



United Way of Peel Region and Region of Peel

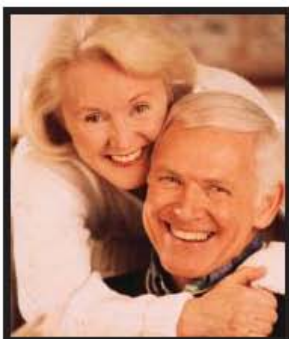


Community Investment Strategy

Background Paper



January 2008



United Way
of Peel Region

Region of Peel
Working for you

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Executive Summary

The *Region of Peel* and *United Way of Peel Region* have both been leaders in laying the foundation for long-term strategic planning and investment in Peel's human services – investment that includes not only dollars but also leadership and support of collaborative efforts. The challenge of the next decade is to plan and invest, not only strategically, but also collaboratively with partners who share the common vision of a sustainable, vibrant Peel that provides access and equity for all residents.

The *Region of Peel* and *United Way of Peel Region* are both conducting reviews of their respective investment strategies and have decided to work together, and in partnership with the broader community, to develop strategies that will direct each of their own future community investments and capacity building action plans.

This paper's purpose is to tell a story about the journey of understanding past opportunities and challenges, and to prepare for a new discussion about achieving a shared desired future.

Section 1 highlights recent demographic trends. Using 2006 census data, Peel has grown by 17.1% since 2001 to a current population of 1,159,405. In 2001, about 43% of the regional population was comprised of immigrants, a proportion that now may be nearing 50%. There were 114,505 low income individuals (27,090 families) in Peel, representing 11.6% of the total population. The number of children and youth in Peel in 2006 was 329,170 – an increase of 14.2% from 2001. There were 104,530 seniors aged 65 and older in 2006 – an increase of 33% from 2001.

In addition to consideration of the rapid growth and changing demographics in Peel, it is important to understand that this is occurring while a trend of growing gaps in funding for all types of human services continues – an estimated gap of \$369.0 million in 2006/2007 in Peel Region.

Section 2, using the findings of *Vision 2020: Seeing a New Future for Peel*, provides a summary of current issues. There are four broad categories of challenges faced by the human services sector in Peel: service challenges; client challenges; organizational challenges; and funding challenges.

In **Section 3**, strategic planning processes and funding investments made by the *Region of Peel* are reviewed. The *Region of Peel*, as part of a corporate-wide integrated framework, has recently brought its *Children's Services, Housing Policy and Programs* and *Ontario Works Departments* into an integrated *Department of Human Services. Communities Program Funding*, which in 2007 invested \$1,655,211 in 50 community agencies, is placed in context with other funding investments made by the *Region of Peel*, such as approximately \$47.7 million in purchase of service grants and \$55,743 in the *Strengthening Organizational Effectiveness Fund* (administered and funded jointly with *United Way of Peel Region*).

In **Section 4**, *United Way of Peel Region's* strategic plans for community impact are reviewed. Building upon the work completed through the *On the Road to a Better Way* dialogue conducted in 2001/2002, *United Way of Peel Region* recently completed its new strategic plan *Building Vibrant Communities Together*. *United Way of Peel Region* invests financial resources in the community through four funding streams: the *Community Priorities Fund*; the *Community Response Fund*; the *Community Contingency Fund*; and the *Strengthening Organizational Effectiveness Fund*. In 2007, it invested \$7,332,347 in 54 agencies through the *Community Priorities Fund* and \$55,743 in the *Strengthening Organizational Effectiveness Fund*.

Section 5 looks at the collaborative partnerships of the *Region of Peel* and *United Way of Peel Region*. The *Peel Newcomer Strategy*, the *Mentoring Partnership* and the *Peel Regional Task Force on Homelessness* are examples of recent multi-sectoral, multi-agency collaborations in which the *Region of Peel* and *United Way of Peel Region* have been key players. Other partnerships of note include *Families First*, *Best Start* and *Success by 6*.

Many other partnerships thrive at the community level and are important assets to Peel. These partnerships have been formed for purposes as far ranging as advocacy (i.e. *Peel Fair Share Task Force*), systems integration (i.e. *Geriatric Task Force for Peel Halton* and *Peel Committee Against Women Abuse*) and for program-specific objectives (i.e. *211* and *the Elder Abuse Strategy*).

Partnerships at both the provincial and federal levels of government have brought additional resources and funding to Peel in the areas of children's services, health care and immigrant support.

Partnerships with the private sector have also been important to the human services sector – sometimes providing support for programs, such as *Winter Warmth*, and other times providing a forum for discussing and finding new solutions, such as the *Mississauga Summit*.

Section 6 looks at a newly emerging concept called the “communities agenda” and proposes using the framework as the basis for further dialogue about creating community investment strategies, specifically for *United Way of Peel Region* and the *Region of Peel's Community Program Funding*, but also as a strategy that works for all human service providers and residents in Peel.

In her recent book *Shared Space: The Communities Agenda*, Sherri Torjman of the *Caledon Institute of Social Policy* has gathered the collective wisdom of communities across Canada and, using research to support her model, has proposed a way to sift through the many competing priorities and strategies that confront communities today.

The purpose of the framework is to capture the essence of local efforts in order to help them advance strategically together. The communities agenda is about local expression within a shared understanding. The communities agenda is intended to impart conceptual rigour that is guided by effective practice in both substance and process. There are two key concepts to the communities agenda framework. First, is recognizing that the issues communities face are complex. Second, is the importance of shifting our thinking to embrace resilience as a better way to tackle complex issues because it deals, not only with the ability to cope, but also with the capacity to thrive in the face of tough problems and continual change.

Using action plans proposed in the *Vision 2020*, this section outlines a way to continue and to expand the dialogue with a broader audience and to use the communities agenda framework to help map out the beginning elements of a community investment strategy.

Finally, in **Section 7** a series of questions are posed for further dialogue. Working under the guidance of an Advisory Group, *United Way of Peel Region* and *Region of Peel* will be seeking input from the broader community in the coming months to develop their own community investment strategies – strategies that seek to find solutions through different ways of thinking about the problems we face.

"The significant problems we face cannot be solved at the same level of thinking we were at when we created them."

Albert Einstein (1879-1955)

Introduction

Peel is a rapidly growing and changing region. Growth has meant economic prosperity in the three municipalities of Mississauga, Brampton and Caledon. It has also brought new families into those communities, changing the face of long established neighbourhoods and building brand new ones.

Peel is diverse in many ways. Our geographic diversity encompasses both densely populated neighbourhoods and rural farms and hamlets. Peel is home to many residents who have lived here for a long time, but it is also a destination for newcomers from around the world. Now Peel is part of a global world, where international trade and commerce is often conducted at head offices located in the region and by residents commuting to Toronto and to other cities around the world.

And yet, as much as Peel is riding a wave of growth and prosperity, there is still a need to be attentive to the quality of community life. Everyone depends on the programs and services provided by the healthcare, education, community and social service sectors – but some more than others. Without a continued investment in building strong, healthy communities, everyone's quality of life, not just those in greatest need, becomes threatened.

The *Region of Peel* and *United Way of Peel Region* have both been leaders in laying the foundation for long-term strategic planning and investment in Peel's human services – investment that includes not only dollars but also leadership and support of collaborative efforts. The challenge of the next decade is to plan and invest, not only strategically, but also collaboratively with partners who share the common vision of a sustainable, vibrant Peel Region that provides access and equity for all residents.

This background paper builds upon the past. This paper's purpose is to tell a story about the journey of understanding past opportunities and challenges and to prepare for a new discussion about achieving our desired future.

Section 1 highlights recent demographic trends. Section 2, using the findings of *Vision 2020: Seeing a New Future for Peel*, provides a summary of current issues. In Sections 3 and 4, the processes and funding investments made by both *Region of Peel* and *United Way of Peel Region* are summarized. Section 5 looks at the collaborative partnerships of *Region of Peel* and *United Way of Peel Region* as well as other initiatives occurring in Peel, including those sponsored and funded by the provincial and federal levels of government. Section 6 looks at a newly emerging concept called the "communities agenda" and proposes using the framework as the basis for further dialogue about creating community investment strategies, specifically for *United Way of Peel Region* and the *Region of Peel's Community Program*, but also as a strategy that works for all human service providers and residents in Peel.

Finally, in Section 7 a series of questions are posed for further dialogue. Working under the guidance of an Advisory Group, *United Way of Peel Region* and *Region of Peel* will be seeking input from the broader community in the coming months to develop their own community investment strategies – strategies that seek to find solutions through different ways of thinking about the problems we face.

Section 1: Peel Region – The Demographics

1.1 Population Growth

The single most defining demographic feature about Peel Region is its rapid rate of growth. In the report *Portraits of Peel: Facing the Facts*¹ the reasons for that growth and its consequences are summarized:

Thirty years ago, Peel became an especially attractive place to live. This was due in large part to the availability of bigger lots and homes. Today, however, Peel is no longer the bedroom community it once was. It is a major urban, commercial, industrial and residential centre. The majority of its citizens work in the region. Peel has a broad range of inner-city issues in a suburban context.

According to the *Region's Population and Dwelling Counts Report*² and the 2006 Census, 1,159,405 people were living in Peel in May 2006. From 2001 to 2006, Peel's population increased by 17.2%, or 170,457 people. Peel's population is expected to continue to increase, growing by about 2% in 2007 to reach 1.18 million persons.

The City of Brampton led growth over the five year period with a 33.3% increase in population to reach 433,806 persons. The population of the Town of Caledon increased by 12.8% to 57,050. The population of Mississauga was 668,549, up 9.1% over that recorded in 2001. Mississauga is home to approximately 57% of Peel residents, Brampton is home to 38% and Caledon 5%.

The fastest growing areas of Peel are located in the east and west parts of Brampton, southwest Caledon (Bolton) and northwest Mississauga.

By comparison, the population of the GTA increased by 9% to 5.5 million people from 2001 to 2006. Toronto had the highest population (2,503,281), followed by Peel (1,159,405), York (892,712), Durham (561,258) and Halton (439,256).

1.2 Immigration

Another major factor for Peel Region is the growth in the number of recent immigrants. Data from the 2006 census on immigration are just now being released. According to 2001 census data, about 43% of the regional population was comprised of immigrants, a proportion that now may be nearing 50%³. Peel had the second highest percentage of immigrants in the GTA, behind Toronto (49.4%) and ahead of York (39.1%).

37% of Peel's immigrants arrived within the 10 years preceding the 2001 Census. In the past the majority of Peel's recent immigrants were from European countries, whereas the top four places of birth of recent immigrants are India (21,795), Pakistan (10,445), Philippines (4,565) and China (3,140).

¹ The United Way of Peel, The Social Planning Council of Peel, Region of Peel, The Fair Share Task Force, *Portraits of Peel: Facing the Facts*, 2005

² Region of Peel, *Population and Dwelling Counts in Peel and the Greater Toronto Area (GTA)*, <http://www.region.peel.on.ca/planning/pdc/data/census/pop-dwelling-2006.htm>

³ Sandeep Kumar Agrwal, Mohammad Qadeer, Arvin Prasad, *Immigrants' Needs and Public Service Provisions in Peel Region*, Plan Canada Vol 47, No. 2, Summer 2007, pp. 45-49 [Note: According to early Stats. Canada data for 2006, the rate is 48.6%]

1.3 Income and Poverty

Information from the 2006 census is scheduled for release in May 2008, so rates of income and levels of poverty in Peel Region are based on 2001 data. According to that data, the average family income in Peel is \$79,325, which is higher than the provincial (\$73,849) and national (\$66,160) averages.

There were 114,505 low income individuals (27,090 families) in Peel, representing 11.6% of the total population. The incidence of low income in Peel in 2001 was lower than the provincial (14.4%) and national (16.2%) averages but is still higher than it was in 1991 (9.8%), contrary to the national trend.

Two neighbourhoods in Peel Region have rates of low income above both the provincial and national averages – Malton at 20.5 % and Cooksville/Dixie at 16.5%⁴.

The groups most vulnerable to poverty are also among the fastest-growing components of Peel's populations. These groups include recent immigrants, visible minorities, single parents, young families with children and unattached seniors⁵.

1.4 Family Demographics

In 2006 there were 324,115 families in Peel, up 17% from 2001 (276,090). Lone parent families make up 15.3% (49,600) of all families in Peel, up 24% from 2001 when lone parent families were 14.4% (39,945)⁶ of all families, of which approximately 80% were headed by women⁷.

According to 2001 statistics, Peel had one of the highest proportions of households with children in the province – close to 70%⁸.

1.5 Child and Youth Population

Based on 2006 census data, the number of children and youth in Peel is 329,170 (28% of the total population). This is an increase of 14.2% from 2001 when there were 288,095 children and youth (29% of the total population).

As well as the rapid rate in growth of the number of children and youth in Peel, the rates of poverty for children and youth are of concern. As previously noted, 2006 census data on income are not yet available, but based on 2001 data, 1 in 7 families in Peel and 12,000 children under the age of six live in poverty⁹.

1.6 Seniors Population

One of the most significant changes in the demographic composition of Peel is the rapidly aging population. Based on 2006 census data there are 104,530 seniors aged 65 and older

⁴ *A Comparative Perspective of Social Indicators in Peel Neighbourhoods, 2001*, Social Planning Council of Peel Region, March 2005 <http://www.spcpeel.com/neighbourhoodsBySocialIndicator.pdf>

⁵ Social Services Department, *Position Statement on Poverty*, June 2006 http://www.peelregion.ca/social-services/pdfs/Poverty_Statement_Jn19_2006.pdf

⁶ Region of Peel, *Population and Dwelling Counts in Peel and the Greater Toronto Area (GTA)*, <http://www.region.peel.on.ca/planning/pdc/data/census/pop-dwelling-2006.htm>

⁷ The United Way of Peel, The Social Planning Council of Peel, Region of Peel, The Fair Share Task Force, *Portraits of Peel: Facing the Facts*, 2005, p. 13

⁸ Ibid.

⁹ Success by 6, *Children in Peel: A Snapshot of Our Youngest Children*, Winter 2006, p.3 and p.7

(9% of the total population) in Peel. This is an increase of 33% from 2001 when there were 78,805 seniors (8% of the total population)¹⁰.

The last census data indicates the rapid growth in the senior's population, which has been expected to increase as baby boomers age, is now in full bloom. The number of seniors is expected to double in the next twenty years and quadruple in 40 years.

Aging can bring its own challenges, including increased health concerns, depression, loneliness, isolation and addiction issues related to prescription medicines. Many seniors accessing services in Peel have multiple mental and physical health concerns and a growing number of seniors in Peel, particularly women, live in poverty or just above the poverty line¹¹.

1.7 People with Disabilities

Since the incidence of disability increases significantly with age, it has been estimated that the number of persons with disabilities who will need to access special services will increase by 75% from 2001 to 2021¹².

The Region of Peel completed its fifth Accessibility Plan in September 2007.

1.8 Violence and Abuse

Sadly, violence and abuse, particularly against women and children, continue to be an issue throughout Canada and in Peel Region. It has been reported that one in eight (more than 62,000) women are abused by their intimate partner. There are five shelters in Peel Region that women can turn to for help.

Children who are exposed to abuse have an increased chance of being abused or being abusive as an adult. Boys whose fathers abused their mothers have a 1,000% greater likelihood of abusing their partners as adults than sons of non-violent partners¹³.

1.9 Human Services Funding Gaps

In addition to consideration of the rapid growth and changing demographics in Peel, it is important to understand that this is occurring while a trend of growing gaps in funding for all types of human services continues. The annual operating funding gap on a per resident basis for all types of social services grew in several areas over the 2000/2001 to 2003/2004 period and has continued through the 2005/2006 period.

The report *Assessing the Gap in Health and Social Service Funding Between the GTA/905 and the Rest of Ontario: An Update* indicated that the total annual operating funding gap for all social services in the 905 region increased by 28% or \$156.7 million from \$551.5 million in 2003/2004 to \$708.2 million in 2005/2006¹⁴.

Recent information from the province indicates that the funding gap for Peel social services, alone, was \$369.0 million in 2006/2007 (up \$69.6 million from \$299.4 million in 2005/2006)¹⁵.

¹⁰ Region of Peel, *Population and Dwelling Counts in Peel and the Greater Toronto Area (GTA)*, <http://www.region.peel.on.ca/planning/pdc/data/census/pop-dwelling-2006.htm>

¹¹ The United Way of Peel, The Social Planning Council of Peel, Region of Peel, The Fair Share Task Force, *Portraits of Peel: Facing the Facts*, 2005, p.17

¹² Regional Municipality of Peel, *Making Way for Ontarians with Disabilities: 2007 Accessibility Plan*, September 2007, p. 11

¹³ The United Way of Peel, The Social Planning Council of Peel, Region of Peel, The Fair Share Task Force, *Portraits of Peel: Facing the Facts*, 2005, p.15

¹⁴ Strong Communities Coalition, *Assessing the Gap in Health and Social Service Funding Between the GTA/905 and the Rest of Ontario: An Update*, September 2007, p.4

¹⁵ Fair Share Task Force, *Funding Equity Facts*, February 2008

Section 2: Peel Region – The Issues

Peel Region is fortunate in having a strong core of champions and advocates for building healthy communities and a vibrant network of human services. The work of the *Fair Share Task Force*, for example, in the report, *Vision 2020: Seeing a New Future for Peel*, has produced a key resource for building a community-wide understanding of the issues facing Peel Region – and a shared vision of the long-term future. Following extensive review of existing studies and dialogue with leaders, service providers and residents, John Huether wrote:

There is recognition that as the service sector grows and evolves it is important to ensure preventative and community-based strategies are put in place to reduce the long term demands upon the more expensive and intrusive components of the service system. Education of the public and strategies promoting inclusion of all citizens and strengthening neighbourhoods are being implemented and developed. New partnerships which look at service delivery from the point of view of the individual or the family are being encouraged and fostered. An emphasis upon investing in our children, especially those aged 0-6, is emerging. Strategies which build on strengths and health are also more common than problem centred approaches¹⁶.

Notwithstanding the desire to build a vision for 2020 from an asset-based perspective, the report identified four broad categories of challenge that will confront the human services over the next few years. Those challenges are summarized in the following chart:

<p style="text-align: center;">Service Challenges</p> <p>Capacity</p> <ul style="list-style-type: none"> ▪ the ability to keep pace with demand <p>Accessibility</p> <ul style="list-style-type: none"> ▪ limited access due to wait lists <p>Inadequate resources</p> <ul style="list-style-type: none"> ▪ resources spread too thinly <p>Lack of depth</p> <ul style="list-style-type: none"> ▪ not enough service on an individual basis <p>Single point of entry</p> <ul style="list-style-type: none"> ▪ pressure for centralized in-take <p>Diversity</p> <ul style="list-style-type: none"> ▪ cultural competency and inclusivity <p>Transitions through life</p> <ul style="list-style-type: none"> ▪ continuum of care through life stages <p>Service Delivery*</p> <ul style="list-style-type: none"> ▪ implementing new models of service delivery 	<p style="text-align: center;">Client Challenges</p> <p>Vulnerability of clients</p> <ul style="list-style-type: none"> ▪ growing number of people with special needs <p>Complexity of problems</p> <ul style="list-style-type: none"> ▪ the interrelatedness of cause and effect <p>Extent of violence</p> <ul style="list-style-type: none"> ▪ perceptions of increased violence, especially among youth <p>Poverty</p> <ul style="list-style-type: none"> ▪ persistent poverty among low income families, single seniors and immigrants <p>Immigration</p> <ul style="list-style-type: none"> ▪ continued increase in the number of newcomers <p>Human Rights*</p> <ul style="list-style-type: none"> ▪ protecting and ensuring human rights are upheld
<p style="text-align: center;">Organizational Challenges</p> <p>Human resource issues</p> <ul style="list-style-type: none"> ▪ recruitment and retention of trained professionals <p>Location</p> <ul style="list-style-type: none"> ▪ human services in accessible places <p>Role of volunteers</p> <ul style="list-style-type: none"> ▪ recruitment and risk management <p>Accountability</p> <ul style="list-style-type: none"> ▪ development of processes and infrastructure <p>Collaborative approaches</p> <ul style="list-style-type: none"> ▪ increased instances of integration and coordination <p>Virtual Space*</p> <ul style="list-style-type: none"> ▪ technology demanding real time response 	<p style="text-align: center;">Funding Challenges</p> <p>Provincial role</p> <ul style="list-style-type: none"> ▪ downloading and cost-sharing agreements <p>Limited new funding</p> <ul style="list-style-type: none"> ▪ gaps in social services, health and education funding <p>Growth</p> <ul style="list-style-type: none"> ▪ funding not keeping pace with growth <p><i>note: * - issues identified by the Advisory Group</i></p>

¹⁶ John Huether, *Vision 2020: Seeing a New Future for Peel – Common Themes and Growing Needs: Towards Thriving, Caring Communities within the Region of Peel*, A Report prepared for the Fair Share Task Force, May 2007, p. 5

Section 3: The Region of Peel

3.1 Introduction

The *Region of Peel* was established in 1974. As an upper tier municipal government in the Greater Toronto Area its 2007 operating budget is \$1.3 billion and its capital budget is \$722.3 million. In June 2007, the *Region of Peel* implemented a corporate restructuring plan based on an integrated service delivery framework that supports the Region's *Strategic Plan V: 2007 – 2010*.

3.2 Strategic Planning at the Region of Peel

For most human services, the Region is mandated by the provincial government to deliver a prescribed level of service, hence there is limited flexibility to alter program targets or goals. Nonetheless, the Region strives to meet the needs of local residents within existing resources and legislated requirements. In that sense, both the Human Service and the Health Departments are guided by strategic processes at the Regional level.

The *Region of Peel Strategic Plan V: 2007 – 2010* was approved by Regional Council in May, 2007. The plan outlines the way in which the Region's mission – to serve its changing community through leadership, partnership and service excellence – will be achieved through five goal areas:

- i. Deliver citizen-focused services
- ii. Deliver services that meet the diverse and evolving needs of the community
- iii. Provide human services that meet current and changing needs
- iv. Manage the impacts of growth on the community and Regional services
- v. Be a citizen-focussed Regional government

3.3 Integrated Human Services

In recent years there has been a growing recognition in the public sector that the human services sector is interrelated. The *Ontario Municipal Social Services Association (OMSSA)*, in a paper released in September 2007, defined integrated human services as "a system of services which are effectively coordinated, seamless and tailored to the needs of people so that they can maximize their potential, enhance their quality of life and contribute to their community"¹⁷.

The *Region of Peel* fully embraced this approach during the reorganization process by forming a new *Human Services Department*. The new department is aligned across three interrelated human services divisions: *Children Services*, *Social Housing and Policy* and *Ontario Works*. The *Department of Human Services* administers a budget of \$312.8 million through three budget lines: *Children's Services* (\$56.7 million), *Social Housing Policy and Programs* (\$101.9 million) and *Ontario Works* (\$154.1 million)¹⁸.

3.4 Region of Peel Human Services Funding Investments

As already noted, most human service programs delivered by the *Region of Peel* are mandated by the province. However, the *Region of Peel* has for many years provided financial support to community agencies to deliver a range of services.

Currently, funding to community agencies is provided through *Community Program Grants*. Dollars flow to approved agencies through two streams: multi-year and one-year funding

¹⁷ OMSSA, *A Guide to Thinking About Human Services Integration: Making a Greater Difference for People and Communities*, September 2007, page 4 <http://www.omssa.com/lib/Db2file.asp?fileid=18916>

¹⁸ It should be noted as well that the Health Services Department, with a total budget of \$171.2 million also delivers human services to residents through three budget lines: Public Health (\$65.3 million), Long Term Care (\$63.4 million) and EMS (\$42.4 million).

grants. The one-year funding stream was added to the program in 2004 and was targeted at two priority areas: mental health and youth. These priorities were determined based upon input from funded agencies, through community consultations conducted by the *United Way of Peel Region* and through staff recommendations.

The following chart summarizes funding of the *Community Program Grants* for the past five years.

	Multi-year Funding	# Agencies*	One-year Funding	# Agencies	Total Funding	Total # Agencies*
2003	\$487,180	23	N/A	N/A	\$487,180	23
2004	\$733,147	23	\$164,500	10	\$897,647	33
2005	\$775,729	23	\$261,544	15	\$1,037,273	38
2006	\$808,416	27	\$251,603	13	\$1,060,019	40
2007	\$1,457,560	37	\$148,000	7	\$1,605,560	44

*includes six agricultural organizations

In 2007, a review of the Region's *Community Programs Funding Guidelines and Eligibility Criteria* involved participation from 15 community agencies, six Peel funders and five municipalities. The review explored how *Community Program Grants* can continue to address community needs and provide effective support to not-for-profit agencies in future funding years. Key findings from the review included:

- Peel agencies will continue to have increased financial pressure to address growth related needs;
- In addition to monetary support, Peel agencies are searching for sources of in-kind resources (i.e. computers, resources, meeting space, leadership, etc.);
- Peel agencies appreciate partnerships and encourage additional investment in programs such as *Strengthening Organizational Effectiveness Fund*; and
- Opportunities for improving the Region's *Community Program Grants* include:
 - policy changes
 - increased funders collaboration
 - increased monetary investment.

Another community funding program, the *Strengthening Organizational Effectiveness Fund* (SOEF), is jointly provided by the *Region of Peel* and *United Way of Peel Region*. It assists with capacity-building activities like business planning, organizational assessment, policy development and human resource development. The following chart summarizes the Region's investment in SOEF:

	Total Funding	# Agencies (programs)
2004	\$18,776	5
2005	\$19,292	2
2006	\$19,687	2
2007*	\$55,743	8

* approved to date

It should be noted that, in addition to the *Community Services Program*, the *Human Services Department* invests over \$47.7 million in purchase of service agreements. This includes funding to 112 child care centres, 19 employment programs and 16 Ontario Works community programs.

Section 4: United Way of Peel Region

4.1 Introduction

United Way of Peel Region has had a presence in Peel Region since 1967. Since then the population of the Region has grown five-fold and *United Way's* annual fund-raising campaign target has grown to \$14.0 million. In 2007 *United Way of Peel Region* provided leadership and support to the human services sector as well as directly contributing over \$7.1 million to 53 different agencies providing human services to the residents of Peel.

4.2 Community Impact

While *United Way of Peel Region* has changed the way it serves agencies over the years, its vision, which is to champion and inspire sustainable change that strengthens community and improves lives, has always been strong. In successive rounds of strategic planning, *United Way of Peel Region* has refined its mission – both as it has gained greater understanding of how to best serve the community and as Peel Region has changed demographically, economically and socially.

In a comprehensive review conducted in 2001/2002, *United Way of Peel Region* took a bold step forward in becoming more than just a funder to agencies and services addressing important community needs. *United Way of Peel Region* also became an important partner with the community by initiating and hosting a dialogue called *On the Road to a Better Way*. As a result of that process, the *United Way* identified, in partnership with the community, five funding priorities that would guide the allocation of their financial resources for the next five years.

At that time, the conversation about Peel Region was placed in the context of national trends as identified by a report called *Reclaiming Our Humanity*¹⁹. In that report, compiled from a series of national opinion polls, the factors that shaped the national social context in the late 1990s were:

- Growing poverty that is increasingly concentrated in certain neighbourhoods;
- Threats to social cohesion through pervasive social pressures and economic stresses that erode the sense of community, trust and equity;
- Time crunch for families resulting from juggling two or more jobs and competing demands on time;
- Increased diversity of communities; and
- Social determinants of health including income equality, safe housing, adequate nutrition and supports embedded in caring communities.²⁰

As the *United Way* and its partners looked at the national context and the local situation in 2001, they developed the analogy of a healthy orange orchard to describe their aspirations of strengthening community capacity. By building community capacity (i.e. a healthy orchard) the necessity to constantly juggle oranges (i.e. choose between competing priorities) would be minimized – and perhaps eventually replaced by an entirely new model of resilience within the community.

¹⁹ Sherri Torjman, *Civil Society: Reclaiming our Humanity*, Caledon Institute of Social Policy, 1997

²⁰ Mike Balkwill, *On the Road to A Better Way*, *United Way of Peel Region* April 2002, page 4

The recommendations from that process became road signs for *United Way of Peel Region's* journey over the next five years. The recommendations were:

- Continue to invest in human service agencies that provide direct services;
- Expand the role of *United Way* in developing community capacity;
- Continue to promote policies and actions that recognize and support community diversity;
- Invest in five key areas:
 - i. Help abused women and their children
 - ii. Alleviate hunger, homelessness and poverty
 - iii. Support seniors to stay healthy and live independently
 - iv. Strengthen families and children
 - v. Help newcomers and immigrants; and
- Implement the recommendations through a targeted community investment.

4.3 Moving Forward

With five priorities guiding its investment strategies from 2002-07, *United Way of Peel Region* has begun, in a concerted way, to measure the impact of funding allocated to agencies and community initiatives.

In the first of a planned series, the *Centre for Research and Education in Human Services* conducted a third-party, quantitative and qualitative evaluation of the impact of programs that address the priority area of strengthening families and children. The findings show empirical evidence that the *United Way* is helping large numbers of people build better social skills and family relationships, although other hoped-for outcomes have not been achieved because there are still too few resources available to address them²¹.

It is hoped that as *United Way of Peel Region* and its partner agencies gain more experience, the ability to both articulate and measure expected outcomes, as a consequence of a strategic investment approach, will increase.

In the meantime, two other major initiatives continue to guide and frame the *United Way's* path forward. One of these initiatives is national in scope while the other is local.

On the national front, *United Way of Peel Region* has been an active contributor to the development of a national *United Way-Centraide* project to develop *Standards of Excellence*²². The standards recognize that the issues facing communities across Canada have become increasingly complex. Compliance with the standards is voluntary, but they have been widely embraced as a guideline for operating as an effective community-impact organization. Appendix A (page 19) contains a summary of the *Standards of Excellence*.

The other important initiative is *United Way of Peel Region's* strategic plan called *Building Vibrant Communities Together*. Echoing and complementary to the national *Standards of Excellence*, the 2007–2011 strategic plan will drive the *United Way's* transformation to a community impact organization. As a community impact organization, *United Way* is committed to addressing key social issues by mobilizing collective action to create measurable, cumulative lasting change that improves lives and builds resilient communities.

²¹ For example, support to caregivers of people with special needs family members and elderly parents. Centre for Research and Education in Human Services, *United Way of Peel Region, Strengthening Families and Children Priority Areas, Review of Investments and Outcomes*, April 2007, pp. 18-19

²² United Way-Centraide, *Aspiring to Excellence: United Way Standards of Excellence*, September 2006

The plan identifies three strategic directions for the next five years:

- i. Diversify and increase sustainable financial resources
- ii. Invest *United Way* resources strategically to address human service priorities
- iii. Strengthen the capacity of the human services sector

4.4 United Way of Peel Funding Investments

United Way of Peel Region invests financial resources in the community mainly through four funding streams: the *Community Priorities Fund*, the *Community Response Fund*, the *Community Contingency Fund* and the *Strengthening Organizational Effectiveness Fund* (SOEF). Two new funding streams were launched in 2007: the *Social Purpose Enterprise Fund* and the *Neighbourhood Development Fund*. Each of these new funds invested \$100,000 in the past year to support three social enterprise and six neighbourhood projects.

The majority of its funding flowed through the *Community Priorities Fund*. The following chart summarizes *Community Priorities Funding* to community agencies over the past five years:

	Total Funding	# Agencies (programs)
2003/04	\$6,457,612	55(108)
2004/05	\$6,862,853	59(127)
2005/06	\$7,031,422	57 (108)
2006/07	\$7,162,448	55 (105)
2007/08	\$7,332,347	54 (111)

In addition, the *Community Contingency Fund* provided \$48,310 in 2007/08 to qualifying community agencies to assist with unforeseen circumstances and \$1,274,082 for other community programs and initiatives (e.g. Success by 6, Outcomes Measurement Training Project and others).

In 2007/08, *United Way of Peel Region* provided \$2,900,000 in designations to other *United Ways* and charities.

And lastly, the SOEF, which is jointly funded by *the United Way of Peel* and the *Region of Peel* provides program grants to strengthen the infrastructure of the non-profit sector in Peel. The following chart summarizes *United Way's* investment in SOEF:

	Total Funding	# Agencies (programs)
2004	\$18,776	5
2005	\$19,292	2
2006	\$19,687	2
2007*	\$55,743	8

* approved to date

Section 5: Partnerships and Other Community Assets

5.1 Partnerships with *Region of Peel* and *United Way of Peel Region*

Both the *Region of Peel* and *United Way of Peel Region* have many partnerships throughout the community. They assume many different roles in their partnerships and whether it be as the convener, funder, leader or participant, they consider the investment in community partnerships to be as important as their financial investments. There are far too many partnerships to individually name with which either the *Region of Peel* or *United Way of Peel Region* participate in some way, however, there are a number of significant collaborative efforts that can be highlighted.

The *Peel Newcomer Strategy* is an initiative jointly planned by the *Region of Peel*, the *United Way of Peel*, the *Social Planning Council of Peel*, *Peel LINC Partnership*, *Peel ISAP Committee*, the *University of Toronto at Mississauga*, the Boards of Trade, the Boards of Education, *Peel Regional Police*, service providers and the provincial and federal government. The *Region of Peel's* and *United Way of Peel Region's* participation in this collaborative effort has contributed to a successful application to *Citizenship and Immigration Canada* for funding to develop a community-led coherent service delivery system for new immigrants arriving in Peel. The initiative will be complemented by at least two *Region of Peel* projects – a *Municipal Immigration Web Portal* and the *Liveable Peel Immigration Project*. *United Way of Peel Region* is managing a community collaborative model for serving newcomers. The *Peel Newcomer Strategy Group* is jointly co-chaired by the *Region of Peel* and *United Way of Peel Region*.

Even earlier, in 2005, the *Region of Peel*, *United Way of Peel Region* and *Service Canada* partnered together to match internationally trained immigrants with established professionals in their field. *The Mentoring Partnership* is a collaboration of community and corporate partners that brings together skilled immigrants and established professionals in occupation-specific mentoring relationships. The program is managed by a coalition of partner organizations in the City of Toronto and the Regions of Halton, Peel and York. It is delivered in Peel by *Dixie-Bloor Neighbourhood Centre*.

The *Peel Regional Task Force on Homelessness* was another collaborative partnership with broad community participation, including representatives from local area municipalities, *Region of Peel*, *Peel Regional Police* and one of the co-Chairs of the *Peel Coalition for Shelter*. The *Task Force* consulted agencies and individuals who work with homeless people, the faith community, ethnic minorities and the homeless themselves. It also examined the findings and recommendations from the *Provincial Task Force on Homelessness* and the *Toronto Mayor's Action Task Force on Homelessness* to assess their applicability to Peel Region and to develop a "made in Peel" solution.

The *Region of Peel's Families First* project for people on social assistance brings together social, health and recreational services from the voluntary, regional and municipal government sectors. The project demonstrates the positive impacts that can occur when service delivery in different sectors is supported by co-ordinated policies and programs. It is also an example of a concerted, multi-faceted approach to a complex issue such as poverty that involves both levels of local government and community-based human service providers.

Many partnerships have been formed throughout Peel Region to support services to children. *Best Start* is an initiative primarily led by the *Region of Peel*, but with many community partners who are members of the *Best Start Network*.

United Way of Peel Region invests in other important partnerships, such as:

Success By Six Peel A collaboration of more than 60 partners working together to ensure that every child in Peel thrives. *United Way of Peel Region* provides oversight and governance

Peel Learning Institute The goal of *Peel Learning Institute*, once established, will be to strengthen the capacity and ensure the sustainability of non-profit agencies in Peel by enhancing the leadership skills of human

	services staff and board members. It is presently funded by the <i>Ontario Trillium Foundation</i> and supported by a steering committee of stakeholders.
<i>Winter Warmth</i>	In partnership with <i>Enersource Mississauga, Enbridge Consumer Gas and Dixie Bloor Neighbourhood Centre</i> this initiative provides grants to low-income residents faced with the threat of service disconnection due to being in arrears on their utility payments.
<i>Healthy City Stewardship Centre</i>	A partnership with the <i>City of Mississauga</i> and other community stakeholders to work proactively and collaboratively toward the betterment of the health of the people of Mississauga.
<i>Community Outreach</i>	Outreaching and engaging the diverse communities of Peel, specifically the Chinese, South Asian and Black communities with the activities and work of <i>United Way of Peel Region</i> .
<i>Regional Diversity Roundtable</i>	A network of organizations and institutions committed to building inclusion and diversity in core values, structures, workforce, policies and services.
<i>Strong Communities Coalition</i>	An alliance of the <i>United Ways</i> in Peel, York, Durham and Halton, and the <i>GTA/905 Health Care Alliance</i> speaking out about local and timely access to health and social services.
<i>Nonprofit Library Network</i>	Partnering with the <i>Imagine Canada - John Hodgson Library</i> to support the successful delivery of their services, outreach and fundraising programs.
<i>Labour and UW</i>	Ensuring that the people who live in Peel here have access to the services and programs they need to live happy, healthy and productive lives.

5.2 Partnerships in the Local Community

Community agencies and funders in Peel Region have a long history of collaboration. The *Peel Fair Share Task Force*, established in 1990, gathers data from the provincial government to make the case that Peel Region has not received its fair share of funding compared to similar jurisdictions in the province. In 2005, the report *Facing the Facts* was jointly prepared and released by the *Social Planning Council*, the *Fair Share Task Force*, *United Way of Peel Region* and the *Region of Peel*.

In 2006, with strong leadership provided by *United Way of Peel Region*, *Peel Fair Share* joined forces with the *Strong Communities Coalition* – a partnership of the *United Ways* of the 905 regions and the *GTA/905 Healthcare Alliance*. The *Coalition's* goal is to raise awareness and advocate for equitable funding of health and social services in the under-served and under-funded communities of the 905 regions.

At the community and service delivery level, collaborative approaches have become more and more common. This way of doing business has been driven by two forces. First is the need to explore innovative ways of doing more with less as funding has contracted while needs have exploded. Second, is the growing evidence from research and practical experience that the human services sector is interrelated, that root causes are complex and lasting solutions require collaborative approaches.

Many partners in Peel have joined together in collaborative efforts, often learning as they go. Examples of collaborations working at a system level include *Peel Newcomer Strategy Group*, *Success by 6 Peel*, *Metamorphosis*, *Geriatric Task Force for Peel Halton*, *Peel Planning Group* and *Peel Committee Against Women Abuse*. At a program-specific level, examples include *211* and the *Elder Abuse Strategy*.

Local municipal governments are also important partners, not only providing direct service, but also taking on a leadership role in mobilizing community assets. Examples in Mississauga include *Mississauga in the 21st Century, Future Directions for Community Services and Moving Forward*. In Brampton is the *Parks, Culture and Recreation Master Plan* and in Caledon, the *Caledon Community Work Plan*²³.

5.3 Partnerships With Provincial Government

The level of service and access to human services in Peel Region is heavily dependent on the policies and funding decisions of the provincial government. As noted in *Vision 2020*, transformation is a key theme in the *Ministries of Health and Long Term Care, Children and Youth, Community and Social Services and Education*.

The most significant impacts of these transformation agendas for the human service sector in Peel Region originate with three key Ministries.

First, the *Ministry of Community and Social Services*, in its planning document *Thriving Communities*²⁴, has put considerable emphasis on working in partnership with the community.

Second, and perhaps the most far reaching change, is the *Ministry of Health and Long Term Care's* creation of the *Local Health Integration Networks* – intended to drive transformation of the health care system at a local level.

And third, the *Ministry of Public Infrastructure and Renewal*, in its broadly sweeping plan *Places to Grow*²⁵, has mapped out the infrastructure, economic and environmental requirements to support the rapid growth in population expected in the Greater Golden Horseshoe Region over the next 30 years. The plan, while comprehensive in outlining the hard infrastructure needs to support growth, says little about strategies needed to meet the human service needs of the residents who will be living and working in these new communities.

5.4 Partnerships with the Federal Government

The federal government provides direct services to communities through *Human Resources and Social Development, Service Canada* and in policy areas such as immigration and citizenship. In addition, its influence, derived from its role in delivering fiscal transfers to both the provincial level and municipal levels, is significant.

In the area of immigration and citizenship, the signing of the *Canada-Ontario Immigration Agreement* in 2005 ushered in new opportunities to provide services and programs to support the integration of newcomers into Ontario's economy and communities. The changes in policy and additional resources have enabled Peel Region partners, working together as the *Peel Newcomer Strategy Group*, to leverage new and existing funding opportunities to better serve the growing immigrant population in Peel Region.

²³ Examples are drawn from John Huether, *Vision 2020: Seeing a New Future for Peel – Common Themes and Growing Needs: Towards Thriving, Caring Communities within the Region of Peel*, A Report prepared for the Fair Share Task Force, May 2007

²⁴ Ministry of Community and Social Services, *Thriving Communities: A Strategic Direction for the Ministry of Community and Social Services*, 2006 http://www.mcscs.gov.on.ca/NR/rdonlyres/OBEC9ACD-3112-4A2E-8F6A-E30DB2278731/100/En_ThrivingCommunities_Jan2006.pdf

²⁵ Ministry of Public Infrastructure and Renewal, *Places to Grow: Growth Plan for the Greater Golden Horseshoe*, 2006 http://www.pir.gov.on.ca/english/growth/ggh_plan.htm

5.5 Partnerships with the Private Sector

United Way of Peel Region counts on the corporate social responsibility of the private sector in both fund-raising and, in examples like *Winter Warmth*, in the provision of services and programs for residents in need. *Region of Peel* also has partnerships with the private sector, many that help to secure employment opportunities for recipients of *Ontario Works*.

At the *Mississauga Summit*²⁶ held in September 2007, CEOs and senior executives of Mississauga companies and leaders in government, labour, non-profit agencies and the volunteer sector across Peel joined together to address the economic, sustainability and social issues facing the increasingly complex urban landscape of the city. The *Summit* featured thought-provoking information from international, national and local speakers and provided opportunities for participants to discuss issues with leaders from other sectors.

²⁶ For more information see: <http://mississaugasummit.ca/index.html>

Section 6: A Framework for Understanding

6.1 Looking Back

When *United Way's Priority Review Working Group* developed its recommendations for funding priorities for the period 2002-2007, they recognized they were on a journey together with all community partners to find a better way.

The *Working Group*, when looking for a guide, referred to Sheri Torjman's discussion about social development strategies in her report *Reclaiming Our Humanity*²⁷. Social development strategies, they said in their final report, are directed toward promoting what Torjman calls 'vibrant communities'. Vibrant communities have three dimensions – they provide support, promote social inclusion and encourage shared learning. The *Working Group* concluded "some of these strategies are achieved through the funding of direct services. Others are achieved by tapping into community assets and community capacity and by advocating for social policies that address poverty and social inclusion"²⁸.

Six years have passed since the *Working Group* pondered the road to a better way. In the intervening years, the *Region of Peel* has increased its investment in *Community Program* grants three-fold (an additional \$1.1 million) while *United Way of Peel Region* increased its *Community Priorities Fund* by 13% (an additional \$0.9 million). Both *Region of Peel* and *United Way of Peel Region* have tripled (an additional \$37,000) their funding to the *SOEF* program. At the same time, more and more community partnerships have formed to collaboratively plan and deliver integrated human services. Advocates' voices, such as the *Social Planning Council of Peel*, the *Fair Share Task Force* and the *Strong Communities Coalition*, have spoken more urgently about the interrelatedness of the human services sector and the necessity to adequately resource local service providers so they can respond to continued relentless growth and changing demographics.

A sense of a common and shared vision among community partners in Peel Region is palpable. This is, perhaps, most recently demonstrated in the multi-agency, collaborative approach of the *Peel Newcomer Strategy Group*, which has quickly mobilized existing resources and leveraged new ones to develop a comprehensive, action-oriented, community-driven plan to ensure newcomers are integrated into all aspects of community life.

6.2 Looking Forward

The trend in Peel Region toward a greater shared vision is part of a bigger trend. Sherri Torjman, since she wrote *Reclaiming Our Humanity*, has also been observing the bigger picture in Canada. In a recent book *Shared Space: The Communities Agenda*, Torjman has gathered the collective wisdom of communities across Canada and, using research to support her model, has proposed a way to sift through the many competing priorities and strategies that confront communities.

The purpose of her framework, Torjman says, is to help capture the essence of local efforts in order to help them advance strategically together. The communities agenda, she continues, is all about local expression within a shared understanding. The communities agenda is intended to impart conceptual rigour that is guided by effective practice in both substance and process²⁹.

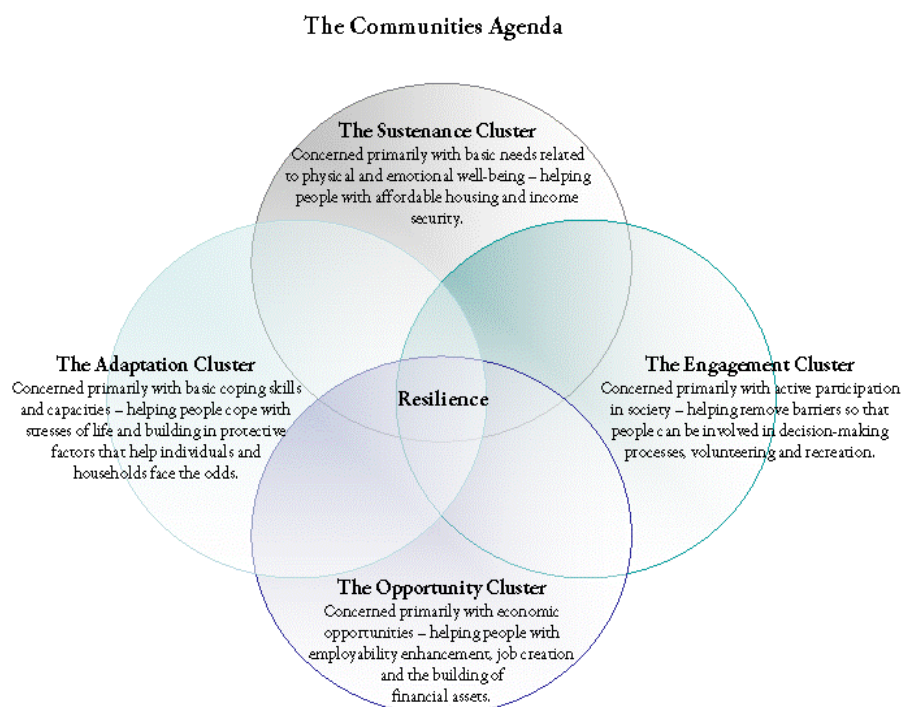
There are two key concepts to the communities agenda framework. First, is recognizing that the issues communities face are complex. Second, is the importance of shifting our thinking to embrace resilience as a better way to tackle complex issues because it deals, not only with the ability to cope, but also with the capacity to thrive in the face of tough problems and continual change.

²⁷ Sherri Torjman, *Civil Society: Reclaiming Our Humanity*, Caledon Institute of Social Policy, 1997

²⁸ Mike Balkwill, *On the Road to A Better Way*, United Way of Peel Region April 2002, page 6

²⁹ Sherri Torjman, *Shared Space: The Communities Agenda*, Caledon Institute of Social Policy, 2007, p. 2

The communities agenda framework is comprised of four clusters, each of which must be active to build sustainable, resilient communities. The four clusters are explained in the following diagram:



In addition to organizing collective effort in each of these clusters, the communities agenda also recognizes that the space between each of these clusters is shared space – and, as such, is an important place where community partners, local government and residents come together to build their own place-based, shared agendas.

6.3 The Communities Agenda: Where to From Here?

The process of setting a community agenda for Peel is already well underway. *Vision 2020: Seeing a New Future for Peel* consolidated the findings of 135 relevant reports with a process of community consultation and dialogue with groups and individuals. The collective voice of the community proposed ten cross-sectoral strategies that could be pursued to achieve Peel's future vision. Using those strategies, and placing them within the framework of the communities agenda, begins to suggest a way to continue the dialogue with a broader audience.

For example, *Vision 2020* discussed the following action strategies:

- i. Recruiting qualified human services staff and professionals
- ii. Partnering to support healthy workplaces
- iii. Strengthening the role and presence of human services in neighbourhoods
- iv. Expanding approaches to addressing poverty
- v. Creating a services system for children and youth
- vi. Building an inclusive community

- vii. Supporting new immigrants
- viii. Developing shared services and technology support for human service organizations
- ix. Educating the public and raising awareness about human services and volunteers

Putting these action strategies into the communities agenda framework encourages a new way of thinking about community investment that addresses root causes, prevention, capacity building, collaboration and advocacy.

For example, in the substance cluster, which is concerned primarily with basic needs, is action strategy *iv) expanding approaches to addressing poverty*. Human service providers that have a mandate to provide services to low income families or to mitigate against growing poverty could align around this cluster.

In the adaptation cluster, which is primarily concerned with coping skills and capacities, there are several *2020 Vision* strategies: *ii) partnering to support healthy workplaces* and *v) creating a service system for children and youth*. Again strategy *iv) expanding approaches to addressing poverty* would be concerned with adaptation, especially when considering prevention strategies.

In the engagement cluster, which is primarily concerned with active participation in society, there is action strategy *vi) building an inclusive society*.

And in the opportunity cluster, which is primarily concerned with economic opportunities, there is action strategy *iv) expanding approaches to addressing poverty*. There are also strategies *i) recruiting qualified human services staff and professionals* and *vii) supporting new immigrants*.

At least one strategy would be relevant to all clusters: *iii) strengthening the role and presence of human services in neighbourhoods*. And several would cut across clusters and build capacity at a systems level, for example *viii) developing shared services and technology support for human service organizations* and *ix) educating the public and raising awareness about human services and volunteers*.

The communities agenda framework can help to map out the beginning elements of a community investment strategy. The potential for the framework to simplify the complexity of issues, without losing the synchronicity of existing aligned and complementary initiatives, is significant. Expanding the dialogue and asking questions about effective and appropriate community investments by all community partners and levels of government, not just the *Region of Peel* and *United Way of Peel Region*, holds considerable promise as a means to strengthen Peel's own communities agenda.

6.4 Conclusion

Looking at the past, reviewing the role of various players and identifying significant milestones helps to build an understanding of what needs to be done to achieve the desired future.

Now the question becomes – how do we get from here to there? What investments do we need to make, individually and collectively, to achieve our common vision? What must we continue, start and stop doing? What can we do collaboratively together and how can we, as a community, marshal our assets and resources towards shared goals?

In the next section, an invitation is extended to all community partners to explore these questions – and to collectively and collaboratively build together the investment strategy that will help the human services sector in Peel Region achieve its shared vision of a vibrant community for all.

Section 7: Questions for Further Dialogue

Questions for further dialogue as we frame our planning for the future.

First, think about the basis upon which the work and success to date is being considered:

- A) What inferences or conclusions do you draw as you begin to consider the demographic trends in this region? Are there any other trends that are influencing your thinking?
- B) How well have the issues, as you understand them, been captured in the discussion on page 5?
- C) What did you learn as you reviewed the activities, funding and partnerships of both the *Region of Peel* and *United Way of Peel Region* that you believe the planners and funders should pay particular attention to, going forward?

Now, think about how best to plan and move forward with success into the future:

- D) How well does the model described in Section 6 work as a way to understand where *United Way of Peel*, the *Region of Peel* and the broader community should go from here?
- E) Can we use the *Communities Agenda* framework to identify the priorities for future investment? If so, how?
- F) Past priorities for investment were:
 - *United Way of Peel Region*: abused women and children; hunger, homelessness and poverty; seniors; strengthening families and children; newcomers and immigrants
 - *Region of Peel*: mental health; youthAre these still priorities, in your view? Why or why not?
- G) Recent consultation and review (e.g., *Vision 2020*) indicates continued and/or emerging priorities are: neighbourhoods; interconnectedness of the human services sector; early child development; poverty; and immigrants. Do you agree? What comments do you have about this list?
- H) Are there any other observations you would like to make that you believe need to be considered as part of this community investment review and planning process?

Community Investment Strategy Advisory Group Members:

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Janice Baker, City Manager, City of Mississauga
Doug Barnes, Chief Administrative Officer, Town of Caledon
Judy Bowyer, Performance and Contract Consultant, Mississauga Halton LHIN
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Appendix A

Aspiring to Excellence: United Way Standards of Excellence

Component 1: Engagement and Mobilization of the Community

Standard 1.1: Know the Community

- 1.1 (a) Do community research
- 1.1 (b) Build knowledge
- 1.1 (c) Develop strong community relationships.

Standard 1.2: Engage with the Community

- 1.2 (a) Listen
- 1.2 (b) Seek diverse voices
- 1.2 (c) Determine appropriate roles
- 1.2 (d) Strengthen the UW-C partnership with the Canadian Labour Congress

Standard 1.3: Build a Shared Community Vision and Action Plans

- 1.3 (a) Involve all citizens
- 1.3 (b) Respect affected groups
- 1.3 (c) Capture knowledge

Standard 1.4: Build and Sustain Effective Relationships

- 1.4 (a) Work inclusively
- 1.4 (b) Build on current assets
- 1.4 (c) Invest in building capacity
- 1.4 (d) Contribute expertise
- 1.4 (e) Share acknowledgement
- 1.4 (f) Create a safe environment

Standard 1.5: Build Collaborations

- 1.5 (a) Build community collaborations
- 1.5 (b) Get invited to join collaborations
- 1.5 (c) Get the work done

Component 2: Planning for Impact

Standard 2.1: Learn and Share

- 2.1 (a) Build a culture of sharing
- 2.1 (b) Do research
- 2.1 (c) Adapt practices

Standard 2.2: Develop and Invest in Common Outcomes, Strategies and Plans

- 2.2 (a) Foster community dialogue
- 2.2 (b) Develop focused plans
- 2.2 (c) Define roles
- 2.2 (d) Mobilize resources

Standard 2.3: Focus on Underlying Causes

- 2.3 (a) Understand the issues
- 2.3 (b) Engage in public policy
- 2.3 (c) Advocate

Standard 2.4: Measure and Evaluate Impact

- 2.4 (a) Measure impact
- 2.4 (b) Base research on evidence
- 2.4 (c) Monitor and adapt

Standard 2.5: Communicate and Report Impact

- 2.5 (a) Communicate results
- 2.5 (b) Celebrate
- 2.5 (c) Recognize

Standard 2.6: Achieve Community-level Outcomes

- 2.6 (a) Aim for the highest community aspirations
- 2.6 (b) Be collaborative
- 2.6 (c) Identify key considerations
- 2.6 (d) Define investments
- 2.6 (e) Use diverse strategies

Component 3: Mobilization of Resources

Standard 3.1: Link Resource Development to Impact

- 3.1 (a) Align staff
- 3.1 (b) Integrate work
- 3.1 (c) Align resource-development goals with impact goals
- 3.1 (d) Create a consistent brand experience
- 3.1 (e) Tell the impact story

Standard 3.2: Develop and Sustain Donor Relationships

- 3.2 (a) Customize donor service
- 3.2 (b) Connect donors
- 3.2 (c) Manage relationships
- 3.2 (d) Recognize donors

Standard 3.3: Raise Resources Strategically

- 3.3 (a) Do research and understand trends
- 3.3 (b) Diversify
- 3.3 (c) Set priorities

Component 4: Excellence in Performance

Standard 4.1: Be Principled

- 4.1 (a) Be ethical
- 4.1 (b) Respect donor rights
- 4.1 (c) Respect legal obligations

Standard 4.2: Manage Finances

- 4.2 (a) Use budgets
- 4.2 (b) Strike an audit committee
- 4.2 (c) Appoint an independent auditor

Standard 4.3: Commit to People

- 4.3 (a) Monitor organizational culture
- 4.3 (b) Define key competencies
- 4.3 (c) Have a human resource plan

Standard 4.4: Commit to Focused Strategic and Operational Planning

- 4.4 (a) Set and approve the strategic direction
- 4.4 (b) Monitor and adjust the plan
- 4.4 (c) Oversee operational planning

Standard 4.5: Support Key Business Functions

- 4.5 (a) Promote efficiency and effectiveness
- 4.5 (b) Manage technology

Standard 4.6: Manage Risk

- 4.6 (a) Understand the risks
- 4.6 (b) Recognize opportunities
- 4.6 (c) Encourage evolution of risk management

Standard 4.7: Operate Transparently and Accountably

- 4.7 (a) Produce financial reports
- 4.7 (b) Produce impact reports

Component 5: Leadership and Governance

Standard 5.1: Govern Effectively

- 5.1 (a) Develop shared leadership
- 5.1 (b) Evaluate performances
- 5.1 (c) Operate legally
- 5.1 (d) Enforce ethical behaviour
- 5.1 (e) Define board structure

Standard 5.2: Provide Authentic Leadership

- 5.2 (a) Act with passion.
- 5.2 (b) Communicate skilfully
- 5.2 (c) Support innovation and learning
- 5.2 (d) Create an honest and open change environment
- 5.2 (e) Build partnerships for action

Standard 5.3: Align and Integrate the Work

- 5.3 (a) Articulate expected knowledge, skills, and behaviours
- 5.3 (b) Define critical staff responsibilities
- 5.3 (c) Invest strategically in agencies
- 5.3 (d) Engage volunteers
- 5.3 (e) Review all initiatives
- 5.3 (f) Integrate initiatives

Standard 5.4: Practise System Citizenship

- 5.4 (a) Share information
- 5.4 (b) Participate
- 5.4 (c) Collaborate on common issues
- 5.4 (d) Seek pan-Canadian impact
- 5.4 (e) Honour membership requirements