Partnerships in Recreation and Parks

Planning for the Future Together

Contents

INTRODUCTION 1

Partnerships in Recreation and Parks 1

Corporate Alignment 2

PARTNERSHIP PHILOSOPHY 4

Purpose 4

Partnership Principles 4

Partnership Areas 5

Partnership Contributions 6

PARTNERSHIP LIFECYCLE 7

Discovery 7

Development 8

Animation 10

Review 11

MONITORING AND EVALUATION FRAMEWORK 12

Discovery 12

Development 12

Animation 13

Review 13

ADMINISTRATIVE PROCESSES 15

Formalizing a Partnership 15

INTRODUCTION

Partnerships in Recreation and Parks

Recreation and Parks are integral to the quality of life for St. Albertans. As such, the City of St. Albert (the City) plays a leading role within the local recreation and parks ecosystem through the direct provision of recreation facilities, programs, and services. The City also recognizes that that there are many other actors in the community working to enhance the quality of life for our citizens. As such, the City continually looks to work directly with these actors to extend and enhance the range, quality, and accessibility of recreation opportunities for residents of St. Albert and the surrounding area. As the community continues to grow and change, the City recognizes that creating and maintaining capacity to meet emerging needs requires developing a relationship between all those involved in providing these opportunities.

Recreation and Parks (the Department) maintains relationships with many organizations throughout the city and the region related to recreation and parks opportunities. These relationships take different forms and serve different functions. They can be informal or formal, legally required, transactional, strategic, or friendly. Partnership represents one form of relationship between the City and the community. Given the social value we place on a partnership it is important that we are consistent in how we a think about our partnerships with community, how we evaluate the partnerships we are in, and how we approach new opportunities for partnership.

Not all relationships are partnerships, and it is important to evaluate whether a partnership is best suited for any given relationship.

Partnership

A formal mutually agreed upon relationship between two organizations focused on achieving specific outcomes or objectives.

Relationship

An ongoing connection between organizations

The document is intended to serve as a foundation for all partnerships across the Department. It is divided into four sections:

1) Partnership Philosophy,

2) Partnership Lifecycle,

3) Monitoring and Evaluation Framework, and

4) Business Unit Processes.

The first three sections apply across the Department, establishing a shared approach to partnerships. Recognizing the unique demands of contexts of the various business units within the department, the fourth section establishes unit specific process and authorities for navigating the partnership lifecycle. While this document is written for Department staff, it also provides community organizations with a clear picture of what can be expected from and in partnering with the City.

Finally, this document builds upon past Department work. Like the documents before, it captures a snapshot in time. While it is anticipated that most of the common elements will remain constant the process outlined in section can, and should, be updated regularly to reflect council direction, community need, and administration change.

Corporate Alignment

Partnerships managed by Recreation and Parks are partnerships with the City of St. Albert. As such, all our partnerships must align with Department and City priorities, approaches, and plans. Understanding these corporate directions is critical to ensuring that our partnerships are developed, evaluated, and actioned in support of the whole community.

Key Corporate directions include:

Municipal Development Plan – Flourish (2021)

Vision

St. Albert is a vibrant, innovative, and thriving city that we all call home, that sustains and cherishes its unique identity and small-town values. We are the botanical arts city.

Pillars of Sustainability

NATURAL ENVIRONMENT – We protect, embrace, and treasure our deeplyrooted connections with the natural environment through championing environmental action.

SOCIAL - We are a friendly and inclusive community of passionate equals, where everyone feels a sense of belonging. We believe that community starts with the person next door.

CULTURE - We are proud of our storied history that has fed and nurtured our festive and culturally rich community.

ECONOMIC – We prosper and excel through strong and diverse economiy that is supported by forward-thinkg commerce, outstanding local businesses and a dynamic downtown core.

BUILT ENVIRONMENT – We build our community towards the future to sustain balanced development, with a reverent eye to the past, honouring our unique settlement history and distinct identity.

Community Well-being Goal

St. Albert supports the physical, mental, and social well-being of residents through community services and neighbourhoods that support healthy lifestyles.

Policies

11.3.5. Collaborate with partners to develop innovative programs and accessible facilities.

Recreation and Parks Master Plan (2016 and 2022 Update)

Vision

St Albert: An active and engaged community. Active communities are healthy and proud.

Recreation is a catalyst for getting residents and visitors active— mentally, physically, and socially. For people to use recreation, they must be engaged not only in the activity in which they are participating, but also in their community. St Albert engages residents through recreation participation and engages delivery partner groups in recreation service delivery.

Mission

Creating quality of life and community building through recreation.

This mission is achieved by advancing strategic priorities and tactics under three priority areas:

Building: Recreation and Parks builds and maintains recreation facilities and parks to ensure longevity and meet community needs

Partnering: Recreation and Parks partners with the community in the delivery of recreation to provide recreation opportunities and build community connectedness.

Delivering: Recreation and Parks directly delivers recreation programs, services, facilities, and parks to foster community well-being.

PARTNERSHIP PHILOSOPHY

Each partnership is reflection of the moment in which it was it was formed. This moment includes a wide range of social, economic, philosophical, environmental, and political factors. It also includes a series of choices, assumptions, and beliefs about: why partnership is important, what a partnership is, and how partnership should operate? The why, what, and how of partnership form the foundation of a partnership philosophy. This section provides a sketch of our partnership philosophy, identifying the critical principles, values, and purposes that should be reflected throughout a partnership.

Purpose

Partnerships must aim to advance the interests of the community, as expressed by council priorities, strategic plans, corporate directives, and department service levels.

Partnerships that stray from these interests become tenuous and are at increased risk for critique by Council, Administration, and the public. For this reason, partnership should be regularly reviewed to ensure that their specific purpose is aligned to current interests and that corporate investments are reasonable given current corporate constraints. With this in mind, 'because we always have' is not a valid argument to sustain a partnership, or the investments in it.

As Administration seeks to ensure the relevance of its partnerships and justify specific municipal investments, it needs to set parameters that respect the unique interests and capacities of the municipality and the partnering agency. The following sections identify core values to be respected while engaging in self and collective reflection.

Partnership Principles

- Partnership is a distinct relationship formed to support and enhance shared interest.
- Partnership requires defined benefits for each party.
- Each partnership is unique.
- Partners have equal agency[1] within the partnership.
- Partnership requires mutual trust, respect, and commitment.
- Partnerships evolve to address current needs, capacities, and interests.

[1] Agency – capacity of an individual or organization to effectively determine and fulfil their potential.

- Partnership benefits should be reflective of the relative investment of each partner.

Rights & Responsibilities:

Partners are responsible for:

- Establishing a clearly defined purpose.
- Making a meaningful investment of resources towards achieving their purpose.
- Maintaining open and timely communication on all matters that have or could have impacts on the partnership.
- Honouring the spirit, and governing terms of the partnership.

Partners have the right to:

- Not be exploited.
- Define meaningful forms of reciprocity.
- Establish conditions and practices that protect and honour their respective cultures, interests, and responsibilities.

Partnership Areas

Partnerships contribute to improving the quality of life of St. Albert residents. This may be through direct provision of services or infrastructure that support recreation activities or indirectly through knowledge transfer, skill development or increasing available funding and resources that enables enhanced recreation service delivery.

Partnership Areas are organized to reflect the demands and interests of departmental business units. In addition to the previously discussed elements, partnership areas provide additional context for reviewing and shaping the specific nature (e.g., objectives, outcomes, or impacts, and investments) of a partnership.

Sponsorship

The provision of money or other goods and services for the purposes of general support and recognition. Sponsorship differs from simple advertisement, as it is longer term in nature, implies an endorsement of the product or service from both parties and has multiple motivations and benefits, not all of which are directly financial.

Example: Servus Credit Union naming rights partnership

Facility Operations
Control over and responsibility over an entire facility, amenity of site, or portion thereof, for a specific purpose. This includes built or natural structures and spaces.

Example: St. Albert Curling Club

Facility or Land Use
Access to an entire facility, amenity or site or portion thereof, or amenity for a specific purpose. This includes built or natural structures and spaces.

Example: St. Albert Rugby Football Club

Capital Development
Contributions in support of the development or enhancement of a facility, amenity or site or portion thereof. This includes built or natural structures or spaces.

Example: Rondeau Park Development

Strategic Priorities
A contribution towards advancing a strategic priority. This is more common around areas of knowledge transfer or general planning and exploration that could lead to the identification and advancement of specific partnership opportunities.

Example: Edmonton-St. Albert Intermunicipal Collaboration Framework for Recreation

Programming & Events
The direct provision of programs or events in alignment with an identified service level.

Example: No current partnerships

Partnership Contributions

Partnership Contributions capture the broad range of assets that the City can offer to or receive from a partnership, or that may be jointly developed as the result of a partnership. Specific contributions will be reflective of the unique needs and capacities of the partners, and the defined partnership opportunity. General kinds of contributions include:

- Space/Land
- Infrastructure
- Money
- Expertise/Knowledge

- Labour / Services
- Market / Community Access
- Political Influence or Access
- Subsides for Access or Use

PARTNERSHIP LIFECYCLE

Partnerships are a living relationship. They reflect the broad environment in which they exist and the actions and intentions of the people who care for them (nature). Understanding the partnership lifecycle is important for establishing processes and practices that support critical reflection, evaluation, and purposeful action. It is also important for framing partnership success, challenges, and failures.

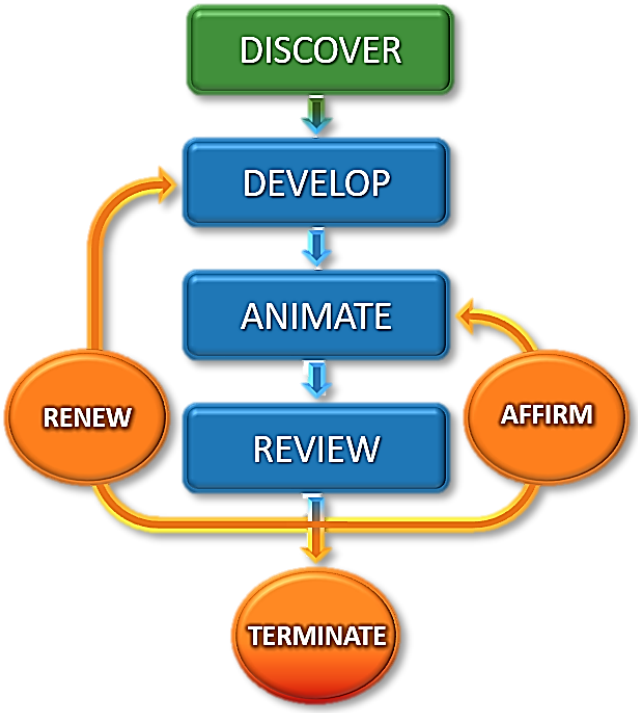


Figure 1: Partnership Lifecycle

We have identified four lifecycle phases:

- Discovery
- Development
- Animation
- Review

Each phase is connected to the phase(s) that come before it (see Figure 1). All the phases are shaped by the partnership principles previously identified.

Discovery

This is a self-reflective phase of work that precedes any partnered activity. Each potential partner (agent) should consider its starting position, needs, wants, and capacity for investing in and benefitting from a partnership. While each partnership opportunity is unique, all agents should begin by considering the philosophic, strategic, and operational context in which a partnership could form. These incude asking questions such as:

- Why is this partnership valuable (to what end)?
- What is my core business or purpose?
- Who am I accountable to?
- How do I make decisions?

- What can I offer to a partnership?
- What organizational goals will a partnership help to advance?
- What Service Level(s) will a partnership help to meet?
- What shared aims could a partnership advance?
- What is my organization not willing to do, offer, support?
- What benefits do I hope to achieve through partnership?

Philosophical Context – The values and purpose that underpin the actions, decisions of an organization. These are often reflected in statements of vision, mission, and values.

Strategic Context – The specific goals, outcomes, or priorities pursued by an organization. These are often captured in strategic or operational plan and can exists within multiple levels of an organization and have varying timelines.

Operational Context - The process, hierarchies, and accountabilities through which an organization makes decision and has the authority and ability to act.

Development

In this phase, actors, as potential partners, engage with each other to explore potential benefits, outcomes, objectives, and impacts to partnering. If each potential partner can identify a benefit in partnering, further discussion around the conditions of partnership can proceed. In this phase, the benefits of the potential partnership are fully explored and quantified wherever possible.

Questions for each agent to consider include:

- What shared outcomes, objectives, impacts could be achieved through this partnership?
- What resources could the organizations invest in the potential partnership?
- How will these resources be managed?

- How will the partners make decisions on matters that impact the other or shared goals?
- How will you know when the partnership has met its goals?
- How will progress towards goals or benefits be measured?
- What is the anticipated timeframe of the partnership?
- When should the partnership end?
- How will invested resources or gains be accounted for when the partnership ends?

In alignment to the questions above, agents need to consider the following factors a minimum:

Capital Impacts – This includes but is not limited to the potential cost savings the municipality for capital growth, repair, maintenance or replacement related to natural and built assets.

Operating Impacts – This includes but is not limited to the potential cost saving to the municipality related to ongoing operations of programs, facilities, or spaces.

Social Benefits – The extent to which a potential opportunity will directly address social issues or advance social initiatives prioritized by the community). Social benefits include but are limited to health and well-being, community connectivity, equity, and inclusivity.

Environmental Sustainability – The extent to which an opportunity will directly address environmental issue or advance environmental initiatives prioritized by the community.

Organizational Competency – This includes the specific capacities an organization has or is deemed to be able to develop.

This phase ends when the agents either decided not to partner or have established and formalized the conditions of partnership. Although each business unit will develop its own guidelines and specific processes for developing partnerships. Not all components will ultimately be required for all partnerships however each should be considered when evaluating a potential partnership.

Partnership Proposal (City or Partner)

- Initial approach of ideas and potential shared benefits
- May be formal (e.g., expression of interest, letter of intent, Council presentation etc.) or informal (e.g., through established relationship channels)

Exploration (City)

- How does the proposal align to organizational values, principles, goals and/or service levels?
- What benefits can be anticipated?
- Are there sufficient resources (time, staff) to properly evaluate and respond to the proposal?
- Are there political or other external influences that may drive partnership decisions?

Feasibility (City and Partner)

Assess Social Benefits

- Articulate anticipated social or quality of life or wellbeing benefits.
- Identify political factors that may influence decision.
- Determine community need.

Assess Financial Feasibility

- Requirements are specific to the project and increase depending on the longevity, complexity, and risk inherent to the proposal.
- Project potential cost savings/efficiencies
- Completion of project specific financial analysis.
- For Capital Development partnerships, take a total cost of ownership approach where possible.
- Determine resourcing needs and requirements to animate the partnership.

Assess Organizational Capacity

- Determine if the resources are sufficiently available for all parties to maintain the partnership, including monitoring and evaluation.
- Ensure all parties aligned and working towards the same goal.
- Determine if the partners have sufficient history/experience, organizational knowledge, and administrative/governance support to successfully meet the terms of the partnership.

Formalization

- Determine the most appropriate Partnership Form
- Determine the decision makers and governance processes required.
- Negotiate and establish any terms, conditions, roles, and responsibilities required.
- Establish key performance indicators, targets or other measures required to monitor and evaluate the partnership.
- Execute the Partnership Form and move to Animation.

Animation

In this phase the actors, as potential partners, transition to full partners, as outlined by the terms of the partnership. This is the ongoing implementation phase of the partnership, as defined by the terms put in place in the development phase and outlined in the partnership agreement. This phase requires active engagement, communication, support, and ongoing commitment for success.

While the initial conditions frame the start of this phase, they can be adapted through mutual agreement. Change to the partnership conditions should be documented. Changes to the partnership agreement could arise from:

- Changes in available resources.
- Further self-reflection
- Evaluation of success in advancing outcomes, objective, impacts.
    - Criteria for partners – what must each partner be/maintain/do.
    - Use of limited resources in meeting community needs.
- Change in desired benefit.
- Changes in community need or demand.
- Challenges for one or both partners to fulfill the rights and responsibilities of partnership.

Review

As a conditional relationship, it follows that if conditions of a partnership change, then the validity of the partnership should be reviewed. Conditional changes can take many forms. For example, the goals of the partnership could be achieved or fail to be realized, the capacity or needs of one of the partners may have shifted, or a specific time frame for partnership may come to pass. In these moments of conditional change, the partners should review the value of the partnership and determine if the partnership should be affirmed under its existing terms, renewed to reflect the new conditions, or terminated.

If the partnership is advancing towards its stated aims and functioning in accordance with partnership principles, then the review affirms the current terms of the partnership, through agreement renewal and the partners return to Animation until the next Review.

If there are substantive changes in the partnership conditions (i.e., environment, aims, adherence to principles, partnership capacity or either or both partners) then the review should result in renewal or termination. A decision to renew a partnership suggests that there is shared value in reframing the terms of the existing partnership to reflect current conditions. This would take the participants back to the Development stage. Renewal, like Affirmation must be a shared decision. Termination, however, in denoting a formal end to the partnership does not have to be mutual decision.

While understandable that a partner may feel a sense of loss or regret in ending a partnership, or an obligation to continue a historical partnership due to shared history, terminating a partnership is a valid part of the partnership lifecycle. Each actor must be cautious of their intrinsic resources and guard against overextending themselves for the sake of sustaining the capacity of the other. Partners also need to be cognizant of changing conditions, including changing goals or evolving desired outcomes that diverge from each other or from the original

reason for the partnership. When the conditions of the partnership fail to be sustained, it is okay for the partnership to end and for the relationship to evolve.

The reasons for ending a partnership can vary. For example, the partnership may have achieved its aims, or a partner no longer has the capacity to uphold its commitments. Similarly, the post partnership relationship can also vary, with the agents parting ways amicably (in the best case), with animosity (much less desirable), or somewhere in between (most likely). Furthermore, there is not a simple correlation between the reason a partnership ends and the nature of the relationship between the former partners once the partnership is ended. In any case, ending a partnership does not end the relationship between the agents.

MONITORING AND EVALUATION FRAMEWORK

Successful partnerships require purposeful and frequent monitoring and evaluation (M&E). M&E is important at all stages of the partnership lifecycle. The following framework establishes key factors to consideration across the partnership lifecycle phases and emphasizes the importance and interconnection of adopting and supporting strong M&E practices throughout the lifecycle (See Figure 1)

Discovery

M&E in this phase is primarily introspective to the City. In alignment with corporate directions, the Department is should be continually framing its work in the context of identifying opportunities and capacities for partnership across its business units. It should also establish metrics and processes to monitor and evaluate the bureaucracy that supports its partnership work and the general effectiveness and efficiency of the partnerships it is engaged in (M&E of specific partnerships is addressed in other phases of the lifecycle).

Development

M& E in this phase is focused on potential partners and partnership opportunities. It includes evaluation of what is possible and desirable for both partners as autonomous organizations and in partnership. Neither party is not able to dictate the terms or purpose of the partnership. The organizations must engage in some level of participatory exploration and decision making to establish clear relational expectations, and outcomes, outputs or impacts from the partnership.

M&E in the discovery phase should begin with a focus on how closely the proposal aligns to the potential benefits and end with clearly defined key metrics and processes that will be used to define track and assess partnership success.

Specific tool or indicators for these factors are established in relation to the specific business units, opportunities, and potential partners. These metrics must be scaled appropriately to the level of investment in the partnership, and clearly link the actions taken to the results being evaluated. M&E in this phase should also include discussion of, and agreement to, specific metrics, timeline, and process for evaluation.

In parallel to the above, it is also critical that the potential partners discuss the relational expectations under which the partnership will exist. This includes consideration for relational general partnership values and specific ways in which the partners will exercise these values. Done well, the phase should result in a set of clearly defined and mutually agreeable set of partnership goals, outcomes, outputs, or impact, and terms related to the day-to-day relationship between the partners.

Animation

M&E in the partnership phase primarily consists of implementing and adapting as needed the M&E plans established in the Development phase. While is reasonable that these plans may change during this phase, it is unwise to begin this phase without a solid plan in place.

In support of the M&E methodology used in the previous phase, it is expected that the partners will work collaboratively to evaluate their progress towards the identified collective and individual benefits. It is also expected that they will continue to monitor the quality of their relationship in working towards these benefits.

Review

Following from the conditions set in partnership agreements and the results of M&E data collected in the animation phase, partners should regularly review whether the partnership is achieving it stated outcomes, objectives or goals and doing so in ways that reflect partnership principles. This review provides an opportunity to affirm, renew or terminate the partnership. M&E at this stage should be reflective of the entire partnership process, considering both that actions of the partners and the conditions under which the partnership operated. Along with determining the future of the partnership, this phase of M&E also focuses on identifying learnings that can be added to future partnership considerations. Ideally, this a shared task. However, depending on the reason for termination both parties may not feel invested in this work. Regardless, it is incumbent upon the City to provide an honest account of the partnership, to formalize the termination and to share this learning with others in the organization and community

Table 1: M&E Across the Partnership Lifecycle

Phase of Partnership	Who Has a Role	Areas of Focus	Key Considerations	Methodology and Metrics
Discover	• City*	• Individual needs, opportunities, and capacities.	• Short-term and long-term unit, branch, department, and City vision, priorities, and strategies • Available and required resourcing, Philosophic Alignment, Strategic Alignment.	City determined
Develop	• City • Potential Partners	• Establishing shared interests, goals, outcomes, outputs, impacts metrics, and schedules. • Establishing relational expectations metrics and schedules.	• Capital impacts • Operating impacts • Social good • Environmental good • Organizational	City and Potential Partner determined
Animate	• City • Partner • Partnership	• Progress towards individual and shared goals, outcomes, outputs, and impacts. • Quality of relationships. • Changes that may influence aspects of the partnership.	• Monitoring of Factors identified in Develop Stage • Evaluation of shared and individual goals, outcomes, outputs, impacts.	City and Partner determined
Review	• City • Partner • Partnership	• Progress towards individual and shared goals, outcomes, outputs, and impacts. • Quality of relationships.	• Evaluation of shared and individual goals, outcomes, outputs, impacts. • Capture of lessons learned.	City and Partner determined

* City - Counsel, Administration, Department

ADMINISTRATIVE PROCESSES

Partnership outcomes and benefits should be directly tied to the City's service provision and goals of the Department. They are supported by appropriate and formalized governance structures, agreements and roles and responsibilities that enable shared clarity and positive relationship building.

Formalizing a Partnership

All partnerships need to be documented. The City uses several typical agreements to establish formal agreements with outside agencies. These agreements focus generally on spaces, funding, or permissions. The agreement does not necessarily mean there is a partnership. For example, a contracted service has a formal agreement, however there is no partnership implied. In each case the partnership intent needs to be made explicit, either through the agreement or under an existing partnership agreement. Typical agreements include:

Lease

An agreement for exclusive use of a specified area of land or property for a specified period. Typically, in the form of landlord tenant relationship, for which the tenant carries a greater responsibility for repair, maintenance, and replacement of infrastructure. Examples include:

- Lease and operation of City facilities in their entirety
- Lease of a portion of a facility, such as for office space in an existing facility
- Lease of entire sites where the partner develops all infrastructure.
- Lease of entire sites where the partner takes over City facilities.
- Lease of facilities or sites that are jointly developed and ultimate ownership is held by one party.

Lease agreements are used to capture complex or long-term relationships, can have significant financial impacts to one or both the parties, and provide a higher level of autonomy for operations within a space. For these reasons significant recourses are required to develop and review lease agreements, and the agreement requires a higher level of signing authority.

License of Occupation

An agreement providing permission of use of land or property for a specific time. Typically, used in situations where use is shorter term or where the owner requires greater control over or responsibility for the repair, maintenance, and replacement of asset and infrastructure, and requiring a moderate level of approval authority. A license may also be used where the duration is long-term, but the impact of the use or development of the space is low risk or exploratory. Examples:

- A license of occupation for use for a specified purpose
- Short to mid-term use of a portion of a facility or site
- Conditional use of space (purposes, times)

Sponsorship Agreements

An agreement to provide fund development for programs, events, and services. A sponsorship is a strong ongoing relationship where an endorsement of the product/service is implied to promote brand awareness and affinity. There are opportunities for activation such as on-site business presence, sampling, etc. and more creative use of branding. Examples include:

- Naming Right's Agreements
- Presented by Agreements
- Contra Agreements

Grants

An agreement to support a partner in a specific program, capital project or strategic initiative to meet specified outcomes. A grant implies support to the outcomes or endorsement of the proposed project, organization or individual but typically does not transfer any ownership or responsibility for the project back to the granting body. Examples include:

- Grants to support organizations administration and planning.
- Grants to support capital projects, including projects within City owned land or facilities and privately held.
- Grants to support individual skill development or professional growth.
- Grants to support service delivery.

Capital Development Agreement

An agreement that outlines terms and conditions under which capital work could be undertaken by a third-party on City owned land or facilities, including leased property.

Contribution (Funding Agreement)

An agreement to provide money, goods or services towards a defined project or operation. Typically, this does not involve any expected reporting or accountability beyond delivery of the final product or program but may include requirements for recognition. Examples include:

- Donations of cash or goods
- Services provided at no cost or subsidized cost.
- Staffing resources provided at no cost or subsidized cost.

Memorandum of Understanding/Memorandum of Agreement

An agreement outlining a general commitment to explore or align resources towards a common interest. Typically used in projects where the partnership is more strategic in nature, or when the more prescribed forms of agreement do not meet the needs of the partnership. Examples include:

- Agreements to collaborate with no requirements for joint decision making.
- Agreements to meet specific outcomes within a specific time with variable roles and responsibilities through the lifecycle of the partnership.

Letter of Approval

An agreement that permits a specific activity or action to take within the scope of an already defined agreement (e.g., permission for construction granted under a lease). This would typically include responsibilities of each partner as it relates to the item of consent.

Examples include:

- Grant support letters
- Capital work
- Overnight Parking

Subsidies

An agreement that outlines specific terms or conditions under which a third-party gain below market value access to City facilities, lands, or programs. This typically includes reduced rates for booking and rentals and is different from grants an organization may receive to offset operational expenses.

Examples include:

- Sport Partner Rates