



Handbook

Compassionate Community Index (CCI)
June 2020



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This Handbook is a part of the [Compassionate Communities Toolkit](#) that includes:

- Compassionate Community Ideal
- Compassionate Community Index
- Compassionate Community Action Guide
- Compassionate Community Index Handbook
- Compassionate Community Case Studies

The toolkit was created by [BC Centre for Palliative Care](#) in partnership with [Kalein Centre](#) for Dialogue, Integrated Hospice Care and Education, and with the guidance and content contribution from an advisory committee of compassionate communities' champion organizations, a public health physician, and a palliative care physician.

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Background

In 2016, BC Centre for Palliative Care (BCCPC) [adapted the global concept and movement for creating compassionate communities](#) and launched a social movement to inspire and foster the creation and spread of compassionate communities across BC.

A Compassionate Community is a community of people who are passionate and committed to improving the experiences for those living with a serious illness, caregiving, dying and grieving.

It's a community....

- where people support each other during serious illness, end of life and grief
- where people plan in advance for the way they want to be treated and cared for during serious illness and near end of life
- that helps its people to live well and with dignity right until the end.



To support the movement, the BCCPC provided seed funding, training, coaching and tools for community-based organizations to help them implement compassionate communities' initiatives. A total of 68 compassionate community ideas were initiated successfully across BC; 50% are based in rural and remote communities.

Evaluation provides evidence of positive impact at different levels: 1) volunteers: improved knowledge, skills and confidence 2) organizations: improved engagement with the public, enhanced competency and new partnerships 3) public: better supported, socially engaged, better informed of available resources. The BC model offers innovative solutions to help Canadians live well until the end.

Living in a community that cares for others makes us cope better with our health challenges, keeps us connected, and helps us find meaning in life.

[Compassionate Communities benefit us all.](#)



About the Handbook

This Handbook is written for the coordinator/facilitator of a compassionate community initiative, to guide them through administering the Compassionate Community Index.

Before using the CC Index and Handbook, the facilitator must read all the resources in the Compassionate Community toolkit. While this is a step-by-step manual, the Handbook is a guideline, not a prescription.

The ideal facilitator has the following skills and experiences:

1. **Passion** for making their community more compassionate
2. **Committed** to coordinate or support a compassionate community initiative
3. **Facilitation** experience
4. **Problem-solving** abilities
5. **Positive** attitude
6. **Ability** to forge partnerships
7. **Knowledge** of resources available in the community for actions/initiatives
8. **Some** Excel spreadsheet experience (should they choose to score the Index in more detail)
9. **Ability** to compile, analyze and explain results from the Compassionate Community Index survey

About the Compassionate Community Index (CCI)

What is CCI?

The Compassionate Community Index is an easy-to-use assessment survey for helping communities gauge their level of readiness and commitment to start up a compassionate community initiative.

Intended to be administered within the context of a community meeting, the Compassionate Community Index:

- **takes** a snapshot to **assess** a community's readiness to become a more Compassionate Community, using the perceptions of key community stakeholders (and the public, if you choose to involve them)
- **helps** a community **focus** on strategies or actions for improvement, and
- **assists** in launching the community into **action**
- **can** be used to **evaluate** new compassionate community initiatives as they grow.

The Compassionate Community Index survey is designed based on best practices in compassionate communities in B.C., Canada and around the world, and on input from the advisory committee.

Principles

The Compassionate Community Index is created based on these principles:

- **Communities** know best.
- **Perceptions** are powerful. Measuring and communicating them is a key to jump-starting a community to action.
- **Communities** have untapped human resources and energy that the Compassionate Community Index can tap into.
- **The process** is better when it's inclusive and engages potential partners and allies.
- **The Compassionate Community Index** can assist in community planning.
- **Small steps/actions** to build capacity are recommended.



The Compassionate Community Index is based on a successful

- **ASSESS**
- **FOCUS**
- **ACT** formula:

- **ASSESS** the community using the perceptions of key stakeholders to get a collective sense of where we think we are
- **FOCUS** the community's energy on no more than one to three possible actions
- **ACT** by forming community-based action teams to carry out the decided-on actions.

Expected outcomes

The expected outcomes of the CCI are to:

- **educate** participants and the community on key elements of Compassionate Communities
- **stimulate** conversations about Compassionate Communities
- **build** bridges and alliances amongst community organizations and among citizens
- **develop** a collective understanding of where the community sees itself with respect to Compassionate Communities
- **identify** key Compassionate Community assets and liabilities
- create a benchmark for future comparisons
- **assess** the capacity of the community so that appropriate actions and activities can be identified and implemented
- **develop** a longer-term plan for a Compassionate Community



Commitment Requirements

Before beginning the process to build a Compassionate Community, the lead organization or individual should recruit two or three partner organizations or individuals who are committed to working together through the planning and implementation. Not only will this help share the work, it will also ensure the process is community- rather than organization- focused.

Participating individuals and organizations in the CCI survey should be committed to:

- **Creating** a more enhanced sense of Compassionate Community
- **Attending** the two-hour CCI survey meeting
- **Participating** in discussing the survey results
- **Assisting** in identifying actions
- **Sharing** leadership in taking action
- **Helping** to identify resources required to mobilize actions
- **Attending** at least one other follow-up meeting around actions

And **ideally** to:

- **Being** part of the process for a minimum of three to six months (this may involve several meetings in Action Teams to move CCI-identified priority projects and actions forward)
- **Reviewing** progress in a year.

Administering the CCI

Approaches

There are several approaches to administer the Compassionate Community Index (See Table 1). Your choice about how you administer the Compassionate Communities Index will depend on your time and resources.

Table 1 Approaches to administer the Compassionate Community Index

CCI administration approach	Who's involved	Advantages
Working group meeting (small)	A maximum of twelve people who work in organizations familiar with Compassionate Community is recommended. The ideal composition would be the local hospice society, key municipal councillor (and staff member), a champion in the health care community (a key doctor, nurse, social worker), important social service support organizations, church groups, and other important community stakeholders.	Efficiency and the group's expert knowledge of the subject matter
Working group plus others meeting (medium)	Include people who would be in your working group, along with other aligned organizations, community leaders, and key businesses, such as social service organizations, MS Society, Alzheimer Society, United Way, church groups, etc.	Many of the community's change-makers in the room.
General public online survey (large)	Make sure to include the above groups plus educators, artists, youth, seniors, First Nations, etc. (See Appendix 1 : surveying the general public using CCI)	A larger volume of responses from a broader cross-section of the community. This approach can also assist in recruiting Compassionate Community volunteers, creating richer networks and connections, and spreading the concept of Compassionate Communities so that it has a greater likelihood of being ingrained in the culture of the community.



Photo from the public forum hosted by [a community working group in Gabriola Island, BC](#) to identify unmet needs, existing assets, and priority actions needed to create community supports for those needing palliative care.

Face-to-Face Meeting is the Recommended Approach

In addition to the advantages listed in Table 1, bringing people together to complete the survey and then holding a follow-up conversation immediately after is recommended versus having them complete it in isolation or on-line. It provides a rich opportunity for informed conversation while people are thinking about Compassionate Communities.

Administering the CCI through a face to face meeting helps with:

- enlisting new allies to the Compassionate Communities movement
- building connections
- increasing awareness and educating about Compassionate Communities
- coming to a collective understanding of where the community is in regard to Compassionate Communities
- having an informed conversation about Compassionate Communities using the results of the survey
- using the results to inform and select future actions.

Facilitating the CCI Meeting

Prepare for the Meeting

- **Plan** for a two-hour meeting. (If you plan to go over two hours, consider planning for two meetings instead.)
- **Schedule** the meeting on a weekday or weekday evening.
- **Prepare** invitation list.
- **Confirm** venue and arrange for refreshments and snacks.
(If possible, use a separate room to host food and drink for the networking break. Ensure that coffee, tea, water, juice, and snacks are set up and available prior to and throughout the session.)
- **Prepare** personal invitations.
(We recommend people on the invitation list to be personally invited (by phone call or in-person invitation), in addition to an e-mail or written invitation. People are more likely to attend a session if you have personally invited them and you have identified them as a “key stakeholder” in your invitation. Explain the purpose and importance of the meeting in the invitation.)
- **Set** the meeting agenda (see Table 2)
- **Bring** these items to the meeting:
 - name tags
 - pens/pencils
 - a flipchart with paper for recording actions
 - flipchart markers
 - attendance sheet (recording emails, phone numbers and other relevant info)
 - LCD projector, laptop, screen and power cords if a PowerPoint presentation is to be used
 - this Handbook for your reference
 - copies of these for each participant:
 - o What is a Compassionate Community brochure?
 - o The Compassionate Community Ideal
 - o the CCI survey
 - o the CCI Action Guide
 - o the Reality Check Form - **see [Appendix 2](#)** – This is a handy guide to assess whether your community is likely to succeed in the action(s) it chooses. It looks at what needs to be in place - things like resources, timing, leadership, etc. – for a selected action to be successful.
 - o other literature to provide as background (optional) – remember to use this as an opportunity to educate and build bridges!

Start the Meeting: Execute the Agenda

Table 2 Agenda for CCI Survey Meeting

Agenda items		Activities
1	Welcome	<ul style="list-style-type: none"> • Welcome participants to the meeting • Mix up the seating so that people are not sitting with the people they always associate with.
2	Facilitator introduction	<ul style="list-style-type: none"> • Introduce yourself and explain your role. • Share housekeeping information. <p><i>(As a facilitator, it is your role to keep the meeting positive, on track, and focused.)</i></p>
3	Participant introductions	<ul style="list-style-type: none"> • Ask each participant to introduce themselves to others citing why they are there and their interest in CC. <p><i>(Remember, this networking and getting to know one another should be seen as an important part of the reason for the meeting)</i></p>
4	Goals	<ul style="list-style-type: none"> • Confirm the goals of the meeting • Set some ground rules to help participants feel comfortable and free to speak their minds in a safe environment.
5	Agenda	<ul style="list-style-type: none"> • Share the agenda of the session
6	Introduction to the concept of Compassionate Communities	<ul style="list-style-type: none"> • Use the “What is a Compassionate Community?” and “The Compassionate Community Ideal” to explain the concept of Compassionate Communities. <p><i>(Keep in mind many people will be unfamiliar with the concept of Compassionate Communities – if this is the case, you might want to start by asking participants what they would expect to see, hear, and feel in a truly Compassionate Community. This could be done in small tables or one on one with another participant and then shared with the rest of the group and recorded on the flip chart.)</i></p> <ul style="list-style-type: none"> • Share a story that demonstrates the current gaps in supports and unmet needs of people with serious illness and their families. • Share examples of existing Compassionate Community initiatives (<i>in other communities</i>) that help address these gaps.

Agenda items		Activities
7	Geographical boundaries of the community	<ul style="list-style-type: none"> Ask participants to agree on the geographical boundaries of their community. <p><i>(This boundary may be just a community's boundaries, or it may also encompass nearby surrounding communities that rely on or are integrated into the central community. Should you live in a large city, you may identify the neighbourhood, borough, or some other geographically distinguishable area.)</i></p>
8	Completing the survey	<ul style="list-style-type: none"> Give each participant a paper copy of CCI and ask them to complete the survey and score each statement according to this scoring matrix: <ul style="list-style-type: none"> Not yet started = 0 Just started = 1 On the road = 2 Nearly there = 3 We're there = 4 Don't know = DK <p><i>(Some people may finish the survey in 5 minutes while some may take 15 minutes. Ensure that participants are respectful of this.)</i></p>
9	A short networking break	<ul style="list-style-type: none"> Encourage participants to use the opportunity of the break to get to know each other and build connection. <p><i>(ideally in an adjoining room where refreshments are available. The facilitator could begin tabulating the results during the break)</i></p>
10	Call back, discussion of the results	<p>Option 1: If the time remaining is limited, initiate a preliminary discussion at this meeting by asking participants to share with others their answers on some of the questions. This can be followed by a more fulsome discussion at a subsequent meeting where the tabulated results are shared and then follow with open-ended questions to expand the discussion.</p> <p><i>(See below for information on tabulating the results and questions to stimulate discussion.)</i></p> <hr/> <p>Option 2: If time permits, continue with tabulation of the results and then follow with open-ended questions to expand the discussion.</p> <p><i>(See below for information on tabulating the results and questions to stimulate discussion.)</i></p>

Agenda items		Activities
11	Expanding the discussion through break-out group (Optional)	<ul style="list-style-type: none"> • Divide participants into groups of no more than six to ensure meaningful conversation. • Use one or more of the open-ended questions on the survey's last page as focus group questions for discussion at small tables. • Explain the reporting-back mechanism from each small group and encourage recording notes on flipcharts. <p><i>(One effective technique for reporting back is to ask each small group to indicate their top two or three responses with an asterisk and to report back only on these.)</i></p>
<p>The following steps will very likely need to happen at a subsequent meeting along with any discussion of the results that was not completed in step 11.</p>		
12	Identifying possible actions	<ul style="list-style-type: none"> • After reviewing the results of the CCI survey and the responses to the open-ended questions, identify possible actions. • The Action Guide offers some ideas – not wanting to limit ideas that are considered to what is in the Action Guide. Choose no more than three priority actions that are: <ul style="list-style-type: none"> - do-able (can be completed within 6 months) - realistic (given the energy of the group and community) - specific (where you can easily determine if you have been successful) - where there seems to be good working group energy and excitement. <p><i>(If there are lots of suggestions, narrow it down by getting the group to vote on their favourites, or, depending on the issues and size of the group, use a technique called dotmocracy - researchable on the internet).</i></p>
13	Reality check	<ul style="list-style-type: none"> • Complete a Reality Check on the priority action(s) chosen (see Appendix 2: Reality check form). <p><i>(The Reality Check ensures that critical elements like resources, timing, leadership, etc. are taken into account.)</i></p> <p><i>(If the group is larger, consider dividing the group into two or three sub-groups (Action Teams) to use the Reality Check to discuss and write up a specific action they are very interested in.)</i></p>

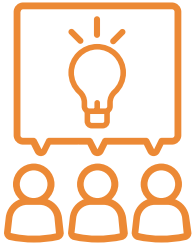
Agenda items		Activities
14	Next Steps	<ul style="list-style-type: none"> Assign an Action Manager to each action—this could be you or another member of the group. It should be clear that each Action Manager is accountable to the group for the success of the action. <p><i>(Everyone should leave the meeting with a clear picture of the way forward: what will be done, by whom, by when, and by what criteria.)</i></p>
15	Next Meeting	<ul style="list-style-type: none"> Confirm the next meeting time, date and location.
16	Evaluation of the meeting (Optional)	<ul style="list-style-type: none"> Ask participants about their feedback and suggestions to improve future meeting.

Tabulate the CCI Survey Results

Once the survey is complete, tabulate the results, either on your own, or with the participants self-scoring, which will give you a general idea which sections and which statements scored lowest and highest.

The maximum score for each section is 20, and the maximum score for the whole CCI is 100 (if the survey participant indicated “We’re there” for each statement).

Don’t be alarmed by low scores. Compassionate Communities is a relatively new concept in BC and Canada. This is meant as much as a check-up and education process, as it is about identifying next steps



Reflect on Scoring

In addition to establishing benchmark scores for the community, the CCI survey is meant to stimulate thinking, reflection and conversation.

- After scoring, ask any of the following questions to begin a conversation:
 - What was the lowest scoring section?
 - What was the highest scoring section?
 - What statement made you think the most?
 - Which statement was most difficult to rate?
 - What statements surprised you the most?
 - What statements did you score highest? Lowest?

These questions can all be used to get a sense of where the community sees itself, and most importantly, help figure out next steps and possible actions and activities (and ideally, to formulate a Compassionate Communities plan for the community).

If there are many responses to tabulate, using a spreadsheet to collect the data will allow you to use the Compassionate Community Index as a rough tool for a community snapshot, or a more refined tool for deeper analysis.



Expand the Discussion

(This is most effective with smaller groups of 12 or fewer participants).

- One question at a time, ask each person to share their written responses to these open-ended questions on the last page of the CCI:
 1. Name 3 words, phrases or adjectives that best describe our community.
(This question can indicate how people perceive the community – positive or negative – or whether kindness, neighbourliness or compassion is seen already as a community value.)
 2. How do we best show we are a Compassionate Community?
 3. What are 3 significant challenges hindering development of a Compassionate Community?
 4. What are 3 undeveloped opportunities around Compassionate Community?
- Record responses on the flip chart, and look for common themes.
- Begin a discussion around the identified common themes.



Present the CCI Survey Results

It is always beneficial to have a written record of the results of the Compassionate Community Index survey. Not only is the report an important milestone for your group and useful for reference, it can often be used as a way to access funding.

- In the follow-up meeting, ensure that as part of the agenda you review the report from the first meeting. The report should include:
 - Summary of the meeting (date, time, location, etc.)
 - Who attended?
 - The themes discussed
 - Scores (this can be section scores only, or scores for each statement – remember the scores are as much about stimulating ideas and actions as they are about creating a benchmark). This might also include:
 - o Highest scoring section
 - o Lowest scoring section
 - o Highest scoring statements
 - o Lowest scoring statements
- Summary of the open-ended questions (indicating how many times words [or their synonym] showed up):
 - Words to describe the community
 - How we best show we are Compassionate Community
 - Challenges
 - Compassionate Community opportunities
- Possible actions discussed
- Actions decided upon (type up Reality Check forms if these were used)

Of course, you always have the option of making the report available to the public and perhaps inviting public comment.

Implementation and Follow-up

We all know the fate suffered by so many reports, plans and strategies— a long and lonely life on the shelf while everyday life takes over.

That's why the decided-on actions must be realistic and why they need to be persistently kept on the front burner. Find a process to keep them there, such as reporting progress at each group meeting or on a quarterly timeline. The coordinator/facilitator should help the *Action Managers* stay accountable, and vice-versa.

It is hoped that this process becomes a regular check-in, perhaps being revisited annually. In this way you have the best chance of becoming a true Compassionate Community that excites you, your working group and your citizens, and that might also inspire other communities. **See [Appendix 3 – 11 Tips to Compassionate Community Success](#).**

Good luck!



Appendix 1 – Surveying the General Public with the CCI

The advantage of a public survey, even though it is a more complex project to administer, is a larger volume of responses from a broader cross-section of the community. This approach can also assist in recruiting Compassionate Community volunteers, creating richer networks and connections, and spreading the concept of Compassionate Communities so that it has a greater likelihood of being ingrained in the culture of the community.

If you decide to survey the general public, it is important to get a good volume of responses. This will depend on how well you publicize the survey and how you describe it. You can use Survey Monkey for a public survey (see below) or hold a public meeting.

Tell the public something like this:

- You want to know what people in the community think about compassion in the community as it affects those living with a serious illness, frailty, those near end of life, or those who are grieving.
- You are asking the public to fill out a survey that will take five to fifteen minutes.
- The survey is anonymous.
- The results will help the community set direction for the coming year or more.

In publicizing the survey, do not restrict yourself to traditional media. In addition to a press release and a newspaper ad, engage people on social media, since this will amount to free advertising and, most importantly, may bring in the under-40 crowd. Try to get a radio interview about Compassionate Communities and the survey. Ask community organizations to get the word out to their members. Go to community or organization meetings and tell them about it. Be sure the web address of the survey and the deadline are clear to everyone.

You could offer a prize draw for people who fill out the survey. To do that you will have to ask them to volunteer their name on the online survey.

It will be important to share the results of the public survey with the public. This could be done at a community meeting, on a website and/or through local media.

For a public survey, you can consider [Survey Monkey](#) or other commercial online survey services. Survey Monkey has a free introductory plan, but it has a limit of ten questions per survey, too small for this project. The site explains itself quite well with built-in tutorials. You can copy and paste questions directly from your Word version into Survey Monkey's question builder.

Appendix 2 – Reality Check Form

(to be completed by the working group or the Action Teams for each priority action)

Reality Check	
Action:	
Action Team Members (indicate Action Manager with *):	
Question	Answer
Success – Describe what the successful action might look like.	
Purpose – What is the main goal of this action?	
Commitment – Can we get commitment and energy from the community to undertake this? If not, what do we have to do?	
Leadership – Who has the skills to lead (organizations, individuals)? Who else do we need to involve to ensure success?	
Time Frame – How long will it take to accomplish? Are there any political, economic or funding factors which might hurt/help the timing?	
Finances/ Resources – What, if any, financial resources do we need to tap into? Are there any organizations that can assist this action? Any other resources?	
Your recommendation – Proceed immediately / Wait /Do not proceed	
Next Steps	

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Appendix 3 – 11 Tips to Compassionate Community Success



A comprehensive and accurate assessment is crucial.

Because the assessment is based on perceptions, it is important that you take the time to complete each section of the Compassionate Community Index carefully and honestly. An accurate assessment is a necessary starting point for community action.



Stay positive and committed to working together.

Working together as a community is a necessary component for the improvement of community health. Staying positive and committed to working together will assure success. Some compromise may be required, and ‘baggage’ is best left at the door.



Recruit your friends, neighbours and new members of the community.

Compassionate Community Index participants can help by recruiting other community members, especially those not traditionally involved in community initiatives, to help with moving forward with actions. It is a good way to get some fresh energy and perspective.



Bite off small pieces – keep actions short term and specific.

Keep initial projects small in order to build momentum and capacity for longer-term courses of action. Starting out with short-term specific actions is an excellent starting point.



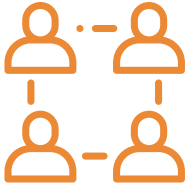
Stay focused and organized in your Action Teams.

Make sure you identify an Action Team member who will communicate group activities to the Compassionate Communities coordinator or planning group. This will help the coordinator to ensure projects are moving in complementary fashion, minimizing overlap. In addition, open communication encourages collaboration across working groups.



Be open and envision the possibilities.

New ideas are a good thing. Working collectively as a community is a powerful process, one which will allow your community to succeed at projects that once seemed out of reach. The consideration of new ideas is key to an innovative future vision.



Stay committed to shared leadership.

Ensure that is not the same people - the ones at all the meetings – who are solely involved or leading. The responsibility here rests on those citizens currently active AND those currently inactive in community life. Those currently active could recruit other citizens, assuring their input would be valued and beneficial to the community. Active citizens could also share leadership positions in order to encourage increased involvement by others. Inactive citizens could rise to the challenge and volunteer their time to a joint community project.



Keep everyone informed & encourage a cross-section of community involvement.

Momentum is built from the initial session, but this momentum needs to be nurtured. Formal and informal communication is key to keeping this momentum going. Involved citizens can spread the word on the assessment and working group progress in their everyday interactions, while the coordinator or coordinating group/organization can use advertisements and press releases to assure the community is informed.



Celebrate success and build incentives into meetings.

It is amazing how much community work builds up one's appetite, especially when meetings are held around dinner time. Make sure there is plenty of food, drink, and praise to keep energy and spirits replenished. The coordinator or coordinating organization will assure ample food and drink at the first meeting; the Action Teams are responsible for food and drink after that.



Change is slow, so adaptability is necessary.

Remember that change at the community level is often much slower than expected. Recognize change as slow-moving and don't get discouraged. Be ready to revisit action plans as sometimes things change and with that change comes a shuffling of priorities. This is why keeping lines of communication open with other working groups is key.



Set reasonable expectations

The success of your Compassionate Community initiative depends on the energy and commitment of the community, especially following through on identified actions. The Compassionate Community Index is a tool/process specifically designed to assess Compassionate Community capacity and opportunities, and to identify short-term courses of action. As such, the tool is not a substitute for comprehensive community planning (see CIEL's [Communities Matrix](#)).

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*All British Columbians affected
by serious illness will have equitable
access to compassionate,
person-centred care and resources.*