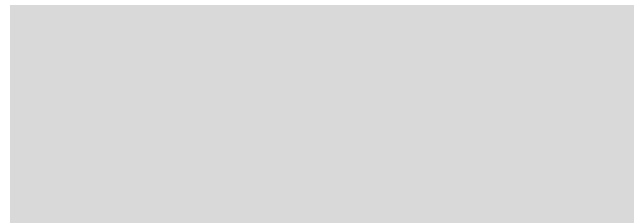




PARTNERHSIP POLICY AND PROPOSAL FORMAT

CITY OF UNION PARKS &
RECREATION
8/15/2020



**CITY OF UNION PARKS & RECREATION
PARTNERHSIP POLICY
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I. The City of Union Parks & Recreation Partnership Policy

A. Statement of Purpose

This policy is designed to guide the process for City of Union Parks and Recreation Department in their desire to partner with other private, non-profit, or other governmental entities for the development, design, construction and operation of possibly partnered recreational or related facilities and/or program partnerships that may occur on the City of Union property.

City of Union Parks and Recreation Department would like to identify for-profit, non-profit, and governmental entities that are interested in proposing to partner with the Agency to develop recreational and related facilities and/or programs. A major component in exploring any potential partnership will be to identify additional collaborating partners that may help provide a synergistic working relationship in terms of resources, community contributions, knowledge, and political sensitivity. These partnerships should be mutually beneficial for all proposing partners, as well as for the citizens of the community.

This policy document is designed to:

- Provide essential background information,
- Provide parameters for gathering information regarding the needs and contributions of potential partners, and
- Identify how the partnerships will benefit City of Union Parks and Recreation and the community.

Part Two, “Proposed Partnership Outline Format”, provides a format that is intended to help guide Proposing Partners in creating a proposal for review with City of Union Parks and Recreation staff.

B. Background and Assumptions

Partnerships are being used across the nation by governmental agencies in order to utilize additional resources for their community’s benefit. Examples of partnerships abound, and encompass a broad spectrum of agreements and implementation. The most commonly described partnership is between a public and a private entity, but partnerships also occur between public entities and non-profit organizations and/or other governmental agencies.

A Note on Privatization:

This application is specific for proposed partnering for new facilities or programs. This information does not intend to address the issue of privatization or transferring existing agency functions to a non-agency entity for improved efficiency and/or competitive cost concerns. An example of privatization would be a contract for a landscaping company to provide mowing services in a park. The agency is always open to suggestions for improving services and cost savings through contractual arrangements. If you have an idea for privatization of current agency functions, please call or outline your ideas in a letter for the agency's consideration.

In order for partnerships to be successful, research has shown that the following elements should be in place prior to partnership procurement:

- There must be support for the concept and process of partnering from the very highest organizational level, i.e. the Park Advisory Board, Board of Aldermen and/or Department Head.
- It is very important to have a Partnership Policy in place before partner procurement begins. This allows the agency to be proactive rather than reactive when presented with a partnership opportunity. It also sets a "level playing field" for all potential partners, so that they can know and understand in advance the parameters and selection criteria for a proposed partnership.
- A partnership policy and process should set development priorities and incorporate multiple points for go/no-go decisions.
- The partnership creation process should be a public process, with both Partners and the Partnering Agency well aware in advance of the upcoming steps

C. Partnership Definition

For purposes of this document and policy, a Proposed Partnership is defined as:

"An identified idea or concept involving City of Union Parks & Recreation Department and for-profit, non-profit, and/or governmental entities, outlining the application of combined resources to develop facilities, programs, and/or amenities for the Parks and Recreation Department and its citizens."

A partnership is a cooperative venture between two or more parties with a common goal, who combine complementary resources to establish a mutual direction or complete a mutually beneficial project. Partnerships can be facility-based or program-specific. The main goal for City of Union Parks & Recreation

partnerships is enhancing public offerings. City of Union Parks & Recreation is interested in promoting partnerships which involve cooperation among many partners, bringing resources together to accomplish goals in a synergistic manner. Proposals that incorporate such collaborative efforts will receive priority status.

Partnerships can accomplish tasks with limited resources, respond to compelling issues, encourage cooperative interaction and conflict resolution, involve outside interests, and serve as an education and outreach tool. Partnerships broaden ownership in various projects and increase public support for community recreation goals. Partners often have flexibility to obtain and invest resources/dollars on products or activities where municipal government may be limited.

The following shows the categories of possible partnerships discussed in this policy.

1. Category 1 – City of Union Parks & Recreation Department Events or Programs

Definition - Activities and events of the Union Parks & Recreation Department facilitated and supported by City of Union employees and volunteers for the City of Union.

Expectations of City of Union Parks & Recreation Department

- The Parks Director and the Parks & Recreation Department is responsible for all legal and financial planning, management, facilitation and execution of programs, events and/or facilities.

Expectations for Partnering Agencies

- N/A. No partnering agencies.

2. Category 2 – City of Union Parks & Recreation Department with Independent Contractor Events or Programs

Definition - Activities and events that the Union Parks & Recreation Department collaborate with an Independent Contractor. Independent Contractor and the City of Union will both sign an agreement of terms.

Expectations of City of Union Parks & Recreation Department

- The Parks Director and the Parks & Recreation Department shares responsibility for legal and financial planning, management, facilitation and execution of programs, events and/or facilities.
- All registration and fees will be processed through the City of Union Parks & Recreation department.

Expectations for Partnering Agencies

- The Partnering Agencies shares responsibility for legal and financial planning, management, facilitation and execution of programs, events and/or facilities.
- Partnering agency must fill out all necessary paperwork in the Independent Contractor Instruction Guidebook.
- Partnering agency is required to furnish and keep current general liability insurance naming the City of Union its officers, agents, and employees as “additional insured” in the amount of \$1,000,000 per occurrence and \$2,000,000

aggregate. Furthermore, an Additional Insured Endorsement page naming the City of Union, its officers, agents and employees as additionally insured must be submitted. If the agency has employees, they are required to provide proof of Workers' Compensation and Employers' Liability with limits of \$1,000,000 per accident.

- Partnering agency must be considered a legal and recognized business structure that is in good legal standing.
- Partnering agency must adhere to all standards set forth in the City of Union Parks & Recreation Independent Contractor Instruction Guidebook.

3. Category 3 – Affiliated Public Use Partnerships

Definition - Activities and events that the City of Union Parks & Recreation Department collaborate with an outside municipality, school district or nonprofit organization. Partnering agency and the City of Union will both sign an agreement of terms. These events are open to the public and all funds raised go to nonprofit entities.

Expectations of City of Union Parks & Recreation Department

- The Parks Director and the Parks & Recreation Department shares responsibility for legal and financial planning, management, facilitation and execution of programs, events and/or facilities.
- Registration and fees can be processed through the City of Union Parks & Recreation department.

Expectations for Partnering Agencies

- The Partnering Agencies shares responsibility for legal and financial planning, management, facilitation and execution of programs, events and/or facilities.
- Partnering agency must fill out all necessary paperwork concerning the specific event.
- Partnering agency is required to furnish and keep current general liability insurance naming the City of Union its officers, agents, and employees as “additional insured” in the amount of \$1,000,000 per occurrence and \$2,000,000 aggregate. Furthermore, an Additional Insured Endorsement page naming the City of Union, its officers, agents and employees as additionally insured must be submitted. If they have employees, they are required to provide proof of Workers' Compensation and Employers' Liability with limits of \$1,000,000 per accident.
- Partnering agency must be considered a legal and recognized business structure or non-profit organization or that is in good legal standing.
- All Partnering agencies proceeds from the program or event must go to a federally recognized tax exempt organization.

4. Category 4 – Non-Affiliated Commercial Use Partnership

Definition - For profit public use of City of Union facilities by a business, corporations, nonprofit Organization or individuals. Partnering agency and the City of Union will both sign an agreement of terms. These events can be open or closed to the public and for the use of monetary profit by the Partnering agency.

Expectations of City of Union Parks & Recreation Department

- The Parks Director and the Parks & Recreation Department offers clean and safe facilities.

Expectations for Partnering Agencies

- The Partnering Agencies is responsible for legal and financial planning, management, facilitation and execution of programs, events and/or facilities.
- Partnering agency must fill out all necessary paperwork concerning the specific event.
- Partnering agency is required to furnish and keep current general liability insurance naming the City of Union its officers, agents, and employees as “additional insured” in the amount of \$1,000,000 per occurrence and \$2,000,000 aggregate. Furthermore, an Additional Insured Endorsement page naming the City of Union, its officers, agents and employees as additionally insured must be submitted. If they have employees, they are required to provide proof of Workers' Compensation and Employers' Liability with limits of \$1,000,000 per accident.
- Partnering agency must be considered a legal and recognized business structure or non-profit organization that is in good legal standing.

5. Category 5 – Non-Affiliated Public Use Partnerships

Definition – Public nonprofit activities and events that happen on City of Union property and facilities but have no direct collaboration with the City of Union Parks and Recreation Department. Partnering agency will fill out all rental forms and hold harmless/insurance forms. These events are open to the public and all funds raised go to nonprofit entities.

Expectations of City of Union Parks & Recreation Department

- The Parks Director and the Parks & Recreation Department offers clean and safe facilities.

Expectations for Partnering Agencies

- The Partnering Agencies is responsible for legal and financial planning, management, facilitation and execution of programs, events and/or facilities.
- Partnering agency must fill out all necessary paperwork concerning the specific event.
- Event or program must be open to the public with no restrictions.
- Partnering agency is required to furnish and keep current general liability insurance naming the City of Union its officers, agents, and employees as “additional insured” in the amount of \$1,000,000 per occurrence and \$2,000,000 aggregate. Furthermore, an Additional Insured Endorsement page naming the City of Union, its officers, agents and employees as additionally insured must be submitted. If they have employees, they are required to provide proof of Workers' Compensation and Employers' Liability with limits of \$1,000,000 per accident.
- Partnering agency must be considered a legal and recognized business structure or non-profit organization or that is in good legal standing.
- All Partnering agencies proceeds from the program or event must go to a federally recognized tax exempt organization.

6. Category 6 – Non-Affiliated Private Use Partnerships

Definition – Private nonprofit activities and events that happen on City of Union property and facilities but have no direct collaboration with the City of Union Parks and Recreation Department. Partnering agency will fill out all rental forms and hold harmless/insurance forms. These are private events and no funds are raised.

Expectations of City of Union Parks & Recreation Department

- The Parks Director and the Parks & Recreation Department offers clean and safe facilities.

Expectations for Partnering Agencies

- The Partnering Agencies is responsible for legal and financial planning, management, facilitation and execution of programs, events and/or facilities.
- Partnering agency must fill out all necessary paperwork concerning the specific event.

D. Guidelines for Consideration

Guidelines: All partnership applications will be evaluated based upon the following guidelines. The guidelines are broken out into required conditions and High, Medium, or Low priority considerations.

Required Conditions:

- The Partnership must comply with all applicable laws, rules and policies.
- The Partner must have the necessary competency, resources, or license(s) (if applicable) to engage in the proposed activity.
- The Partner must meet insurance coverage requirements as determined by the City of Union agreement standards.
- The Partner must agree to submit proposed activities to City of Union Parks & Recreation Department for review and approval.
- The Partner must agree to meet all applicable City of Union Parks & Recreation Department maintenance standards and construction requirements (if applicable)

1. High Priority Consideration

- Is the proposed Partnership activity consistent with City of Union Parks & Recreation Department current priorities?
- Does the Partnership provide public benefit?
- Does the Partnership meet the needs and interests of underserved or diverse populations?
- Does the Partnership engage diverse populations and groups?
- If the proposed Partnership activity displaces existing programs or other Partner programs, does it allow current resources to new programs and services, provide more benefit to the public or increase the efficiency of utilization of resources?
- Does the proposed activity add value?
- Does the Partnership help the Union Parks & Recreation Department to commit resources to other area in the future?
- Does the proposed Partnership have plans to mitigate public safety issues or concerns?

2. Medium Priority Consideration
 - Does the Partnership increase capacity to deliver or enhance the quality of existing programs or services?
 - Does the Partnership have the potential to reduce operating, maintenance or capital costs?
 - Will the Partnership provide money, labor (manual or employment), overall management or operational assistance?
3. Low Priority Consideration
 - Does the proposed Partnership activity negatively impact traffic, parking or the public's enjoyment of the park or facility?
 - Will the proposed Partnership activity create noise that will be a disturbance to users or the surrounding community?

E. Benefits of Partnering with the City of Union Parks & Recreation Department

The City of Union expects that any Proposed Partnership will have benefits for all involved parties. Some general expected benefits are:

Benefits for the City of Union and the Community:

- Merging of resources to create a higher level of service and facility availability for community members.
- Making alternative funding sources available for public community amenities.
- Tapping into the dynamic and entrepreneurial traits of private industry.
- Delivering services and facilities more efficiently by allowing for collaborative business solutions to public organizational challenges.
- Meeting the needs of specific groups of users through the availability of land for community use.

Benefits for the Partners:

- Land and/or facility availability at a subsidized level for specific facility and/or program needs.
- Sharing of the risk with an established stable governmental entity.
- Becoming part of a larger network of support for management and promotion of facilities and programs.
- Availability of professional recreation and planning experts to maximize the facilities and programs that may result.
- Availability of staff facilitation to help streamline the planning and operational efforts.

II. The Partnering Process

The steps for the creation of a partnership with the City of Union Parks & Recreation Department are as follows:

A. Notification

The City of Union Parks & Recreation Department will create a public notification process that will help inform any and all interested partners of the availability of partnerships with the Agency. This will be done at a minimum annually December 1st through notification in social media post, park advertisement screens, flyers and through any other notification method that is feasible.

B. Preliminary Proposal

The proposing partner takes the first step to propose partnering. To help in reviewing both the partnerships proposed, and the project to be developed in partnership, the City of Union Parks & Recreation Department asks for a **Preliminary Proposal** according to a specific format as outlined in *Part Two - Proposed Partnership Outline Format*.

C. Review

If initial review of a Preliminary Proposal yields interest and appears to be mutually beneficial the Program Coordinator will work with potential partners.

D. Planning

The Program Coordinator is available to answer questions related to the creation of an initial proposal, and after initial interest has been indicated, will work with the proposing partner to create a checklist of what actions need to take place next. Each project will have distinctive planning, design, review and support issues. The Program Coordinator will facilitate the process of determining how the partnership will address these issues. The Program Coordinator and the proposing partner can also facilitate input from the Parks Director, Parks Advisory Board, City Administrator and/or the Board of Aldermen providing guidance for the partners as to necessary steps.

E. Cost Evaluation

The partnership must cover the costs the partnership incurs, regardless of how the partnered project is staffed, and reflect those costs in its project proposal and budget. The proposal for the partnered project should also

discuss how staffing and expertise will be provided, and what documents will be produced. If City of Union Parks & Recreation staff resources are to be used by the partnership, those costs should be allocated to the partnered project and charged to it.

III. The Partnership Evaluation Process

A. Mission Statement and Goals

All partnerships with City of Union Parks & Recreation Department should be in accord with the Department's Mission and Goals. For purposes of example for this policy, the following sections utilize the Parks & Recreation Department's Mission and Goals to represent how a proposed partnership would be preliminarily evaluated:

**Mission Statement
Union Parks and Recreation Board**

We the Union Parks and Recreation department wish to touch all segments of the community in our endeavors to boost the Quality of Life. We will provide all users of the Union Parks facilities with safe, clean and well-organized areas. We will offer programs that encourage a healthy life style in mental as well as physical capacity. We will see that all monies, whether it be tax dollars or donations, are to be spent as a wise investment toward the present and future for the citizens of Union. As our community grows, we take the responsibility to expand our park system to meet our obligations to achieve our goals of maintaining the Quality of Life for all.

B. Other Considerations

1. Costs for the Proposal Approval Process

For most proposed partnerships, there will be considerable staff time spent on the review and approval process once a project passes the initial review stage. This time includes discussions with Proposing Partners, exploration of synergistic partnering opportunities, possible RFP processes, facilitation of the approval process, and assistance in writing and negotiating agreements, contracting, etc. There may also be costs for construction and planning documents, design work, and related needs and development review processes mandated by ordinances.

Successful Partnerships will take these costs into account and may plan for Parks & Recreation Department recovery of some or all of these costs within the proposal framework. Some of these costs could be reimbursed through a negotiated agreement once operations begin, or covered through some other creative means.

2. Need

The nature of provision of public services determines that certain activities will have a higher need than others. Some activities serve a relatively small number of users and have a high facility cost. Others serve a large number of users and are widely available from the private sector because they are profitable. The determination of need for facilities and programs is an ongoing discussion. The proposal will be evaluated based on how the project fulfills a public need.

3. Funding

Only when a Partnership Proposal demonstrates high unmet needs and high benefits for citizens, will the City of Union consider contributing resources. The Parks & Recreation Department recommends that Proposing Partners consider sources of potential funding. The more successful partnerships will have funding secured in advance. In most cases, Proposing Partners should consider funding and cash flow for initial development, staffing, and ongoing operation and maintenance.

The details of approved and pending funding sources should be clearly identified in a proposal.

For many partners, especially small private user groups, non-profit groups, and governmental agencies, cash resources may be a limiting factor in the proposal. It may be a necessity for partners to utilize alternative funding sources for resources to complete a proposed project. Getting alternative funding often demands creativity, ingenuity, and persistence, but many forms of funding are available.

Alternative funding can come from many sources, e.g. Sponsorships, Grants, and Donor Programs. All plans for using alternative funding should be clearly identified.

C. Selection Criteria

In assessing a partnership opportunity to provide facilities and services, the City of Union Parks & Recreation Department will consider (as appropriate) the following criteria. The Proposed Partnership Outline Format in Part Two gives a structure to use in creating a proposal. Proposing Partner and representatives will make an evaluation by attempting to answer each of the following Guiding Questions:

1. How does the project align with the City of Union Parks & Recreation Department's Mission Statement and Goals?
2. How does the Partnership meet the needs of City of Union residents?

3. How will the project generate more revenue and/or less cost per participant than the Parks & Recreation can provide with its own staff or facilities?
4. What are the alternatives that currently exist, or have been considered, to serve the users identified in this Proposed Partnership?
5. How much of the existing need is now being met?
6. What is the number and demographic profile of participants who will be served?
7. How can the proposing partner assure the City of Union long-term stability of the proposed partnership, both for operations and for maintenance standards?
8. How will the partnered project meet Americans with Disabilities Act and EEOC requirements?
9. How will the proposing partner offer programs at reasonable and competitive costs for participants?
10. What are the overall benefits for both the City of Union and the Proposing Partners?

PART TWO

Proposed Partnership Outline Format

(Sample format to be used by the Parks & Recreation Department)

Please provide as much information as possible in the following outline form.

I. Description of Proposing Organization

- Name of Organization
- Years in Existence
- Contact Names, Mailing Address
- Physical Address, Phone, Fax, E-mail • Purpose of Organization
- Services Provided
- Member/User Profiles
- Accomplishments
- Legal Status

II. Summary of Proposal (100 words or less)

What is being proposed?

III. Benefits to the Partnering Organization

Why is your organization interested in partnering with the City of Union Parks & Recreation Department? Please individually list and discuss the benefits (monetary and non-monetary) for your organization.

IV. Benefits to the City of Union Parks & Recreation Department

Please individually list and discuss the benefits (monetary and non-monetary) for the City of Union Parks & Recreation Department and residents of the Agency.

V. Details (as currently known)

The following page lists a series of **Guiding Questions** to help you address details that can help outline the benefits of a possible partnership. Please try to answer as many as possible with currently known information. Please include what your organization proposes to provide and what is requested of the City of Union Parks & Recreation Department. Please include (as known) initial plans for your

concept, operations, projected costs and revenues, staffing, and/or any scheduling or maintenance needs, etc.

Guiding Questions

Meeting the Needs of our Community:

- In your experience, how does the project align with park and recreation goals?
- How does the proposed program or facility meet a need for Agency residents?
- Who will be the users?
- What is the projected number and profile of participants who will be served?
- What alternatives currently exist to serve the users identified in this project?
- How much of the existing need is now being met?
- What is the availability of similar programs elsewhere in the community?
- Do the programs provide opportunities for entry-level, intermediate, and/or expert skill levels?

The Financial Aspect:

- Can the project generate more revenue and/or less cost per participant than the Agency can provide with its own staff or facilities?
- Will your organization offer programs at reasonable and competitive costs for participants?
- What are the anticipated prices for participants?
- What resources are expected to come from the Parks & Recreation Department?
- Will there be a monetary benefit for the Agency, and if so, how and how much?

Logistics:

- How much space do you need? What type of space?
- What is your proposed timeline?
- What are your projected hours of operations?
- What are your initial staffing projections?
- Are there any mutually-beneficial cooperative marketing benefits?

- What types of insurance will be needed and who will be responsible for acquiring and paying premiums on the policies?
- What is your organization's experience in providing this type of facility/program?
- How will your organization meet Americans with Disabilities Act and EEO requirements?

Agreements and Evaluation:

- How, by whom, and at what intervals should the project be evaluated?
- How can you assure the Agency of long-term stability of your organization?
- What types and length of agreements should be used for this project?
- What types of “exit strategies” should we include?
- What should be done if the project does not meet the conditions of the original agreements?