarks every two years.


February 1992 -- Governor Roberts directs agencies to give priority to critical near-term benchmarks in the budget process, and directs all agencies to develop performance measures consistent with benchmarks.

June 1992 -- Governor's Task Force on State Government recommends in its report, *New Directions*, that *Oregon Benchmarks* be integrated as goals for state agencies, and that planning, budgeting and compensation systems be directed towards those goals.

*Source: Oregon Benchmarks 1993*
attainment of all of the benchmark goals. In 1995, the benchmark will again
be measured to see if the desired progress has been made, and new goals and
objectives will be set. In addition, new benchmarks may be deemed neces-
sary to measure true progress or performance.

In addition to reassessing goals, objectives and benchmarks, it is also
critical to reassess community priorities in the same process. As a means of
targeting the pool of scarce funds most effectively, the state has designated
each of the 272 benchmarks as being *urgent* or *core* benchmarks. Core bench-
marks are the fundamental indicators of quality of life. While these may not
be as critically important at present, they are nonetheless indicators that re-
quire monitoring. Urgent benchmarks, on the other hand, represent or mea-
sure the most pressing problems and need immediate progress. These urgent
benchmarks, as established through resident prioritizing, receive greater pro-
portions of investment.

The system of benchmarks established in Oregon will no doubt have
a significant positive affect on the quality of life in the state. It translates
vision into measurable attainments, promotes greater governmental account-
ability, and targets funds most efficiently to the most critical priority areas. It
also provides a means of consistent monitoring, which can discover dramatic
downswings or damaging trends in specific areas. If gone unnoticed, these
may do serious damage to the community's quality of life. However, this
early warning device allows for trained professionals and public servants to
keep watch over public valuables.

While the Oregon system of benchmarking serves as an excellent model
for other states and local communities, it falls well short in one respect: the
use of subjective and perceptual data. As has been documented throughout
this report, the use of this type of information is critical to the true assessment and measurement of quality of life. Yet, only the issue of customer satisfaction within the public finance and public agency performance objective uses any subjective data, other than that which was used to prioritize the urgent benchmarks. This means that only five out of 272 benchmarks make use of perceptual information, a key component to the monitoring of quality of life. These five benchmarks measure the percentage of state residents who think Oregon is doing a good job at creating jobs, keeping jobs, promoting Oregon to other states, promoting Oregon to other countries, and providing government services. As with all other benchmarks, these five have established goals to be achieved by 1995. Why are more benchmarks not utilizing the highly valuable information and understanding gained from questions of perception and satisfaction? According to the rationale provided for these benchmarks (which is provided for each in the appendix), "attitudes are one good measure of satisfaction" (Oregon 1993). However, what could be a better indicator of satisfaction than a question asking the citizens for their level of satisfaction?

A missed opportunity for the use of perceptual data is found within the public safety realm of the communities that are safe, enriching, and participative objective. The seven benchmarks are index crimes rate per 1,000, other crimes punishable by statute rate per 1,000, juvenile arrests per 1,000 juveniles, average rate of reincarnation, rate of arrestees who have drug(s) in their system at time of arrest, percentage of parole revocations involving substance abuse problems, and number of communities involved in a community-based strategic plan for law enforcement. The realities of crime and public safety problems are critical to quality of life, but so are the public perceptions of the same issues. Perceptions are often times very different
from reality. A statistic which indicates that the occurrence of crime is decreasing is very interesting to note. Yet, if the older residents still do not feel safe walking around their neighborhoods, is the objective statistic a good measure of quality of life? At the very least, a good quality of life benchmarking study will include both objective and subjective data.

**Concluding Remarks**

With an increased emphasis on perceptual data, the *Oregon Benchmarks* system provides the rest of the nation with a progressive tool for benchmarking quality of life. While this system was designed for an entire state, the process and the pool of potential benchmarks are transferable to individual communities. Oregon Benchmarks, with the necessary modifications, provides a tremendous model for benchmarking quality of life at the community scale.

The most critical aspect of a locally-developed community QOL benchmarking is that there are no set numbers or equations to compare one community to another. Community comparison is certainly not the aim of such an instrument. Rather, the residents of an individual community can develop their own system of benchmarks to appraise progress and facilitate future trend analysis. By establishing their own system of benchmarks, the community can assess whether community goals have been met, and distinguish in which areas they have fallen short or improved beyond expectations. It is clearly desirable to not only monitor quality of life changes both through objective and perceptual data, but also to establish quantifiable performance benchmarks to promote the attainment of specific and concrete quality of life improvements.
Chapter 8

Future Endeavors to Improve Quality of Life Monitoring

It is apparent that a community's quality of life is critical to the success of local economic development. As infrastructure, funding strategies, and tax abatement policies become standard in most communities, and mobility becomes more feasible for many facilities, quality of life becomes the single differentiating factor in many locational decisions. In addition to the attraction of business and personnel, a strong community quality of life helps to retain existing business and labor. Because of the increasing impact of quality of life upon economic development, it is critical that economic development professionals and other public servants understand the means by which community quality of life can be monitored.

The next step of monitoring community quality of life, after gaining an basic understanding of the QOL concept and its importance, is to assess and prioritize. A model of this phase was provided through the descriptive Total Quality of Life Initiative case study. Quality of life must first be assessed through the gathering of perceptual and objective data concerning each of the many specific factors affecting QOL. With these assessments the residents can then prioritize issues and needs. Having done so, the community can begin to develop goals and objective towards meeting these needs and priorities. The community then establishes specific and measurable bench-
marks, as illustrated by the description and analysis of Oregon Benchmarks, in order to set concrete goals and assess progress. In time, these benchmarks provide a means by which to compare progress and performance. The community begins the cycle again by reassessing needs and prioritizing. The different phases and steps within the Community Quality of Life Monitoring Process are essential building blocks for successful local economic development, and for a strong and stable quality of life.

Throughout the monitoring process it is essential that community leaders stay abreast of new monitoring instruments or potential benchmarks, like those described as models in this report. While switching over completely to new techniques and tools is unlikely and potentially harmful to the system, they provide insight into refinements or additions which enhance the entire monitoring system.
Communities should be aware of progressive techniques which might be used to improve monitoring methods, such as establishing multi-community study areas. Forming multi-community coalitions and study areas provides greater coordination, greater range of power and QOL improvements, and may take advantage of certain economies of scale. One obvious economy of scale is the promotion of an area for economic development purposes, which certainly benefits the entire region.

Communities should also take advantage of new and developing technologies, such as on-line information access terminals. Available to external users equipped with modems, public information systems become easily accessible to a great number of residents. In addition, such a system should be made available to the general public by placing networked terminals in government facilities and making them completely accessible. This technology allows for citizens to attain important information quickly and easily, which may enhance public awareness and civic involvement. Such terminals and networks may also be utilized as a means of gaining subjective and perceptual data from the public. This direct and up-to-date information can greatly enhance a community quality of life monitoring system. By keeping abreast of progressive techniques and applicable technologies, communities will become even more adept at maintaining and enhancing their precious quality of life.

While taking full advantage of new methods and technologies is important, it is of even greater importance that the process of monitoring community QOL is not removed, in any way, from the people of the community. The monitoring process does not always have to be one of formal interviews and surveys. The perceptions of the residents are easily gathered at more informal occasions, such as festivals, county fairs, and other community gath-
erings. In fact, the monitoring process may actually be built around several community celebrations, or it may even be the theme itself. While measuring community quality of life trends is critical to maintaining and enhancing QOL, we must not forget that the first step is to fully understand the needs of the community. Every means available for attaining this information, both formal and informal, should be utilized to promote a successful community quality of life monitoring process.
Bibliography


Segedy, James A. and Scott Truex. 1993. *TQL Workbook*. Ball State University, Department of Urban Planning and Indiana Department of Commerce, Division of Community Development.

Segedy, James A. and Scott Truex. 1994. *1993 Indiana Total Quality of Life Report*. Ball State University, Department of Urban Planning and Indiana Department of Commerce, Division of Community Development.


Appendix A

Summary of Workbook Questions

Total Quality of Life Initiative
Appendix B

Sample Community Profile Worksheet

Total Quality of Life Initiative
Community Profile Worksheet
Economic Development Director

The Indiana Total Quality of Life Initiative

In the past year, I have noted a change in the mood of our community and believe this is a positive trend. We are seeing more businesses opening up and the economy seems to be growing. This growth is benefiting local people, improving their quality of life, and creating new opportunities for employment.

The Indiana Total Quality of Life Initiative is a comprehensive effort to improve the quality of life for all residents of Indiana. Our goal is to create a healthier, more prosperous, and more diverse community where everyone can thrive.

Thank you very much for your participation.

Yours sincerely,

[Signature]

The Indiana Total Quality of Life Initiative is a partnership with the Indiana Department of Commerce.

[Table]

<table>
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[Checklist]

- 1. Economic Stability
- 2. Public Safety
- 3. Community Opportunity
- 4. Health and Safety
- 5. Recreation
- 6. Environment
- 7. Education
- 8. Transportation
- 9. Housing
- 10. Community Life

ECONOMIC VITALITY

Business Support:
- Local businesses need support, and we have a role to play in providing that support.
- Local businesses are important to the community and need our support.
- Local businesses create jobs and contribute to the local economy.

What incentives are available to local businesses?
- Tax breaks
- Grants
- Low-interest loans

Additional comments:
- Local businesses are the backbone of our community.
- We must support local businesses to ensure their success.

Labor:
- The labor market is a key component of the local economy.
- Local businesses need trained and skilled employees.
- We need to ensure that our workforce is prepared to meet the needs of local businesses.

What types of training programs are available?
- Apprenticeships
- GED programs
- Adult education programs

Additional comments:
- Training programs are essential to ensuring a skilled workforce.
- We need to invest in training programs to meet the needs of local businesses.

ECONOMIC VITALITY

Businesses need support to thrive in our community.

What types of support are available to businesses?
- Tax breaks
- Grants
- Low-interest loans

Additional comments:
- Business support is critical to the success of local businesses.
- We need to provide support to ensure the success of local businesses.

Local businesses are important to the community.

What incentives are available to local businesses?
- Tax breaks
- Grants
- Low-interest loans

Additional comments:
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Appendix C

Citizen Focus Worksheet

Total Quality of Life Initiative
Citizen Focus Worksheet

Consumer Opportunity

Evaluate the following consumer—desired goods and services. Place check mark beside all items that apply.

- Landscaping
- Why do you have it?
- Would you want it?

1. Personal services
2. Food
3. Communication
4. Transportation
5. Clothing
6. Utility services

- Comments

Economic Vitality

Is your community a good place to do business? Explain.

- Are there fewer business opportunities than a few years ago?
- Have business opportunities increased in the last few years?

- Do you think this is happening?

- Is your community a good place to do business?

Transportation

Evaluate the following aspects of transportation based on your level of agreement with it. Use many strongly agree, agree, neutral, disagree, disagree strongly, agree strongly.

- Traffic congestion is an important issue affecting your community. Use many strongly agree, agree, neutral, disagree, disagree strongly, agree strongly.

- How your community can solve traffic congestion problems? Explain.

Public Services

Evaluate these public services provided in your community.

- Are there any public goods and services on the list that are provided more by businesses than by local government?
- Can you think that there is a local business that could be providing more of these goods and services more efficiently than the government?
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**HOUSING**

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**COMMUNITY CHARACTER**

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**TOTAL QUALITY OF LIFE**

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<td>Social and cultural</td>
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