



## Committee of the Whole Report

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**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

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### **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

**Department Head email: [rtaylor@kawarthalakes.ca](mailto:rtaylor@kawarthalakes.ca)**

**Department Head: Ron Taylor**





COMMUNITY FOUNDATION  
OF KAWARTHA LAKES

# Presentation to Council



May 9, 2023



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# Presenting Today

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## Goal

- Introduction
- Connection
- Collaboration
- Ask

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## Jack Roks

Treasurer & Past President, CFKL  
Retired, Formerly Corporate Secretary,  
OMERS

## Laurie Dillon-Schalk

Executive Director, CFKL  
Formerly, Co-Founder Conquer Covid19  
>12 years Strategy Planning, Advertising Sector  
>8 years Management Consultant, IBM Canada

COMMUNITY FOUNDATION  
OF KAWARTHA LAKES

# We are business and community leaders

Our Board Of Directors

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## Mike Bellamy

Board Chair  
Owner, Webrelay Toronto

## James Barrett

Owner, Lakeview Arts Barn /  
Globus Theatre

## Andrew Davidson

Sr Relationship Mgr,  
TD Commercial Banking

## Adam Hayward

Owner, Nesbitts Meat Market  
& BDC Board Member

## Mark Knoester

Formerly Owner, Sobeys  
Fenelon Falls

## Jack Roks

Retired, Formerly Corporate  
Secretary, OMERS

## Nancy Stinson

Certified Financial Planner, CFP,  
RRC IG Wealth Management

## Tina VanderHeyden

President, Movanager  
Productions

## Glen Wright

Chair, Council for Clean & Reliable  
Energy, Former Chair WSIB

## And Foundation Staff

Laurie Dillon-Schalk  
Margaret Cunningham

# A foundation by the community

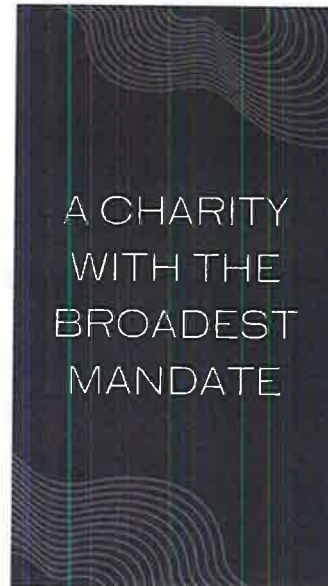
*We are GIVERS to the GIVERS*

- Registered charity
- Dedicated to improving the quality of life in the City of Kawartha Lakes
- Attracting endowment funds and facilitating philanthropic partnerships

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INCREDIBLE  
IMPACT in  
CKL



BUILDING  
VIBRANT  
INCLUSIVE  
COMMUNITIE

## AN INCREDIBLE TRACK RECORD

WE HAVE FACILITATED  
A LEVEL OF COMMUNITY INVESTMENT  
SIMILAR TO FOUNDATIONS 3-5 TIMES OUR SIZE

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# Since 2020, we've administered **\$638,588** in relief / Gov't Grants

**\$194K**

Gov't of Canada Emergency Support Community Fund Investment

**\$180K**

Bobcaygeon & Area Covid19 Relief Funds (Private Donations)

**\$265K**

Gov't of Canada Community Service Recovery Fund Investment

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## BOBCAYGEON AND AREA COVID-19 RELIEF FUND



COMPLISHED



- Kawartha Sexual Assault
- Canadian Mental Health Association
- Awesome Music Program
- Bobcaygeon Public School
- Community Care Foundation CKL
- Community Care CKL
- T.H.R.I.L.
- BGC Kawarthas
- Bobcaygeon Helps Food Bank
- Dunsford Food Bank
- Women's Resources Kawartha Lakes
- A Sheila Boyd Museum
- City of Kawartha Lakes - BACRF Memorial
- City of Kawartha Lakes - Impact 32
- City of Kawartha Lakes - Truth and Reconciliation Committee
- Tri-County Community Support Services
- John Howard Society of Kawartha Lakes and Haliburton
- Society of Saint Vincent de Paul
- King Albert Public School - Trillium Lakelands DSB
- Five Counties Children Centre
- Spinal Cord Injury Ontario - Kawartha Lakes
- Coboconk and Area Food Bank
- Kawartha Lakes Food Source
- Globus Theatre

# Since 2020, we've administered >\$556,597 in donor directed giving

**\$189.5K**

Permanent Endowment Funds

**\$21K +**

The Canopy Project - planting trees on public land

**\$346K +**

The Grove Theatre

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## Community Support

- Coboconk Wellness Center
- Coboconk Foodbank
- A Place Called Home
- The Grove Theatre
- Fenelon Falls Horticultural Society
- Womens' Resources Kawartha Lakes
- Sculpture Project Fenelon Falls

## Scholarships / Bursaries / Support

- U of T Nursing Program
- Fenelon Falls High School
- Youth Leadership Training
- Fleming College
- Langton Public School
- Globus Theatre

## The Canopy Project

- BGC Kawarthas 7 acres property including the new skate park
- Edward Binney Community Gardens

## 2023 To Come

- St. Thomas Aquinas Secondary School, Lindsay
- I.E. Weldon Secondary School, Lindsay
- Dr. George Hall Public School, Little Britain
- Fenelon Falls Secondary School
- Langton Public School, Fenelon Falls
- Bobcaygeon Public School
- Coboconk / Bethany TBD

The Grove Theatre - the creation of an outdoor amphitheatre in Fenelon Falls, now in its 3rd year.

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We offer a broad  
range of funds to  
accommodating  
all types of giving

— *Permanent Endowed Funds*

Funds created by gifts by donors. May include

- Field of Interest Fund
- Community Funds
- Donor Directed Funds
- Designated Funds
- Operating Endowment Fund

— *Managed Funds*

Established by a charitable organization and "held" by the Foundation but not endowed.

— *Flow Through Funds*

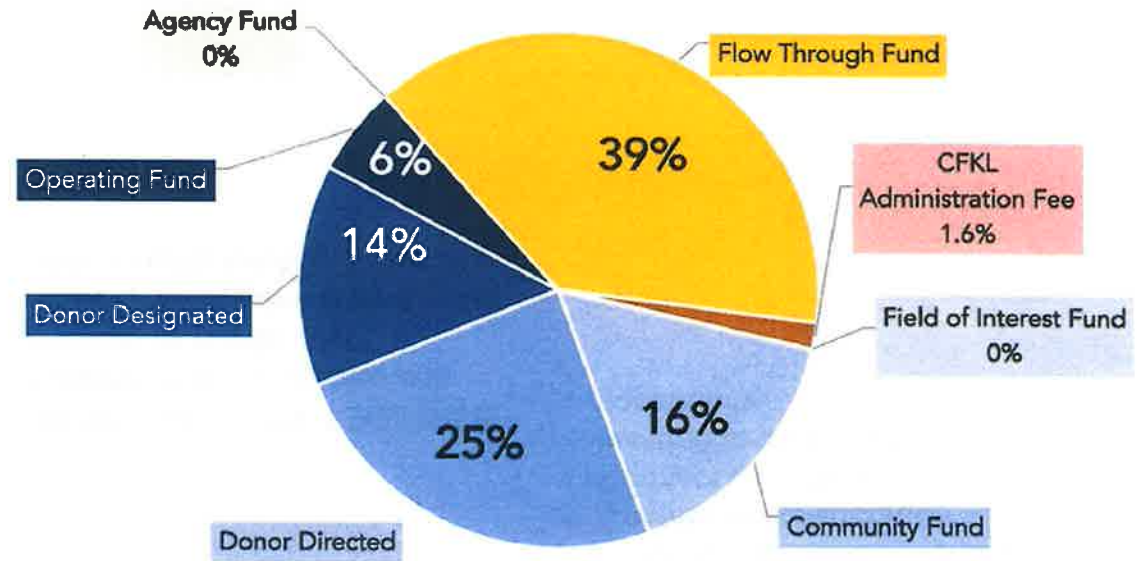
Funds that are not kept more than 12 months.  
Higher administration



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# The composition of our funds

Historical Fund Holdings  
Apr 1 2021 - Mar 31 2023



Does not include federal grants

# ... Asking for Connection & Collaboration

## WHAT WE OFFER:

- A healthy charity ecosystem
- A route to market for hyper local community granting
- Attract Federal Grants

## HOW WE CAN SUPPORT YOU:

- Accelerate municipally endorsed projects on the cusp of funding
- Support community needs that fall outside of the traditional budget
- Productivity & economic impact via fostering community leadership & volunteerism



## HOW WE CAN WORK TOGETHER:

- Funding NQD nonprofits with projects on public land
- Allow CFKL to administer a grant
- Joint insights funding & analysis

## HOW YOU CAN SUPPORT US:

- Open a fund at CFKL
- Fund our capital start up costs
- Commit to collaboration
- Connect us to businesses wanting to invest in the community

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# The needs of our community are INCREASING

- BIG initiatives supporting a growing city - including building cultural / health centers
- Rise of community specific giving to support neighbourhood level investments [Community Funds]
- Continued demand for relief - especially 'non qualified donees' NQD

# ... Opportunity: Establish a "Good Neighbours" FUND

A collaborative effort offering small grants to maintain community contributions as the city grows while also advancing the infrastructure for local giving.



# Let's work together

🌐 [KawarthaFoundation.ca](http://KawarthaFoundation.ca)

✉ [Laurie@KawarthaFoundation.ca](mailto:Laurie@KawarthaFoundation.ca)

📞 416-738-4716

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COMMUNITY  
FOUNDATION  
OF KAWARTHA LAKES

# Deputation to Council

November 8, 2023

PRESENTING:

MARK KNOESTER, INCOMING BOARD CHAIR

[MARKKNOESTER227@GMAIL.COM](mailto:MARKKNOESTER227@GMAIL.COM)

LURIE DILLON-SCHALK, EXECUTIVE DIRECTOR

[LURIE@KAWARTHAFOUNDATION.CA](mailto:LURIE@KAWARTHAFOUNDATION.CA)



## About Us

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- We are **founded by the community**
- We are dedicated to **improving the quality of life** in Kawartha Lakes
- We attract endowment funds and **facilitate philanthropic partnerships**
- We are part the Community Foundation of Canada with a network of over 200+ community foundations

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# About our impact

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We **BRING IN**  
**FUNDING** to this  
area that  
otherwise would  
not have come in

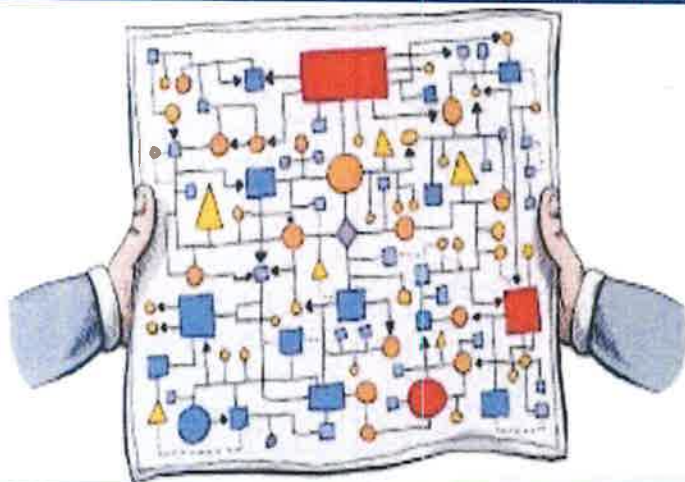
We **ELEVATE**  
emerging  
community efforts  
or area nonprofits

We  
**FACILITATE**  
**FINANCING** of  
community level  
investments

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## At our core



We manage the **very complex processes** around

- DONATIONS,
- TAX RECEIPTING
- FUNDS MANAGEMENT

We are a **critical part of the infrastructure** required to help the community help itself

# We deliver a desired outcome



## Recent social post:

*"The goal is to empower the private sector, not-for-profit agencies,... to help finance and build" – **Jamie Schmale***

**Our Foundation offers the infrastructure** needed to make this happen.

**There are HURDLES  
preventing the  
community from  
financing growth  
in the Kawartha  
Lakes**

We can **overcome these hurdles** by:

- Gaining support during our startup years
- Helping connect donors who wish to fund community investments
- Hasten our sustainability through the creation of a fund between the Foundation and the CKL

**This translates  
into our  
THREE ASKS**

1. Three year operating budget support of \$250K for our startup operation
2. Formalize a process for disbursing funds through the municipality
3. Enter a value exchange by
  - Hold funds with us
  - Partner in grant administration

# Let's grow together

[KawarthaFoundation.ca](http://KawarthaFoundation.ca)  
[Laurie@KawarthaFoundation.ca](mailto:Laurie@KawarthaFoundation.ca)

416-738-4716



# About Funds Management

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- Our funds are managed by the Toronto Foundation as part of a >\$250 million asset portfolio. They use an Outsourced Chief Investment Officer from RockCreek Advisors.
  - Funds management is designed for charity sector including strong wealth preservation, generating strong returns while mindful of fees and costs.
  - Investments are protected from down slides, adjusted constantly for today's market realities and include niche market opportunities for growth
- *"We invest in equity that will make just as much money as other equities BUT has a positive impact to the community"*



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# Examples of other Ontario foundations partnering with municipalities

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- **Lennox & Addington CF** - formalized process for disbursing to non-qualified donees
  - **Brant CF** - manages \$630,000 in community granting with a 10% administration fee, processing upwards of 70 applications per year. Responsible for accepting and adjudicating all applications. The Grant Committee recommendations are ratified by the Board, and the outcome is conveyed to the City of Brantford. City disburses all grants. (2001 – 2023)
  - **Picton / Prince Edward County** - manages community grant programs including agricultural grants, community programming and relief funds for low income households.
  - **Toronto Foundation** – Shared funding and resources model with co-granting initiatives such as the Toronto Resilience Strategy, shared research programs via Toronto's Vital Signs, to crisis response work. Work with leaders across Mayor's Office, the Toronto Office of Partnerships, Economic Development and Culture, Transportation Services and Social Development, Finance and Administration

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# Examples of other foundations partnering with municipalities

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- **Abbotsford** - administers a matching grant program with grants up to \$50K per project.
- **Prince George Community Foundation** – administers the municipality's grant cycle each spring including accepting applications, issuing cheques, hosts a grants committee, makes decisions, sits on City's adjudication committee. Endowment funds established for each community
- **Selkirk, Manitoba** - each municipality (3) has an endowment fund with the Community Foundation. Designated funds include supporting active transit, park space, recreation facilities and future museum site.
- **Kamloops Community Foundation** – 7 Funds on behalf of the municipality including Arts & Culture, Sports for local teams supporting provincial or national recruitment, Festival of Arts as well as 4 Endowment Funds
- **Community Foundation South Okanagan** – Municipality donated \$1,000,000 to start legacy funds
- **Port Coquitlam** – Managers of the municipality's grants program including managing all payments to charities, while the municipality manages payment for NQDs. Signed an MOU with the City to oversee and award their Capital Project Matching fund (up to \$10,000) and their Community Cultural Development (CCD) Grants.

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THREE YEAR STRATEGY & BUDGET FORECAST  
COMMUNITY FOUNDATION OF KAWARTHA LAKES

Prepared April 5, 2024  
For Distribution June 4<sup>th</sup> Council Meeting

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## Three Year Strategic Plan

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Our Mission is to improve the **quality of life** and **sense of belonging** in the Kawartha Lakes.

We will achieve our mission by **building a greater path for philanthropy** directed to the communities within City of Kawartha Lakes.

We are aided by a **unique value proposition** found in our special CRA designation as one of the few (only?) **multipurpose public foundations** in Kawartha Lakes.

This allows us to

- o Operate or grant across major areas that contribute to the vitality of a community including health & wellness, social services, education, economic development, environment, arts & culture, and agriculture.
- o Attract, manage, and disburse funds, in addition to carrying out our own charitable activities.

While we are small in our inception (registered in 2019), one of our core strengths is being a **member of the Community Foundations of Canada**, a network of over 200 community foundations, which brings unique sources of grants, training, collaboration, provincial / federal relationships, and innovative models of working with communities.

While our start included the critical role of local pandemic crisis relief, we have a strong track record in managing funds and investing back into the region. Our future lies in building permanent endowments / donor advised funds (DAFs), with the ability to distribute funds over the long term.

With the focus on building permanent endowments and the ability to distribute funds over the long term, Community Foundations are able to tackle both long term as well as immediate community needs. For example,

- o Partner to accelerate larger community investments that take time to fund and build.
- o Uplift emergent community project efforts that are not yet founded or registered.
- o Over time, address societal or systematic change.

For the next 3-5 years, our objectives are:

1. Build a healthy and sustainable base of operation.
2. Increase the level of giving (donations) in the City of Kawartha Lakes.
3. Increase the level of granting to City of Kawartha Lakes nonprofits or emergent community initiatives.
4. Build a healthier nonprofit sector creating a supportive environment for our charity and others.
5. Develop a deeper understanding of the community's wellbeing and needs, an activity that is essential in designing effective programs and directing investment essential in designing and prioritizing programs and investment.

Tactics in achieving these objectives are found in internal strategic plan documents.

## FINANCIAL STATEMENTS

This forecast reflects a time period of

- o Starting April 1, 2024
- o Ending March 31, 2027

And outlines two major areas of our financials.

### 1. **Funds under management.**

- o Which includes:
  - **Funds Managed:** also called 'invested' funds. These funds are more permanent, longer-term investments which have disbursements over several years. These funds are typically held in our Toronto Foundation investment account, although may fundholders may hold a small balance in our current banking account pending on in or out flows of their fund's activity.
  - **Flow Through Funds:** also called 'spend down' funds as the funds received are typically disbursed in a shorter time frame, e.g. within 12 – 24 months.
  - **Federal Grant and Other Grant Funds:** Please note that federal grant funding or other grant administration typically sees rapid fund disbursement. As such the net fund reflected remains zero.
- o For the ease of the reviewer, we are showing the net fund balances (income minus disbursement), which drives our administration fee income in the operational income.

### 2. **Charity Operating Income and Expenses.** This outlines our major revenue streams and operating expenditures with a yellow column showing growth over FY23.

The following financials are full size to allow for better viewing. Notes follow after financials.

Community Foundation of Kawartha Lakes	FY23 ACTUALS	FISCAL YE 2024	% Chg over YE23	Fiscal YE 2025	Fiscal YE 2026	FISCAL YE 2027	
<b>3 Year Budget Forecast</b>	Ending Mar 31 2023	Ending Mar 31, 2024	Growth over YE23	Ending Mar 31 2025	Ending Mar 31 2026	Ending Mar 31 2027	
<b>NET FUND UNDER MANAGEMENT (INCOME-DISBURSEMENT)</b>	ACTUALS	Actuals to end Feb 24		FORECAST	FORECAST	FORECAST	
Funds under management - in Toronto Foundation	\$382,694	\$457,684	19.6%	\$650,037	\$934,924	\$1,281,629	FY25 onwards growth rate 30%, but disburse 15% per year
Funds flow through / spend down - in chequing	\$130,588	\$41,326	-68.4%	\$98,346	\$106,124	\$115,863	FY25 onwards growth rate 35% but disburse 70% per year
4800- Federal Grant Funding	\$0	\$0	0.0%	\$0	\$0	\$0	Gov't grants flow through so net is zero
Other Govt Grant Fund	\$0	\$0	0.0%	\$0	\$0	\$0	Assumes \$180K fund by Jan 1 2025, completely disbursed biannually, admin fee 13% pending responsibilities
<b>Total NET FUND BALANCE</b>	<b>513,282</b>	<b>499,010</b>	<b>-2.8%</b>	<b>748,383</b>	<b>1,041,048</b>	<b>1,397,493</b>	
<b>OPERATING INCOME</b>							
4100 ADMINISTRATION FEE - Roll UP	6,424.63	13,845.56	115.5%	28,664.80	54,100.67	67,027.07	Assumes new funds at 3% admin fee & 13% admin for grant administration
Federal Grant Administration Fee	40,000.00	0.00	-100.0%				Federal admin fee granted in FY23 but executed in FY24
All other Grants - Roll Up	21,908.21	0.00	-100.0%	79,000.00	107,000.00	30,000.00	Assumes municipal 18 mos support \$7/mth
4120 Event Income	0.00	3,545.42		2,000.00	2,000.00	2,000.00	Assumes break event low budget events
4130 Foundations Opportunities Fund	17,585.76	14,252.85	-19.0%	15,652.85	16,652.85	17,579.78	Moderate growth on opportunity fund
4550 Sponsorships	6,000.00	11,481.85	91.4%	48,000.00	46,500.00	56,500.00	Focused growth on sponsorships
<b>Total 4101 Operating Incomes</b>	<b>91,919</b>	<b>43,126</b>	<b>-53.1%</b>	<b>173,318</b>	<b>226,254</b>	<b>173,107</b>	

h 2024



Community Foundation of Kawartha Lakes	FY23 ACTUALS	FISCAL YE 2024	% Chg over YE23	Fiscal YE 2025	Fiscal YE 2026	FISCAL YE 2027	
3 Year Budget Forecast	Ending Mar 31 2023	Ending Mar 31, 2024	Growth over YE23	Ending Mar 31 2025	Ending Mar 31 2026	Ending Mar 31 2027	
<b>OPERATING EXPENSES</b>							
Contract Services	29,053	13,780	-52.6%	0	30,000	30,000	PT Staff for grant administration / writing / donor comms
Rent	2,801.20	7,708.80	175.2%	8,160.00	8,400.00	8,640.00	As part of Loan MOU, assume moderate inflation increase
Professional Fees	13,967.27	22,301.91	59.7%	17,800.00	17,800.00	17,800.00	FY23 digitizing & financial review, FY24 =2 audits & bookkeeping, continue annual audit & bookkeeping
Loan Repayment	7,500.00	7,500.00	0.0%	0.00	0.00	0.00	New MOU has no interest payments
Insurance	2,715.12	2,115.72	-22.1%	2,300.00	2,300.00	2,500.00	Assumes inflationary increases
Marketing / Advertising / Event Expense / Meals & E / Honorarium	2,487.94	7,071.80	184.2%	5,200.00	5,200.00	5,800.00	Event expenses make event income neutral
Technology / Software / Website / Subscriptions	4,633.20	4,067.91	-12.2%	5,122.78	3,804.78	4,404.78	All hardware is currently on loan, FY25 sees 1 computer, FY26 printer & inflation increases
Misc Office Expenses / Phone / Banking Charges	2,682.32	3,807.51	41.9%	4,192.00	4,192.00	4,192.00	Minimal mileage coverage to service CKL, inflation increase
Total 6600 Salaries and Benefits	42,938	95,784	123.1%	97,825	106,274	112,673	Assumes restart benefits & Cost of Living Adjustment (COLA) by Sept 2024 (in FY25), COLA every September
Total 6000 OPERATIONS EXPENSES	108,778	164,138	50.9%	140,600	177,971	186,010	Assumes thin marketing budget + inflation increases in licenses, insurance, etc
<b>NET CASHFLOW – SURPLUS / DEFICIT. [INCOME / OPERATING EXPENSES]</b>	<b>(\$16,860)</b>	<b>(\$121,012)</b>		<b>\$32,718</b>	<b>\$48,282</b>	<b>(\$12,903)</b>	Over 4 year period, surplus will be used to pay previous deficits leading to a financial footing that is sustainable.
<b>Bank balance estimate</b>							

## NOTE TO FINANCIAL STATEMENTS

### Early Contributors to the Community Foundation's Growth

- Ability to apply for public and private grant enabled in Spring 2024
  - April 2024 completion of the FY23 Audit for the period April 1 2022 – March 31, 2023
  - May 2024 completion of unaudited financial statements for FY24 for the period April 1 2023 – March 31, 2024
  - Starting June 2024 of audit FY24, for a target completion August 2024 in time for CRA filing in September 2024
- Expanded fund opportunities capturing orphaned community projects
  - Amending CRA registration to include broader purposes allowing the Foundation to partner with Non-Qualified Donees, targeted submission June 2024 for estimated CRA approval by year end 2024.
- Restructured MOU with the KL Community Futures Development Corporation
  - Extended loan agreement till 2030 with no interest payments nor accrual
  - Financial risk of immediate repayment or interest rates appreciation is eliminated

### Funds Managed

- We are assuming growth of approximately \$300K per year in total funds managed. Our growth rates are based on our FY24 performance, adjusted for conservative growth.
  - In FY24, funds managed grew by \$130K or 34%. Assuming a go forward growth rate at 30%.
  - In FY23, flow through / spend down funds grew by \$70K or 54%. Assuming a conservative growth rate of 35%.
  - To simplify our analysis, we are focused on the additional revenue from new funds under management and did not reflect any market gains in these funds. We do prioritize wealth preservation over gains, even still, our target growth is 5 -7% by the Toronto Foundation with 9.9% performance in the 2023 calendar year.
- 3. Disbursements, which reduce the fund balances, are based on FY24 performance.
  - In FY24, funds managed had a 24% disbursement rate. Assuming a conservative spend down of 15%.
  - In FY24, spend down funds had a 70% spend down rate. Assuming 70% rate.

## Operating Revenue

This forecast shows major streams of revenue

- Administration Fees – new funds will be standardized to fees at 3% in FY25. Applying a blended rate of 2.6% in FY25 / FY26, then 3% in FY27 reflecting grandfathered admin rates of 2%.
- Federal grant funding is not included in this forecast as the foundation can not influence nor predict this funding element.
- Other grants include 18 months of operational support at \$7K/month (~\$85K per year) starting September 2024. Other grants also include private foundation applications which will be possible with the completion of current year audited statements.
- Event income is a brand awareness / donor engagement lever but not reflected as a major revenue source because it requires heavy resourcing to move past breakeven results.
- While relaunched, the Foundation's opportunity fund reflects individual donations and due to size on donation, shows moderate growth. This supports a more strategic focus on grant applications and sponsorships.

## Operating Expenses

- Contract Services - Assuming PT contractor in YE26 to address grant administration and application.
- Rent - As part of BCDC MOU Loan agreement, Community Foundation of Kawartha Lakes agrees to rent office space in Launch which offers secure space for operations & financial records.
- Professional Fees - Assuming a cap on professional fees once the Foundation auditing is finished in YE25. This is balanced by digitization of all financial records.
- Loan Repayment - BCDC MOU Loan agreement was recently extended to 2030 with no interest payments nor accrual.
- Insurance – reflecting moderate inflationary increases over time.
- Marketing et all – includes moderate marketing, event expenses balanced by event income, meals associated with estate planning events, speaker fees for educational events
- Technology – assuming continued subscriptions to leading financial / fundraising platforms with first time acquisition of office hardware and equipment. Current equipment is all on loan.
- Salary & benefits – assumes restart of benefits for FT staff September 2024 with cost of living adjustments only.







COMMUNITY  
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OF CANADA

VitalSigns.

2024

# VITAL SIGNS GUIDEBOOK

for Canadian Community Foundations

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WHAT DOES



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DES FONDATIONS  
DE COMMUNAUTÉ



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## Using and adapting materials from CFC

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Step 2: Identify your scope, capacity and resourcing

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Step 6: Share your findings

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COMMUNITY  
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OF CANADA

**VitalSigns.**

## Hear from community foundations



For me, Vital Signs are the heart of what community foundations do. The program allows us to understand the realities of the communities we serve, so that we can adjust our actions to meet their needs directly. Philanthropy by and for the community!

**Perrine Vasseur, Financial Assistance and  
Community Relations Advisor**



Vital Signs® is an important tool in the toolkit of all Community Foundations (CF), that allows us to dive deeply into issues affecting our communities, hold data-informed discussions with people from across our communities – and turn that knowledge into action. Whether a CF chooses to go broad with a community scorecard, or deep on an issue – it provides an opportunity to make an impact locally, while increasing your CF's reach, connectivity to issues that matter and overall brand awareness.

**Lynne Short, Vice President, Waterloo Region  
Community Foundation**





## Introduction

Community Foundations of Canada (CFC) has created this Vital Signs Guidebook to meet community foundations where they are at and support them throughout Vital Signs. It provides practical examples, Ideas and steps for implementing Vital Signs, while also sharing ways to deepen current community foundation work with clear next steps to expand their leadership and impact.

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Vital Signs is Canada's most extensive community-driven data program. Spearheaded by CFC and led by community foundations from coast to coast to coast, Vital Signs uses local knowledge to measure the vitality of a community and support action towards improving collective quality of life. Community foundations and community leaders use local data gathered through the program to support evidence-based, locally-relevant solutions to improve the quality of life at the community level.

If this is your first time exploring Vital Signs, we encourage you to explore the [Vital Signs 101 webinar recording](#), as it covers the key components of Vital Signs.

## Introduction to Vital Signs

Vital Signs was created by community leaders and led by the Toronto Foundation for the first time in 2001. It has since evolved and expanded, with community foundations participating in the program from coast to coast to coast and worldwide.

Community foundations conduct research through data collection and community consultation to identify key issue areas and to celebrate areas where the community is thriving. The Vital Signs program is an evidence-based, non-partisan activity designed to examine aspects of community well-being without bias.

Community foundations look at various factors and issue areas, including the social determinants of health and other indicators, to get a sense of overall community well-being (you can find more information about indicators on [page 18](#)).

Local data gathered through the program is analyzed and shared by the community foundation back with the community and is used to support evidence-based, locally-relevant solutions to improve the quality of life at the community level. Vital Signs aims to inspire civic engagement, provide a focus for public debate, and help a range of actors take action and direct resources where they will have the greatest impact.



## **CFC's Vital Signs website**

CFC's Vital Signs website hosts the key information and resources about Vital Signs. You can also explore past reports from community foundations and find out more about upcoming events and opportunities.

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Vital Signs also offers an array of strategic opportunities for the community foundation. Vital Signs provides the community foundation with valuable in-depth community knowledge and insight into key priorities that will inform the work of the community foundation. With the knowledge gained through Vital Signs, community foundations can be more strategic with their leadership and local granting and drive progress on the issues that matter most. It can be helpful to think of Vital Signs as the community foundation's "operating system" – where the evidence provided by Vital Signs informs every decision, priority and action taken by the community foundation.

Community foundations can use their Vital Signs research in several ways:

- to develop partnerships;
- to conduct advocacy for systemic change;
- to update granting priorities and requirements;
- as a fundraising tool;
- to influence donor engagement strategies;
- to inform strategic planning, and;
- to spark community discussion.

Community foundations can support programs and activities needed to improve community well-being and respond to identified gaps in the community that create systemic issues. For example, responding to food insecurity by supporting a food redistribution warehouse and program through real-estate investments and granting that redirects food from grocery stores to food banks.



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2024

# VITAL SIGNS GUIDEBOOK

for Canadian Community Foundations

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COMMUNITY  
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**VitalSigns.**

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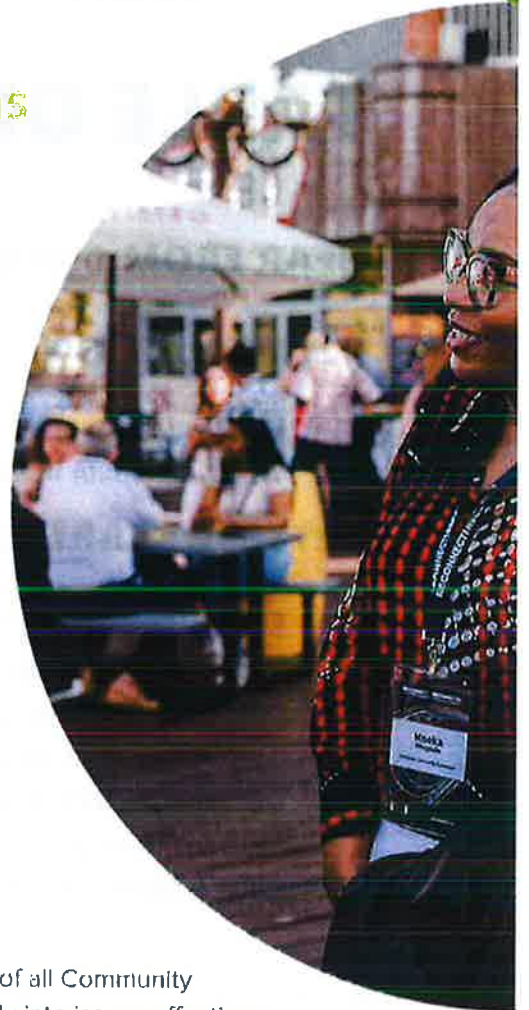
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Vital Signs offers community foundations an opportunity to demonstrate leadership in the community and can help the foundation to connect to new partners, and facilitate connections between community groups working on target issue areas. Vital Signs also appeals to new and existing donors and can open doors to those who wish to see their funds being delegated to where they are most needed in the community based on evidence.

Overall, Vital Signs offers the community foundation an opportunity to inform its strategic direction and granting activities, demonstrate community leadership and raise the foundation's profile, and develop new relationships in the community and with donors.

## Vital Signs today

More than 80 community foundations in Canada and over 40 community foundations worldwide have conducted Vital Signs research and produced Vital Signs reports. Many others are involved in Vital Signs research through Vital Conversations. The Vital Signs program continues to grow and expand around the world as a community needs-based assessment tool that is crucial to the impact of philanthropy around the world.

Community Foundations of Canada began to explore the alignment of the Vital Signs program with the Sustainable Development Goals (SDGs) in 2017. The SDGs are a universally accepted standard for measuring community well-being worldwide and offer community foundations an opportunity to measure progress against global targets. CFC's exploration found that the research conducted through Vital Signs naturally aligned with the 17 SDGs. CFC now identifies how the indicators it collects for Canadian Vital Signs participants (on request) are aligned with the SDG Agenda indicators and goals and ensures that data collection leverages SDG-aligned indicators as much as possible.

The Vital Signs program is an internationally recognized and respected program by communities around the world. CFC has taken steps to ensure that community foundations of all sizes and capacities can engage in the program and access its benefits in a 'right-sized' fashion. CFC recognizes not all foundations have the capacity to complete a full Vital Signs report and has created other avenues of engagement, detailed in the next section, to promote access to the program for communities of all sizes.





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VitalSigns



### Find out more:

- [The United Nations 2030 Agenda for Sustainable Development and the 17 SDGs](#)
- [SDG 101 webinars for community foundations](#)
- [The SDG Guideway and Toolkit](#)
- [Report prepared by CFC for the Government of Canada about how Vital Signs can contribute to the federal implementation of the SDG Agenda in Canada](#)
- [Localizing the 2030 Agenda With Community Data: Lessons From the Community Foundations of Canada's Vital Signs Program](#) - a research paper with community foundation case studies and reflections on incorporating the SDGs into their Vital Signs
- [The Brookings Institute's Who and What Gets Left Behind? Assessing Canada's Domestic Status on the Sustainable Development Goals](#)

## Vital Signs for all

The objective of Vital Signs is to provide the community foundation, and by extension, the community, with greater clarity around local needs and priority areas in need of action and attention. Community foundations of all sizes and capacities can participate in Vital Signs

### Vital Signs Report

Vital Signs reports are the standard product of the Vital Signs program. They typically feature an introduction, acknowledgements, information about the data collection practices, a short community snapshot, and themes that dive deeper into the research on each page. Vital Signs reports are non-partisan, evidence-based, and easy to read. Easy to read means they are written at a 5th to 8th-grade reading level for a broad community understanding of the presented information and its significance. They are referred to as “data you can read on the bus,” and are often quite visual.

Longer Vital Signs reports may present up to ten theme areas, exploring issues ranging from education and learning, employment, poverty, health, arts and culture, environment, belonging, safety and crime, housing and food security. For example, [La Fondation Quebec Philanthrope's 2022 Report](#) takes this approach. Or, they may contain a very detailed and in-depth look at one particular issue, such as the [Waterloo Region Community Foundation's focus on Affordable Housing in 2023](#).

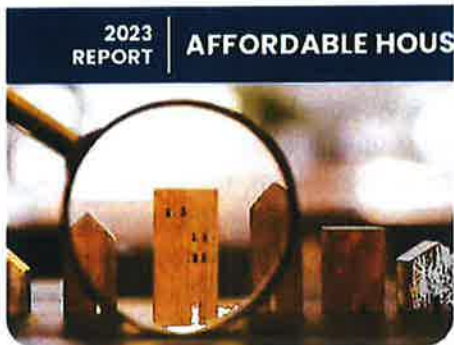


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# VitalSigns



WATERLOO REGION'S  
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“It’s inescapable. No matter where we look, no matter what media we consume, no matter what community we call home, it’s impossible to deny the housing crisis across Canada. Waterloo Region is not immune! We’re experiencing that housing crisis in stark terms, and it appears not to be going away.”

Some foundations may choose to report on a fewer number of issues, and may opt to present data on 3-5 theme areas. For example, the [2023 Whistler Community Foundation Vital Signs Report](#) examines sustainability, community livability and asks the question, Is everyone thriving?

Other Vital Signs reports may just focus on one topic area, presented in a shorter or more focused document. Some community foundations may select a theme for the year and present focused Vital Signs. For example, the Rural Communities Foundation of Nova Scotia has focussed on environmental sustainability and the interconnectedness this issue with many other experiences in community. Or a foundation may align their report with the United Nations Sustainable Development Goals (SDGs), such as the [Squamish Community Foundation's 2023 Vital Signs](#).

Depending on the capacity and focus of the community foundation, the length and depth of the Vital Signs report will vary. Community foundations producing reports typically publish Vital Signs reports on either an annual or biennial basis to continue to monitor and track progress on key issue areas.

Reports have historically been released at a collective moment by the network during Vital Signs week in October each year. However, in recent years, community foundations have been adapting their release dates to be tied to strategic moments in time for their foundation. All Vital Signs reports and plans for release are requested to be shared with CFC so that we can amplify promotion and reports can be added to the [Vital Signs website](#).





## Vital Conversations

A Vital Conversation is a facilitated community conversation, organized or led by the community foundation, and can be held at various points in the project timeline.

Vital Conversations are an important first step for any Vital Signs work. Typically, community foundations ask focused questions and host activities that are designed to learn from community members about the perceived issues in the community, and to identify which are of most importance and interest. The results will help to provide a framework for the community foundation to dive deeper with their research. Vital Conversations are also an excellent strategic tool to increase community awareness and buy-in into the research and work of the community foundation. Vital Conversations are an important first step to any Vital Signs research process, as community engagement, input, and buy-in are extremely important to the overall direction and success of the Vital Signs program.

Vital Conversations are also used throughout the research phase of the project timeline, and can be used to collect information from the community. Community foundations with less capacity to produce a full Vital Signs report often rely heavily on Vital Conversations as research opportunities.

Vital Conversations can occur at any point of the research phase, or be used as a stand-alone engagement tool. Many Community Foundations host a Vital Conversation at the end of the research phase, to share the results back with the community and collectively identify key priority issues and create collaborative plans for action.

In sum, Vital Conversations can be regular and recurring events that check in with the community at various stages of the Vital Signs work. A Vital Conversation can serve many purposes and can be used at different points in the Vital Signs timeline. They can be used to:

- Learn from a variety of community members about what they see as the greatest need in the community;
- Learn from a specific sub-group in the community about the issues confronting them such as seniors, youth, newcomers, etc.;
- Discuss the results of engagement, research or surveys conducted by the community foundation and look for solutions together. These events are especially useful as they can:
  - Spark ideas, connections and collaborations between relevant key actors in the community
  - Help the foundation to understand the network of actors on a particular issue, and better understand where its dollars can have the greatest impact
  - Be used to engage donors and provide concrete ideas for increasing their contributions to directly support action and outcomes
  - Raise the profile of the community foundation as a network builder, connector, and community knowledge holder and leader.



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Vital Conversations can be used as a community foundation's entry point into the Vital Signs program, and are extremely useful to community foundations with less capacity to complete a Vital Signs report. Community-based research can be collected through these community convenings, and no report is required.



## Vital Conversations Guide

### **Vital Signs Data Platform**

Community foundations in Canada have access to a Vital Signs digital platform, which has been made possible by the International Institute for Sustainable Development's (IISD) Tracking Progress platform. CFC and community foundations have the opportunity to create living data platforms that can be updated with new Vital Signs data at any time.

Community foundations use these Vital Signs platforms to publish and share new information with their communities anytime they like. CFC and IISD ensure to keep the platforms updated with the data they collect each year through the national Vital Signs data collection.

Find out more:

- [London Vital Signs Data Hub](#)
- [Greater Victoria's Data Hub](#)
- [Vital Signs Data FAQ](#)



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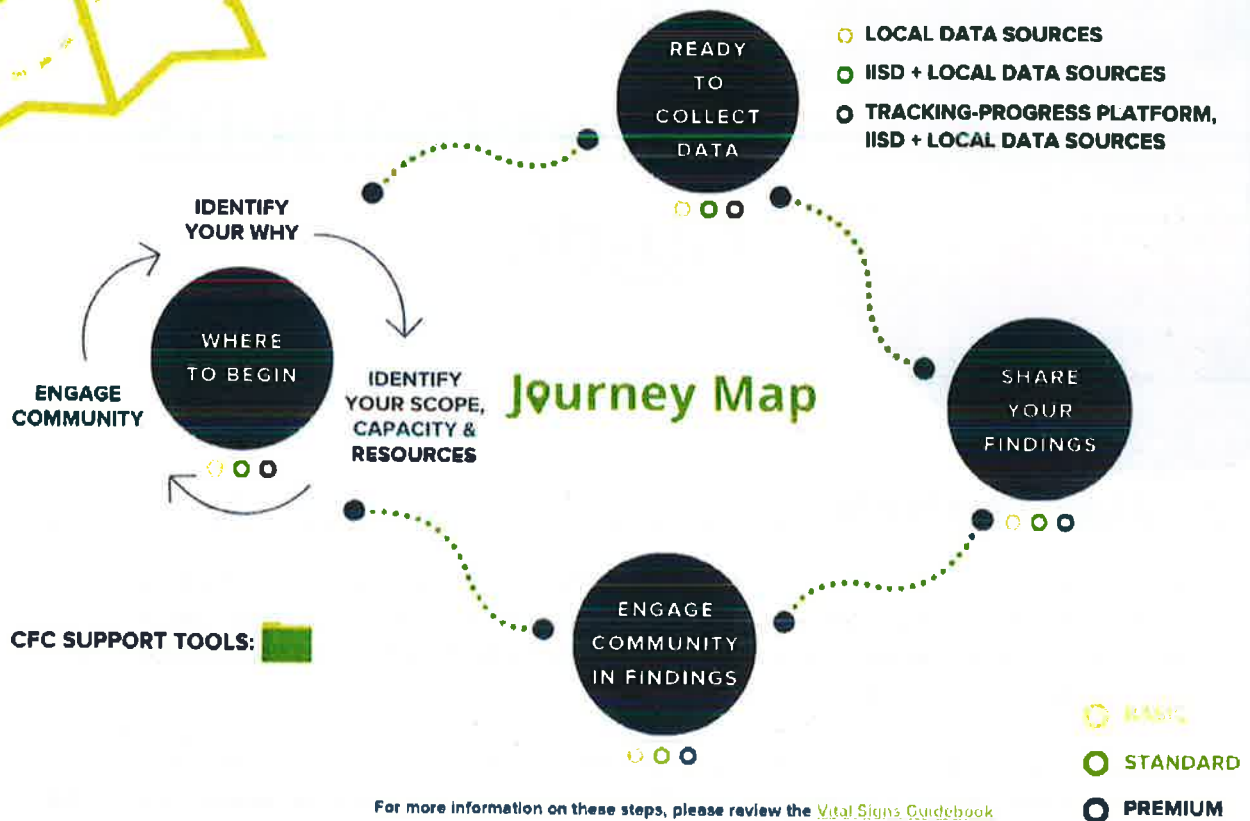
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## Journey Map

Each community foundation has a unique approach to their Vital Signs journey. It is not linear, rather, a process of key moments. However, it's important to start somewhere, so we suggest beginning with a few key areas.



### VitalSigns.





## Getting Started



### Step 1

#### Identify your 'why'

Vital Signs is a powerful tool that can inform the work and priorities of the foundation. It is important to remember that the work of Vital Signs does not stop after the report is published or a Vital Conversation is hosted.

The work of Vital Signs begins with the research and lives on through the way your foundation uses the information. It is crucial to think through and discuss with your board the purpose of your organization going through a Vital Signs process at the very beginning of the process. Here are some questions to consider before you get started:

- When is my next strategic planning cycle, and am I ready to incorporate the outcomes of Vital Signs into my next strategic plan (or update my current one)?
- How much do I currently know about the community? Am I connected to a variety of stakeholders and demographics? Am I willing and able to develop and strengthen relationships with those who I am not connected with?
- How much will I invest (financially and of your time) into Vital Signs?
  - Do I have the financial means to hire a project manager and conduct a full Vital Signs report?
  - If not, do I have time to conduct meaningful community engagement and host Vital Conversation(s)?
- What am I hoping to get out of the Vital Signs program? (some examples are listed below)
  - A more strategic use of granting dollars
    - Updated granting criteria that require applicants to tie their projects to the key community priorities discovered through Vital Signs research
    - A new funding stream specifically tied to Vital Signs priorities
  - New relationships in the community
  - New partnerships with businesses and organizations in the community
  - New donors
  - A higher profile in the community

Thinking through these questions will allow you to be strategic about how you are approaching your Vital Signs and how you will use it once it is complete.

Find out more:

- [Vital Signs Community Impact Guidebook](#)
- Using Vital Signs for impact ([slides](#) and [recording](#))



## Step 2

### Identify your scope, capacity and resourcing

The next step is to identify the scope and depth of your Vital Signs program you have the capacity and to start to map out a plan to get involved at that level.

### Writing a Vital Signs report

Consider whether you have the capacity and resources to conduct and write a Vital Signs report. CFC recommends that a project manager be brought on for 9-12 months to help with Vital Signs if that is the case. It is simply too much work for the Executive Director, or the board, to do on their own. The individual(s) you will want to hire will benefit from having the following skills:

- Project management;
- Community engagement;
- Research, data collection, and data analysis;
- Writing skills, and;
- Event coordination for Vital Conversations and launch event.

Some foundations have found it helpful to hire post-graduate students seeking or with experience in research and writing. A partnership with a local educational institution like a community college or university can also be beneficial for sourcing data.

You will also want to identify the scope of your report – do you wish to create a comprehensive overview of community wellbeing, pulling data and research together for up to 10 theme areas (or more)? Or would you prefer to focus on a few issues and do a bit of a deeper dive? Alternatively, perhaps you would like to research one issue area or key demographic and investigate all of the interconnected issues that relate to that one issue. Identifying your goals for the output will help identify your focus for researching and the required resources. Conducting Vital Conversations, engaging the community, and conducting an environmental scan (all detailed below) can help you to identify your focus.

### Vital Conversations

Vital Conversations are a way to engage your community in sharing areas of concern or report results.

If your foundation would prefer to engage in Vital Signs but has less capacity than what's required for a Vital Signs report, we encourage those foundations to participate through the hosting of Vital Conversations. There are often community partners interested in co-hosting or helping with the development and hosting of the event.



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You will want to consider the objective of the Vital Conversations – is it to bring together a wide variety of perspectives, to hear from one demographic group, or to discuss one topic in particular? Will it be a one-off event, or will it be a series of events? Once you have a sense of these answers, you can start to think through components like specific topics, the best way to meet your goals through specific event formats, and who needs to be invited into that space.

Find out more:

- Sample budgets - [one](#) and [two](#)
- Vital Signs pricing model ([EN](#)/[FR](#))
- [Special Reports Guidebook](#)



## Step 3

### Engage the community

A Vital Conversation is an important first step in engaging the community. One of the key functions of the Vital Signs program is to report to the community how it is doing across a wide range of issues the community thinks are important. The community foundation's role is to both listen to the community and report back. For this reason, consultation and ongoing dialogue with the community is essential. Part stakeholder management, part constituency building, part research – developing Vital Signs requires that the community foundation reach out to identify the pressing issues in the community, deepen knowledge and understanding about them and make them better known. Effective consultation will strengthen the important relationships that support and impact the foundation's work and help embed the learnings from Vital Signs.

Engaging the community ensures that folks know about the upcoming Vital Signs work and the community foundation's leadership. It can build community buy-in and interest in the process and the outcomes. Depending on your strategy, it can also offer community members the opportunity to participate. Relevant stakeholders can participate in Vital Conversations that impact where the foundation might choose to research and provide their perceptions and lived-experience to the community foundations' research process.

### Getting your community involved

Community members' knowledge and perspective are important to community foundation and can also participate in Vital Signs work through sitting on advisory committees, working groups, partnering on different aspects, providing data, and more.



Inviting community members to participate in Vital Signs surveys helps the community foundation gather primary research to help build a base of local perspectives. In the past, community foundations have also asked community members to evaluate certain key areas of the community and provide their reflections. For example, how do people feel about safety which is different from crime rate data? Or what data overlaps do they see with different areas? Or how do people feel like they belong to the community?

Inviting the community to the launch event and any Vital Conversations events also helps to generate interest in the outcomes of the research conducted by the community foundation. It can also help with solution-finding to the issues presented through the research and consultations.

## Important to ask - who is not at the table?

When conducting community engagement work, it is always important to ask yourself: "Who is not at the table and why? What barriers might be present that would prevent someone from attending your engagement opportunities?"

Some things to consider:

- It will take time to build trust with community members, especially if your leadership is not similar or does not represent all members of the community
- Those who work shift work may not be able to attend events that take place on nights or weekends
- Geography and transportation may be a barrier for some - consider a meeting place and offering travel stipends
- Childcare may be a barrier for others - consider offering childcare at your event
- Has your foundation done work to decolonize its practices? How can you improve?
- Has your foundation made efforts to be anti-racist in its practices, policies, and leadership?

As community foundations, we always try to move at the speed of trust, and we know trust can take time to build. Community engagement is always the first and most important step of any Vital Signs process. It is important to meet the community where they are at and offer time and flexibility to respond to community needs and capacity. If this means your community foundation delays the Vital Signs process, that is okay. Vital Signs offers a crucial opportunity to build trust and respect within the community, and you cannot overlook this piece.

Find out more:

- [Community Engagement Guide](#)
- [Fact Sheet: Building Inclusive Teams and Boards](#)



## Step 4

### Conduct an environmental scan

Once you have a sense of what areas you would like to focus on, a helpful first step is to map out who in the community is already working on these topics, and who might have access to data on the themes you would like to research. It's essential to identify what the community already knows, who is doing similar work, and what data already exists?

Here are some examples of sources for data:

- Local police force or RCMP;
- School board or district, universities and colleges;
- Municipal government;
- Hospitals or health care centres;
- Health authorities;
- Non-profit organizations (ie. homeless shelters, soup kitchens, environmental groups, depending on the type of research you are seeking), and;
- CCSD [Community Data Program](#) participants - you can also become a member.

Organizations producing or collecting data and organizations working on the thematic areas you are interested in learning more about are great places to start building connections and identifying whether there are opportunities for connections with your Vital Signs program.

Find out more:

- [Vital Signs Collaboration Guidebook](#)



## Step 5

### Conduct research, write your report, and build your data platform

Conducting an environmental scan will help you identify potential data sources, and it is important to determine what constitutes good reliable data. The Vital Signs program is the success it is due to the reliable, non-bias and non-partisan nature of the data it shares. In addition to identifying the topics you wish to cover with your research, you will also need to identify the geographic region you wish to cover with your research. Review the resources listed below in Find Out More to help you get started on identifying good data sources and collecting research for your identified geography from various sources.





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CFC also offers limited data collection for those who wish to receive it. CFC aligns its data collection with the Sustainable Development Goals, a universally accepted standard for measuring community well-being worldwide. Each year, CFC selects approximately 80 indicators across about ten thematic areas, including poverty, hunger, health and wellbeing, education, decent work and economic growth, gender equality, sustainability and affordability, the environment, safety, and culture and arts. Community foundations may select the data and conduct their own research based on their identified priority areas.

Community foundations that wish to receive these indicators must inform CFC of their geographic region and pay for the data they will receive. The data provided by CFC is collected by a data partner (typically the International Institute for Sustainable Development, IISD). The data comes from sources that are available across Canada, and that can be disaggregated down to provide your data at a community level. CFC also prioritizes data that can be disaggregated by age, sex, and any other factors. This means that Statistics Canada data is preferred, with a preference for Census data, though this is not always the case when the data becomes outdated. CFC will collect similar data year over year to allow community foundations to track progress over time as surveys take place and data are updated. While most of this data is free, CFC and IISD offer the service of downloading and producing light context and analysis of the data for your specific community. CFC will also seek out paid data sources where needed. For those who opt-in to developing a digital platform for their Vital Signs, CFC will provide the indicators it collects for free with the site.

## Creating the report

CFC has a template designed to support you in exploring ways to highlight your data. This Vital Signs Report [Template](#) provides key areas to consider when designing your final document.

Many community foundations print their reports or a summary of their reports and post the full report online as this provides opportunities to highlight specific areas and is each to be accessed by your community members. CFC will support you in promoting your report and will post your report online on the Vital Signs website.

Find out more:

- [Vital Signs Brand Guidelines](#)
- [Activating Vital Signs Webinar - Vital Signs Week 2023](#)
- [Using Data and Research for your Vital Signs](#) webinar
- [Vital Signs Research Guidebook](#)
- IISD: [Brief guidance on local data sources](#)
- [Data Collection for your Catchment Region](#) webinar
- Samples of data collected by CFC - [2021](#), [2019](#), [2018](#)
- [Vital Signs and the SDG's](#)
- [Alliance 2030](#)
- [SDG Data Hub](#)



## Step 6

### Share your findings

Communications are key to sharing what you've learned back with the community. We encourage you to use [Amplification Packages](#) provided. These packages provide key messages, template social graphics, a template news release and other helpful communications materials.

Many community foundations, especially those with a Vital Signs report, also use this opportunity to host a launch event. A launch event can look like a Mayor's Breakfast, an event at a community centre, a virtual launch, a press conference, a press release, or a radio spot (or a combination of these). Any of these events can also be used as a Vital Conversation to discuss the results with the folks in the room. CFC can support you with planning a launch event. You know your community best, and you will be best positioned to understand what type of launch will have the greatest impact and will generate the most impact.

Others in your community desire to learn about the findings of your report. Reach out to your community service groups, government, local agencies, and media, sharing your findings and engaging in conversations to explore ways your community can take action. This is your opportunity to share your leadership role, celebrate success, and help shape change in your community.

#### Additional Resources:

- [100 Ways to Leverage Your Vital Signs Report](#)
- [Communications strategy slide deck](#)
- [Launch plans slide deck](#)
- [Planning for your virtual launch recording](#)
- [Vital Signs Launch planning \(digital first\)](#)



## Step 7

### Make the changes for impact

Now that you have completed your research for this round of Vital Signs, and you've shared the results with the community, it is now time to reflect on your objectives set out in Step 1 and implement your action plans.



Here are some reflection questions to help get started:

- What have you learned from the Vital Signs research or Vital Conversations?
- What key community priorities have you identified through your Vital Signs?
- How do your existing strategic plan and granting priorities align with the results of your research and community engagement? What needs to shift?
- How will this inform the work of your foundation moving forward?
- What can your foundation do to shift circumstances in the community to make the changes required to address the key priorities?
  - How can you leverage your investments, granting dollars, the position of leadership, and connections?
- Have you developed new relationships or partnerships or acquired new donors from your work? How might you do so moving forward?

## Sharing the results with your community and CFC

### Timeline

Community foundations from coast to coast to coast face unprecedented challenges and strain on resources and capacity alongside the communities they serve. The timeline presented below offers a pathway for community foundations to consider the sequence of a work plan, with the eventual goal of launching during Vital Signs week. CFC shares this timeline with the recognition that it may look quite different depending on the local circumstances, community foundation capacity, and level and type of engagement in the Vital Signs program.





## 01 — October - January

- Steps 1-3 are recommended
- Community engagement can start this early
- Develop a budget and resourcing plan, hire a project manager
- Acquire board approval



## 02 — January - March

- Sign up to the Vital Signs listserv
- Receive the Participation Agreement from CFC, complete and return it to communicate to CFC your level of engagement and requested support for the year
- Community engagement is ongoing
- Key priority areas for research are identified
- Step 4 is completed



## 03 — March - July

- Community engagement is ongoing
- Step 5 is underway and mostly completed during this time – research and data collection is underway and completed by both CFC and your foundation
- If you are writing a report, it is starting to take shape in draft form



## 04 — July - August

- The report is written
- Launch plans and event planning is underway



## 05 — September

- Report is finalized and shared with CFC
- Launch strategy and key communications messages are confirmed
- Launch event is planned and finalized, guest speakers are confirmed



## 06 — October

- Step 6 - Share your findings!
- Vital Signs week takes place, launch your Vital Signs report and carry out promotional activities



## 07 — November and onward

- Step 7 - reflect on the Vital Signs exercise and information you've gained
- Host a Vital Conversation that looks at the learnings and identifies next steps for action
- Discuss with your board required areas for change, and start to build out a work plan for next steps



Often the first year of conducting Vital Signs takes longer to complete than this timeline allows, as new relationships are forming, and the foundation is learning how to prioritize, conduct and analyze the research for the first time.

In census years, it is important to note that some valuable data may come out as late as November or December. Sometimes, data is released by the government later than scheduled, which causes delays in CFC's ability to deliver on the predetermined timelines. Census data, however, is extremely valuable. It is worth considering postponing the launch of your report until all census data is released, so it contains the most relevant and up-to-date data available.

If you're using a digital platform model, data is always able to be uploaded, so the timeline and launch can vary. Your community foundation could release a different version of a Vital Signs report that aligns well with your platform, and it may be released at a time that makes better sense for your foundation (rather than orienting around Vital Signs week).

For community foundations that are not releasing a report but are hosting Vital Conversations, it may be worthwhile to consider publishing a press release, or doing some form of media engagement. This would allow for a discussion of the results of your Vital Conversations, and where the foundation will be going next due to the community consultation it has led.

Ultimately, the timeline is up to your foundation to determine whatever works best for you and your communications and community engagement strategy.

## Scope of roles between CFC and your community foundation

While Vital Signs is delivered by community foundations locally, CFC sets a shared vision and strategy for this initiative nationally. CFC provides a range of technical and capacity building supports, including access to data and suggested themes around which community foundations can align. Over the years, CFC has focused on inclusion and a sense of belonging. In more recent years, CFC has also incorporated the Sustainable Development Goals (SDGs) with the overarching objective to 'leave no one behind', and equity.

In this section, the roles and responsibilities of CFC and participating community foundations are outlined.



## The role of the community foundation

### Local project lead

Community foundations lead and manage their own localized Vital Signs program. Community foundations: select the level of engagement in Vital Signs, select the theme(s) they wish to identify with, the key priority area(s) they want to investigate, their data collection methods, and how they want to share the findings through a report, data platform or community engagement. Their theme and key priority area(s) do not have to directly align with CFC's, and should reflect the local context.

### Community engagement host and facilitator

Community foundations consult with their community to determine areas needing attention, prioritization, and research. Community foundations collecting data are also responsible for conducting any primary research with local experts and community members they wish to complete.

### Data platform creator

While IISD will create the template and manage the back-end build of your site, community foundations who opt-in to the data platform are responsible for ensuring the data is accurate and presented well. Community foundations are responsible for selecting which data they want to present and how.

### Key priority creator

While CFC may recommend a tone, theme, or data set for the year, community foundations are encouraged to reflect upon their local community needs and frame their Vital Signs around what is most needed locally.

### Data collector

Community foundations keen for data and research are responsible for conducting their own research through community consultation and local sources. While CFC does provide some data, the community foundation is responsible for supplementing this information with any additional data they wish to collect. It is important to note that for community foundations working in a small geographic region, often the data CFC provides from Statistics Canada may cover a larger geography (if the data is only available at the Census Metropolitan Area, CMA, level, for example), so it is important to ensure there is local research conducted.

### Report Writer

The community foundation is responsible for writing their own report, should they choose to do so.



## The role of the CFC

### Program owner

CFC purchased the Vital Signs program from the Toronto Foundation in 2006 to share the program with our membership more broadly. CFC is responsible for ensuring the trademark and brand are protected and maintains its level of integrity.

### Tone setter

CFC shares a recommended theme each year, which informs the national data collection and, when applicable, a national report. A recent national report is the [Reconnecting Communities: Belonging, Engagement and Well-Being](#), which was focused on the lived experience of what it means to belong in community.

### Connector and educator

CFC hosts learning and connecting opportunities through webinars, in-person events, sessions and peer gatherings at the biennial CFC conference, and digital communication tools (including a Google listserv).

### Data collection

CFC, in partnership with the Institute for International Sustainable Development (IISD), selects and collects data from national sources (i.e. Statistics Canada) for participating foundations each year. Alongside the current data are historical data and light analysis to put the data into context. CFC invites community foundations to share feedback and requests with CFC for the indicators and data desired by the network each year.

### Resource provider

CFC hosts shared Dropbox and Google Drive folders for Vital Signs participants that include:

- Webinar slide decks
- Resource Guides
- A template design file for a Vital Signs report
- Templates and copies of materials provided for use by community foundation Vital Signs participants (including Vital Conversation agendas, surveys for community research, and more)
- Resources such as a launch toolkit, a template press release, amplification package, and others.

### Network Connection

CFC hosts a Google listserv with over 200 individuals in Canada and around the world that have participated or are currently learning how to participate in Vital Signs. It is a place for community foundations to connect, ask questions, share resources, and recommendations. CFC also sends a weekly Community Connect Newsletter which is the go-to place for all Vital Signs updates.

Specifics about what CFC is able to offer community foundations and at which price point, is available in our Pricing Model FAQ (can be found in your CF Shared Folder).



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## Other Frequently Asked Questions

### **I will be completing Vital Signs during an election year. How will this impact my program?**

Vital Signs retains its strength as a brand by remaining non-partisan and non-bias. It is always important to ensure that any research conducted is done so in a way that is as politically neutral as possible. During an election year, there is an opportunity to leverage the moment for greater community engagement and awareness. Local politicians will be more likely motivated to attend launch events and Vital Conversations. That's great, as long as politicians from every party are invited to attend and the community foundation isn't perceived as politically biased, especially in respect to its Vital Signs research and work.

Some foundations have even used their Vital Signs reports to inform candidates debates - where data and Vital Signs results were presented to the candidates to inquire about their plans to solve specific issues. It is an opportunity for the community foundation to demonstrate community leadership and advocacy on the issues that are most pressing to the community.

### **An organization in my community wants to run a Vital Signs. What do I do?**

Partnerships with community organizations are always encouraged by CFC, as long as they are not politically motivated and they are aligned with the brand purpose and will maintain its integrity. The Vital Signs program is owned and overseen by CFC and the network of community foundations. The brand's strength makes the program so trusted and relied upon, and it is our collective responsibility to ensure that it remains this way.

Suppose your community foundation is already planning to run a Vital Signs. In that case, CFC encourages you to partner with community organizations that would like to be involved in any way that feels appropriate for your community. In these cases, the community foundation would retain the program's leadership and direct the process.

If your community foundation is not currently interested or does not have capacity to run Vital Signs and will not in the near future, CFC would like to have a conversation with your foundation to explore opportunities. There have been cases where external organizations completed Vital Signs under the supervision of the nearby community foundation. This has been effective when the external organizations were values aligned and committed to delivering accurate research for the same objectives as the Vital Signs program and committed to using high-quality, reliable and unbiased data.

Please contact CFC to discuss the specifics of your question in more detail.





## How do I include SDGs in my report?

The priorities of Vital Signs and themes used to evaluate community well-being naturally align well with the [17 SDGs](#). The mandate of the Agenda 2030 for Sustainable Development is to 'leave no one behind,' which encourages maintaining equitable research and practices to ensure we are not just looking at aggregate community data, but investigating intersectionality, and how different sub-groups within the population of the community are experiencing its conditions. There are a few concrete ways community foundations can incorporate the SDGs into their Vital Signs work:

- Identify which SDGs are most relevant, or are top priority, for your community or the work of the community foundation
- Host a Vital Conversation specifically tied to an SDG, or a few key SDGs. The Community Foundation for Lennox and Addington shared information in their [2019 Vital Signs report](#) about their Vital Conversation strategy to incorporate the SDGs.
- Frame your Vital Signs work and thematic areas so they are directly tied to the SDGs
- Leverage the data provided by CFC, which pulls together indicators that are either directly or loosely aligned with corresponding SDG indicators
- Reference Statistics Canada's [SDG Data Hub](#) to identify data tables that exist and are aligned with Canadian indicators
- If you are writing a Vital Signs report, you can incorporate the SDGs visually by:
  - Incorporating a brief note about the SDGs and their local relevance at the beginning of your report (ie. [A Vital Exploration](#), a report published in 2020 through a collaboration of 5 community foundations)
  - Using the SDGs as the themes that make up your report (ie. [Fondation du Grand Montreal's 2020 report](#))
  - Indicating which SDGs are related to each section using graphics (ie. [Victoria Foundation's 2020 report](#))
- Note: The [UN's website](#) has made downloadable copies of SDG images free for use.

## I would like to report on Indigenous communities in my report. How do I get started?

The first step is to contact the Indigenous communities in your area to build a relationship and establish trust with the community. Collecting information about Indigenous communities is a colonial practice. Therefore, it is important that you exercise extreme sensitivity and consideration to how you would like to approach this topic with the Indigenous communities in your area.

CFC recommends that community foundations interested in building stronger relationships with Indigenous communities complete some research to better understand the sensitivities that may exist before reaching out to these communities. A few resources that exist are:



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- University of Alberta's online free course entitled [Indigenous Canada](#)
- The First Nations Governance Centre's [Fundamentals of OCAP course](#), which discusses the complex history between Canada and Indigenous communities when it comes to owning, collecting, accessing, and protecting Indigenous information and provides guidance into best practices for researchers

It is also worth noting that due to the history between the Government of Canada and Indigenous communities when it comes to data collection, many Indigenous communities do not align with or complete the census. Any information that the Government of Canada provides pertaining to Indigenous communities is likely flawed and inaccurate, and CFC does not use this data in our data collection for this reason.

### Next Steps

Community foundations are encouraged to read through this guidebook and associated resources to better understand the Vital Signs program and the capacity it requires, as well as the outcomes it can have for your work and community.

As a next step, contact our [Vital Signs team](#) about joining the Vital Signs listserv to stay updated about all programmatic details, learning opportunities, important dates, and connect with your peers! The Vital Signs listserv, online learning opportunities, and in-person connection moments are so valuable for foundations to learn from one another about best practices, opportunities for impact, strategies for overcoming obstacles, and sharing resources.

### Conclusion

The Vital Signs program presents a unique and significant opportunity for your community foundation to better understand and respond to your community and its greatest challenges. Whether you participate by hosting Vital Conversations, writing a report or by hosting an online data platform, the opportunity presented by engaging with and learning from your community can lead to enormous impacts and improvements on the collective well-being of your community.

Vital Signs is a program recognized worldwide as one of the best community-needs assessment tools. CFC is proud of the work of our network of community foundations here in Canada that have led this program and upheld its integrity and world renowned esteem since 2006. CFC encourages each foundation to consider how it might leverage community knowledge to further increase the foundation's impact in the community. Please reach out to CFC or your community foundation peers to learn more about Vital Signs and the support available as you take on this exciting next chapter for your foundation and your community.

