

POLICY No. 2011-01

Community Partnership Program

Originating Department PED-COM-15-2011
SMT Approval: Select a Date
Council in Committee: 2011-05-09 **Recommendation #:** 6
Council Approval: 2011-05-16 **Resolution #:** 99-11
Revision History: [Click here for revision history](#)

1. PURPOSE

The purpose of this policy is to provide a comprehensive partnership model and process capable of guiding the identification, pursuit and/or evaluation of potential not-for-profit partners to develop community assets on County-owned property. The policy will ensure a fair, clear and consistent approach to identifying and evaluating partnership opportunities. It is the intent of Haldimand County to encourage, support and maximize these partnership opportunities through the implementation of this policy.

2. POLICY

Background:

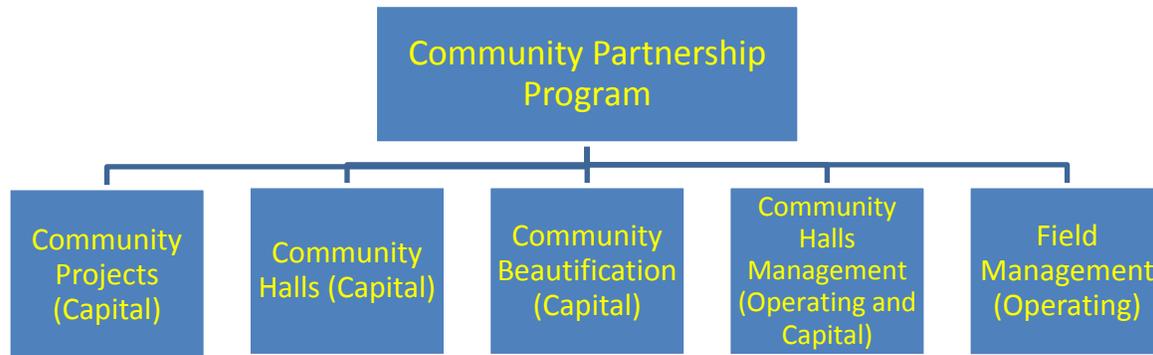
Haldimand County currently partners with a number of not-for-profit community groups and agencies to support facilities/assets on County-owned property (i.e. community hall management, field management, Community Partnership (Beautification) Program). The County has operating relationships with community and not-for-profit groups, working relationships with special interest groups, service contracts and agreements with school boards, hall management groups and field associations.

Partnerships are an effective strategy to achieve the County's goals. As such, there is a need for a standardized approach to partnership development which assists the County in identifying and prioritizing appropriate projects where partnerships are suitable, a mechanism to fairly and equitably assess potential and existing partnerships and a means to make decisions related to partnering with outside interests.

The County had existing policies regarding: (i) the Community Partnership (Beautification) Program; (ii) Community Halls capital funding; (iii) Community Halls management agreements; and, (iv) draft Field Management agreements. The County has also recently committed funding for the development of community capital projects which build on existing partnerships and opportunities and fill funding gaps.

A comprehensive Community Partnership Program policy will encourage and actively support partnerships with not-for-profit community groups while guiding all of the above-noted programs. The Community Partnership Program (CPP) will provide the principles and framework for Haldimand County's capital and management arrangements with community groups. Through the CPP, Haldimand County will provide three streams of capital funding

for community groups to access (one of which—the Community Projects Capital Fund—is new; the remaining two—the Community Halls and Community Beautification Funds—are existing programs which will be revised to reflect the new Community Partnership Principles). Lastly, the Capital Halls and Field Management agreements and processes will be reviewed to reflect the new partnership principles and objectives.



The Community Partnership Program policy and process will ensure a single entry-point for proposals from groups and/or individuals to the County as well as a fair and consistent approach to reviewing, assessing, supporting and approving community proposals.

3. DEFINITIONS

- 3.1 *Principles*: Outlines the general philosophy and basic eligibility of potential partners, and ensures that all requests will be reviewed in a clear, fair and consistent manner.
- 3.2 *Partner/Community Group*: A community-based volunteer board of directors on behalf of a not-for-profit, incorporated group/organization or an established community association or private sector business or organization.
- 3.3 *Solicited Proposal*: Any request that is initiated by Haldimand County.
- 3.4 *Unsolicited Proposal*: Any request that is initiated by a community group/agency and/or individual.
- 3.5 *Strategic Plan*: The process of defining the partner/project's strategy or direction, including identifying required resources (capital and people). The strategic plan might include an analysis of socio-cultural, technological, economic, ecological and regulatory factors (STEER) and is a formal consideration of a project/partner's future course. All strategic planning should address at least one of three key questions: "What do we do?", "For whom do we do it?", and, "How do we excel?".
- 3.6 *Capital*: Haldimand County uses the definition of Tangible Capital Assets from the Public Sector Accounting Board. As well, the County utilizes principles to determine when an item should be deemed a 'capital' asset for financial reporting purposes.
- 3.7 *Existing Initiative*: An enhancement to or accelerated replacement of an existing asset or service currently provided by Haldimand County.

- 3.8 *New Initiative:* An asset or service that is not currently provided by Haldimand County.
- 3.9 *Partnership Parameters:* The guiding principles by which Haldimand County determines eligibility of potential partners.
- 3.10 *Partnership Criteria:* The details by which Haldimand County assesses potential partners and their proposals.
- 3.11 *Wide Scope of Interest:* An initiative or asset that affects more than one user group or has identified value for tourism and/or economic development. This project would have a positive effect to the community-at-large or the County as a whole.
- 3.12 *Narrow Scope of Interest:* An initiative or asset that affects only the user group or entity, or a specific segment of the community.
- 3.13 *Project Proposal:* A detailed outline of the proposed initiative or asset, including all required resources (financial and human, including volunteer time and equipment), timelines, implementation, sustainability and reconciliation. The Plan should further address the community need or benefit in implementing the initiative/asset.
- 3.14 *Project Review & Implementation:* Projects will be reviewed by a staff team with a view to helping the community group—as much as possible—succeed with its vision. While the County will use a rigorous evaluation and pre-consultation process to ensure the need, benefit and viability of the project, it will also help community groups identify and source relevant financial and other supports to maximize the success of the project.
- 3.15 *Appeals Process:* The process through which community groups will have an opportunity to appeal a decision recommended by staff.
- 3.16 *Grant/Release of Funds:* Following approval of a project, an outline will be developed regarding the release of funds from Haldimand County. Timing will relate to (i) ensuring the group's ability to begin initial work on the project (i.e. release of a percentage of funds to support the planning and development of the project); and, (ii) the achievement of targets and thresholds during the project.
- 3.17 *Reporting/Reconciliation:* Depending upon the size/scope of the project, groups will be required to provide interim report(s) and/or a final report.

4 RESPONSIBILITIES

- 4.1 *Scope:*

This policy applies to all requests from community groups and/or individuals to initiate or enhance a new or existing asset or service that takes place on County land. Further, the policy addresses the principles and criteria for assessing Haldimand County funding through the three community capital streams (Community Projects, Community Halls and Community Beautification) and the community halls and field management operating agreements.
- 4.2 *Partnership Principles:*

Through broad-based community consultation, the following principles have been identified and approved by Haldimand County Council (January 2011):

1. That all potential partnership proposals are vetted through one entry point and process in the County.
2. That the County only partner when the proposed projects and/or agreements are in alignment with Council's strategic objectives and one or more of the strategic plans and priorities for the County.
3. The project responds to a demonstrated community need and/or is supported by a well-researched and sound financial plan.
4. That all potential partners are able to demonstrate a positive impact (short- and long-term) of the project in terms of measuring outcomes, benefit and/or value added in the community and methods of evaluation.
5. That all potential partners (public and private) must demonstrate capacity to fulfill the roles and obligations outlined in the project/agreement/policy criteria including organizational capacity, functional capacities and financial accountability (short- and long-term).

4.3 *Partnership Criteria:*

In order to put the above-noted Principles into practice, a series of Partnership Criteria was developed using best practices (some of which were already being utilized by Haldimand County) and input from community consultation. These criteria have been reviewed with community stakeholders and have broad support.

In order for a request to be considered for any of the funding streams, it must meet **at least two** or more of the following objectives:

- Creates or maintains public infrastructure;
- Improves customer service;
- Reduces the cost of government services by optimizing the use of public sector resources;
- Provides public agencies and community groups with greater access to new sources of capital funding;
- Capitalizes on collective energies and expertise of participating partners;
- Addresses major social or economic issues or initiatives; and,
- Removes barriers to services and facilities by providing accessibility.

Once objectives have been met, the proposal will be evaluated using the following **criteria:**

1. The potential partner's compliance with the County's corporate values and evidence of a public service attitude and commitment.
2. Supports at least one of the three strategic pillars of Haldimand County: Economic Opportunity, Community Health/Vibrancy or Efficient Government/Corporate Image.
3. Confirmation that there is legal authority to undertake the proposal.
4. The proposition responds to a demonstrated need or presents an attractive benefit to Haldimand County's public service.
5. There is clear and measurable community benefit and/or economic impact spin-offs within the municipality.
6. There are revenue/cost and operating advantages to the proposal, relative to the County's ability to deliver the service.
7. There is value inherent in the proposal that would provide the municipality with enhanced levels of service.
8. The proponent is capable of demonstrating operating and technical qualifications and financial ability commensurate with the nature and scope of the project.
9. The project will not create and can mitigate any environmental concerns.

10. The proposal includes a risk analysis (financial, continuity of service, public relations, liability, etc.) that is acceptable to the County.
11. The proposal includes a benefit analysis for both the municipality and the proponent that is acceptable to the County.
12. The proposal maintains the general intent of any applicable urban design guidelines and streetscape plan.
13. The proposal includes compliance under the Accessibility for Ontarians with Disabilities Act as well as any other regulatory compliance.
14. The proposal has received approval from applicable governing agencies (example: Grand River Conservation Authority).

While it is important that projects meet certain criteria, the intent of the Community Partnership Program—and its four funding streams—is to maximize the ease and success of groups wishing to initiate community projects.

4.4 *Partnership Formula:*

Haldimand County has developed its partnership funding formula through a process that incorporates elements consistent with previously successful granting programs, current best practices and community consultation and support.

Given that it is the goal of Haldimand County to enhance financial and in-kind support to community groups through this process, the CPP intends to balance the rigor of the review process with flexibility. Community opportunities which may present an exception to the policy can be assessed through an appeals process or by an exception to the policy (which would be reviewed by Council).

4.5 *Process:*

1. All community groups/individuals submitting a proposal must meet with the County's Community Partnership Liaison staff in order to discuss/review the proposed project for eligibility. Based upon this meeting/discussion, a customized pre-consultation and application form will be prepared for the group.
2. All proposals for Community Partnership Program funding or support must be completed on the appropriate form/application.
3. Once a proposal is received, eligibility will be determined by using the partnership criteria. Funding will be determined using the relevant partnership formula, and all applicants will be notified as to their eligibility and consideration by Haldimand County. All applications will be reviewed by a staff team. Groups wishing to appeal a decision may do so through a presentation to Council; as well, exceptions to the policy may be presented for review by Council.
4. All Community Partnership initiatives will be administered in keeping with the County's applicable policies and standards (i.e. planning and development, by-law, procurement, Health and Safety, charitable receipts, etc.).
5. All fund-raising initiatives related to the application must be included in the initial Project Plan and/or County staff must be made aware of any new/amended fund-raising activities.
6. Groups will be provided with a final report/reconciliation which is to be submitted no later than one year after the completion of the project. As well, depending upon the size/scope of the project and the funding request, interim reports will be required.

5 REFERENCES

- 5.1 Community Partnership Program Principles
- 5.2 Accessibility Standards for Customer Service Policy

- 5.3 Accountability and Transparency Policy
- 5.4 Cash Management and Investments Policy
- 5.5 Community Halls Capital Funding Policy
- 5.6 Grant to Organizations (Community Partnership Program) Policy

REVISION HISTORY					
REPORT	CIC		COUNCIL		DETAILS
	Date	Rec#	Date	Res#	
	Date	Rec#	Date	Res#	
	Date	Rec#	Date	Res#	
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