

# *Pearland Parks & Recreation*

## **Partnership Policy and Proposal Format**

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**Pearland Parks and Recreation Department  
Partnership Policy  
And Proposal Format**

**Table of Contents**

<i>Part One</i>	<b><u>Page</u></b>
I. The Pearland Parks and Recreation Department Partnership Policy	
A. Purpose	3
B. Background and Assumptions	4
C. Partnership Definition	5
D. Possible Types of Partners	6
E. Sponsorships	7
F. Limited Decision-Making Partnerships	7
G. Benefits of Partnerships	8
II. The Partnering Process	9
III. The Partnership Evaluation Process	
A. Mission and Goals	11
B. Other Considerations	11
C. Selection Criteria	13
D. Additional Assistance	14
 <i>Part Two</i>	
The "Proposed Partnership Outline Format"	15

# I. Pearland Parks & Recreation Department Partnership Policy

## A. Purpose

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

Pearland Parks & Recreation Department would like to identify for-profit, non-profit, and governmental entities that are interested in proposing to partner with the City to develop recreational 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 including the City, and particularly beneficial 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 the Pearland Parks and Recreation Department and the community.

**Part Two: The “Proposed Partnership Outline Format”**, provides a format that is intended to help guide Proposing Partners in creating a proposal for review by Pearland Parks and Recreation Department 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.

### **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 City functions to a non-City 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 City is always open to suggestions for improving services and cost savings through contractual arrangements. If you have an idea for privatization of current City functions, please call or outline your ideas in a letter for the City'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 Board or Trustees, a council, and/or department head.
- The most successful agencies have high-ranking officials that believe that they owe it to their citizens to explore partnering opportunities whenever presented, those communities both solicit partners and consider partnering requests brought to them.
- 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

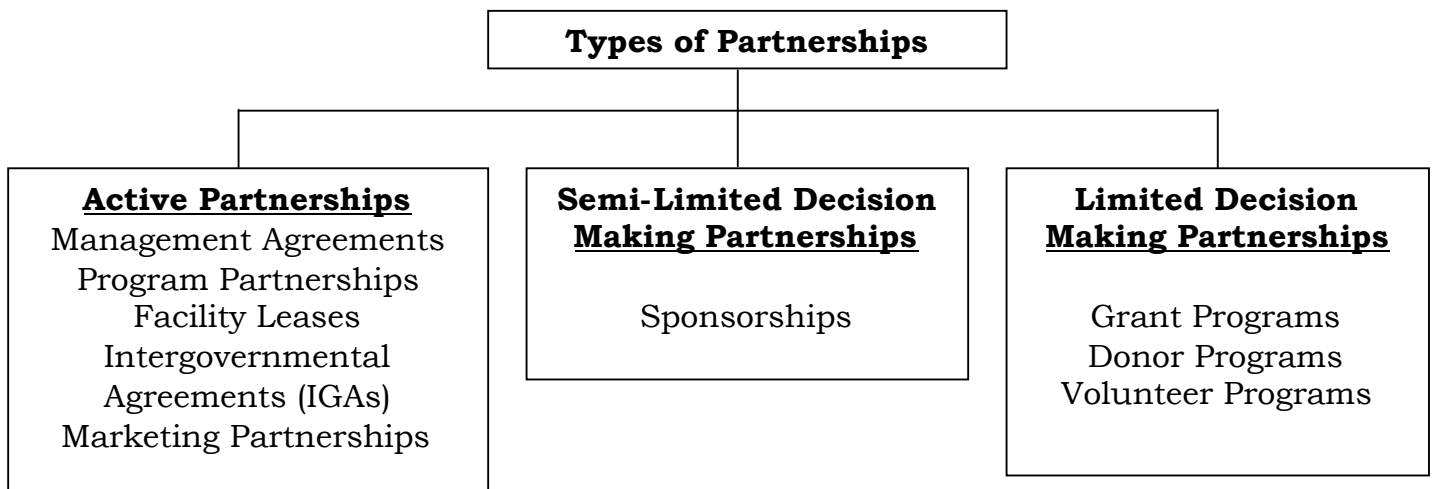
For purposes of this document and policy, a Proposed Partnership is defined as:

**"An identified idea or concept involving Pearland Parks and 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 City 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 the Pearland Parks and Recreation Department partnerships is enhancing public offerings to meet the mission and goals of the City. Pearland Parks and Recreation Department 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.

Partnerships can take the form of (1) cash gifts and donor programs, (2) improved access to alternative funding, (3) property investments, (4) charitable trust funds, (5) labor, (6) materials, (7) equipment, (8) sponsorships, (9) technical skills and/or management skills, and other forms of value. The effective use of volunteers also can figure significantly into developing partnerships. Some partnerships involve active decision making, while in others, certain partners take a more passive role. The following schematic shows the types of possible partnerships discussed in this policy:



## **D. Possible Types of Active Partnerships**

Pearland Parks and Recreation Department is interested in promoting collaborative partnerships among multiple community organizations. Types of agreements for Proposed "Active" Partnerships may include leases, contracts, sponsorship agreements, marketing agreements, management agreements, joint-use agreements, inter-governmental agreements, or a combination of these. An innovative and mutually beneficial partnership that does not fit into any of the following categories may also be considered.

Proposed partnerships will be considered for facility, service, operations, and/or program development including associated needs, such as parking, paving, fencing, drainage systems, signage, outdoor restrooms, lighting, utility infrastructure, etc.

The following examples are provided only to illustrate possible types of partnerships. They are not necessarily examples that would be approved and/or implemented.

### **Examples of Public/Private Partnerships**

- A private business seeing the need for more/different community fitness and wellness activities wants to build a facility on City land, negotiate a management contract, provide the needed programs, and make a profit.
- A private group interested in environmental conservation obtains a grant from a foundation to build an educational kiosk, providing all materials and labor, and is in need of a spot to place it.
- Several neighboring businesses see the need for a place for their employees to work out during the work day. They group together to fund initial facilities and an operating subsidy and give the facility to the City to operate for additional public users.
- A biking club wants to fund the building of a race course through a park. The races would be held one night per week, but otherwise the path would be open for public biking and in-line skating.
- A large corporate community relations office wants to provide a skatepark, but doesn't want to run it. They give a check to the City in exchange for publicizing their underwriting of the park's cost.
- A private restaurant operator sees the need for a concessions stand in a park and funds the building of one, operates it, and provides a share of revenue back to the City.

- A garden club wants land to build unique butterfly gardens. They will tend the gardens and just need a location and irrigation water.

#### Examples of Public/Non-Profit Partnerships

- A group of participants for a particular sport or hobby sees a need for more playing space and forms a non-profit entity to raise funds for a facility for their priority use that is open to the public during other hours.
- A non-profit baseball association needs fields for community programs and wants to obtain grants for the building of the fields. They would get priority use of the fields, which would be open for the City to schedule use during other times.
- A museum funds and constructs a new building, dedicating some space and time for community meetings and paying a portion of revenues to the City to lease its land.

#### Examples of Public/Public Partnerships

- Two governmental entities contribute financially to the development and construction of a recreational facility to serve residents of both entities. One entity, through an IGA, is responsible for the operation of the facility, while the other entity contributes operating subsidy through a formula based on population or some other appropriate factor.
- Two governmental public safety agencies see the need for more physical training space for their employees. They jointly build a gym adjacent to City facilities to share for their training during the day. The gyms would be open for the City to schedule for other users at night.
- A school district sees the need for a climbing wall for their athletes. The district funds the wall and subsidizes operating costs, and the City manages and maintains the wall to provide public use during non-school hours.
- A university needs meeting rooms. They fund a multi-use building on City land that can be used for City community programs at night.

#### **E. Sponsorships**

Pearland Parks and Recreation Department is interested in actively procuring sponsorships for facilities and programs as one type of beneficial partnership. Please see *the Pearland Parks and Recreation Department Sponsorship Policy* for more information.

## **F. Limited-Decision Making Partnerships: Donor, Volunteer, and Granting Programs**

While this policy document focuses on the parameters for more active types of partnerships, the City is interested in, and will be happy to discuss, a proposal for any of these types of partnerships, and may create specific plans for such in the future.

## **G. Benefits of Partnerships with Pearland Parks and Recreation Department**

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

### *Benefits for the City 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 development and 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 City recreation and planning experts to maximize the facilities and programs that may result
- Availability of City staff facilitation to help streamline the planning and operational efforts.

## II. The Partnering Process

The steps for the creation of a partnership with the Pearland Parks and Recreation Department are as follows:

- A. Pearland Parks and Recreation Department will create a public notification process that will help inform any and all interested partners of the availability of partnerships with the City. This will be done through notification in area newspapers, listing in the brochure, or through any other notification method that is feasible.
- B. The proposing partner takes the first step to propose partnering with the City. To help in reviewing both the partnerships proposed, and the project to be developed in partnership, the City asks for a **Preliminary Proposal** according to a specific format as outlined in *Part Two - Proposed Partnership Outline Format*.
- C. If initial review of a Preliminary Proposal yields interest and appears to be mutually beneficial based on the City Mission and Goals, and the Selection Criteria, a City staff or appointed representative will be assigned to work with potential partners.
- D. The City representative 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 City representative will facilitate the process of determining how the partnership will address these issues. This representative can also facilitate approvals and input from any involved City departments, providing guidance for the partners as to necessary steps.
- E. An additional focus at this point will be determining whether this project is appropriate for additional collaborative partnering, and whether this project should prompt the City to seek a **Request for Proposal (RFP)** from competing/ collaborating organizations.

**Request for Proposal (RFP) Trigger:** In order to reduce concerns of unfair private competition, if a proposed project involves partnering with a private "for-profit" entity and a dollar amount greater than \$5,000, and the City has not already undergone a public process for solicitation of that particular type of partnership, the City will request Partnership Proposals from other interested private entities for identical and/or complementary facilities, programs or services. A selection of appropriate partners will be part of the process.

- F. For most projects, a **Formal Proposal** from the partners for their desired development project will need to be presented for the City's official development review processes and approvals. The project may require approval by the Legal, Planning, Fire and Safety, Finance and/or other City Departments, Parks and

Recreation Advisory Board, Planning Board, The Board of Trustees, and/or the City Manager's Office, depending on project complexity and applicable City Charter provisions, ordinances or regulations. If these reviews are necessary, provision to reimburse the City for its costs incurred in having a representative facilitate the partnered project's passage through Development Review should be included in the partnership proposal.

- G. Depending on project complexity and anticipated benefits, responsibilities for all action points are negotiable, within the framework established by law, to assure the most efficient and mutually beneficial outcome. Some projects may require that all technical and professional expertise and staff resources come from outside the City's staff, while some projects may proceed most efficiently if the City contributes staff resources to the partnership.
- H. 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 staff resources are to be used by the partnership, those costs should be allocated to the partnered project and charged to it.
- I. Specific **Partnership Agreements** appropriate to the project will be drafted jointly. There is no specifically prescribed format for **Partnership Agreements**, which may take any of several forms depending on what will accomplish the desired relationships among partners. The agreements may be in the form of:
- Lease Agreements
  - Management and/or Operating Agreements
  - Maintenance Agreements
  - Intergovernmental Agreements (IGAs)
  - Or a combination of these and/or other appropriate agreements

Proposed partnership agreements might include oversight of the development of the partnership, concept plans and project master plans, environmental assessments, architectural designs, development and design review, project management, and construction documents, inspections, contracting, monitoring, etc. Provision to fund the costs and for reimbursing the City for its costs incurred in creating the partnership, facilitating the project's passage through the Development Review Processes, and completing the required documents should be considered.

- J. If all is approved, the Partnership begins. The City is committed to upholding its responsibilities to Partners from the initiation through the continuation of a partnership. Evaluation will be an integral component of all Partnerships. The agreements should outline who is responsible for evaluation, the types of measures used, and detail what will occur should the evaluations reveal Partners are not meeting their Partnership obligations.

### III. The Partnership Evaluation Process

#### A. Mission Statements and Goals

All partnerships with Pearland Parks and Recreation Department should be in accord with the City's and the Parks and Recreation Department's Mission and Goals to indicate how a proposed partnership for that Department would be preliminarily evaluated:

#### **VISION STATEMENT**

To be the leader in providing quality services that connect the community through people, parks, and programs.

#### **MISSION STATEMENT**

Pearland Parks & Recreation is dedicated to multiplying the Q<sup>4</sup> factor: quality facilities, quality programs, quality service for your quality of life.

#### **CORE PRINCIPLES**

We are results-oriented by continuously striving to provide an environment that enhances the quality of life for the residents of Pearland.

We are responsive to the community needs by providing quality services that enhance the health and well-being of the individual and the Pearland community.

We are accountable and trustworthy by upholding our positive reputation and high standards through the delivery of excellent customer service, quality parks, facilities, programs and events.

#### 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, 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 City ordinances.

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

## ***2. Land Use and/or Site Improvements***

Some proposed partnerships may include facility and/or land use. Necessary site improvements cannot be automatically assumed. Costs and responsibility for these improvements should be considered in any Proposal. Some of the general and usual needs for public facilities that may not be included as City contributions and may need to be negotiated for a project include:

- Any facilities or non-existent infrastructure construction
- Roads or street improvements
- Maintenance to specified standards
- Staffing
- Parking
- Lighting
- Trash removal
- Outdoor restrooms
- Water fountains
- Complementary uses of the site
- Utility improvements (phone, cable, storm drainage, electricity, water, gas, sewer, etc.)
- Custodial services

## ***3. 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 in public provision of programs and amenities. The project will be evaluated based on how the project fulfills a public need.

## ***4. Funding***

Only when a Partnership Proposal demonstrates high unmet needs and high benefits for City citizens, will the City consider contributing resources at a below market value to a project. The City 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 capital 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. Obtaining 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. Developing a solid leadership team for a partnering organization will help find funding sources. In-kind contributions can in some cases add additional funding.

All plans for using alternative funding should be clearly identified. The City has an established Sponsorship Policy, and partnered projects will be expected to adhere to the Policy. This includes the necessity of having an Approved Sponsorship Plan in place prior to procurement of sponsorships for a Partnered Project.

### **C. Selection Criteria**

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

- How does the project align with the City and affected Department's Mission Statement and Goals?
- How does the proposed facility fit into the current City and the affected Department's Master Plan?
- How does the facility/program meet the needs of City residents?
- How will the project generate more revenue and/or less cost per participant than the City can provide with its own staff or facilities?
- What are the alternatives that currently exist, or have been considered, to serve the users identified in this project?
- How much of the existing need is now being met within the City borders and within adjacent cities?
- What is the number and demographic profile of participants who will be served?
- How can the proposing partner assure the City of the long-term stability of the proposed partnership, both for operations and for maintenance standards?
- How will the partnered project meet Americans with Disabilities Act and EEOC requirements?
- How will the organization offer programs at reasonable and competitive costs for participants
- What are the overall benefits for both the City and the Proposing Partners?

## **Additional Assistance**

Pearland Parks and Recreation Department is aware that the partnership process does entail a great deal of background work on the part of the Proposing Partner. The following list of resources may be helpful in preparing a proposal:

- Courses are available through local colleges and universities to help organizations develop a business plan.
- Reference Librarians at local libraries can be very helpful in identifying possible funding sources and partners, including grants, foundations, financing, etc.
- Relevant information including the City of Pearland Comprehensive Plan, the Parks and Recreation Master Plan, site maps, and other documents are available at the City Hall or on the City of Pearland website at [www.cityofpearland.com](http://www.cityofpearland.com). These documents may be printed, copied or reviewed. There may be a cost associated to obtaining these documents.
- **If additional help or information is needed, please call 281-652-1673.**

*Part Two*

# Proposed Partnership Outline Format

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

**I. Description of Proposing Organization:**

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

**II. Decision Making Authority**

Who is authorized to negotiate on behalf of the organization? Who or what group (i.e. Council/Commission/Board) is the final decision maker and can authorize the funding commitment? What is the timeframe for decision making?

**Summary of Proposal** (100 words or less)

What is being proposed in terms of capital development, and program needs?

**III. Benefits to the Partnering Organization**

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

**IV. Benefits to the Pearland Parks and Recreation Department**

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

**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 Pearland Parks and 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 Pearland Park and Recreation vision, mission and core beliefs?
- How does the proposed program or facility meet a need for City 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 City 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 City, and if so, how and how much?

### *Logistics:*

- How much space do you need? What type of space?
- What is critical related to location?
- 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 City 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?