

# Staff Report



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To	<b>Committee of the Whole</b>
Service Area	Office of the Chief Administrative Officer
Date	Tuesday, June 3, 2025
Subject	<b>Community Benefit Agreement Program Review</b>

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## Recommendation

1. That recommendations outlined in the Community Benefit Agreement Program Review – 2025-220 staff report dated June 3, 2025 be approved.
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## Executive Summary

### Purpose of Report

The purpose of this report is to respond to the 2025 budget directive to initiate a comprehensive review of the Community Benefit Agreements (CBA) program. This review included an examination of current governance, processes, budgeting practices, and the alignment of existing CBAs with the City's Strategic Plan and evaluation framework.

Pending Council approval, the recommended improvements will be implemented and integrated into the 2026 multi-year budget update, where possible, and fully implemented in 2026.

### Key Findings

Earlier this year, staff collaborated with the Guelph-based consulting firm, Collective Results, to support the CBA review. The review included examining existing CBA templates, tools, reports, and the current CBA process, as well as municipal best practices. Stakeholder engagement was conducted through focus groups, interviews, surveys, and workshops.

The review identified several assets and barriers and highlighted several gaps in the CBA program.

As a result of the review, staff are recommending several changes to the CBA program structure and purpose, identification, selection, budget, reporting, accountability and monitoring.

### Strategic Plan Alignment

The report's key findings and recommendations are aligned with the City of Guelph's Future Guelph: People and Economy, Support community well-being, by enhancing the effectiveness of CBAs to better support inclusive economic growth and local opportunities. By refining governance and evaluation processes, the City's ability to deliver targeted, impactful benefits that address community needs strengthen.

## **Future Guelph Theme**

People and Economy

## **Future Guelph Objectives**

People and Economy: Support community well-being

## **Financial Implications**

None.

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## **Report**

### **Background**

CBAs are City-led agreements for strategic partnerships to achieve key strategic objectives where a community partner is better positioned than the City to achieve the objective or outcomes.

Agreements are standardized to ensure there is ongoing accountability through staff involvement, review of annual workplans, reports, and budgets, and consistency with a cross-departmental staff review of agreements being considered.

Through the 2025 budget process the need for enhanced clarity, consistency and transparency regarding CBA governance, process, budgeting and evaluation for CBA recipients as well as staff and council was identified.

For community organizations, an increase in funding scarcity and pressure to respond to growing community needs is driving increased demand for funding from government sources and furthers the need for additional clarity around City funding programs, including CBAs.

### **CBA Program Review**

Early in 2025, staff collaborated with the Guelph-based consulting firm, Collective Results, to support the CBA review. This collaboration included engaging both internal and external stakeholders to identify assets, barriers, gaps, and solutions for the program.

The review involved:

- A review of existing CBA templates, tools, reports, and other documents
- A review of the current CBA process from start to finish
- A review of municipal best practices related to similar types of agreements
- Stakeholder engagement with Council, staff, and CBA recipients through focus groups, interviews, surveys, and workshops

The review identified several assets in the CBA program including:

- Consistent CBA structures and processes
- Strong relationships and communication
- Effective staff program management
- Transparency through connections with Council
- Cost-savings, community impact, and alignment with the strategic plan
- Rigor and standardization of the program
- Predictable long-term funding for organizational planning
- Flexibility of program elements (e.g., reporting schedule) to help organizations demonstrate value

- Reporting that highlights the uniqueness of each organization

The review identified several barriers in the CBA program including:

- Lack of a clearly documented end-to-end CBA process
- Lack of clarity regarding the purpose, guiding principles of CBAs, and overlap with community grants
- Lack of clear standards and accountability for recipients
- Emotional toll of funding uncertainty on recipients and pressure on staff decision-makers
- Inequitable access to the CBA program due to unclear intake criteria, a lack of community awareness, and the influence of pre-existing relationships with City staff and Council
- Lack of departmental representation on the review table
- Long-term CBAs limiting opportunities for other community organizations
- One-size-fits-all reporting template focusing on KPIs do not capture impacts of diverse CBAs (e.g., storytelling) and include quantifiable data
- Unclear reporting timelines that do not align with a CBA recipient's fiscal years

The review identified several gaps in the CBA program including:

- Clear communication (e.g., reporting deadlines, renewal processes, guidance on workplan alignment)
- Clarity about what drives CBA selection (e.g., community needs, City plans, etc.) and how the selected organization is the best option in the community to meet those needs
- Increased transparency regarding funding decisions, selection criteria, and which organizations receive funding
- Clear roles and responsibilities, including decision-making processes and how/when Council will get involved
- Accountability measures focused on better oversight of funding use and alignment of executed activities with City needs and approved workplans
- Mechanisms to address any perceived conflicts of interest within the program
- Accountability measures to address end-user issues with services/programs provided through the CBA program
- Stability and long-term budget certainty
- Equitable access, opportunities, and awareness of the CBA program
- An open, competitive procurement style process aligned with City goals and values
- A comprehensive departmental representative review table to ensure all needs are considered
- Standardized, effective reporting structures that capture the full, unique impact of each CBA using qualitative and quantitative data, demonstrating value for funds to Council and alignment with strategic goals
- Increased transparency by sharing the impact of CBAs with the broader community
- More City support for CBA recipients with reporting

Based on the program review, staff are advancing the following recommendations to improve the structure and purpose of the program, the process for identifying and selecting CBAs and integrating them into the budget process, and accountability and monitoring of the CBA program.

## **Recommendations**

### **Program Structure and Purpose**

- Define Purpose: Clearly articulate and document the core purpose of CBAs as City-led agreements for strategic partnerships to achieve key community, departmental, and strategic objectives where a community partner is better positioned to achieve the objective.
- Purpose-Driven Communication: Shift communication to emphasize the purpose of the CBA rather than the recipient organization. For example, communicate about the Remembrance Day CBA instead of the Guelph Legion CBA.
- Differentiate: Establish distinct CBA streams based on value of investment to allow for different accountability measures for agreements over \$200,000 in value.
- Funding Distinction: Formalize a process to prevent funding duplication between CBAs, community grants, and other City funding programs. Note: A CBA recipient is eligible to apply for grant funding for activities that fall outside of the scope of work of an existing CBA.
- Confirm Appropriateness: Review existing CBAs to confirm if they need to be structured as something different (e.g., purchased services) based on program criteria such as:
  - the need for the work is identified by a department of the City,
  - funded through the budget process,
  - can be done more effectively and efficiently by a community partner,
  - benefits from ongoing involvement of City staff,
  - needs financial or in-kind investment from the City.
- Process Transparency: Document and visualize the end-to-end CBA process, including roles and responsibilities, for clear accountability.
- Council Education: Conduct a comprehensive workshop for each term of Council to clarify CBA purpose, process, and governance.

### **Identifying CBA Opportunities, Selection, and Budget**

- Strategic Alignment: Integrate CBA opportunity identification with key City planning milestones, including strategic plan development and multi-year budget cycles. For example, CBA opportunity identification, expiration and renewals (as possible) would be implemented to line up with the multi-year budget process and other significant departmental strategic planning milestones.
- City-Led Expiration and Renewal: Transition CBA expiration and renewal processes from recipient-led to City-led to ensure alignment to strategic objectives.
- Advisory Group Establishment: Create a CBA staff Advisory Group to assess CBA appropriateness, program compliance, and which CBAs may be appropriate for a more open Expression of Interest (EOI) process.
- Formalize Department Liaisons: Formalize the role of departmental liaisons for CBAs (separate from individuals on the CBA Advisory Group) to strengthen connections to departmental strategic priorities, work plans, monitoring and evaluation.
- Formal EOI: Implement a standardized EOI process to be leveraged as appropriate to ensure broad community outreach and equitable access to CBA opportunities.

- **Budget Integration and Oversight:** Embed CBAs (new requests and existing opportunities) within departmental budget processes for greater departmental ownership and accountability. Establish a centralized envelope for CBAs in Equity and Community Investment, with a charge-back process to departments to align expenses with opportunities.

### **Enhanced Recipient Accountability, Reporting and Monitoring**

- **Standardized Agreements:** Update CBA agreements with support from Legal with clear processes, templates, and timelines based on CBA streams, ensuring mutual understanding and expectations.
- **Accountability Measures:** Implement accountability measures, including the development of a quality audit program for CBAs with support from Internal Audit, to ensure alignment of CBA activities with approved work plans.
- **End-User Feedback:** Establish a centralized feedback mechanism for end-users to report concerns or issues related to CBA-funded activities.
- **Evaluation Framework:** Develop a comprehensive evaluation framework with support from Corporate Performance and Strategy to align data, objectives, outputs and outcomes with the strategic plan.
- **Reporting Standardization, Alignment and Capacity Building:** Create user-friendly reporting templates that emphasize impact (outcomes) and value for funds (ROI). Align CBA reporting timelines with the City's annual reporting cycle, including simplified mid-year reports where appropriate. Provide City staff expertise and support to CBA recipients to enhance reporting quality.
- **Impact Dissemination:** Develop concise, visually engaging reports for each CBA to highlight key metrics and impact stories and disseminate them to raise awareness.

Implementing the recommendations above will enhance the governance, process, budgeting, equity and evaluation of the CBA program. The Equity and Community Investment team will operationalize these recommendations to align with the 2026 budget process, where possible, and fully implement them in 2026.

For CBAs expiring at the end of 2025, the Equity and Community investment team will work with departments to bring prioritized budget requests forward via the 2026 Budget update process.

### **Financial Implications**

None.

### **Consultations and Engagement**

Throughout the CBA program review, consultations and engagement were conducted through a combination of virtual sessions (interviews, focus groups), and email communications (surveys). Input and support were received from the following groups and departments:

- Brendan Johnson, Guelph Neighbourhood Support Coalition
- Sarah Haanstra, Guelph CHC
- Carolyn Lee, Guelph Sports Hall of Fame
- Preetam Sengupta, Guelph Arts Council
- Karyn Kirkwood, Children's Foundation of Guelph and Wellington
- John Dennis, Guelph Tool Library
- Dominica McPherson, Guelph and Wellington Poverty Task Force

- Caroline Folkman, Toward Common Ground
- Mayor and Council
- Executive Team
- City Clerk's Office
- Finance
- Legal and Court Services
- Information Technology
- Strategic Initiatives and Intergovernmental Services
- Culture and Recreation
- Operations
- Environmental Services

### **Attachments**

None.

### **Departmental Approval**

None.

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