



PORTLAND PARKS & RECREATION

Healthy Parks, Healthy Portland

POLICY NAME: Friends & Allied Partners *(1/30/10 FINAL DRAFT)*

Policy Category: Workforce & Community Alliances

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Authorized By:
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The Value of Collaborative Partnership

The success of Portland Parks & Recreation (PP&R) depends on the support, assistance and enthusiasm of the public, as stewards of their parks and recreation system. Public parks and recreation are essential elements in the vibrant life of the city.

Each year, tens of thousands of Portlanders help the city's parks, natural areas, trails, playgrounds, athletic and recreational facilities/programs flourish through individual volunteerism or through work with a host of organized PP&R ***"Friends and Allied Partners."***

Out of a commitment to protect the public interest and the "commonwealth," friends and allied partner groups donate hundreds of thousands of hours of skilled and unskilled labor, as well as cash, materials, equipment and infrastructure improvements that build and strengthen the parks and recreation system, prized so much by local residents. These partner groups are genuinely committed to protect the the "commonwealth" that the historic parks and recreation system represents.

These friends and allied partners have demonstrated service that is transformative for parks and recreation in Portland. Public spaces and programs that thrive, rather than simply survive, are those that have active allies caring and advocating for them. This is fundamentally Portland.

The intent of this policy is one of mutual benefit for the friends/allied partner group and its collaborative partner, Portland Parks & Recreation. There is no intent to add to the complexity or "bureaucracy" of any group but rather to clarify value, obligations and expectations one to the other. This policy includes input from Parks Commissioner, PP&R management, staff liaisons, friends and allied partner groups and the public at-large.

Policy Statement

Portland Parks & Recreation will foster and nurture friends and allied partners to increase community support and stewardship for its public spaces and recreation programs. PP&R works to reinforce and promote existing friends and allied partner groups while orienting and supporting new ones.

This policy is intended to describe the protocols and practices to engage allied partners that may be formally sanctioned by City Code (e.g. via leases, licenses, agreements), as well as those groups that are informally organized and individuals.

PP&R has prioritized its allied partnership efforts as a primary business model for the Bureau. Public-private partnerships build trust and commitment, expand awareness and

understanding, and advance mutual goals. These partnerships can also provide much needed capital to finance PP&R programs and projects, thereby freeing public funds for other PP&R services. This Policy confirms that public-private partnerships are preferred as a procurement practice to achieve best value for the delivery of PP&R services or provision of park and recreation infrastructure.

Inasmuch as the City is the sole property owner of land and structures, with PP&R assigned stewardship and management responsibilities; decisions concerning the greenspace/facility, all capital improvements, its maintenance and operation of facilities and services, are the primary responsibility of PP&R. In some instances, the friends or allied partner group assumes “mutual (or co-) responsibility,” with both parties accountable for the success of the relationship and interests. In rare instances, the friends or allied partner group actually owns land or amenities.

Mutual responsibility for or joint management of a partnership denotes a highly developed and sophisticated level of commitment, often referred to as “collaboration.” Different levels of commitment on the continuum from high commitment and high risk to low commitment and low risk are described below:

HIGH COMMITMENT – HIGH RISK
<p>Collaboration – Involves organizations exchanging information, altering activities and sharing resources (including financial resources) where appropriate. Collaborative parties <u>enhance each others’ capacity for mutual benefit and a common purpose</u> by sharing risks, responsibilities and rewards.</p>
<p>Coordination – Involves <u>commitment to common objectives</u> through working together, altering activities and sharing information and resources.</p>
<p>Cooperation – Involves <u>sharing/networking information</u> to improve service delivery.</p>
LOW COMMITMENT – LOW RISK

Adapted from Fylde Borough (United Kingdom) Council “Partnership Working Policy”

Central to any successful public-private partnership initiative is the identification of risk associated with each component of the project. The desired balance to ensure best value (for economic, environmental or social benefit) is based on an allocation of risk factors to the participants who are best able to manage those risks and thus minimize costs while improving performance. Partnerships must:

- Ensure PP&R services are delivered in the most effective and efficient manner
- Ensure the best interests of the public and the community are served through an appropriate allocation of risks and returns shared by the partners

Best Practices

Focus on Important Needs. PP&R must first determine whether a partnership is the best way to accomplish an important objective. If yes, in most cases PP&R agrees to a partnership proposal, seeks out an existing group worth collaborating with or creates a new group/partner.

Align Shared Vision and Mission. Develop and refine a shared vision of work to be accomplished. The vision should reflect both the broad body of work (mission) and each project or initiative to be undertaken.

Practice Fairness and Transparency. Provide a consistent, fair and open review process to be followed for all initiatives.

Negotiate a Formal Agreement. Partnerships need formal written agreements and work plans that clearly state risks, responsibilities, mutual interests and expectations, and define roles, responsibilities, and accountabilities for each partner.

Document Risk Sharing. Determine which partner is best suited to manage and mitigate each risk or responsibility.

Ensure Good Communication. The success of every partnership is dependent upon the structure, frequency and quality of communication between the partners.

Maintain an Environment of Trust. Trust is an essential ingredient for successful partnerships and enables collaboration and contribution.

Honor Commitments. Partnerships require a shared commitment to each other's success.

Network and Build Relationships. Successful partnership efforts establish formal systems to identify people who can add value and support.

Honor Diversity and Inclusivity. Diverse group leadership, membership and service recipients provide value and continuous improvement to any partnership.

Ensure Cultural Sensitivity. Cultural sensitivity and proficiency ensures partners have the skills to provide a parks and recreation system that is relevant to people of all ages, genders, ethnicities and cultures.

Provide Sustainability. Partnerships focused on sustainability ensure access to a parks and recreation system for generations to come.

Offer Competence. Partnerships build capacity so that the private partners can take on increased responsibility over time. This allows PP&R to strengthen other important areas within the park and recreation system where friends/allied partner groups do not yet exist.

Spectrum of Friend & Allied Partner Functions

Advisory: Provide advice and guidance to PP&R staff on a particular aspect or element of the PP&R system, may be officially endorsed by City Council or PP&R, or ad hoc.

Agreement form: informal letter of agreement or memorandum of understanding, or in many cases none.

Advocacy: Provide support for the parks and recreation system, or an identified element of the system. Advocacy is expressed through public testimony during formal City hearings, discussions and written correspondence with key decision makers and key stakeholders, sponsorship, raising cash or in-kind contributions and volunteering time to enhance PP&R services and amenities.

Agreement form: City ordinance, sponsorship agreement, memorandum of understanding, volunteer agreements, or in some cases none.

Shared Responsibilities for Service Provision: Joint programming and shared results between PP&R and its partner. Partner is usually a formalized entity (non-profit, private or public) with responsibilities for enhancing or improving PP&R program operations or services. Partner provides limited financial investment beyond collection of fees or in-kind provision of goods and services compared to PP&R's financial investment.

Agreement form: Formal City approved and endorsed agreements, most cases requiring City Council approval – PP&R park permit, license agreement, concession agreement, PP&R friends agreement, management agreement or memorandum of understanding.

Independent Program Operation of Site: Partner has a shared mission with PP&R and a demonstrated capability to invest significant financial and technical resources to almost independently operate a PP&R owned property. While the partner has to manage the site to PP&R approved policies, rules and standards, the day-to-day operations are completed without significant PP&R involvement. Some site or building maintenance functions may remain with PP&R.

Agreement form: Formal City approved and endorsed agreement, many cases requiring City Council approval – PP&R park permit, license agreement, concession agreement, management agreement and real property lease.

Partner Finances, Builds, Operates and Maintains Facility: Partner has shared goals and mission with PP&R and the capability to finance, build, operate and maintain a facility to the mutual benefit of the partner, PP&R and the community. Partner abides by PP&R policies, rules and standards via a formal long-term agreement with limited involvement by PP&R. Capital improvements made by the partner may be transferred to PP&R at the conclusion of the agreement.

Agreement form: Real property lease.

Principles, Roles & Responsibilities

The following items form the basis of Portland Parks & Recreation's support and obligations to allied partners and friends:

1. VISION:
 - a. PP&R demonstrates the **value of partnership with** friends and allied partner groups through communication, cooperation and collaboration.
 - b. PP&R **dedicates staff** to the development of allied partner and friends organizations. In addition, a staff liaison shall be responsible for keeping PP&R abreast of all pertinent information and activities of the friend or allied partner group, shall attend at least one partner meeting per year and may hold an ex-officio membership spot on the group's board.
 - c. PP&R provides information on current and shifting **strategic goals**, plans and initiatives, as well as reminders of the overall vision and mission of the park and recreation system.
2. PROCESS & STRUCTURE:
 - a. A **survey** of friends and allied partners will be conducted periodically for the purpose of identifying highest needs for technical support and assistance (e.g. materials, training, grants, outreach publications, marketing, volunteer retention, cultural competency, fundraising, etc.).
 - b. PP&R will organize annual Friends & Allied Partners **Forums/ Workshops** at least three times annually for partnership development and inter-partner communication. Workshops will be conducted to address the top 2-3 needs identified in the surveys.
 - c. PP&R will offer reasonable support toward **criminal background checking** of all staff and volunteers employed by the friend or allied partner group.
 - d. PP&R may decline proposed **gifts or donor recognition** from friends and allied partner groups.
 - e. PP&R may provide each friends/allied partner group with facility **emergency procedures** (the "Red Book") and provides incident reporting training as appropriate.
 - f. PP&R reserves the right to approve all **signage** on PP&R property, including gifts or donor recognition plaques or signage.
 - g. PP&R participates on the **hiring panel** for the executive director of friends and allied partners.
3. RELATIONSHIP:

- a. PP&R makes contact with friends and allied partner groups through designated contact person, to ensure **appropriate, timely and efficient partner communications**.
- b. PP&R strives to have timely and current **Agreements** in place with all allied partners and friends groups, and abides by all terms and conditions of same, allowing for deviations when appropriate and mutually agreed upon.
- c. As appropriate, PP&R will offer friends and allied partner groups opportunities to participate in appropriate City sponsored **training programs** (e.g. First Aid/CPR, emergency preparedness, cultural competency, etc.)
- d. PP&R will allocate cash **contributions** toward specific friends' or allied partners' projects, based on its strategic priorities, as General Fund allows.
- e. PP&R shall provide **maintenance** to facilities as specified under the roles and responsibilities of the partnership agreement.
- f. PP&R will maintain a **web presence** for friends and allied partner groups and link to friends and allied partner websites, where applicable and when authorized.
- g. PP&R will provide friends and partner groups with current and updated **PP&R logo**, in electronic format desired by group.
- h. PP&R will respond to requests of support for the **grant submissions** by friends and partner groups.

The following items form the basis of Friends' and Allied Partners' support and obligations to Portland Parks & Recreation, with the assistance from the Staff Liaison:

1. VISION:
 - a. The **mission/purpose** of the friends or allied partners organization is linked to the **vision – mission – principles – values – strategic initiatives** of PP&R.
 - b. Friends and allied partners **respond to and collaborate** in the development of PP&R documents, policies, initiatives, etc. germane to the partnership.
 - c. Friends and allied partners **serve a diverse public**.
 - d. To the extent feasible, friends and allied partners help to **advocate for the entire citywide system** of parks and recreation programs *in addition to* their special interest area (e.g. PP&R contributes to clean water, clean air, bountiful habitat and beauty of Portland – **and** – Crystal Springs Rhododendron Garden showcases a world class, historic collection of plant material; or PP&R is a provider of high quality arts education – **and** – Multnomah Arts Center Assoc. supports the vibrancy and health of the MAC; etc.).
2. PROCESS/STRUCTURE:
 - a. Friends and allied partners gain PP&R **staff liaison approval** before altering built or green infrastructure owned or managed by PP&R.
 - b. Friends and allied partners include PP&R on the **hiring process** for selection of the executive director for their organizations.
 - c. **Media and Sponsorship plans**, concerning the friend or allied partner group and activities, is coordinated (when possible) with PP&R's staff liaison.
 - d. Friends and allied partners submit (or assist staff liaison with) **regular update reports** on volunteer activity (including quarterly participant counts and hours), visitor attendance, annual approved and year-end financials (upon request), accomplishments and fundraising (upon request), as well as share current leadership contact information.
 - e. Friends and allied partners **conform to City standards** and procedures for safety, maintenance, non-discriminatory, equal employment opportunity and public accessibility.
 - f. All friends' and allied partners' paid and volunteer employees may be asked to submit to a **criminal background check** upon hire.
 - g. Friends and allied partners strive to have at least one representative at PP&R-sponsored Friends **Forums and Workshops**.

3. RELATIONSHIP:

- a. Friends and allied partners **register as a volunteer** organization with PP&R, through the Volunteer Services Coordinator.
- b. Friends and allied partners make contact with PP&R through designated PP&R staff liaison to ensure **efficient partner communications** and welcomes liaison to group meetings and functions. Staff liaison may refer group to another PP&R contact from time to time, for technical assistance.
- c. Friends and allied partners communicate with PP&R on **personnel matters** of significance, within confidentiality restraints.
- d. Friends and allied partners acknowledge their relationship with PP&R by including the **official PP&R logo**, which includes approved graphic, moniker and slogan, in all print and electronic publications, presentations, signage, or other materials that refer to the friend or allied partner group. The following boilerplate language is used (or other language as agreed to by PP&R), where space and opportunity allows:

***“(Friend/Allied Partner Name) partners with
Portland Parks & Recreation
(insert PP&R logo).”***

- e. The friend’s or allied partner’s website contains an **e-link to the website** of Portland Parks & Recreation.
- f. Friends and allied partners strive to have timely and current standard form **Agreements** in place with PP&R, and abide by all terms and conditions of same, allowing for deviations when appropriate and mutually agreed upon.

Any deviation from the above two lists of principles, roles and responsibilities are jointly agreed to between the friends/allied partner group and PP&R.

Forming New Friends/Allied Partner Groups

As with any proposal, the first step is a full evaluation to determine whether the partnership is a PP&R priority. A public-private partnership may be pursued only after alternative methods of delivering the project have undergone careful evaluation, it has emerged as the best alternative, and it offers the best solution demonstrated through a sound business case.

Sample models of public-private partnerships:

Operation & Maintenance Contract (O&M)
Design-build-Finance-Operate (DBFO)
Design-Build-Maintain (DBM)
Build-Own-Operate (BOO)
Build-Own-Operate-Transfer (BOOT)
Buy-Build-Operate (BBO)
Operation License
Lease-Develop-Operate (LDO)
Finance Only

Lease-Purchase
Sponsorships
Donations
Turnkey
Tax-Exempt Lease
Sale-Leaseback
Enhanced Use Leasing (EUL)
Build-Develop-Operate (BDO)

Related PP&R Policies, Procedures & Forms

Sponsorship Policy
Naming Policy
Public/Private Business Development Procedures
Signage Policy
Park Use Permitting Process
Non-Park Use Permitting Process
Community Initiated Capital Improvement Process
Gifts for Parks Program Process

Appendix

Friends & Allied partners Contact Roster