

MUSINGS FROM THE TRENCHES

PART FIVE

TRACKING PROGRESS – SOME ISSUES AND TOOLS

MIKE LEWIS

Tracking progress is easy to say and hard to do. It becomes even harder in an era when tracking progress and accountability have often been morphed into rigid patterns of bean counting. People working in the trenches are increasingly frustrated with the lack of concern on the part of funding organizations, and in particular governments, with performance-oriented tracking. It often seems narrow concentration on financial details consumes far too much human energy compared to discussion focused on what is being learned and how results can be improved.

This section is focused primarily on outcome and performance-based tracking. Financial measurement is but one dimension, and certainly not the most important. From a single social enterprise ([Emerson and Cabaj, 2000](#)), to organization and community level outcome tracking ([Leviten-Reid, Eric, 2000](#); [Lockhart and McNair, 2003](#); [Colussi, 1999](#); [Cabaj, 2000](#)), to tracking social, economic, and environmental progress in an entire state (Oregon) ([Lewis, 2001](#)), and finally to a provocative look at so called multi-level performance measurement in a national level government department (Indian and Northern Affairs Canada) ([Lewis and Lockhart, 2002](#)), this section is a small window into a big and sometimes complicated subject, the progress being made and the remaining unsolved issues.

One of the fundamental difficulties associated with tracking progress is the tremendous confusion among many organizations—community-based, intermediary, and government—about what outcomes they are trying to achieve. Inputs are confused with outputs and outcomes are confused with both. Funding bodies expect organizations to track community-wide impacts when their mission and focus is much more limited. It is little wonder that the notion of tracking progress and accountability can be so bewildering at times, such as in the case of Human Resources Development Canada following the so called billion dollar boondoggle, or in the case of Indian and Northern Affairs challenging and confused performance measurement system; the ripple effects can foster a culture of deception rather clarity, of obfuscation rather than facilitation of learning and improved performance ([Lewis, 2004](#) and [Lewis and Lockhart, 2002](#)).

A second difficulty is that hard number economic and financial outcomes are often elevated by investors and funding bodies as being the bottom line. Social outcomes are often discounted and misunderstood. The result can be a distorted allocation of time, energy, and resources among community organizations and funding organizations. This is exacerbated by the difficulties that often accompany trying to track the so-called softer side of development such as impacts on social cohesion, interconnectedness and well being. Where funders are interested, the time and cost of data collection can be tremendously problematic ([Lockhart and McNair, 2003](#)); everybody wants the information but few want to pay for getting it or effective analysis.

Nevertheless, while these challenges continue to be prevalent, some progress is being made, although the practice in tracking progress is likely still a ways behind the projected promise in the majority of community organizations and, I would hazard to say, governments.

At the organizational level, Cabaj's very practical approach to tracking progress in ways that improve performance is solid and meaningful ([Cabaj, 2000](#)). Emerson's work through the Roberts Enterprise Foundation, states social return on investment is a step forward and has prompted many to continue improving multiple bottom line tracking of social enterprise impacts, including several partners in the BALTA Social Economy Research Alliance ([Emerson and Cabaj, 2000](#)). The community resilience manual is a very powerful diagnostic tool for rural communities wanting to understand where they are, for setting priorities, and tracking progress with respect to their capacity to intentionally shape their economic and social future ([Colussi, 1999](#)). Very reasonable to administer, it has been adapted in Australia, Europe, and Botswana. Also impressive is the work of the Caledon Institute for Social Policy, engaged by a leading CED organization to track a multi-year, comprehensive approach to poverty reduction in the Waterloo region. Reid's article introduces us to the complexity and promise of tracking progress at several levels: individual/family, organization/business, and community/network ([Leviten-Reid, Eric, 2000](#)). Interestingly, the roots of the Cabaj article ([Cabaj, 2000](#)) are in the same organization - the

Lutherwood Community Opportunities Development Association - that the Caledon evaluation work tracked, and that Torjman writes about in her article "Are Outcomes the best Outcome" ([Torjman, 2000](#)). (The article of the failed recycling bid ([Knobbloch, 1995](#)) also relates to this same organization.)

Although complex, and though there have been many unproductive indicator projects in the last 20 years that were launched with great excitement and quickly fizzled, the promise of systematically tracking progress in ways that feed real learning, which in turn feeds systems change of the type Schorr speaks about ([Lewis, 2000](#)), can happen. The incredible impact of the Oregon Benchmarks and the Oregon Progress Board at multiple levels of Oregonian society testifies to this potential ([Lewis, 2001](#)). It is one of the few examples I know of where social, economic, and environmental progress against goals have been tracked and reported on that has led to efficient and effective system level change as a result of societal, agency, and community level learning.

Of the seven BALTA research interests set out in the introduction, I believe there are two that are particularly touched on by the contributions in this section.

1. ***Re-inserting social goals into economic life:*** to better understand and *critically analyze* the impact of inserting such social processes of reciprocity, solidarity, and sustainability into economic life, in practice and in theory.
5. ***What supports or thwarts adaptation & scaling up:*** to understand and *critically analyze* key issues, opportunities, and constraints for adapting and scaling up what is working into the BC and Alberta contexts.