



Committee of the Whole Report

Report Number: CAO2024-004

Meeting Date: June 4, 2024

Title: **Partnership with the Community Foundation of Kawartha Lakes (CFKL)**

Description: Recommended partnership with, and funding for, the Community Foundation of Kawartha Lakes (CFKL) to deliver community and City funding programs, manage fundraising campaigns and implement community engagement and reporting.

Author and Title: Ron Taylor, Chief Administrative Officer

Recommendation(s):

That Report CAO2024-004, **Partnership with the Community Foundation of Kawartha Lakes (CFKL)**, be received;

That total operating funding in the amount of \$126,000 be committed and provided to the Community Foundation of Kawartha Lakes over a three-year period, beginning in 2024, as outlined in Report CAO2024-004;

That staff be directed to develop a partnership agreement with the Community Foundation of Kawartha Lakes, outlining service(s) that the CFKL can deliver on the City's behalf, by end of Q3, 2024;

That the Mayor and Clerk be authorized to execute the resultant partnership agreement with the Community Foundation of Kawartha Lakes; and

That these recommendations be brought forward to Council for consideration at the next Regular Council Meeting.

Department Head: _____

Financial/Legal/HR/Other: _____

Chief Administrative Officer: _____

Background:

At the Committee of the Whole meeting of May 9, 2023, Laurie Dillon-Schalk and Jack Roks of the Community Foundation provided a presentation to members of Council (see Appendix A).

The following resolution was adopted at the May 23, 2023 Council meeting:

That the presentation by Laurie Dillon-Schalk and Jack Roks, of the Community Foundation of Kawartha Lakes, **regarding an Overview of the Community Foundation of Kawartha Lakes**, be received.

At the Special Council meeting of November 8, 2023, Laurie Dillon-Schalk and Mark Knoester of the Community Foundation attended and made a presentation (see Appendix B). Council adopted the following resolution:

That the presentation by Laurie Dillon-Schalk and Mark Knoester, of the Community Foundation of Kawartha Lakes, **regarding the Draft 2024 Budget for the City of Kawartha Lakes**, be received; and

That the request from the Community Foundation of Kawartha Lakes for three year operating budget support of \$250,000.00, the request to formalize a process for disbursing funds through the municipality and the request to enter into a value exchange with the Foundation (by holding funds with the Foundation and partnering in grant administration) be forwarded to the 2024 budget process for consideration as a decision unit.

At the Special Council Meeting of December 5, 2023, Council adopted the following resolution:

That the funding request of \$250,000.00 from the Community Foundation of Kawartha Lakes be referred to Staff for review and report back by the end of Q2, 2024.

This report addresses that direction.

Rationale:

City staff and representatives of the Community Foundation of Kawartha Lakes (CFKL) have met on several occasions in 2024 to discuss partnership opportunities, services the CFKL can deliver on behalf of, and to, the City, and funding to support CFKL administration and operations.

Administration and Operations Funding

CFKL recently completed a three-year strategic planning exercise. Through that process and meetings with City staff, CFKL identified partnership and service opportunities. As a result, the CFKL has revised their total funding request to the City for administration and operations support to \$126,000 (previously \$250,000). This funding would be administered over an 18-month period (three fiscal year cycles).

The revised CFKL three-year funding request is as follows:

2024 - \$28,000
2025 - \$84,000
2026 - \$14,000

This requested funding will allow the CFKL to scale its operations, paving a way to sustainability. As one of the only multi-purpose public foundations in the City of Kawartha Lakes, CFKL offers a core service around local fundraising, donation management and a path for philanthropy like no other organization. This transitional funding will support start-up and expand those core programs.

Social Sustainability Fund Administration

Since 2007, the Human Services Department has led and administered a Community Social Investment Fund (CSIF). This fund has supported community support service agencies with one-time seed money to support programs or initiatives that addressed poverty-related issues within the City of Kawartha Lakes. Key fund objectives were to: i) alleviate child poverty; ii) increase community participation or connection and/or iii) create sustainable opportunities to improve the quality of life. Over these past 17 years, this fund has remained at a limited amount of funds to support these initiatives.

In 2023 and planning forward, staff worked with funded agencies to reconcile and finalize all reporting and outstanding terms and conditions for one-time funds invested to date.

As outlined in the 2024 budget process, the \$145,308 earmarked for CSIF was recommended as a priority under Human Services to re-establish these funds and structurally support and expand investment for the Social Sustainability of our community.

By establishing a partnership with the CFKL, staff recommend investing these dollars to support and grow a Social Sustainability fund within Kawartha Lakes. These one-time dollars invested in 2024 would provide the opportunity for the City staff to work with the CFKL to establish the fund guidelines and objectives. It is with intention that the new fund would be marketed in a manner to promote further giving and growth for the social sustainability of Kawartha Lakes that would address the quality of life and needs of both current and future generations.

Staff is recommending that CFKL administer these funds annually on behalf of the City. Through the future executed partnership agreement, a modest administration fee (e.g. 10%) would be established for the first year of fund management, and would be evaluated for continuation as the fund grows in future years.

Vital Signs – Community Engagement and Reporting

In January 2022, Council approved the City of Kawartha Lakes [Community Safety and Well-Being Plan](#) (CSWBP 2022 – 2025). Mental Health and Addictions; Housing; Poverty and Youth were the areas of focus with consideration given to each around how best to: Improve system navigation; Expand services and supports; Break down barriers; Collaboration and communication; Help our community understand; and Advocate.

Monitoring and measuring success of this plan originally commenced with certain indicators that would demonstrate achievements made towards each area of focus.

Recently, the original CSWBP Advisory Committee members regrouped to celebrate the qualitative achievements made over the course of the last two years. It was recognized by the various partners that a means to monitor and measure the health, wellness and safety of our community is essential.

In order to fill this gap within the community, the CFKL presented the means of compiling a **Community Vital Signs Report** approach. This report would compile evidence-based data, key priority indicators (KPIs) and information to measure the vitality and well-being of Kawartha Lakes. Trends, gaps, opportunities, strengths and areas of improvement for improving the well-being of our population will be evident

through this data. This will offer community partners a chance to be actively engaged in this approach through consultation efforts and assessing community needs, and serve to inform strategic planning, collaboration opportunities and outline where the demand for investment and advocacy is needed.

What is 'Vital Signs'? Vital Signs is a Canadian based community driven data research program spearheaded by the **Community Foundation of Canada**, led at a municipal level by local Community Foundations. This research program offers KPIs / measurement aligned to the UN's Sustainable Development Goals, universally accepted standards for measuring community well-being worldwide. This program leverages local data and knowledge to support evidence based, locally relevant solutions to improve the quality of life at the community level.

Sustainable Development Goals



Vital Signs offers high levels of community engagement and consultation, with emphasis on gathering local knowledge in addition to data to ensure diverse and inclusive participation. This program can offer a means to ongoing measurement and accountability for CSWB plans.

Staff recommend that a partnership with CFKL to produce the Vital Signs Report for Kawartha Lakes is a necessary means to bring rigour and accountability back to community collaborative planning and align with the Community Safety and Well-Being Plan. Details and timeframes for production of the report will be determined as the partnership with CFKL develops.

Other Alternatives Considered:

Council could choose to not fund the CFKL. This is not recommended as the CFKL offers unique local services to support community programs, projects and fundraising. The

requested funding is intended to support “start-up” and acceleration of this core CFKL service locally over a three-year period. Additionally, the provision of annual Vital Signs reporting and monitoring is a service not currently resourced by the City, and is required to measure and report on progress of goals and actions outlined in the City’s Strategic Plan and Community Safety and Well-Being Plan.

Alignment to Strategic Priorities

Formalizing this partnership with the CFKL contributes to the strategic priority of Good Government, and specifically the stated action of “... collaborate with other community builders, partners and institutions.” The Plan further commits to Measurement and Reporting, and specifically progress indicators, including Municipal Quality of Life Indicators. The Vital Signs reporting would contribute to meeting this commitment.

Financial Impacts:

The recommended investment in the CFKL will allow that organization to expand vital programming and achieve sustainability in a short period of time, while establishing a local partnership that directly benefits and supports City service delivery and reporting.

Council placed the 2024 CFKL funding request equivalent in a reserve (funded from the 2023 City Surplus Disposition), pending further information contained in this report. Future year funding would be included in the future 2025 and 2026 budgets.

Consultations:

Director of Corporate Services

Director of Community Services

Director of Human Services

City Treasurer

Community Foundation of Kawartha Lakes

Attachments:

Appendix A – May 9, 2023 Community Foundation Presentation



Appendix A - May 9,
2023 Presentation

Appendix B – November 8, 2023 Community Foundation Presentation



Appendix B - Nov 8,
2023 Presentation

Appendix C – CFKL Three-Year Strategy & Budget Plan



CFKL Three Year
Budget Forecast

Appendix D – Vital Signs Guidebook for Canadian Community Foundations (2024)



Vital Signs
Guidebook

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