

COMMITTEE AGENDA

TO **Community & Social Services Committee**

DATE April 11, 2012

LOCATION Council Chambers

TIME 5:00 p.m.

DISCLOSURE OF PECUNIARY INTEREST

CONFIRMATION OF MINUTES – February 14, 2012

PRESENTATIONS (Items with no accompanying report)

- a) Sonya Poweska, Executive Director of the Guelph Arts Council:- presentation on activities of their Council and upcoming plans
- b) Rosslyn Bentley, Executive Director & Susan Farrelly, Vice-Chair of Hospice Wellington:- update on use of funds received from the City

CONSENT AGENDA

The following resolutions have been prepared to facilitate the Committee's consideration of the various matters and are suggested for consideration. If the Committee wishes to address a specific report in isolation of the Consent Agenda, please identify the item. The item will be extracted and dealt with separately. The balance of the Community & Social Services Committee Consent Agenda will be approved in one resolution.

ITEM	CITY PRESENTATION	DELEGATIONS	TO BE EXTRACTED
CSS-3 Community Investment Strategy Phase 1 Final Report	Eden Grodzinski & Rebecca Sutherns, JPMC		✓

Resolution to adopt the balance of the Community & Social Services Committee Consent Agenda.

ITEMS EXTRACTED FROM THE CONSENT AGENDA

Once extracted items are identified, they will be dealt with in the following order:

- 1) delegations (may include presentations)
- 2) staff presentations only
- 3) all others.

NEXT MEETING – May 8, 2012

**The Corporation of the City of Guelph
Community & Social Services Committee
February 14, 2012, 5:00 p.m.**

A meeting of the Community & Social Services Committee was held on Tuesday February 14, 2012 in the Council Chambers at 5:00 p.m.

Present: Councillors Dennis, Burcher (arrived 5:05), Laidlaw, and Mayor Farbridge

Absent: Councillor Van Hellemond

Also Present: Councillors Bell, Furfaro, Guthrie and Hofland

Staff Present: Ms. C. Bell, Executive Director, Community & Social Services; Ms. T. Agnello, Deputy Clerk; Ms. J. Sweeney, Council Committee Coordinator

There was no disclosure of pecuniary interest.

1. Moved by Councillor Laidlaw
Seconded by Mayor Farbridge

THAT the minutes of the Community & Social Services Committee meeting held December 6, 2011 be confirmed as recorded and without being read.

VOTING IN FAVOUR: Councillors Dennis, Laidlaw and Mayor Farbridge
(3)

VOTING AGAINST: (0)

Carried

Consent Agenda

The following items were extracted from the Consent Agenda to be dealt with separately:

CSS-2012 A.1 Recreation Program Passes

2. Moved by Mayor Farbridge
Seconded by Councillor Laidlaw

THAT the balance of the Community & Social Services Committee February 14, 2012 Consent Agenda, as identified below, be adopted:

- a) **Proposed Change to Non-Prescribed (Discretionary) Social Services Funeral Rates**

February 14, 2012

Community & Social Services Committee

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REPORT

THAT City funding for non-prescribed (discretionary) social services funeral rates be increased by 20% retroactively to January 1, 2012 to align with the County of Wellington's Funeral Directors Fees and to more closely reflect actual costs for funeral services;

AND THAT the process for subsequent rate increases be negotiated as part of an agreement on social services between the City and County of Wellington as Consolidated Municipal Service Manager.

VOTING IN FAVOUR: Councillors Dennis, Laidlaw and Mayor Farbridge (3)

VOTING AGAINST: (0)

Carried

Councillor Burcher arrived at 5:05 p.m.

Anti-Bullying Coalition

Lynne MacIntyre advised of her son's experiences with bullying and the poem that he wrote which has received considerable attention. She further advised that she has spoken on radio shows and met with various levels of government on this issue. She provided information on the various organizations invited to form an Anti-Bullying Coalition. She requested the City be the first municipality to publicly take a stand against bullying and to be an active member of the Coalition to make the City a safe community.

3. Moved by Mayor Farbridge
Seconded by Councillor Laidlaw

Ms. C. Bell

THAT the request for the City to participate on the Guelph Anti-Bullying Coalition be referred to staff to meet with members of the organization to discuss the opportunities and possible alliances and to report back to the Community & Social Services Committee with any recommendations.

VOTING IN FAVOUR: Councillors Burcher, Dennis, Laidlaw and Mayor Farbridge (4)

VOTING AGAINST: (0)

Carried

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Community & Social Services Committee

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Royal City Musical Productions Inc.

Werner Eitzen provided information on the various productions undertaken by the Royal City Musical Productions Inc. He advised of the average costs to stage a show and that most of their costs are covered by ticket sales.

Deanna Clatworthy provided information on their costs for the rental of the River Run Centre and the costs theatre groups in other municipalities receive and rental/user fees charged for nonprofit groups versus for profit entities. She requested that the City conduct a review of their rental costs and that a separate ticket percentage be established for local organizations.

4. Moved by Councillor Burcher
Seconded by Mayor Farbridge

Ms. C. Bell

THAT the request of the Royal City Musical Productions Inc. to review the rental costs for the River Run Centre and creating a separate ticket percentage for local organizations be referred to the Community Investment Strategy.

VOTING IN FAVOUR: Councillors Burcher, Dennis, Laidlaw and Mayor Farbridge (4)

VOTING AGAINST: (0)

Carried

Recreation Program Passes

Colleen Clack, Acting General Manager, Parks & Recreation Programs and Facilities provided an overview of the passes previously offered and the challenges of tracking pass usage. She highlighted the punch passes will be more flexible, have no expiry date and will be customized to the user. She outlined the financial impact of the proposed passes and the matter of fairness for low usage clients not subsidizing high use clients. She also advised that staff will be undertaking a full evaluation of all program offers to determine what programs should be dropped and what programs should grow and a review of all rates and fees with a comparison to some municipalities.

Leslie Snell spoke on behalf of many pass users and expressed dismay over the cancellation of the passes. She suggested that the City passes cost higher than comparator municipalities. She also expressed concern that the users were not consulted. She advised that people will go elsewhere to a more affordable facility.

February 14, 2012

Community & Social Services Committee

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Ms. C. Bell

5. Moved by Mayor Farbridge
Seconded by Councillor Burcher
THAT the report dated February 9, 2012 and entitled 'Recreation
Program Passes', be received for information.

VOTING IN FAVOUR: Councillors Burcher, Dennis, Laidlaw and Mayor
Farbridge (4)

VOTING AGAINST: (0)

Carried

The meeting adjourned at 6 p.m.

.....
Chairperson



Guelph Arts Council

Guelph Arts Council was created by City resolution on September 9, 1974 and was incorporated as a charity in May 1975.

Guelph Arts Council exists to stimulate and coordinate the development of visual, literary, performing, media, and heritage arts to enrich the cultural life of the community and to encourage wide spread appreciation of, support for, and involvement in the arts,



Guelph Arts Council

Guelph Arts Council has been an incubator for:

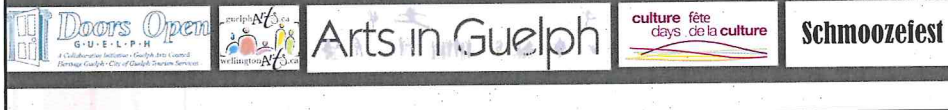
- River Run Centre
- Macdonald Stewart Art Centre
- Guelph Chamber Choir
- Guelph Youth Orchestra
- Guelph Artisans
- Guelph Youth Singers
- Guelph Contemporary Dance Festival
- Theatre Guelph
- Guelph Festival for Moving Media
- The Guelph Arts Platform



Guelph Arts Council

Guelph Arts Council offers a number of programs and services including:

- guelpharts.ca/wellingtonarts.ca web portal
- Doors Open Guelph
- Arts in Guelph bi-monthly newsletter
- Schmoozefest
- Historical Walking Tours
- Guelph Arts Resource Centre



Guelph Arts Council

Guelph Arts Council is a partner in the following projects:

- Culture Days
- art on the street
- Youth Art Week
- Trellis Art Project
- Fourth Fridays



Guelph Arts Council

- Guelph Arts Council boasts a membership of 400+ artists and organizations representing a total of 10,000+ associate members
- Services 1,000's of artists annually
- Has a volunteer base of 300+ community participants who log 3,500+ hours per annum
- Some volunteers have participated with the Guelph Arts Council for over 35 years
- Guelph Arts Council is governed by a volunteer Board of Directors



Some Statistics on Arts in Guelph

- In 2009, Richard Florida named Guelph on of the best places to live in Canada. This was measured on statistics relating to the Cultural Economy.
- Statistics Canada report that artists living and working in Guelph is on par with the national average of .77%. However, this rate has grown exponentially since 1991 and the number of artists listing with Statistics Canada has increased 127%.*
- Average earning for an artist in Guelph is \$21,400 which is 44% less than the average income for the overall labour force in Guelph.*

* Data provided by Hill Strategies



What this tells us

What this reveals is a strong commitment from artists to Guelph despite the fact that opportunities are available in other communities.



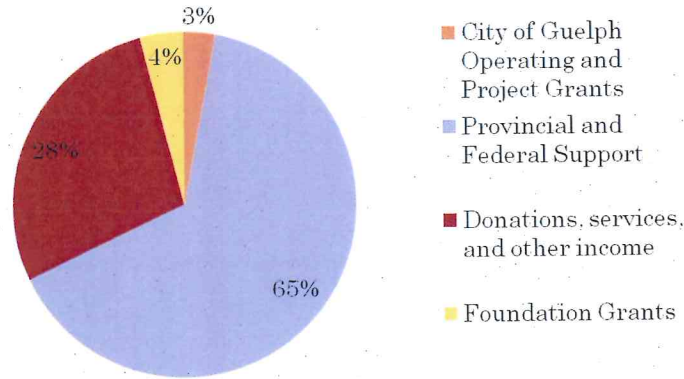
Ed Video

- Ed Video has been a leader in the promotion of media arts since 1976.
- Ed Video is a leading media arts artist run centre operating at the local, provincial, national and international level.
- Boasts a membership of several 100 artists and patrons.
- Recently participated in an international conference in Sweden.

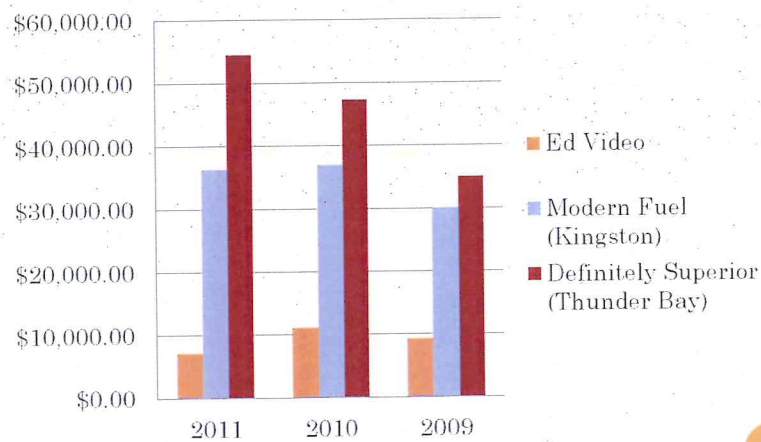




Ed Video 2011 Operating Budget Revenues



City Funding for Artist Run Media Arts Centres in Comparator Cities



* Based on data from CRA charity listings

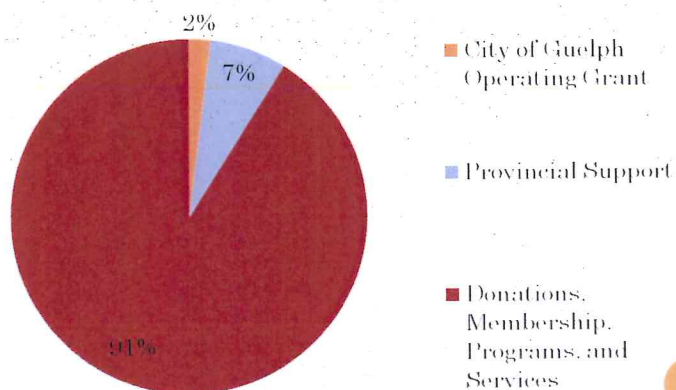


Guelph Chamber Choir

- Guelph Chamber Choir has been in operation since 1980.
- Has collaborated with choirs across Canada.
- Has performed in Great Britain, Ireland, Germany, and Sweden.
- Boasts a choir of 40 voices.

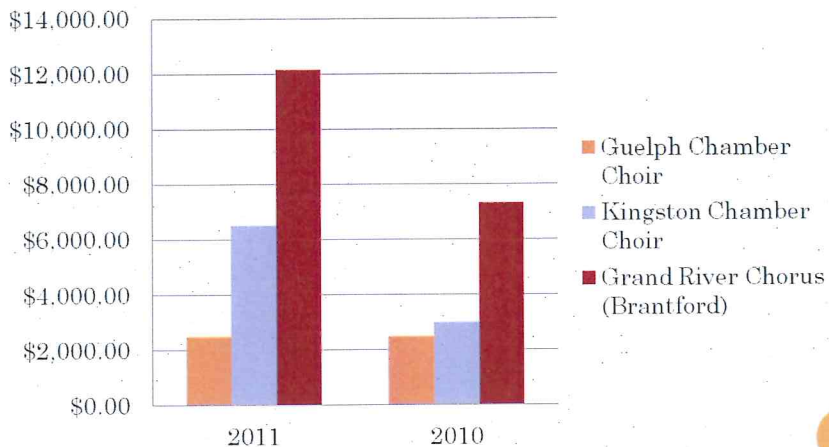


Guelph Chamber Choir 2011 Operating Budget Revenues





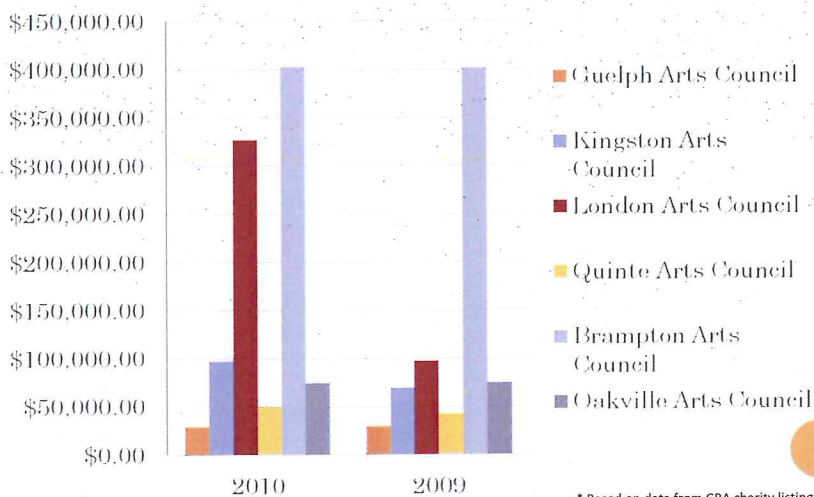
City Funding for Chamber Choirs in Comparator Communities



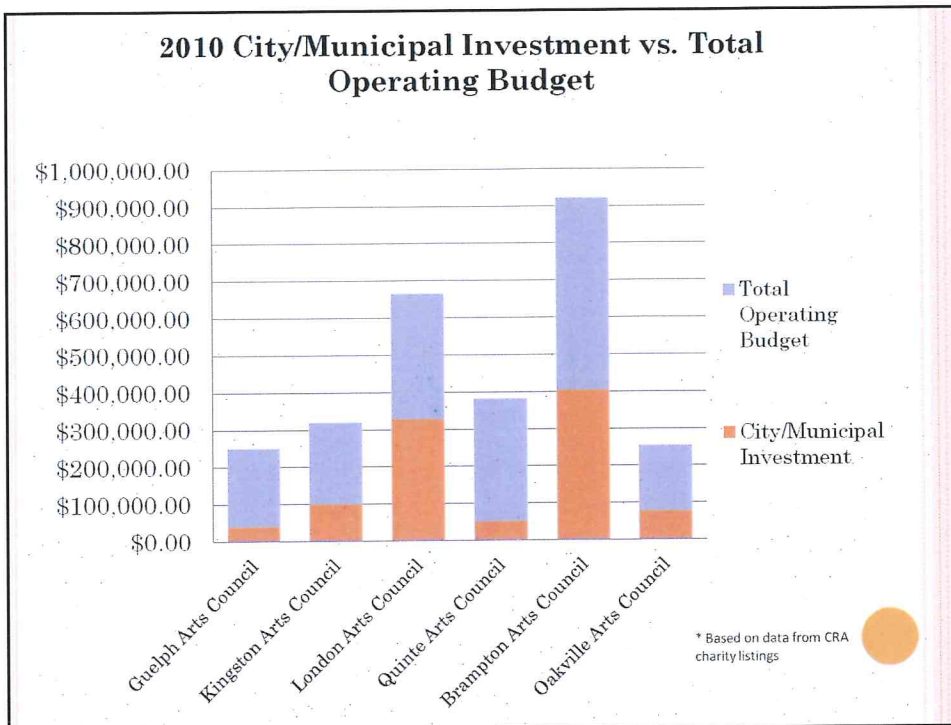
* Based on data from CRA charity listings



City/Municipal Investment in Community Arts Council is Comparator Communities



* Based on data from CRA charity listings



What the Guelph Arts Council is asking of you...

When identifying Guelph as a city of rich cultural heritage, we would ask that you think of the investment the City of Guelph makes to the arts community.

To attract strong cultural and artistic leaders to settle and stay in Guelph, the City needs to confirm and increase their investment to arts and culture in Guelph.

Our artists and arts organization are operating on the same level as other high performing arts organizations in comparative cities, but are doing so with less city funds.

City of Guelph **MUST** increase support for artists and organizations in coming years. This comes as a result of other funding cuts at the provincial and federal level as well as reduced sponsorship dollars coming from corporate donors.

What the Guelph Arts Council is asking of you...

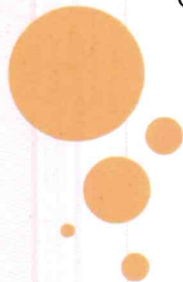
Think of the arts and culture sector when implementing the Community Investment Strategy . The contribution that the arts provide to the health and well-being of the community at large is at stake.

Cuts to the arts and cultural sector will impede on the quality of programming and services that arts organizations provide. These programs and services have come to define Guelph and have contributed to Guelph's designation as one of Canada's great creative cities.

Help us to support organizations like Ed Video, the Guelph Chamber Choir, and Guelph Arts Council by becoming members and active participants in our organizations.



For more information, please contact our office at 519.836.3280 or visit our website at guelpharts.ca/guelphartscouncil.





“Making a difference” in the city
that believes in the importance of
change and respect for the
environment

31 years of commitment to excellence
in Hospice Palliative care

Mission

**In your home or ours, Hospice Wellington
offers excellent support and care to
individuals and families through their end-of-
life journey or grief**

Hospice Wellington



Welcome to the residence





31 years of Community Programs

16,000 units of service per year

Over 400 clients and families served

215 active volunteers

More than a dozen ongoing programs

New programs and partnerships

- Teen 2 Teen
- Bereaved by Suicide
- Families Grieve Together
- Art Therapy
- Music Therapy
- Wellington Wellness Centre
- The Pollinators



Teen2Teen Retreat October 2011



Hospice Wellington's Difference

- 18 new staff positions including 13 full-time
- Care for over 360 residential clients since opening: busiest Hospice in Ontario
- Outstanding levels of satisfaction from families and staff: 98% of those surveyed rated the care as outstanding; 54% increase in residential memorial donations last year
- Winner of Guelph and Wellington Chapter of Human Resource Professionals Small Employer of the Year Award 2012

2012 Small Employer of Distinction



Proud Associations

- The Guelph Police Association's Norma Owen Golf Tournament now funding the "Families Grieve Together" program
- The Guelph Fire Department provided dance partners at the 2011 Hospice Gala
- Evelyn MacKay – Guelph Eramosa volunteer of the year 2010
- Patricia Prentice of "Fathers Remembered by Daughters" named to the 40 under 40 2011

Evelyn MacKay, Guelph Eramosa Volunteer of the Year 2010



Guelph Police Association



Contributing to our City

- A beautiful residential re-use of a local space
- Many green features built in: living wall, rain water cistern, solar panels, efficient design
- Promoter of collaboration: active Volunteer Centre and Chamber of Commerce member, Together 2010, Volunteer "Boards After 5"; host of Wellington Seniors Services Network; Community HPC outreach team; and Bayshore Nursing Guelph office
- 215 active volunteers supporting individuals and community building activities

Thank you



Lucy says thank you too!



**COMMUNITY & SOCIAL SERVICES COMMITTEE
CONSENT AGENDA**

April 11, 2012

Members of the Community & Social Services Committee.

SUMMARY OF REPORTS:

The following resolutions have been prepared to facilitate the Committee's consideration of the various matters and are suggested for consideration. If the Committee wishes to address a specific report in isolation of the Consent Agenda, please identify the item. The item will be extracted and dealt with immediately. The balance of the Community & Social Services Consent Agenda will be approved in one resolution.

A Reports from Administrative Staff

REPORT	DIRECTION
<p>CSS-2012 A.3 COMMUNITY INVESTMENT STRATEGY – PHASE 1 FINAL REPORT</p> <p>THAT the draft CIS Strategic Policy Framework as outlined in this report (Appendix 1 – Community Investment Strategy – Phase 1 Final Report), be approved as the foundation for the development of comprehensive operational investment programs and tools in Phase 2.</p>	Approve

attach.

Community Investment Strategy Phase 1 Report

Prepared by Eden Grodzinski and Rebecca Sutherns
For the Community & Social Services Committee
April 11, 2012

Today's Agenda

- + Project Overview
- + Process to Date
- + Strategic Policy Framework
- + Next Steps
- + Questions & Answers



Why a CIS?

- + To increase the City's ability to respond to changing community needs
- + To address the patchwork of investment mechanisms that has evolved over the years
- + To foster innovation
- + To improve the City's ability to monitor and evaluate community impact

What we did

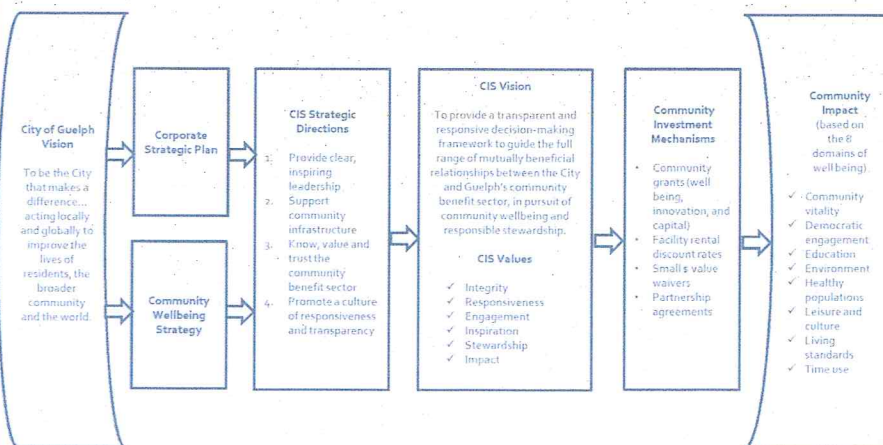
- + Background Research
 - + Inventory of existing investment practices
 - + Best practices and social innovation research
 - + Community benefit sector profile
- + Numerous Consultations
 - + 190 participants
 - + 139 respondents to community survey

The Strategic Policy Framework



- + What it includes
 - + Vision
 - + Guiding principles
 - + Investment model
 - + Evaluation approach
- + Does not identify individual community agencies
- + Costing (Phase 2)

CIS Policy Framework



CIS Strategic Directions

1. Provide clear, inspiring leadership
2. Support community infrastructure
3. Know, value and trust the community benefit sector
4. Promote a culture of responsiveness and transparency

CIS Vision

- + To provide a transparent and responsive decision-making framework to guide the full range of mutually beneficial relationships between the City and Guelph's community benefit sector, in pursuit of community wellbeing and responsible stewardship.

CIS Values

- ✓ Integrity
- ✓ Responsiveness
- ✓ Engagement
- ✓ Inspiration
- ✓ Stewardship
- ✓ Impact

Community Investment Mechanisms

- + Community grants (well being, innovation and capital)
- + Facility rental discount rates
- + Small \$ value waivers
- + Partnership agreements

Community Impact

(based on the 8 domains of well being)

- + Community vitality
- + Democratic engagement
- + Education
- + Environment
- + Healthy populations
- + Leisure and culture
- + Living standards
- + Time use

Next Steps

- + Phase 2: Implementation Planning
 - + Financial analysis
 - + "Nuts and bolts" of investment mechanisms
 - + Impact measurement systems
 - + Communication materials
 - + Transition Planning
- + Timeline
 - + Final report submitted Summer 2012
 - + Initial changes to begin 2013

COMMITTEE REPORT



TO Community and Social Services Committee

SERVICE AREA Community Engagement and Social Services Liaison

DATE April 11, 2012

SUBJECT Community Investment Strategy –Phase 1 Final Report

REPORT NUMBER CSS-CESS-1211

SUMMARY

Purpose of Report:

To provide Committee with the Community Investment Strategy (CIS) Phase 1 Final Report. Its main function is to outline the proposed Community Investment Strategy – Strategic Policy Framework which has been developed on the basis of extensive research, analysis and stakeholder engagement activities.

Committee Action:

Staff recommends that Committee approves the draft CIS Strategic Policy Framework as the foundation for the development of comprehensive operational investment programs and tools in Phase 2.

RECOMMENDATION

THAT the draft CIS Strategic Policy Framework as outlined in this report (Appendix 1 - Community Investment Strategy – Phase 1 Final Report), be approved as the foundation for the development of comprehensive operational investment programs and tools in Phase 2.

BACKGROUND

During the summer of 2011, the City secured the consultancy firm JPMC to undertake the development of the CIS and the project formally commenced in June 2011.

The CIS project aims to improve how the City funds, supports and partners with the community benefit sector (community and voluntary organizations) to achieve shared community and social goals. The scope of the CIS currently addresses those areas under the purview of Community and Social Services. However in the future, the framework could potentially be used to inform other investment practices led by other City departments. The CIS will provide the City with a strategic and operational framework that will:

- Increase the City's ability to respond to changing community needs;
- Address the patchwork of investment mechanisms that has evolved over the years;
- Foster innovation;
- Improve the City's ability to monitor and evaluate community impact;
- Provide a more transparent application and approval process that external organizations can easily navigate.

The project is being undertaken in two phases:

Phase 1 – Creation of the **Strategic Policy Framework** (completion date April 2012)

Phase 2 – Development of the **Investment Program Framework and Tools** that include a portfolio of 'investment' and partnership opportunities and programs and implementation plan (estimated completion date July 2012).

During Phase 1, Community and Social Services Committee and Council have received two information updates on the project in November 2011 (CSS-CESS-1149) and one February 2012 (CSS-CESS-1205).

REPORT

Phase 1 of the Community Investment Strategy is now complete.

Over the past nine months the City's consultants have been working closely with staff to complete extensive research and review stakeholder engagement activity which has informed the development of the Phase 1 Final Report and the proposed Strategic Policy Framework. Two groups of cross departmental staff were created to give direction and support to the project. The first was a Management Group consisting of General Managers. This group oversees and directs the project. Members of this group include Community & Social Services Liaison, Arts Culture & Entertainment, Legal Services, Budget & Financial Services, Economic Development & Tourism, and Parklands & Greenways.

The second was a Working Group, made up of staff who work directly with local organizations and are involved in the process of providing funding or support. The group has acted as a 'task and finish' pool of expertise who has provided advice and support to the consultants in the technical elements of the project.

The Final Phase 1 Report builds on the Phase 1 Interim Report which included three background research papers:

1. Promising Practice in Municipal Community Investment. This involved a review of the City's comparator municipalities to gain an understanding of other civic community investment policies and practices. To supplement this learning, examples of socially innovative practices from published literature, policy "think tanks" and non-municipal collaborations were also explored.
2. Inventory of Guelph's Community Investment Policies & Practices included a detailed review of the City's existing community investment policies and procedures, including funding amounts and trends over the past five years. In addition, five case studies were prepared, providing more comprehensive stories of the relationships between the City and the community sector.
3. A Portrait of Guelph's Community Benefit Sector provided a profile of the community sector in Ontario and in Guelph, plus an examination of the current and emerging issues and trends facing the sector. This also reflected on the results of a survey of local non-profit organizations.

The proposed Strategic Framework will enable the City to direct its community investment to the achievement of things that are most important to Guelph residents. The framework provides City Councillors, staff, partners and Guelph residents with clear and transparent information about this work, its cost and the community benefit it achieves.

The key components of the Strategic Policy Frameworks as detailed in the Phase 1 Final Report are as follows:

- Strategic Directions
- Community Investment Strategy Vision Statement
- Values and Guiding Principles
- Community Investment Mechanisms
- Community impact based on the eight domains of wellbeing (currently under development through the Community Well Being Initiative).

The report also provides an insight into how the new investment process will help organizations to better navigate City Hall and give staff clear guidance and the knowledge they need to provide effective support. It will strengthen existing relationships between the City and the community benefit sector and will bring forward new and exciting partnerships that benefit Guelph and improve community well being.

Next steps

Following Council's approval of the Phase 1 Final Report and the CIS - Strategic Policy Framework, staff and the consultants can begin the intensive work required to complete Phase 2.

During Phase 2, the focus will shift to the development of a comprehensive operational program framework, which will include detailed development of (for example) suggested investment levels; eligibility and evaluation criteria;

investment application review processes; clear roles and responsibilities; and an impact evaluation approach. Targeted stakeholder engagement (internal and external) will be a critical element of this phase and as the CIS fully rolls out to ensure that it is functioning effectively.

Another key component of Phase 2 will be the creation of an implementation plan to ensure the smooth transition between the current approach and the new proposed framework. This plan will clearly define timelines, transitional arrangements and resource requirements. This transition is anticipated to take place over a number of years, with early changes being implemented in 2012/2013.

The implementation plan will include a communication plan to ensure that the community and stakeholders (internal and external) will:

- have a clear understanding of the aims and objectives of the new CIS and the improvements that it will bring forward;
- indicate where they can find the information they need;
- have clear guidance on how it will impact them;
- outline opportunities to provide input into the development of transitional arrangements. This will be particularly relevant to organizations that have an existing relationship or arrangement with the City. Staff are committed to working with these organizations to minimize any impact and ensure a smooth transition if changes are required.

Phase 2 is expected to be completed in the summer of 2012. Following extensive engagement, the detailed investment programs, tools and implementation plan will be brought back to Committee and Council for final approval in summer 2012.

Interdependent projects

The Community Investment Strategy and its implementation are closely tied with a number of interdependent projects. These projects are the Corporate Strategic Plan, Community Wellbeing Initiative, the Community and Social Services Rates and Fees Review, and the Special Events Service Review.

The Corporate Strategic Plan and the Community Well Being Initiative (CSS-CESS-1136: Community Wellbeing Initiative: Work plan) will produce a clear vision for community and social planning in Guelph and a clear direction for the City. The CIS will be grounded in the directions set in these plans and will evolve alongside them.

To support the successful implementation of the CIS, the City will start a two-phased comprehensive review and analysis of the Rates and Fees of all the City's cultural, recreation, park, leisure and neighbourhood programs, rentals and services. Phase 1 will be a cost analysis to determine the true, full and total cost of these programs, rentals and services. Phase 2 will assess and determine the pricing strategies and public policy guiding Rates and Fees. This project will enable the City to understand the real costs of its community investments and will help guide effective and transparent decision making throughout the CIS framework.

During 2012 the City will also be conducting a service review of the Special Events Coordination services. This review will examine the current role the City plays in the Special Events Coordination process. This will have a particular relevance when developing the CIS Investment Program intended to support small community events.

The Management Group will ensure that the CIS implementation plan aligns appropriately with the timelines anticipated for these other projects.

Managing Phase 2

The cross-departmental Management Group set up to steer and manage Phase 1 will continue to provide support throughout Phase 2. To supplement this, it is proposed that a series of smaller working groups be created to focus on various areas of the framework development. These groups will be 'task and finish' in nature and be cross-departmental. The many staff whose skills and expertise have been integral to the success of Phase 1 will continue to provide input into this work.

CORPORATE STRATEGIC PLAN

Goal 2 – A healthy and safe community where life can be lived to the fullest

Goal 3 – A diverse and prosperous local economy

Goal 4 – A vibrant and valued arts, culture and heritage identity

Goal 5 – A community –focused, responsive and countable government

FINANCIAL IMPLICATIONS

At this time it is anticipated that the overall budget for Community Investment will remain unchanged during year 1, based on the pooling and reallocation of existing resources. All financial implications associated with the CIS will be brought forward in detail as part of Phase 2 final reporting in the summer of 2012.

DEPARTMENTAL CONSULTATION

Community Engagement & Social Services

Arts, Culture, Entertainment and Tourism

Parks and Recreation

Budget and Financial Services

Economic Development

Policy Planning and Urban Design

Public Works

Legal Services

COMMUNICATIONS

The community benefit sector has been engaged throughout the project. Most recently the draft Strategic Policy Framework was presented to a variety of stakeholders at a consultation event in February 2012. A detailed communication plan will be created to support the implementation of the CIS.

ATTACHMENTS

Appendix 1: Guelph's Community Investment Strategy – Phase 1 Final Report

Prepared By:

Jennifer Smith
Research Policy Analyst
Community and Social Services



Prepared By:

Barbara Powell
General Manager, Community Engagement &
Social Services Liaison
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Barbara.powell@guelph.ca

Recommended By:

Colleen Bell
Executive Director
Community & Social Services
519-822-1260 ext. 2665
colleen.bell@guelph.ca

Guelph's Community Investment Strategy

Phase 1 Final Report

Prepared by Eden Grodzinski and Rebecca Sutherns

DRAFT (March 20, 2012)

jpmmc

✉ 20 Lyon Ave., Guelph, ON N1H 5C6 ☎ 519 830-7254 🌐 www.jpmmc.ca eden@jpmmc.ca

Executive Summary

The Community Investment Strategy (CIS) is being developed to improve how the City of Guelph funds, supports and partners with community organizations to achieve shared social and community goals. JPMC Inc. was retained by the City to support the delivery of the CIS project in two phases. This report addresses the results of Phase 1 - the development of a Strategic Policy Framework. Phase 2 will involve the refinement of the CI model, and the development of an implementation plan and tools to execute the strategy outlined in Phase 1.

The proposed Framework was informed by three research reports (available separately) and a series of consultations with City councillors, staff and external stakeholders (representing both community organizations and residents). All told, over 190 people contributed to this study, as well as 139 community organizations that responded to an on-line survey. The consulting team is grateful for the assistance, patience and involvement that Guelph residents have shown as this Framework has been under development.

The proposed CIS Policy Framework is encapsulated in Figure 1 below, and each of the components – strategic directions, vision, values, mechanisms, and evaluation criteria - are highlighted here, and described in more detail within the report.

To begin with, the CIS is grounded on the following four strategic directions, which arose from the research and community consultations:

1. Provide clear, inspiring leadership
2. Support community infrastructure (i.e. recreational, sports and cultural facilities, and social connections)
3. Know, value and trust the community benefit sector
4. Promote a culture of responsiveness and transparency

Second, the proposed *vision* for the CIS is to **provide a transparent and responsive decision-making framework to guide the full range of mutually beneficial relationships between the City and Guelph's community benefit sector, in pursuit of community wellbeing and responsible stewardship.**

Third, the CIS will be built upon a foundation of six *core values*, as follows:

- **Integrity** – a transparent, defensible, and consistent process that is free of conflicts of interest
- **Responsiveness** – a timely process that enables innovation, adapts to changing community needs, and is well suited to Guelph

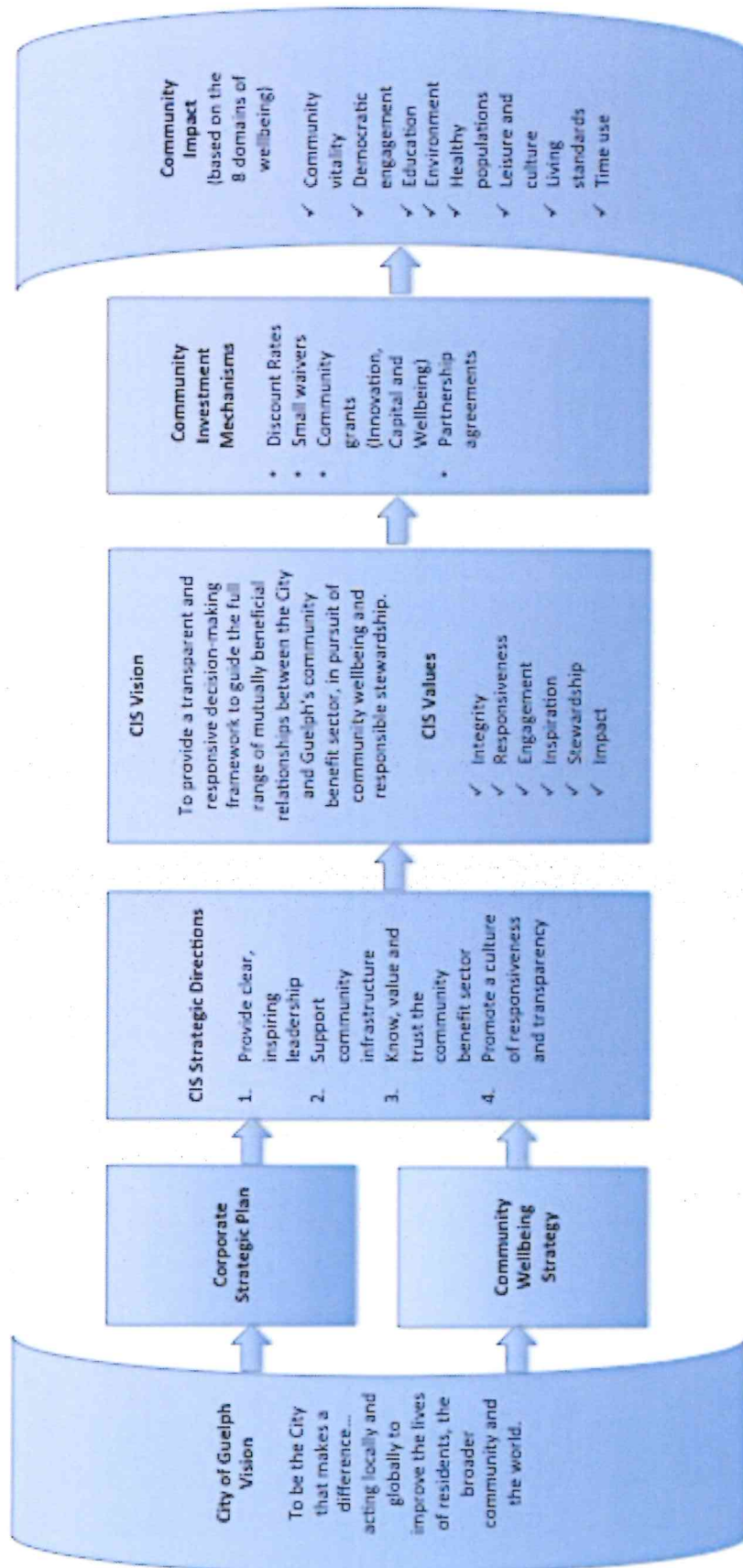
- **Engagement** – a user-friendly and inclusive process that facilitates connections among community groups, in order to strengthen relationships between the City and Guelph's community benefit sector
- **Inspiration** – a visionary approach that demonstrates compelling leadership, fosters creativity, and brings about a community where people are proud to live
- **Stewardship** – a system that maintains guardianship of taxpayer resources, taking into account the complete cost benefits of the City's community investments, as well as leveraging resources from other sources
- **Impact** – a process that monitors and evaluates community impact based on the wellbeing indicators, and promotes a culture of learning and celebration of the City and community benefit sector's collective efforts

Fourth, the proposed CIS includes a simplified set of mechanisms for community investment. These mechanisms include discount rental rates, small waivers, three types of community grants (i.e. innovation, capital and wellbeing), and partnership arrangements.

And lastly, in order to ensure that the CIS is aligned with relevant strategic initiatives such as the Community Plan for Wellbeing, the evaluation criteria will be based primarily on the eight domains of community wellbeing (i.e. community vitality, democratic engagement, education, the environment, healthy populations, leisure and culture, living standards, and time use) which provide a comprehensive, composite measure of quality of life.

Upon Council approval of this Phase I Report, the next stage of the project will be the development of the CIS Program Framework and Implementation Plan, which will take into account future resource requirements to support the new CIS. It is recommended that the overall budget for the City's community investments remain unchanged in Year 1 (2013), with a pooling and reallocation of existing resources to support the new mechanisms. Before the budget for future years can be finalized, it is critical that a comprehensive financial analysis of the City's community investments (including in-kind resources) be undertaken and considered.

Figure 1 - Community Investment Strategy Policy Framework



Highlights of the Proposed Community Investment Model

There was considerable consensus among the participants around the principles or characteristics underpinning a renewed investment process. These included a desire for alignment with broader City strategic initiatives, citizen participation, proportionality of the process to resources sought and available, consistent and transparent application process, simplicity, multi-year budgeting, the fostering of innovation, and a focus on community impact. The following table compares these desired characteristics, alongside the proposed features of the CIS, which are detailed within the report.

DESIRED CHARACTERISTICS	PROPOSED FEATURES
<i>Aligned with broader strategies</i>	<ul style="list-style-type: none"> • Vision and strategy-driven, with evaluation measures linked to outcomes based on the domains of wellbeing
<i>Citizen engagement and opportunities to be heard</i>	<ul style="list-style-type: none"> • Review panels comprised of subject experts • Regular reviews of the process based on community feedback
<i>Simpler navigation of City Hall</i>	<ul style="list-style-type: none"> • Initial “triage” • New “Community Navigator” roles • Improved documentation and communication of the process, including eligibility and evaluation criteria and improved feedback to agencies
<i>Simpler process</i>	<ul style="list-style-type: none"> • On-line information and application processes • Improved communication, including personal contact • Affiliation tiers to clarify eligibility • Shared terminology
<i>More transparent and defensible process that is consistently applied</i>	<ul style="list-style-type: none"> • The process will be clearly described and explained • An appeals process will be established • Regular evaluation is incorporated into the process
<i>Non-political process, free of conflicts of interest but grounded in expertise</i>	<ul style="list-style-type: none"> • Council will be involved in setting CIS strategy and evaluating impact, but staff and citizens will take primary responsibility for allocation recommendations/decisions • Review panels will draw on expert advice, combined with multi-sectoral vision
<i>Multi-year</i>	<ul style="list-style-type: none"> • Multi-year budgeting, planning, granting and partnering will occur whenever reasonably possible
<i>Proportional to the resources sought and available</i>	<ul style="list-style-type: none"> • Smaller requests will involve a simpler application and approval process • The initial phase of the CIS will be designed to be paid for through repositioning of existing resources • Responsibility for implementation is spread throughout the Corporation and into the community
<i>Fostering of creativity</i>	<ul style="list-style-type: none"> • Innovation Fund, with accompanying innovative review process • Small waivers available with minimal “red tape”

DESIRED CHARACTERISTICS	PROPOSED FEATURES
<i>Better tracking of investment and impact</i>	<ul style="list-style-type: none"> • Development of systems that account for what things actually cost • Evaluation process that informs future allocations and the CIS itself
<i>Considers investments beyond community agency grants</i>	<ul style="list-style-type: none"> • Encompasses a variety of forms of investment in community groups
<i>Well-suited to Guelph</i>	<ul style="list-style-type: none"> • Having learned from other municipalities, the Guelph CIS has been designed primarily in response to feedback from Guelph residents and will involve their input throughout
<i>Leverages resources from other sources</i>	<ul style="list-style-type: none"> • Innovation Fund envisioned to be run in collaboration with other funders • Small grants that leverage other external ones have been maintained • Multiple reciprocal agreements anticipated to acknowledge City's contribution
<i>Seamless implementation</i>	<ul style="list-style-type: none"> • Recommendations phased in over time, with attention given to detailed implementation planning and communication
<i>Less reactive</i>	<ul style="list-style-type: none"> • Opportunities for the City to be both responsive to proposals and/or proactive in soliciting them • Recommended investment in the City's social planning capacity that allows for both the identification and validation of community needs
<i>Timely and flexible</i>	<ul style="list-style-type: none"> • Staggered and more frequent intake dates • Navigation assistance • Customized review processes proportional to resources requested
<i>Room for interesting partnerships across sectors</i>	<ul style="list-style-type: none"> • Explicit City role in facilitating connections • Partnership agreements have flexibility to include multiple players

Acknowledgements

We would like to thank all the individuals and organizations that contributed to Phase I of the Community Investment Strategy project. We are extremely grateful to the over 190 City Councillors, staff, and community members who have participated in the various consultations, as well as the 139 community organizations that responded to the on-line survey.

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1. Background

The City of Guelph is often regarded as one of the premier cities in Canada in which to live, work and play. A key reason behind these ratings is Guelph's "community benefit sector", which provides a myriad of programs and services that are vital to the social, cultural and environmental sustainability of the community. Whether it be cleaning up the Speed River, providing alternative education to homeless and at-risk youth, organizing art and music festivals, assisting new Canadians to settle in the community, delivering hot meals to a housebound senior, or teaching children how to skate, Guelph's community benefit sector is *making a difference*.

Moreover, community organizations are vital contributors to the economic sustainability of the City. Provincially, the community benefit sector employs 15% of Ontario's workforce and generates \$34 billion in value to the economy.¹ In Guelph, that equates to over 10,000 jobs.

The City of Guelph has a longstanding history of working with and supporting local community groups, including providing grants, fee subsidies, waivers, in-kind supports, and service agreements. Historically, these investments have varied widely in their size, decision-making processes, and evaluation criteria. The Community Investment Strategy (CIS) project provides an opportunity not only to review how the City can improve the effectiveness of its support mechanisms, but also to explore how the City can strengthen relationships and work with the community benefit sector in more innovative ways.

The CIS project is being undertaken in two phases:

- Phase 1 – Creation of the overarching **Strategic Policy Framework**
- Phase 2 – Development of the **Investment Program Framework and Tools** and supporting implementation plan

This report presents the results of Phase 1, building on the findings presented in the Interim Phase 1 Report (December 2011). The first section of this paper describes the objectives of the project, and the process undertaken to date. This is followed by an overview of the proposed strategic policy framework, as well as considerations for Phase 2.

1.1 Purpose

Council first endorsed the CIS project in 2008 (Report # CS-AD-0818). Its stated purpose is to: improve how the City provides funds, supports and partners with community organizations to achieve shared social and community goals. More specifically, the CIS project is being undertaken in order to provide the City with a strategic and operational framework that:

- Increases the City's ability to respond to changing community needs

¹ Imagine Canada (2006). *The Nonprofit and Voluntary Sector in Ontario: Regional Highlights from the National Survey of*

- Addresses the patchwork of investment mechanisms that has evolved over the years
- Fosters innovation
- Improves the City's ability to monitor and evaluate community impact

1.2 Methodology

In June 2011, JPMC Inc. was retained by the City of Guelph through a competitive process to support the delivery of this project in two phases, over the following 18 months. The process for obtaining data, information and community input for this study was systematic and multi-faceted. It involved: three meetings with the CIS Management and two with the Project Working Groups (see Acknowledgements for membership listings); a review of comparable practices in other municipalities; an on-line survey of completed by 139 local community organizations; numerous key informant interviews, facilitated group discussions and community town hall meetings; as well as an in-depth review of relevant literature, policy documents and available statistics. All told, over 190 participants (City Councillors, staff and external stakeholders representing both community organizations and residents) contributed to this study. For detailed information on the methodology, please refer to Appendix A.

In addition to this report, the following three background research papers have been prepared (and are available under separate cover):

1. *Promising Practices in Municipal Community Investment*

The first background research report involved a review of the City's comparator municipalities to gain an understanding of other civic community investment policies and practices. To supplement this learning, examples of socially innovative practices from published literature, policy think tanks and non-municipal collaborations were also explored.

2. *Inventory of Guelph's Community Investment Policies & Practices*

The second research report provides a detailed review of the City's existing community investment policies and procedures, including funding amounts and trends over the past five years.

3. *A Portrait of Guelph's Community Benefit Sector*

The final background research report contains a profile of the community benefit sector in Ontario and in Guelph, plus an examination of the current and emerging issues and trends facing the sector.

The results of the research findings and community consultations have been synthesized into six themes. They can be summarized as follows, and are detailed in in Appendix B:

- Aspirations for Guelph
- A strategic view of community investment
- Role of the community benefit sector
- City's best role in community investment

- Enabling innovation
- Desired features of the CIS

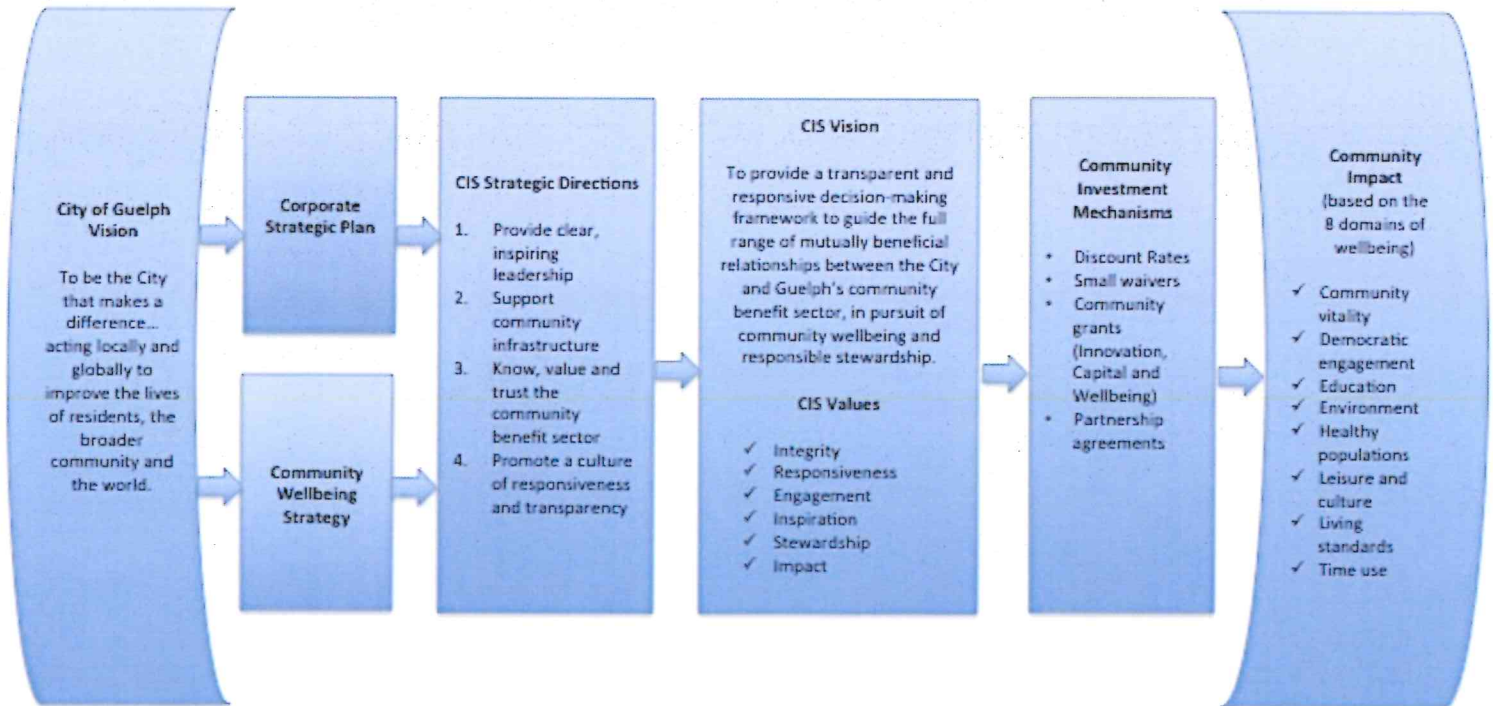
1.3 Terminology

There may be differing levels of understanding about various terms used throughout this project (e.g. social innovation, community benefit sector, subsidies, waivers, etc.). For a detailed list of key terms and definitions, please refer to Appendix C. In addition, Appendix D contains a description of the “eight domains of wellbeing”, upon which the proposed CIS Policy Framework is grounded.

2. Strategic Policy Framework

Figure I below provides a pictorial view of the Community Investment Strategy Policy Framework.

Figure I - Community Investment Strategy Policy Framework



3. Strategic Directions

The following is a list of four strategic directions for the City that have emerged from analysis of the community consultations and research findings, including some proposed action steps for addressing these issues through the proposed CIS Policy Framework.

1. Provide clear, inspiring leadership

Residents are looking to the City to articulate and pursue a compelling identity and strategic goals, in ways that inspire others to follow. The CIS can then become a tool that helps the municipality, and the City as a whole to achieve that desired future.

Proposed Action Steps: The City is currently developing a Corporate Strategic Plan and a Community Wellbeing Strategy, which will produce a clear vision for wellbeing in Guelph. Pending the development of these strategies, the City is encouraged to ground the CIS in the eight domains of wellbeing.

2. Support community infrastructure

One niche the City fills better than any other player is as the supplier and custodian of recreational and cultural facilities. Doing so is perhaps the City's most significant community investment, as it provides community organizations with the spaces to do what they do best. The City also plays a role in supporting "social infrastructure" - facilitating connections between social actors, as a guardian of the City's "big picture".

Proposed Action Steps: The City is encouraged to play a proactive role in facilitating connections among community groups. It should also see the construction, upkeep and management of recreational and cultural facilities and spaces as a cornerstone of its CIS. Another example would be to proactively promote community usage of City-owned lands and properties as they become available.

3. Know, value and trust the community benefit sector

It is important that the City know its community well; its needs, aspirations and the community organizations that serve it. There needs to be a corporate-wide understanding of the value and expertise those agencies bring to community wellbeing.

Proposed Action Steps: The existence of the CIS and its participatory development process demonstrates the City's value of the community benefit sector. More work is needed to enhance the City's reconnaissance and social planning capacity, including more actively participating in the community. As well, the City is encouraged to celebrate community achievements.

4. Promote a culture of responsiveness and transparency

The City should be seen as an enabler and ally; a true partner in the joint pursuit of shared community goals. Currently, the City is often viewed as erecting and enforcing barriers to creative community action rather than facilitating it. It is therefore important for the City to clarify what it “can do” for community organizations, and that the rationale for decisions is communicated proactively.

Proposed Action Steps: The City’s strategic focus on “innovation in local government” will kick start this cultural shift. Examples may include: simpler approval processes (proportional to grant size), assistance navigating City Hall, and more transparent decision making at all levels.

4. Vision of the Community Investment Strategy

4.1 Vision Statement

The City of Guelph’s CIS provides a transparent and responsive decision-making framework to guide the full range of mutually beneficial relationships between the City and Guelph’s community benefit sector, in pursuit of community wellbeing and responsible stewardship.

4.2 Values and Guiding Principles

The CIS will be built upon a foundation of six core values, as follows:

1. ***Integrity***
The integrity principle refers to a transparent, defensible, and consistent process that is free of conflicts of interest.
2. ***Responsiveness***
The responsiveness principle refers to a timely process that enables innovation, adapts to changing community needs, and is well suited to Guelph.
3. ***Engagement***
The engagement principle refers to a user-friendly and inclusive process that facilitates connections among community groups, in order to strengthen relationships between the City and Guelph’s community benefit sector.

4. **Inspiration**

The inspiration principle refers to a visionary approach that demonstrates compelling leadership, fosters creativity, and brings about a community where people are proud to live.

5. **Stewardship**

The stewardship principle refers to a system that maintains guardianship of taxpayer resources, taking into account the complete cost benefits of the City's community investments, as well as leveraging resources from other sources.

6. **Impact**

The impact principle refers to a process that monitors and evaluates community impact based on the wellbeing indicators, and promotes a culture of learning and celebration of the City and community benefit sector's collective efforts.

5. Community Investment Mechanisms

As previously mentioned, the City current provides a wide array of community investment mechanisms to community organizations. These include community grants and waivers, special projects, capital funding, facility use subsidies, leasehold agreements, development fee agreements and waivers, and various in-kind supports. The proposed CIS calls for a consolidation of these into four mechanisms:

- Discount rental rates
- Waivers for small community events
- Three types of community grants - innovation, capital and wellbeing
- Partnership agreements

The following table details the characteristics of these community investment mechanisms, in comparison to current practices. Where possible, a dollar figure for the current level of investments in each area has been provided.

PROPOSED INVESTMENT TYPE	PROPOSED FEATURES	CURRENT SYSTEM
a) Discount rental rates To ensure that public facilities, owned and operated by the City, are accessible and affordable for community activities, pre-approved community organizations will be eligible for facility-use subsidies.	<ul style="list-style-type: none">• Harmonized discount rates across facilities and sectors (rates to be set in relation to the findings from the concurrent study regarding User Rates and Fees)• Simple application form, available online• Intake accepted year-round• Approved by staff, based on	<ul style="list-style-type: none">• Non-profit discount rates are currently available, but at differing levels and rates for various facilities and user groups (e.g. youth, disability groups)• In 2010, about \$1.1 million in subsidized rates was provided to community groups accessing the City's

PROPOSED INVESTMENT TYPE	PROPOSED FEATURES	CURRENT SYSTEM
<p>Examples could include rentals for theatrical performances, music concerts, ice-skating, swimming, softball, soccer, etc.</p>	<p>set eligibility criteria</p> <ul style="list-style-type: none"> Corporate-wide accounting system for monitoring usage and financial impact 	<p>sports and recreation facilities. This figures does not include discounted rental rates for the River Run Centre and other City-owned and managed cultural facilities.</p>
<p>b) Waivers for small community events In order to foster creativity, citizen engagement, and active participation in community life, the City will waive fees for municipal services (e.g. vendor licenses, road closures, garbage bins, etc.) that are provided for small community events.</p> <p>Examples could include: street parties, pumpkin-carving contests in local parks, etc.</p>	<ul style="list-style-type: none"> Free admission to general public Held on public property, owned or managed by the City Maximum of one event per group per year (maximum waiver amount to be set in Phase 2) Simple online application form, with nominal application fee Intake accepted year-round Approved by staff, based on set eligibility criteria Corporate-wide accounting system for monitoring frequency and cost benefits 	<ul style="list-style-type: none"> There is currently no formal system in place to support waivers for small community events. Regardless of event size, any requests for funding support to offset the costs of municipal services go through the Community Grants Process. The Community Events Sector Review Group determines whether they are eligible for a waiver and/or a grant. Some events have received in-kind supports in the past. There is currently no formal system in place for tracking the amount of in-kind supports provided to community groups.
<p>c) Innovation grants A new funding program that would provide one-time support for new, innovative, creative, and untried projects.</p>	<ul style="list-style-type: none"> Involves multiple funders; City as catalyst One time funding, with cap Presentation-based application (similar to “Dragon’s Den”) Review group comprised of “unusual suspects” Bi-annual allocation cycle Unspent funding goes to a new Innovation Reserve Fund 	<ul style="list-style-type: none"> There is currently no formal system in place to support innovation, and as a result, “good ideas” go unfunded
<p>d) Capital grants Provide non-recurring, non-operating funds to community organizations for the purpose of creating new</p>	<ul style="list-style-type: none"> One-time or multi-year funding terms Annual allocation process Unspent funding goes to new Capital Reserve Fund 	<ul style="list-style-type: none"> Since 2008, Council has allocated \$400,000 or more per year through the annual budget process for capital projects. Historical examples

PROPOSED INVESTMENT TYPE	PROPOSED FEATURES	CURRENT SYSTEM
<p>and/or improving existing community infrastructure (i.e. social, health, cultural and recreational facilities)</p>	<ul style="list-style-type: none"> • Business case and presentation 	<p>have included: Guelph General Hospital, Hospice Wellington, Arc Industries, and the MacDonald Stewart Art Centre. Past decisions have been on a case-by-case basis by Council.</p>
<p>e) Wellbeing grants Support a variety of community programs, services, projects and special events affecting multiple sectors and demographic groups (e.g. social services, arts and culture, sports and recreation, youth, seniors, newcomers, etc.).</p>	<ul style="list-style-type: none"> • A multi-sectoral fund; focus is on community well-being • One-time or multi-year funding terms • Annual allocation process • Simple application form, available online • Mixed expert advisory panel • Smaller requests will involve a simpler application and approval process • Phased in implementation 	<p>4. In 2011, the City allocated over \$770,000 to community groups through a variety of granting streams, including: community grants program (health and social services; arts and cultural activities; community events; special projects (approved by Council)); program service fees; non-prescribed social services (in collaboration with County)</p> <ul style="list-style-type: none"> • Examples of past recipients include: Action Read, Community Health Centre, Big Brothers Big Sisters, Jazz Festival, Chamber Choir, Ed Video, University of Guelph (various conferences and tournaments), Rowing Club, etc.
<p>f) Partnership Agreements Mutually beneficial arrangements that assist the City to provide services it would otherwise do directly. Supports achievement of the City's strategic goals, core business, and/or official/master plans (e.g. recreation, affordable housing, etc.).</p> <p>Examples could include: GWSA, Wyndham House, Civic Celebrations (Canada)</p>	<ul style="list-style-type: none"> • May involve multiple funders • Signed multi-year agreements • Corporate-wide tracking system for reviewing and monitoring agreements and value of partnerships 	<ul style="list-style-type: none"> • There are mixed monitoring systems in place. • Many existing agreements have expired and need to be revisited. • Some of the existing partnership agreements (e.g. Civic Celebrations, Wyndham House, MacDonald Stewart Art Centre, etc.) involve annual operating dollars from the City, totaling about \$1 million annually. • For other agreements that

PROPOSED INVESTMENT TYPE	PROPOSED FEATURES	CURRENT SYSTEM
Day, Santa Claus Parade), Snow Angels, Trees for Guelph, Habitat for Humanity, etc.		do not involve direct funding arrangements, it is challenging to “quantify” the cost of the City’s agreements. And in many respects, the costs to the City are negligible, as community organizations are able to deliver needed community programs and services for considerably less than it would cost the City to do so itself.

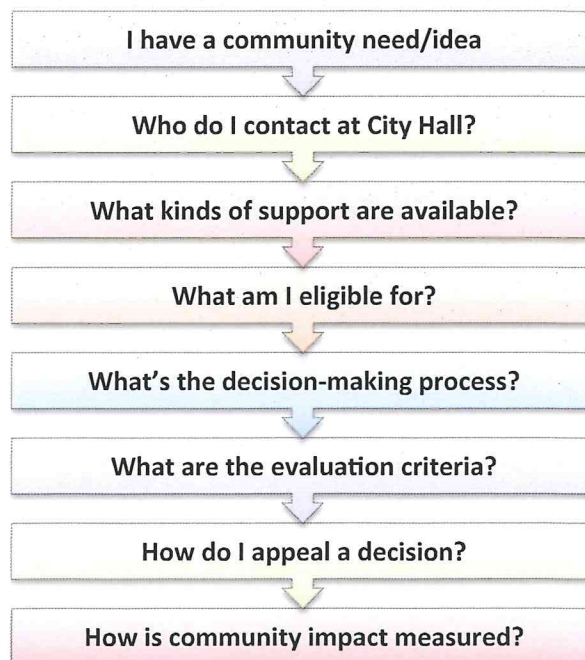
6. Proposed Process

This section of the report provides a “sneak peek” of the Program Framework envisioned to support the Strategic Policy Framework. This is depicted by the flowchart shown as Figure 1, which is intended to act as a decision-making tool for community organizations to use. From this *community-facing* perspective, the focus of the process is on helping groups navigate City Hall, clarifying the types and amounts of support available, and providing transparency and consistency in how decisions are made.

Behind each of the questions within the flowchart lie *corporate-facing* dimensions as well. From the corporate perspective, the focus of the CIS is on ensuring that those same questions are well-answered, while staying responsive to emerging needs, targeting municipal resources appropriately, building mutually beneficial partnerships, fostering innovation, delivering public services better, and measuring the impact municipal support has on community wellbeing.

In reality, the process is not intended to be strictly linear. Each component in the flowchart represents multiple layers with differing entry and exit points. These layers will be refined in Phase 2, and are

Figure 2 - Community Investment Process



described here for conceptual purposes only. They are also contrasted with the current process to demonstrate both the continuity and the changes that are being proposed.

	CURRENT REALITY	PROPOSED PROCESS
I have a community need/idea	There is a disconnect between past community investment decisions and achieving community-wide goals and needs, and the City’s existing social planning capacity to measure community needs is limited.	<p>The starting point of the proposed framework is with the identification of a community need and/or an idea to address it. This need/idea may be new or existing. It may be identified by a community group, by City personnel, or by a combination thereof.</p> <p>Vital to this, is an investment in the City’s social planning capacity that allows for both the identification and validation of community needs. This can be accomplished in several ways. The City may choose to enhance its policy, planning and research capacity internally; it may choose to partner with one or more local community organization(s) with expertise in this area; and/or it may choose to participate more actively in the community at various collaborative planning tables.</p>
Who do I contact at City Hall?	Community organizations find navigating City Hall to be quite challenging. Many report that Finance is often their first point of contact, and that there is an inconsistency among messages received from various departments. Contacting the relevant departments usually falls to the applicant. The quality of experiences dealing with City Hall is often dependent on pre-existing relationships.	<p>A ‘triage’ system will be established to provide quick responses to community queries, resulting in either the person receiving the information they need immediately, and/or being contacted by a “Community Navigator” within a set amount of time. This intake process needs to be accessible on-line, by telephone and in person.</p> <p>The role of the Community Navigator will involve providing help to community organizations (e.g. facilitating ideas/requests through the appropriate channels at City Hall, proactively communicating about the types of supports that are available, maintaining an inventory of other sources of support in order to make appropriate referrals, etc.).</p> <p>As part of the CIS implementation plan, there is a need for ongoing inter-</p>

	CURRENT REALITY	PROPOSED PROCESS
		departmental education and communication. The appointment of staff members (Community Navigators) who bring understanding and knowledge of community needs could be instrumental in this regard.
What kinds of supports are available?	See section 5 above.	See section 5 above
What am I eligible for?	Many of the existing policies that spell out eligibility criteria were created over 20 years old, and in some cases are not reflective of current practices. There is not a consistent system across the corporation for monitoring and reviewing partnership arrangements.	Eligibility will be dependent on a variety of factors, including the type of support sought (e.g. space, grant, partnership, etc.). Consideration is being given to developing a new affiliation system, whereby organizations seeking municipal support will be categorized according to affiliation with the City. Details of this system will be determined in Phase 2.
What's the decision-making process?	Within Community Grants program, there are three sector review panels (Health & Social Services, Arts & Culture, Community Events). These panels operate independently of each other. The Arts Council receives an annual fee for overseeing one of the sector review panels, while the other two groups are managed internally.	Like the eligibility criteria, the allocation decision-making process is dependent on the type of support sought (e.g. space, grant, partnership, etc.). The new process will be proportional to the resources requested, non-political, free of (both perceived and real) conflicts of interest, and grounded in expertise (see section 4.3 – Mechanisms for detail). Moving forward, it will be important to clarify roles and responsibilities (i.e. Council, staff, and community members) in the decision-making process, including delegates of authority.
What are the evaluation criteria?	Current investment decisions are made in the absence of strategic goals and/or feedback loops to ensure future allocations are based on past performance. Decision-making criteria vary across review panels.	It is essential that the goals of the CIS be aligned with relevant strategic initiatives such as the Community Plan for Wellbeing. Therefore, the evaluation criteria will be based primarily on the eight domains of community wellbeing originally developed for the <i>Canadian Index of Wellbeing</i> (see Appendix D). These eight domains – community vitality, democratic engagement,

	CURRENT REALITY	PROPOSED PROCESS
		<p>education, the environment, healthy populations, leisure and culture, living standards, and time use – provide a comprehensive, composite measure of quality of life, and will be further defined for Guelph through the Wellbeing Initiative.</p> <p>For each domain, there will be a set of indicators by which community investment requests/proposals can be scored. A priority ranking system will be developed in Phase 2. For example, priority may be given to activities that address a variety of indicators in multiple domains, or to those that demonstrate strengths in select areas.</p> <p>Additional criteria may be added to help achieve additional City priorities if not adequately covered within the domains (e.g. an event held on City property might score higher).</p>
How do I appeal a decision?	<p>According to the current community grants process, appeals cannot be made with respect to the amount allocated, only if there is evidence to demonstrate that the normal process was not followed. However, the rationale for decisions is not always shared with community organizations.</p>	<p>In order to ensure that the proposed Framework is transparent and consistent in its decision-making, it is important that the evaluation criteria and appeals process be specified at the outset, and that the rationale for decisions be communicated proactively. Details of this system will be determined in Phase 2.</p>
How is community impact measured?	<p>With the exception of a few debriefing meetings that are held post community events, there is no follow-up mechanism for organizations to provide follow-up information demonstrating the impact and benefits (and lessons learned) the City's investment have made.</p>	<p>The overall intent of the CIS Framework is to help strengthen the capacity of both the City and community organizations to monitor the impact local social services, arts and culture, and sports and recreational activities have on community wellbeing.</p> <p>Evaluation requirements will be proportional to the amount of resources received, and previous outcomes will be well integrated into subsequent granting decisions. Details of this system will be finalized in Phase 2.</p>

7. Considerations for Phase 2

7.1 Costing

It is anticipated that the overall budget for the City's community investments will remain unchanged in Year 1, with a pooling and reallocation of existing resources to support the new mechanisms. Before the budget for future years can be finalized, it is critical that a comprehensive financial analysis of what community investment currently costs the City is undertaken and considered. Preliminary analysis reveals that the value of the City's community grants and waivers (i.e. health and social service, arts and cultural, special events, civic celebrations, non-prescribed social services, etc.), capital grants, partnership agreements, and sports and recreation facility-use subsidies totalled over \$3 million in 2011. Phase 2 of this project includes the development of a multi-year implementation plan, which will take into account future resource requirements to support the new CIS.

7.2 Staffing

The proposed CIS Framework calls for staff to play enhanced roles in areas such as: facilitation/navigation, social planning, monitoring and evaluation, and administrative support for Community Expert Advisory Panels. There are a variety of approaches the City can take to accomplish these functions. The City may choose to redefine existing staff roles; it may choose to augment its staffing capacity; and/or it may choose to partner with one or more local community organization(s) with expertise in an area (e.g. social planning and community development). Further recommendations regarding the human resource requirements to support the CIS will be identified in Phase 2.

7.3 Future Scope of the CIS

The current CIS Framework is consistent with the scope of the Request for Proposals for the project, which reflects the revised responsibilities of Department of the Community and Social Services. A number of stakeholders have indicated that they would like to see the values, mandate and/or influence of the CIS spread to other areas of the corporation over time as appropriate. For the time being, it is recommended that the CIS remain housed and managed within the service area of Community and Social Services.

8. Next Steps

Upon Council approval of the Phase I Report, the next stage of the project will be the development of the CIS Program Framework and Toolkit, and supporting Implementation Plan. As well, a Peer Review of the CIS Framework will be undertaken.

Appendix A – Detailed Methodology

The development of the Phase I report took place between July 2011 and March 2012. The process was split into two parts:

1. Background research into the practices of comparable municipalities and social innovation, the City's own past investments, and a profile of Guelph's community benefit sector
2. Consultations with internal and external stakeholders, soliciting input, advice and feedback on the proposed CIS vision, values and policy framework

I. Background Research

The methodology undertaken for the development of the background research reports was systematic and multifaceted, and is described below. Copies of the reports are available under separate cover.

- A review of available facts and statistics on the local community benefit sector. Key data sources included:
 - Statistic Canada's Census of the Population, 2006
 - Canada Survey of Giving, Volunteering and Participating (CSGVP), 2007
 - National Survey of Nonprofit and Voluntary Organizations (NSNVO), 2003
 - Community Information Database records from the Volunteer Centre of Guelph/Wellington, 2011
- A review of "think tanks" and published literature relating to Canada's community benefit sector and social innovation. Leads for this line of inquiry were provided by the City's project manager. For a complete bibliography and list of organizations reviewed, please refer to the background research reports "A Portrait of Guelph's Community Benefit Sector" and "Promising Practices in Municipal Community Investment"
- A survey of Guelph's comparator municipalities. In the summer of 2011, City staff sent an electronic survey to 39 people representing 29 municipalities taken from Council's approved list of comparator municipalities. The survey asked about the nature of the municipalities' investment in community activities and partnerships with community organizations. Twelve responses were received from 11 municipalities. Those responses were summarized by City staff, with the report and background details provided to the consulting team. The findings provided an initial overview and suggested which municipalities warranted more thorough follow up. In some cases, municipalities also provided relevant policy documents, which were then reviewed by the consulting team. A list of municipalities surveyed and interviewed can be found in the "Promising Practices in Municipal Community Investment" report.

- A review of the City’s current community investment policies and practices, including a five-year financial analysis. This review involved an internal inventory survey, as well as six key informant interviews involving City staff and the Guelph Arts Council.
- The preparation of five case studies to provide more detailed “stories” of the range of ways the City partners with and supports external groups in the pursuit of shared goals. The topics for these case studies, which were selected by the Management Group with input from the Project Working Group, include: Ed Video Media Arts Centre, Volunteer Centre of Guelph Wellington, Ribfest, Guelph Wellington Seniors Association, and Guelph Community Sports. As part of the case study development process, seven key informant interviews and one focus group were held, relevant policy documents and websites were reviewed, and municipal support of comparable organizations within selected comparator municipalities was researched.
- A funders forum. On November 14, 2011, a facilitated focus group session involving 19 participants, representing a range of funding organizations that support the community benefit sector in Guelph, was held.
- An on-line survey (using Survey Monkey) about the local community sector. The survey gathered information about the composition, strengths, needs and priorities of Guelph’s community benefit sector, as well as feedback about past experiences accessing the City for support. The web link was circulated to over 400 community stakeholders by City staff, as well as promoted via multiple sources (i.e. City website, local funder distribution networks and community membership lists). A total of 139 community organizations responded to the survey between November 21 and December 7, 2011.

2. Stakeholder Engagement

A variety of opportunities were offered for both internal and external stakeholders to help define the vision and policy framework of the CIS. Topics of conversation included:

- What Guelph is known for, loved for or good at
- The City of Guelph’s best role vis-à-vis the community benefit sector
- Aspirations for the CIS
- Approaches to community investment (i.e. ways to organize the CIS, types of support, levels of support, allocation process, eligibility criteria, evaluation criteria, etc.)

The following is a list of meetings that were conducted by one or both of the consultants (Eden Grodzinski and Rebecca Sutherns), primarily in January and February 2012. All told, over 190 participants contributed to the study (The total number of participants is listed in parenthesis below. It should be noted that some individuals partook in more than one discussion, and therefore, the total number of participants does not represent the sum of the individual discussions).

- Mayor and Councillors (8)
 - 5 key informant interviews, small group discussions (7)
 - Participation in Town Hall meetings (4)

- Staff (35)
 - 3 Management Group meetings (6)
 - 2 Project Working Group meetings (10)
 - 2 staff workshops (22)
 - 15 key informant interviews, small group discussions (22)

- Community members (approx. 150)
 - Funders Forum (19)
 - Cultural Advisory Group (8)
 - Guelph Youth Council (10)
 - Sports Advisory Group (12)
 - Executive Directors Network (9)
 - 2 Town Hall meetings on January 25th (78)
 - Town hall meeting on February 28th (51)
 - 9 key informant interviews, small group discussions (11)

Appendix B - Research & Consultation Findings

The following is a synthesis of the key findings gathered through the CIS community engagement process, as well as the three background research reports.

Aspirations for Guelph

In order to obtain input into the vision and values for the CIS, stakeholders were asked “What makes Guelph, Guelph?” or “What do you love about Guelph?” The responses were quite consistent across respondents. The following features were repeatedly identified:

- A strong cultural reputation, especially festivals
- A terrific downtown, especially the market
- Strong community engagement
- Caring, serving and volunteering
- Small town feel with bigger city services
- Diverse, with something for everyone
- Environmental sensibility
- Supportive of innovation

In a related question, when respondents were asked to identify their hopes for Guelph’s future, they responded with similar answers, such as the following:

- “Make a difference” – be innovative, creative, learning
- A complete community
- Established as the arts and cultural capital of the region
- Maximize use of downtown
- Provide leadership in all things green
- Stay beautiful
- Be well-run and small business friendly
- Be known as a caring place
- Engaged citizens who are well listened-to by their leaders
- Inclusive
- Collaborative

Besides providing directions regarding the desired characteristics and outcomes that the CIS should pursue, these messages are also relevant to the City’s Corporate Strategic Plan (CSP).

A Strategic View of Community Investment

The extent of the Guelph's investments in community organizations is much broader than simply providing community grants. Other types of supports include fee waivers and discounts, in-kind services, capital investments, capacity building efforts, staff time and many other contributions, all with a view to meeting the City's strategic goals. The scope and scale of that investment is currently difficult to quantify as it is not consistently tracked and monitored across the corporation. And in some instances, the expense may actually be of net benefit to the City as community organizations are often able to deliver the program/services for less cost.

Similar experience in other comparable municipalities suggests that successful community investment is most often reflected in a well-run granting process to community groups, and in Guelph those grants are clearly the best communicated and understood type of City support. And while improving the community grants program would certainly take the City a long way towards creating a more accountable, transparent community investment system, limiting the CIS to a review of the grant management process alone would address only a small fraction of the City's overall community investments.

Participants viewed the CIS as a vital opportunity for the City to clarify the strategic impact it wants to achieve and its role vis-à-vis the community benefit sector.

Role of the Community Benefit Sector

Successful municipalities are encouraged to see their community benefit sector as a creative resource rather than an optional partner.² Guelph is home to over 700 community organizations and is proud to be known as the volunteering capital of Canada. This sector is large and active. It provides social, health, recreational, cultural and environmental services that contribute to the wellbeing of this community.

In Guelph, as elsewhere, the current economic climate is resulting in dramatic changes in the demand for and delivery of community services. Solving the current social, economic and environmental challenges facing Guelph will require more than government action alone. Community organizations have the ability to extend governments' reach, engage community members at the grass-roots level, and build cross-sectoral partnerships.

Community agency representatives are asking the City to develop a CIS that values, trusts, listens to and supports the valuable work that they do.

² Brodhead, Tim. (2010) "On Not Letting a Crisis Go to Waste: Innovation Agenda for Canada's Community Sector" *The Philanthropist*.

City's Best Role in Community Investment

According to recent literature, the primary desired or possible areas of involvement for municipalities seeking to be socially innovative are social finance, public policy, culture and enabling environment. In those arenas, governments take responsibility for roles such as setting the tone, convening the players, enabling access to resources and mobilizing knowledge.³ This wise counsel was clearly reflected in the feedback from Guelph stakeholders.

All of the stakeholders in the CIS consultations were asked to comment on the City's best role vis-à-vis the community benefit sector. Responses were numerous and varied, but the following core messages have clearly emerged. The City should:

- Articulate a clear, inspiring vision, and be strategic in decision-making
- Be known for saying “yes” rather than “no,” particularly in terms of processes and policies
- Support facilities and gathering spaces that allow community activities to flourish
- Use its resources to leverage other investments on behalf of community groups
- Enable innovation, even as it may struggle to be innovative itself
- Listen carefully to the community, building in lots of opportunities for citizen engagement
- Facilitate connections among people, with the whole community in mind
- Support diversity, as reflected in the City's investment practices across a range of sectors, groups and activities
- Communicate well, and help others to do the same through marketing and promotional support
- Facilitate event planning according to a model of “easy one-stop shopping”
- Be the guardian of accessibility and inclusion for the marginalized
- Be a good steward of taxpayer resources
- Consider supporting innovative financing models

It is significant to note how many of these roles are not directly related to grants. Stakeholders articulated numerous helpful, creative roles for the City that do not necessarily involve funding.

Enabling Innovation

A preliminary exploration of social innovation among the City of Guelph's comparable municipalities was also incorporated into this project. Municipal governments are not usually known for their capacity to innovate. Yet in Guelph the City is seen as playing an important potential role in *enabling* social and cultural innovation. Some of the specific ways identified by which it can do so overlap with roles listed above. They include facilitating access to shared spaces for community groups; collaborating with other funders to leverage and coordinate

³ Public Policy Forum (2011). *Adapting and Thriving: Innovative practices by small and medium nonprofits emerging from the economic downturn*. Ottawa.

resources; exploring innovative financing options to improve cash flow and access to investment capital for agencies; connecting like-minded groups in interesting ways; and supporting marketing and communications efforts to publicize community events. The City also needs to be realistic about its own ability to create the structures, culture and political will needed to sustain innovation. While some of these potential roles are incorporated into the proposed Strategic Framework, others will need to grow and/or be explored over time.

Desired Features of the Community Investment Strategy

Community stakeholders were consistent and assertive in expressing the values, principles and features that they want to characterize a renewed community investment process. Their aspirations can be summarized as follows:

- A transparent and defensible process that is simple to follow, timely, responsive to changing needs and consistently applied
- Non-political allocation process, free of [perceived and real] conflicts of interest and grounded in expertise
- Well-aligned with other related strategies
- Fosters creativity and innovation
- Inclusive and participatory
- Reflective of a broad understanding of investment and a multi-sectoral, integrated view of allocation, grounded in community impact
- Proportional to the resources sought and available (i.e. the application and approval process is relative to the size of the financial request)
- Multi-year in its orientation
- Well-suited to Guelph
- Designed to leverage additional resources from other sources
- Accounts for what things actually cost
- Seamless in its implementation

Appendix C - Glossary of Terms

- **Collaborations** - The Research Shop at the University of Guelph is an excellent resource on collaborative research, and has recently conducted a review of local community collaborations (see www.worktogether.ca). The following is their definition, which has been adopted for the CIS Framework: “A mutually beneficial and well-defined relationship entered into by two or more stakeholders to achieve common goals. It occurs when stakeholders work together to address problems and seize opportunities through shared effort, contribution of resources, decision-making, and ownership of the final products or outcomes.”
- **Community Benefit Sector** - Across the world, this sector is referred to in many ways – non-profit, not-for-profit, voluntary, charitable, social benefit, public benefit, community, and the third sector. The terms of reference for the CIS project originally used the term “not-for-profit organizations” to describe this sector. However, according to a survey conducted for the Government of Ontario’s Partnership Project (2011), this is not a descriptive term that individuals working within this sector prefer. And so, for the purposes of the CIS study, the broad term “community benefit sector” has been employed.
- **Community Grant** – Funds dispersed by the City to a community organization
- **Community Investment** – In many communities, “community granting” is considered to be synonymous with “community investment”. In Guelph, however, the term extends well beyond the traditional community grants program, to encompass capital funding, facility-use subsidies, fee waivers, leasehold agreements, tax rebates, development fee waivers and agreements, and various kinds of staff support as well. In fact, Guelph’s CIS includes a larger bundle of services and sectors than many other comparable municipalities.
- **Community Investment Strategy** - A strategic and operational decision-making framework that will guide how the City funds, supports and partners with community organizations.
- **Community Organizations** - Are defined as organized, private, not profit distributing, self-governing and voluntary. They are non-governmental; yet work collaboratively with government to provide necessary services to the public. It is important to note that this definition includes groups that may not be incorporated non-profits or registered charities, as research revealed that not all community groups meet these criteria. For example, of the respondents to the CIS survey, only 75% are incorporated non-profits and 55% are registered charities.
- **Community Wellbeing** – According to the Community Index of Wellbeing (CIW), wellbeing is defined as, “the presence of the highest possible quality of life in its full breadth of expressions, focused on but not necessarily exclusive to: good living standards, robust health, a sustainable environment, vital communities, an educated

populace, balanced time use, high levels of democratic participation, and access to and participation in leisure and culture.

- **Partnership** – A relationship where two or more parties, having compatible goals, form an agreement to do something together. Partnerships are about people working together in a mutually beneficial relationship, oftentimes doing things together that might not be able to be achieved alone.⁴
- **Social Innovation** – According to Social Innovation Generation (SiG) in Waterloo, Ontario, the term social innovation refers to “new ideas that work to solve pressing unmet [social] needs.” In the context of municipal community investment, social innovation can occur directly (i.e. when a civic government implements a new idea to solve a socioeconomic problem), or indirectly (i.e. when a civic government creates an environment in which the realization of new ideas, helpful in the social realm, can flourish).
- **Subsidy** – Discounted rental rate for use of a public facility, owned or operated by the City
- **Waiver** – Grant credits for municipal services provided to community organizations organizing special events held on public property, owned or operated by the City (e.g. vendor licenses, park rentals, potable water supplies, port-a-potties, garbage bins, road closures, picnic tables, etc.)

⁴ Frank, F. and Smith, A. (2000). *The Partnership Handbook*. Hull, Quebec: Human Resources Development Canada.

Appendix D - Domains of Wellbeing

The **Canadian Index of Wellbeing (CIW)** is a nationally recognized composite index that measures quality of life in Canada across eight different, but interconnected categories of wellbeing. A brief description of these wellbeing domains, as defined by the CIW Network, is provided below. For more detail, please refer to www.ciw.ca.

1. **Community Vitality** measures the strength, activity and inclusiveness of relationships between residents, private sector, public sector and civil society organizations that fosters individual and collective wellbeing.
2. **Democratic Engagement** measures the participation of citizens in public life and in governance; the functioning of Canadian governments; and the role Canadians and their institutions play as global citizens.
3. **Education** measures the literacy and skill levels of the population, including the ability of both children and adults to function in various societal contexts and plan for and adapt to future situations.
4. **Environment** measures the state of and the trends in Canada's environment by looking at the stocks and flows of Canada's environmental goods and services.
5. **Healthy Populations** measures the physical, mental, and social wellbeing of the population by looking at different aspects of health status and certain determinants of health.
6. **Leisure & Culture** measures activity in the very broad area of culture, which involves all forms of human expression; the more focused area of the arts; and recreational activities.
7. **Living Standards** Living Standards measures the level and distribution of income and wealth, including trends in poverty; income volatility; and economic security, including the security of jobs, food, housing and the social safety net.
8. **Time Use** measures the use of time, how people experience time, what controls its use, and how it affects wellbeing.

These eight domains will be further defined for Guelph through the Community Wellbeing Initiative.