



# Opportunity Index Technical Guide:

## Creating an Opportunity Index at the Local Level in Five Steps

### OVERVIEW

Opportunity Nation is a bipartisan, nationwide campaign comprised of over 275 non-profits, businesses, educational institutions, faith-based organizations, community groups and individuals working together to close the opportunity gap in the United States. Opportunity Nation's guiding principle is this: the zip code you are born into should not determine your chances in life. When the ability to move up the ladder of opportunity grinds to a halt, we are in grave danger of losing the best of America.

Opportunity Nation and our partner Measure of America joined together to develop a way to measure opportunity and track progress over time at the state and county level: the Opportunity Index. This unique tool, which is updated annually, helps to spotlight place-based barriers to opportunity. It also gives local leaders a multi-sector way to talk about expanding opportunity where they live, bring diverse groups together and track progress over time.

Our goal is to increase Opportunity Scores in each of the 50 states and Washington D.C. Reaching this goal has become the guiding light for our policy and advocacy efforts, as well as for our community and business partnerships. At the community level, this means working with elected officials, grassroots advocates and other local leaders to set goals based on their priorities, local assets and challenges while encouraging community leaders to work together to expand opportunity.

Sometimes spurring local-level action requires local-level data. This toolkit offers technical guidance on how you can modify the standard Opportunity Index to create your own customized city, town or neighborhood-level Index. It includes an explanation of the indicators that make up the Opportunity Index, how the Index is calculated and ways to adjust the Opportunity Index for the local arena. It also features suggestions of how to build ownership and create an inclusive preparatory process, present information in the best way for your target audience and create mechanisms for sustainable change.

### OPPORTUNITY INDEX: TIP

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**Creating a local Opportunity Index requires a degree of technical skill. We strongly recommend you partner with a local college or university to create yours, to ensure its accuracy and effectiveness.**

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# STEP ONE

## UNDERSTAND WHAT'S BEHIND THE OPPORTUNITY INDEX

Opportunity can be defined in many ways, encompassing a range of circumstances that open doors to economic mobility. Opportunity stems from many sources, including demographic characteristics that individuals cannot change, such as their parents' educational level or their racial heritage, personal characteristics and attributes, such as determination or intelligence, and conditions present in different communities, like quality schools and safe streets. Although the first and second sets of factors are highly relevant to opportunity, the Opportunity Index focuses on the third set of factors, the conditions present in different communities. Compared to the other variables, community conditions can be highly amenable to policy change and to collective efforts to improve both access to opportunity and quality of life.

The Opportunity Index allows us to compare the conditions different people face based on where they live. Where a person lives is pivotal to his or her opportunities, including employment, education, housing quality and availability, access to health care, political processes and more. Some communities have characteristics that open many doors of opportunity for their residents; others do not. Focusing on geographic areas is also valuable because many of the policies and actions required to address lagging opportunity and economic mobility must happen at the county or state level.

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### Indicator Resources:

- U.S. Census: American Community Survey - <http://www.census.gov/acs/www/>
  - Bureau of Labor Statics: Unemployment Statistics - <http://www.bls.gov/data/>
  - National Center for Education Statistics - <http://nces.ed.gov/datatools/>
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The indicators used to calculate the Opportunity Index come from official national datasets. The state-level Opportunity Index is made up of sixteen indicators in three broad categories—jobs and local economy, education and community health and civic life. The county-level Index includes fourteen of these variables; group membership and volunteerism indicators are not part of the county Index due to the lack of reliable, stable data at the county level.

Calculating your local Opportunity Index requires three general steps:

1. Normalizing the indicators in order to put them all on a common scale;
2. Averaging rescaled scores together within each of the three dimensions of the Index;
3. Averaging the three dimension scores together to come up with the final score or grade.
4. Each of the indicators in the Opportunity Index is weighted equally, and each of the three dimensions makes up one-third of the final Index value.

In order to facilitate these calculations, Opportunity Nation can provide an excel spreadsheet with guidance at your request. Contact a member of the Opportunity Nation's Community Leadership team to obtain this resource and any additional guidance.

The following are the sixteen indicators used for calculating the Opportunity Index, divided into the three dimensions of opportunity:

### JOB AND LOCAL ECONOMY

#### Employment

Indicator: Unemployment Rate (%)  
Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

Rationale for inclusion: Retaining a steady job is crucial to the social and economic well-being of the vast majority of Americans, who rely upon wages to maintain their quality of life. A high unemployment rate means that job opportunities are scarce; at the community level, high unemployment rates also mean that there are fewer informal employment networks local people can tap to find a job.

#### Wages

Indicator: Median Household Income (\$)  
Source: U.S. Census Bureau, American Community Survey

Rationale for inclusion: Wages (as opposed to wealth) are the largest part of overall income for most Americans and therefore are the main determinant of living standards and financial security. Those with low wages often face fewer opportunities due to the high cost of educational advancement, as well as restricted social and health resources.

#### Poverty

Indicator: Population below Poverty Line (%)  
Source: U.S. Census Bureau, American Community Survey

Rationale for inclusion: Poverty is both a cause and effect of low educational achievement, poor health and limited community assets. Endemic poverty also puts families at risk and strips them of the resilience they need to weather hard economic times.

#### Affordable Housing

Indicator: Households spending less than 30% of income on housing (%)  
Source: U.S. Census Bureau, American Community Survey

Rationale for inclusion: High housing costs trigger painful tradeoffs between safe, adequate housing and other necessities, such as education, medicine, food and transportation. An inability to find affordable housing in a neighborhood with good schools and adequate transportation constrains opportunity for adults, who may face a long and arduous commute to distant parts of town with more employment, and for children, whose long-term opportunities may be diminished by an inadequate public education.

#### Assets

Indicator: Commercial banks, savings institutions and credit unions per 10,000 residents  
Source: U.S. Census Bureau, County Business Patterns and Population Estimates Program

Rationale for inclusion: Familiarity with and access to banking institutions is critical to maintaining personal financial security. Those who understand saving strategies benefit from tax incentives and are less likely to be exploited by companies marketing financial products with high costs and limited benefits. Individuals with savings make better long-term decisions, have healthier psychological well-being, and are more likely to succeed in higher education. Additionally, understanding and access to credit is key to small business creation and expansion, an important avenue of economic opportunity.

#### Inequality

Indicator: 80/20 Ratio (household income at the 80th percentile compared to that of the 20th percentile)  
Source: U.S. Census Bureau, American Community Survey

Rationale for inclusion: High ratios of income inequality not only concentrate social and economic capital, and therefore resources, among select groups, but also adversely affect the health of those at the bottom of social hierarchies. Evidence suggests that the steeper the social ladder, and therefore the inequality, the worse the health effects on those on the bottom rungs.

#### Internet Access

Indicator: High-speed Internet (% of households)  
Source: Federal Communications Commission Internet Access Services Reports

Rationale for inclusion: Internet access has become a requirement for full participation in American society, necessary for everything from doing homework to applying for jobs to interacting with health-care providers. Indeed, the Internet will soon be the chief way in which people access information, part and parcel of life's essential infrastructure. Those without this resource are at a severe disadvantage in interacting with society and accessing educational and career resources.

## EDUCATION

### Preschool Enrollment

Indicator: % ages 3 and 4 in school  
Source: U.S. Census Bureau, American Community Survey

Rationale for inclusion: An important first step on the road to opportunity is a high quality early education. The percentage of 3- and 4-year-olds enrolled in preschool is an important indicator of school readiness and life chances. Children who attend a high quality preschool are more likely to graduate high school and be employed as adults, and are less likely to repeat a grade, engage in crime, and spend time in prison, than at-risk children who do not attend a high quality preschool.

### On-Time Highschool Graduation

Indicator: % of adults 25 and older who have completed an associate degree or higher  
Source: U.S. Census Bureau, American Community Survey

Rationale for inclusion: Those with more education have access to jobs with higher salaries and greater autonomy, but also tend to be less affected by economic downturns. During the Great Recession, college graduates faced a combined unemployment and underemployment rate of 10 percent; those with only a high school education faced rates twice as high. In our increasingly information-driven national economy, those without a post-secondary education are becoming less desirable employees. More education also correlates to better, healthier, happier and longer lives.

### Associate's Degree or Higher

Indicator: % of freshman who graduate in four years  
Source: U.S. Department of Education & National Center for Education Statistics

Rationale for inclusion: Students who do not graduate from high school on-time are at a higher risk of never graduating, not going on to higher education, and neither working nor attending school in early adulthood. On-time high school graduation sets the stage for young adults to take advantage of educational and career opportunities later in life.

## COMMUNITY HEALTH AND CIVIC LIFE

### Group Membership

Indicator: % of adults 18 and over involved in social, civic, sports and religious groups  
Source: Measure of America analysis of data from U.S. Census Bureau, DataFerrett, Current Population Survey & Civic Engagement Supplement

Rationale for inclusion: Involved community members benefit from social support and greater knowledge about and access to a variety of resources, increasing their well-being and access to opportunity.

### Access to Healthy Food

Indicator: Grocery stores and produce vendors per 10,000 population  
Source: U.S. Census Bureau, County and Business Patterns and Population Estimates Program

Rationale for inclusion: Access to healthy foods at affordable prices is closely linked with access to appropriate medical care, as one of the formative social conditions shaping personal health. When the lack of full-service grocery stores makes obtaining fresh produce difficult, or when the cost of low-calorie, healthy foods—nine times more than the cost of high-calorie foods with little nutritional value per one thousand calories—is insurmountable, health suffers. As health declines, so too does people's ability to seize opportunity.

### Access to Health Care

Indicator: Primary care providers per 100,000 population  
Source: County Health Rankings analysis of data from U.S. Department of Health and Human Services, Health Resources, and Services Administration, Area Resource File.

Rationale for inclusion: Inaccessible medical care directly results in declines in health. Not only do financial and geographic hindrances prevent individuals from obtaining adequate medical attention after they begin to suffer from an illness or injury, but these conditions also impede preventative care. People in poor health are less able to create and seize opportunities.

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## The Opportunity Index in Action

### Arkansas

Dismayed by the 17.6 percent of young people who are neither in school nor working in Arkansas' Ouachita County, Linda Nelson, Executive Director of the Ouachita-Calhoun County Literary Council, uses the Opportunity Index to raise awareness and set goals towards increasing opportunity for these disconnected youth. Working with local leaders, the Council hosted a mentoring series and planned a "Pathways Expo" for 200 youth looking to reengage in school or in the workforce.

Their new "Transitional Pathways Program," will engage 10 youth annually to increase their opportunities. Using the Opportunity Index has aided the program in its work to reform the social conditions that lead to youth disconnection and depress the county's overall Opportunity Index score.

### Iowa

After learning about Opportunity Nation and its mission, the President of the Des Moines Area Community College and CEO of the Community Foundation of Greater Des took action and founded Opportunity Iowa. Today, Iowa has a statewide coalition of community colleges, nonprofits and employers focused on raising public awareness about the urgent need to expand opportunity, by influencing key political leaders, launching worker-training programs and convening representatives to work toward improving opportunities in counties.

Opportunity Iowa uses the Index to identify and resolve key social challenges that hinder personal achievement. They aim to support community efforts already underway that advance economic mobility and to use the Opportunity Index to bring diverse groups together around a common goal.

### Disconnected Youth

Indicator: % of youth (ages 16-24) not in school and not working  
Source: Measure of America analysis of data from U.S. Census Bureau, American Community Survey, PUMS Microdata

Rationale for inclusion: Young people neither enrolled in school nor working face diminished prospects for advancement in comparison to their "connected" peers, who lay the foundation for a productive, fulfilling adulthood during early adulthood. The effects of youth disconnection on all manner of opportunity are long-lasting, influencing everything from earnings and financial independence to physical and mental health and even marital prospects.

### Community Safety

Indicator: Violent crimes (homicide, rape, robbery, assault) per 100,000 population  
Source: State data from U.S. Department of Justice, Federal Bureau of Investigation Uniform Crime Reporting Statistics; county data from County Health Rankings analysis of data from U.S. Department of Justice, Federal Bureau of Investigation Criminal Justice Information Services. County data from Illinois by County Health Rankings from Illinois State Police Uniform Crime Reporting data.

Rationale for inclusion: If residents do not feel safe within their communities, children may struggle in the classroom and adults may be less able to establish cohesive support systems. Social bonds and informal networks tend to fray when crime rates are high. Health also suffers when people do not feel safe enough to exercise outdoors. All these effects create formidable barriers to opportunity.

### Volunteerism

Indicator: % of adults (ages 18 and older) who did volunteer work through or for an organization at any time in the previous year  
Source: Measure of America analysis of data from U.S. Census Bureau, DataFerrett, Current Population Survey, Volunteering Supplement

Rationale for inclusion: Like group membership, volunteerism is a metric of social capital; it serves as a proxy for community trust and social cohesion, both of which are important contributors to expanding access to opportunity.

# STEP TWO

## MODIFY THE OPPORTUNITY INDEX FOR USE AT THE LOCAL LEVEL

The Opportunity Index is available for all U.S. states and Washington, D.C., as well as more than 3,000 counties. But social conditions within states and counties often vary tremendously; sometimes communities need more detailed, locally specific measurements in order to understand key bottlenecks, appropriately focus their priorities and take action. Many of the indicators used in the Opportunity Index are not available for geographies smaller than counties, and when they are, using them requires pooling together several years' worth of data to ensure the data are reliable.

This section explores ways you can adjust the Opportunity Index to zoom in on your community. Just as you know the best pizza place in your hometown and the hours of the local gas station, only you understand the metrics most relevant to opportunity in your own neighborhoods, those dimensions that have played pivotal roles in shaping the well-being of the population. Take advantage of this knowledge and employ it to better measure, analyze, confront and resolve the challenges facing your community.

### Measuring opportunity vs. measuring poverty, what's the difference?

The official U.S. poverty rate is an important measure of people's current material living standards, and is one of the sixteen indicators that make up the Opportunity Index. But the current poverty rate, which measures only income, paints only a partial picture of the landscape of opportunity in any given place. Accessing opportunity requires more than money; it requires that people are healthy and well-educated enough to seize the opportunities that exist, that their ability to come and go is not restricted by street crime, that their social networks provide information and resources about schools and jobs, that jobs are available, and more. The Opportunity Index sheds light on these important questions.

### Indicator basics

What makes an indicator "good"? A good indicator needs to be a fairly sound proxy for what you are trying to measure. If you want to know the degree to which your neighborhood has access to the full range of financial services, from savings and investment services to personal and business lending, you need to decide what you will use as a stand-in for "the full range of financial services." Because business loans tend to be made in person rather than online, you may decide that a physical bank offering a specific set of services is the proxy you will use. Trade-offs are involved here. Some people will do their banking, including getting loans, online, while others may use a financial institution near their office. Choosing physical banks as my proxy thus leaves out a share of banking institutions people in my community use. But since you have no way of getting information on those other financial institutions, this trade-off is necessary.

Each indicator needs to have a clear definition. If you want to know how many full service banking institutions exist in my community, you first need to define in a clear way what that entails. For instance, a storefront operation with access to the public from the street can offer both business and personal loans at mainstream rates as well as savings and investment services. Second, the data needs to be collected in the same way from place to place. If part of your data collection methodology is for people to walk the neighborhood counting the banks, then making sure that everyone is only counting storefront banks and no one is counting checking-cashing places that offer high-interest short-term loans or bank offices not open to the public is critical to the integrity of my data. Third, the indicator should remain constant over time. If in year one, you count ATMs in your bank survey, and years two and three, you only count storefront banks, then you can't make an accurate assessment of whether access to banks has improved or not over the three-year period. Rigor and consistency are very important. Your conclusions are only as good as the data upon which they are based.

### Some possible replacements for Opportunity Index indicators

Below is a table that identifies the three dimensions of the Opportunity Index, the themes within each of those three dimensions, the indicator used for that theme within the Opportunity Index, and then, in italics, examples of indicators that could serve as local-level proxies for your alternative index. The list of alternative indicators is by no means exhaustive. These are simply examples of ways one might get at the different opportunity themes using locally-available data.

Also, some data in the Opportunity Index are available at a very local level: the census tract. When this is the case, it is noted in the table and an alternative proxy indicator is not suggested. One thing to keep in mind, however, is that sometimes numbers at the census tract level are too small to make reliable estimates. Take, for instance, disconnected youth or the percentage of young people ages 16 to 24 who are neither in school nor working. If we try to calculate youth disconnection at the census tract level, we are not working with the entire population of the tract (most census tracts have about 4,000 people, though they range in size from 1,500 to 8,000 people), but rather a subset of that population, namely people ages 16 to 24. This could bring the population in question down from 4,000 (all the people in a census tract) to 400 people (all people in that census tract who are currently ages 16-24). A disconnection rate of 15 percent would mean that in this population of 4,000, about 60 young people are disconnected. Sixty is a very small number, and the error margin in this case would be unacceptably high. An option in this case is to use data pooled over three years or five years; this increases the reliability of the estimate but decreases its value for tracking year-to-year change.

When a good replacement proxy indicator cannot be found, one option is to use the county-level data already included in the Opportunity Index. In other words, if you are working in a small town or a specific city neighborhood for which localized data are unavailable, you can use the county data as a stand-in. This trade-off is not ideal. If you are working in a very disadvantaged area, for instance, a countywide estimate may paint a rosier picture than would data on your specific place. Unfortunately, however, sometimes this option is the best one available.

### Jobs and Local Economy

THEME	INDICATOR
Jobs	Unemployment Rate (%) Available from American Community Survey, U.S. Census Bureau, in five-year pooled data estimates for populations under 20,000.
Wages	Median Household Income (\$) Available by census tract from U.S. Census Bureau, (American Community Survey)
Poverty	Poverty (% of population below poverty line) Available by census tract from U.S. Census Bureau, (American Community Survey)
Inequality	80/20 Ratio (Household income at 80th percentile to that of the 20th percentile): Available by census tract from U.S. Census Bureau, (American Community Survey). Another alternative that is also used as a reliable measure of inequality and may be calculated by a local university research department is the Gini coefficient.
Assets	Banking Institutions (commercial banks, savings institutions, and credit unions per 10,000 residents): Possible local-level replacement: The number of banking institutions in a community can be readily determined by a physical survey of the area in question, with teams of people walking the streets of the community and counting the number of institutions they find.
Affordable Housing	Households Spending Less than 30% of Household Income on Housing Costs (%) Available by census tract from U.S. Census Bureau, (American Community Survey). In addition, other measures of affordable housing could relate to subsidized housing; data on subsidized housing would be available from the local housing authority.

## Jobs and Local Economy

### THEME

#### Internet Access

*High-Speed Internet (% of households for states; 5-level categories for counties)*

### INDICATOR

Possible local-level replacement:

Each internet service provider has information on the location and level of service received by all its subscribers. Though this information is not collected in a uniform way across geographies and service providers, it is nonetheless collected in one form or another. Many county governments offer mapping programs on their websites that identify utilities coverage.

## Education

#### Preschool:

*Preschool (% ages 3 and 4 in school)*

Although these data are available by census tract from U.S. Census Bureau, (American Community Survey), the population of 3 and 4 year-olds in many census tracts is too small for reliable estimates; use these data with caution at that level, or use five-year estimates.

Possible local-level replacements:

- Unmet need for preschool—Ratio of number of preschool slots available in community to number of 3 and 4 year-olds who live in community (information could be obtained by canvassing preschools to tally slots and using Census Fact Finder to identify number of 3 and 4 year olds in the relevant Census tracts).
- Percent of children assessed as ready for kindergarten – sometimes school districts have this information.
- Number of licensed daycare center slots per 1,000 children aged 0 to 4 years (local Department of Social Services may have these data)

#### High School Graduation

*On-Time High School Graduation (% of freshmen who graduate in four years)*

This statistic may be available from local high schools, school district offices or boards of education.

Possible local-level replacements:

- Ratio of 10th graders to graduating seniors in local high school
- Dropout rate

#### Post-Secondary Completion

*Associate Degree or Higher (% of adults 25 and older)*

Available by census tract from U.S. Census Bureau, (American Community Survey)

## Community Health & Civic Life

#### Civic Engagement

*Group Membership (% of adults 18 and older involved in social, civic, sports and religious groups) [STATES ONLY]*

States, cities, and school districts have deployed different surveys that get at the underlying concern for community connectedness that these volunteerism and group membership indicators are measuring.

Possible local-level replacements:

- The Current Population Survey of the U.S. Census Bureau recently did a supplement on volunteering for some cities.
- One example of a local survey is the California Healthy Kids Survey, which assessed “the percent of eleventh graders reporting their level of connectedness to school is high.”
- All states measure the percent of eligible voters who are registered to vote.

*Volunteerism (% of adults ages 18 and older) [STATES ONLY]*

# STEP THREE

## BUILD OWNERSHIP AND CREATE AN INCLUSIVE PARTICIPATORY RESEARCH PROCESS

After you have explored the best way to customize the Opportunity Index for use at your local level, it will be important to think about the team that will be pushing this work forward. There are a few key questions you might want to consider.

### What is your role in this endeavor?

Are you the leader of a program or organization that will collectively participate in this project? Are you working alone and need to build a team? Whether you have a committed staff to work with already or not you should be thinking about partnerships and how a cross- sector approach to creating a local Opportunity Index might create a richer process and outcome.

### Partnership

Community-based organizations and institutions of higher education should be the first two sectors you reach out to locally, as they likely have resources that can play a leading role in researching data and performing the necessary calculations. Also keep in mind local businesses and banks that might also have an interest in this project and in-house expertise to help with data analysis.

Think about each theme in the index and which organizations are working on those issues in your community. They may have insight not only on the best indicators to use, but also better access to data and resources related to those indicators.

How would you explain their participation as a mutually beneficial process? What is your elevator speech to get others involved?

### Who will calculate the Opportunity Index?

Although we advocate a team approach to this project, the actual calculating of your local Index – shown in Step 1 -- should be lead by one person or a portion of the larger team. Having sound, reliable and explainable data is a key part of what makes the Opportunity Index compelling. A considerable amount of time should be taken on making sure the figures are reliable. Establish your own system of checks and balances – this way you won’t have to worry about questionable outcomes. For example, you may want to identify a trusted, credible reviewer in your community who can look at your methodology and results before you share it more broadly.

### What will the “Branding” look like?

If you have created a local Opportunity Index with a team you all should own the work together. This isn’t only fair, it is smart. Collective ownership fosters increased awareness. Unless this is a tool you plan to keep behind the scenes, think of a name for the project to promote it. You and your team will have to tailor this idea to your own needs.

In Norfolk County, MA – specifically Quincy – Opportunity Leader, Melissa Horr initiated Opportunity Quincy. This effort is a merger of local community conversations about volunteerism, data and collaboration, shaped and supported by tools released by Opportunity Nation: the Opportunity Index and our Shared Plan. About 100 individuals and more than 40 organizations participated in the “Opportunity Quincy” initiative over the past fiscal year. This is due to Melissa’s leadership and commitment and also her strategic branding of the work from its earliest stages.

Melissa made sure “Opportunity Quincy” appeared on all related materials and she used this branding to recruit collaborator. Melissa incorporated social media in her outreach efforts, creating a Facebook page, as well as a Twitter account, and is currently working on a strategy to launch an Opportunity Quincy website. Many participants requested a centralized place for information about opportunities and events.

# STEP FOUR

## PRESENT YOUR INFORMATION IN THE BEST WAY FOR YOUR TARGET AUDIENCE

Calculating and preparing your local Opportunity Index is of little use unless it is effectively conveyed to a broader audience, clearly presenting social conditions, highlighting potential for change and inspiring action.

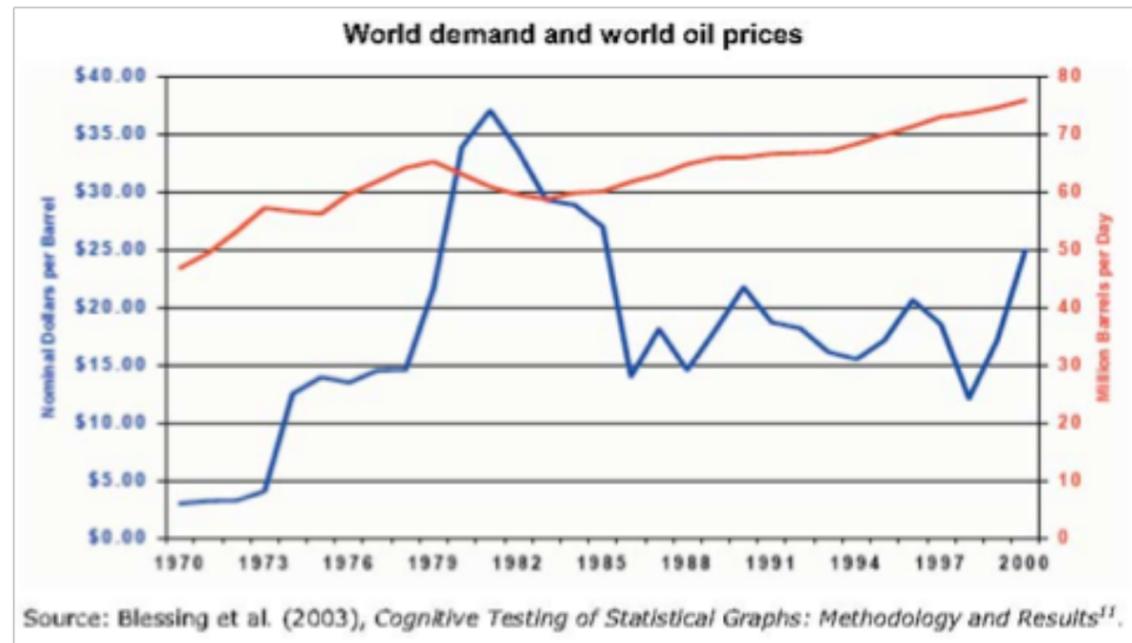
Few people want to read tables of numbers or struggle with complex statistical jargon, and so you will need to find way to share your Index findings in ways that make sense to different groups of people, including those with limited experience in quantitative analysis. In this section, we will discuss strategies to focus your conclusions, as well as explore options for presenting information in order to make a compelling argument for change.

Prior to drafting any account of your findings, think of the central message you wish to communicate to the audience, as well as the most appropriate structure to do so. Regardless of the format of the work—case study, film, photography, formal report or short document—make sure that you have a clear, concise introduction that makes evident the purpose of your work and a conclusion that re-emphasizes the findings.

Within the body of the work, you may wish to discuss the results in the three distinct categories of jobs and the local economy, education, and community and civic life prior to putting them all together. Remember that most people have not yet thought seriously about the complex topic of social mobility and economic opportunity: keep it simple and clear.

Analysis that includes both quantitative and qualitative explanations is often the most convincing. Numerical information is helpful in understanding and summarizing the experiences of groups of individuals, while qualitative data—such as quotes and case studies—are frequently effective in humanizing the data and ensuring that the reader recognizes the real-world impact of the numbers.

When discussing the diminished opportunities of disconnected youth, for example, it may be compelling to include the personal testimony of a young person who is neither enrolled in school nor employed in the workforce and how that experi-



ence has affected his or her personal social and financial prospects. Keep in mind though that highlighted data—whether quantitative or qualitative—should be representative of the broader data set. If, continuing the previous example, the percent of disconnected youth rests below three percent, it may be inappropriate to emphasize the struggles, however real, of that particular population due to its small size.

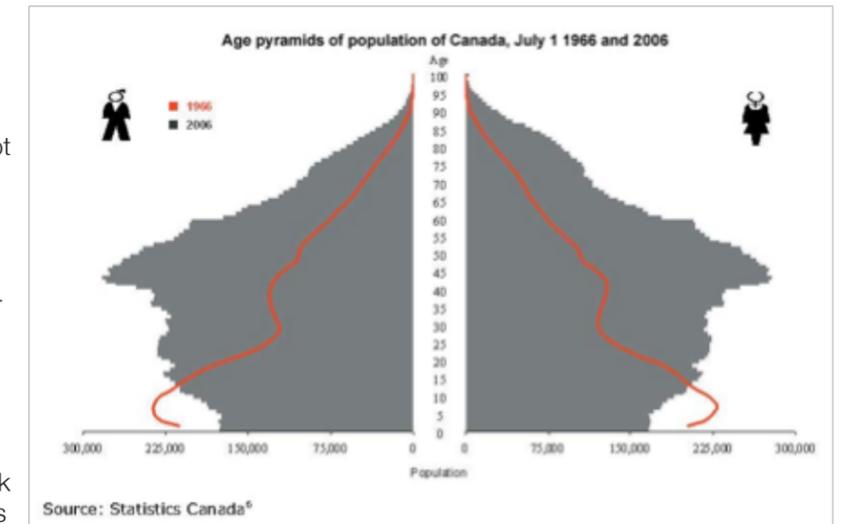
In a similar way, make sure to report standard statistical errors, and explain assumptions and caveats without becoming too technical. Peer reviews and careful editing are key to ensuring both the accuracy and precision of reported data, and are of the utmost importance since even a small error can threaten the authority of the work.

A common trap, particularly easy to fall into while simultaneously analyzing the multiple metrics that contribute to the Opportunity Index, is attributing causality where only a correlation exists. At the national level, for instance, the states that spend more per pupil on education tend to also be states that have a higher average level of educational attainment among adults. It's easy to jump to the conclusion that the higher per pupil spending is leading to higher levels of educational attainment—and maybe it is. But the causality could conceivably be working in the opposite direction; perhaps people with higher levels of educational attainment tend to vote into office candidates that vow to increase educational spending, or are more likely to vote “yes” on increased school budgets. Or maybe some other factor, like a labor market demand for highly skilled workers, is causing both higher educational attainment and higher school spending. In short, tempting though it may be, saying that one thing causes another is a tricky business, and one that even experienced social scientists approach with extreme caution.

Too much quantitative reasoning and data can also overwhelm and unnecessarily confuse the reader. Instead of simply reporting the numbers, use your energy to decode the information so that it is accessible and easy to comprehend. Make sure to explain variables and use words, not numbers, to explain the meaning behind the raw values. If you have a lot of these values and they are integral to your message, use an alternative format, such as a map, table, chart, graphic or diagram to display them in an attractive and user-friendly way.

Graphics should contain years and units of measurement and be easy to read, titled and annotated well, and formatted similarly within the document. Graphics are also a great way to break up blocks of text with color and images as well as highlight key findings, thereby making the reader's experience more enjoyable and less demanding. Bear in mind that not all data referenced in or used for a publication must be formatted for inclusion in its main body; it can be appended in accompanying tables to provide a reference for the author and reader alike.

Simplify each graphic so that it communicates one central message in a way that is straightforward and easy to understand. Prior to distribution, test your presentation on colleagues or friends to see if they get the intended message. If there is too much information for a graphic, try a table. A small, well-formatted table can often provide a great deal of simplified information that is easily absorbable. Ensure that each table is labeled clearly enough such that it could be a stand alone, whether published within a report, article, publication or web page.



Always remember to use plain language not only in the main text of your presentation, but also in all tables, visuals, and graphics. You are discussing themes and topics that affect everyone, from a recently arrived immigrant still struggling with English to the most sophisticated academic. It should also be your goal to make your data as accessible as possible. Plain language is faster to read and more efficient in getting your message across. Some basic tips include keeping sentences and paragraphs short, starting each paragraph with the most important message, aiming for one idea per sentence and avoiding passive voice.

Another useful tool, particularly when developing local data for the Opportunity Index, is drawing comparisons to larger data sets, such as those available for the county, the state or the nation as a whole. The information you have calculated for your local region is only meaningful in the context of how others are faring around you, so remember to provide an appropriate framework.

You may wish to end your presentation with a set of suggestions for action to increase opportunity in your neighborhood. While your findings may be interesting in themselves, they are only as meaningful as the advocacy they inspire and the lives they improve.

**Share of total energy consumption, by sector (in percent)**

Ireland, 1980-2003

	1980	1985	1990	2000	1995	2002	2003
<b>Transport</b>	27.8	27.9	28.2	31.1	36.8	39.5	39.1
<b>Residential</b>	31.1	33.9	30.4	27.6	24.3	23.7	24.0
<b>Industry</b>	31.5	27.2	23.9	22.1	21.4	19.5	18.8
<b>Agriculture</b>	n/a <sup>1</sup>	n/a <sup>1</sup>	3.5	3.7	3.1	2.9	2.8
<b>Services</b>	9.6	11.0	14.0	15.5	14.4	14.4	15.3
<b>Total</b>	100.0	100.0	100.0	100.0	100.0	100.0	100.0

<sup>1</sup> Data on energy consumption for the agricultural sector was not collected until 1990.

Source: Department of Public Enterprise, Ireland

# STEP FIVE

## CREATE A MECHANISM FOR SUSTAINABLE FOLLOW-UP

Our campaign uses the Opportunity Index for a range of activities both external and internal. These include informing our policy agenda and connecting the work of our coalition members to Index data. It also helps us track progress on our goal to improve Opportunity Scores in all 50 states and Washington D.C. When opportunity expands, we all benefit. Because Index scores are updated and released each year, we are able to monitor improvements and setbacks.

### What will the local Opportunity Index be used for?

In Step 3 we explored the idea of branding and how the team who worked on creating the local index can collectively “own” it. But what will you collectively use it for? And do you imagine that use staying the same every year? Please see the enclosed case study on our partners in Iowa who leveraged the Opportunity Index to create a statewide initiative, Opportunity Iowa.

Here are some other examples of how others have used the index in the past:

Opportunity Leader Linda Nelson, executive director of the Literacy Council in rural Arkansas. Linda uses the index to raise awareness and set goals to increase opportunity for disconnected youth ages 16-24. Linda worked with local leaders to host a mentoring series. Soon after, she mobilized a dozen cross-sector stakeholders to plan a “Pathways Expo” for youth looking to reengage in school or the workforce. This collaborative effort is laying a foundation for a “Transitional Pathways Program” that is set to launch in Fall 2013. Linda’s team will engage a minimum of ten young people each year to strategically increase their opportunities on their pathway towards success. Linda plans to use the Opportunity Index to raise awareness as she plans and fundraises each year.

The Washington State Budget and Policy Center’s report titled “In Pursuit of Prosperity: Eight Strategies to Rebuild Washington State’s Economy” cites the Opportunity Index when highlighting the Opportunity Scores of Washington’s counties. The report highlights that no county in Washington received an A grade, and outlines goals and strategies to increase opportunity. Proposals include providing a high quality education to all students, protecting public health and reprioritizing state spending to build thriving communities.

## **Conclusion:**

We know the creation of your own Local Opportunity Index will be a time-intensive and challenging process. But we believe the end result will give you valuable insight into how well your community expands or constricts opportunity where you live. We hope this technical guide is helpful and we look forward to exploring and sharing your local Index when it is ready for prime time.

If you have questions about this document or about the process of creating your own Opportunity Index, please contact Opportunity Nation's Community Leadership staff <http://www.opportunitynation.org/pages/opportunity-nation-staff>.

Thank you for working every day to expand educational opportunity and economic mobility in your community.