



E: Partnership Assessment

This Appendix explores the role of partnerships in delivering community services to Milton’s residents. The Town has a broad range of relationships with many agencies and organizations including service clubs, minor sports providers, school boards, etc., some of which are defined through formal agreements and others through mutual understanding. All relationships (existing and potential) are important to the Town as it considers the best ways in which to meet a broad range of community needs; building upon Milton’s history of collaboration with many stakeholders, this Appendix also explores ways in which to further relationships with five strategic parties that could result in innovative delivery of services and facilities: Wilfrid Laurier University; the YMCA of the Greater Toronto Area; Milton Public Library; Halton District School Board; and Halton Catholic District School Board.

Appendix Contents	Page
Approach to Partnerships	2
Milton’s Current Approach	3
Summary of Partnership Discussions.....	4

Approach to Partnerships

Overview

Municipalities throughout Canada are faced with intensifying demands to provide quality, accessible services in spite of shrinking budgets, a reduction of traditional forms of capital funding and changes to priorities that determine resource deployment. In response to these pressures, many local governments are pursuing creative methods of developing infrastructure and examining new means of delivering community services. Additionally, some departments are dealing with budget pressures by streamlining operations, reducing services or consolidating service units. Others are attempting to increase revenues through an increased focus on user fees or maximizing the outputs of entrepreneurial activities. Recently, an increasing number of municipalities are considering collaboration with traditional (other public entities) or non-traditional partners (not-for-profit or private sector entities) in an attempt to maintain or possibly enhance the number and quality of services.

Partnerships between local governments and outside interests are not new. Municipalities throughout Ontario – indeed across Canada - have benefited from facilities that have been developed in partnership with another entity. For example, the Haber Recreation Centre in Burlington Ontario was made possible through a unique, three-way partnership between the City of Burlington, Halton District School Board and Burlington Public Library. This joint use, fully accessible building acts as a full service sports and recreation facility featuring eight competition-sized gymnasias, a three-storey public high school and an integrated public branch library.

In other communities, service and program inventories have been supported or expanded via relationships with outside interests. For example, in jurisdictions throughout Ontario, the YMCA is operating facilities and providing aquatic and/or community wellness programs where the municipal recreation department was once the sole provider of these services such as in Niagara Falls or Innisfill, Ontario. Likewise, several municipalities have opted to align with private arena operators who help to develop, manage and program community rinks - such as in the City of Vaughan and the City of Hamilton, Ontario.

There is no single formula that is appropriate for all potential partnership situations. The project particulars, mandates and positions of the partnership candidates, local influences and the alignment of priorities are all factors that will dictate the nature of a suitable relationship – or if a partnership is even a reasonable possibility. However, as joint relationship concepts become more prevalent and refined, best practices for “doing more with less in conjunction with a partner” are becoming more widely understood as realistic considerations. As a result, municipal governments are more willing to wrestle with the many facets of new types of facility or service delivery models by developing frameworks within which all potential relationships can be conceived, crafted, evaluated, and managed.

Goal of Partnering

There are nine factors that should be in place when contemplating a partnership relationship for a capital project or an alternative service delivery methodology.

- Individual excellence - partners have something of value to contribute to the relationship.
- Importance - the contemplated alliance fits the strategic goals of each partner.
- Interdependence - the partners need each other and their complementary skills to fulfill the goals and objectives of the project.
- Investment - there is tangible commitment of resources by all involved.
- Increased reach - the partners' scope of service are expanded.
- Information – the partners communicate about goals, conflicts, problems and challenges.

- Integration - there are connections between the partners at several levels.
- Institutionalization - the alliance has a formal status and cannot be abandoned on a whim.
- Integrity - no partner will try to undermine the alliance.

Our review of partnership case studies suggests that the concept is a reasonable option for creating cost-effective solutions to both capital and operating challenges confronting certain recreation systems. However, partnerships are not a cure-all or a panacea for all the problems currently facing the public leisure sector. Too often, expectations are beyond the capacity of a partnership to deliver and consequently the relationship is eventually perceived as unsuccessful. Also, a partnership must be mutually beneficial and there will be inevitable give-and-take in terms of the project outputs. It is therefore advisable to establish clear and attainable objectives at the outset of the project and to tie the expectations of senior officials directly to the likely results of the relationship.

Partnerships between municipalities and outside interests generally involve one of the following objectives and/or outcomes.

- create or maintain public infrastructure
- improve customer service
- acquire access to more information
- reduce the cost of government procurement
- commercialize municipal resources
- provide public agencies or outside groups with greater access to new sources of capital
- capitalize on collective energies and expertise of participating groups
- optimize the use of public sector resources
- undertake major social or economic initiatives

Milton's Current Approach

Overview

The Community Services Department's Mandate statement indicates an intention to work with others in the pursuit of quality facilities and programs. And, Milton's strategy of developing relationships with partners is and will continue to be important to fulfilling the Department's service delivery goals in the most financially responsible fashion. In accordance with this mandate, the Town assesses the merits and drawbacks of proposed relationships and determines the most appropriate response to potential partnerships on a case-by-case basis. The most recent example of this approach was demonstrated when the Town explored, analyzed and eventually entered into a relationship with the Halton Catholic District School Board for the development of an indoor turf facility that officially opened to the public in 2014. It is anticipated that similar scrutiny will be applied to any future potential partnership opportunities that arise for the Town's consideration.

Committing to Partnerships

Organizations with successful partnership records share common traits:

- they have pre-established partnership expectations and guiding principles that are employed in partnership investigations and decision making;
- they identify the types of projects for which partnerships are applicable and remain constantly vigilant to detect emerging opportunities;
- they set the stage for “potential” future partnerships by pre-establishing the conditions, necessary outputs and processes that will be required to bring a “real” project to fruition in concert with a partner;
- they are willing to adjust internal processes, policies and procedures in response to project requirements (such as fast tracking background studies to meet an imposed deadline) or the needs of project partners (such as adjusting normal procedures to align budget cycles); and
- most importantly, that they are proactive in everything they do in their pursuit of partners and partnered projects.

In our experience, partnered projects are often missed opportunities because they are perceived as being too difficult, complex or outside of usual business practices. And, while most public and not-for-profit organizations agree with the notion that working together makes more sense than working alone, jointly developed projects or capital and operating agreements between these organizations are often the exception rather than the norm. Making an organizational commitment to the pursuit of partnerships and laying the groundwork to ensure preparedness should a partnership opportunity emerge, are excellent precursors to taking advantage of the significant financial and operational benefits that become available through working in collaboration with project partners.

Building on Past Successes

Milton understands the potential benefits of partnerships and has a positive history of capitalizing on opportunities as they emerge. We recommend that the Town build on its previous partnership experiences and proactively pursue partners and candidate projects that can contribute to the municipal facility inventory and its program and service delivery system. A commitment to explore and where appropriate create partnerships will undoubtedly require dedication of staff time and resources – which may seem difficult to justify when an opportunity is just an idea, thought or concept. But thoughtful and early attention to these notions and taking the lead by becoming a partnership champion will produce long term results that are not possible working alone.

Summary of Partnership Discussions

The project Terms of Reference requested that this study examine potential partnership solutions that may be available through relationships with specific organizations. The following sections summarize input from representatives of the five potential partners identified in the Terms of Reference.

Wilfrid Laurier University

Over a period of some years, the Town of Milton and Wilfrid Laurier University have been discussing a Laurier Milton Campus on lands referred to as the Milton Education Village (MEV). The MEV is intended to be a 400-acre comprehensively planned neighbourhood that includes the Mattamy National Cycling Centre (the Pan Am velodrome), the university campus, an integrated business park with focus on innovation, an integrated transit



hub, cycling and trail connections, student housing and residential developments and support services. Planning work for the overall secondary plan got underway in fall 2012.

Laurier has been working through a process with the Province of Ontario to receive Ministry of Education approval to move forward with its Milton Campus. While Laurier officials remain optimistic that the University's application for the development will be viewed favourably, there are no assurances until the final "green light" is received from the Ministry. As such, Laurier has not undertaken any specific or detailed planning with respect to the manner in which it will become involved with or utilize the new velodrome facility. Despite the foregoing, the University has developed preliminary concepts and started to generally think about the University's relationship with the Town once the provincial funding decision is received.

While still in the planning stages, the academic focus of Laurier's Milton campus will likely include: general advancement of the number of Ontarians with post-secondary school credentials; general arts and science disciplines; economic sustainability; and environmental sustainability. At least initially, Laurier officials view the velodrome as the principal athletic facility available to students.

Laurier has experience in partnering with others in the development of sport and recreation facilities that serve its students. In Brantford where enrollment is currently 3,000 students, the University is partnering with the YMCA for the development of a \$60M facility that will include gymnasium, double tank swimming pool, large fitness component and support amenities. Given the Ministry of Education will only support the cost of academically oriented facilities, the project funding model includes equity contribution from the partners, \$40M from senior level of government through infrastructure programs, a \$5M fundraising campaign. While still under review, University officials anticipate that the facility will be operated by the YMCA. A combination of community user fees and a contribution from student athletic fees will pay for facility operations. The University also partners with the Brantford public library – texts books and other resources used by students are housed in the library rather than on campus, which is a relationship Laurier would like to duplicate in Milton.

In Milton, Laurier is proposing the campus would open with an enrollment of 2,500 students and will grow to 15,000 students over a number of years. The University strategically desires that each of its three campuses – Waterloo, Brantford and Milton – be structured and operated as autonomous Universities rather than satellite campuses. However, Laurier would be careful not to duplicate services on multiple campuses such as varsity sports programs. Given the Milton campus's proximity of the velodrome, it is certainly Laurier's intention to develop a varsity cycling program. Additionally the University would likely rent time in other municipal recreation facilities for varsity and intramural programs – the extent to which is yet to be determined.

YMCA
of the G.T.A.

The YMCA of the G.T.A. – YMCA has developed a bold 10 year strategic plan that contemplates the development of ten new YMCA projects over the next decade. To fully realize its ambitious growth objective, the YMCA has been engaged in deliberations with numerous municipalities about collaborating on different types of facility developments. While the YMCA has not initiated formal discussions with the Town, YMCA officials suggest that Milton's rapid population growth and the fact that it is serving over 1,000 Milton families through its childcare services has kept the Town "on the YMCA's radar" as a viable partnership candidate.

The YMCA develops different types of partnership models depending upon the circumstances of their municipal partners. And, while the structures differ from community to community they typically involve a facility funded through provincial and municipal contributions plus YMCA fundraised capital – with the building on municipal property. Most recently, partnered YMCA facilities have included gymnasium, pool(s), fitness centre and

sometimes a library. Typical to most community development processes, stakeholder involvement and public consultation is normally included in the planning of these new partnered facilities and the development cycle is typically 3 to 4 years.

Specific to Milton’s situation, YMCA officials are concerned about the detrimental impact of a hospital fundraising campaign on the YMCA’s ability to undertake its typical fundraising activities. The YMCA expects a fair degree of donor fatigue once the hospital campaign has concluded. Therefore, it may be difficult for the YMCA to execute its typical partnership and funding model until the fundraising environment becomes more fluid.

There have been concerns whether if a new YMCA facility developed in the northwest corner of Mississauga – as has been rumored – would jeopardize the potential of a YMCA specifically intended for Milton residents. However, broaching the topic with YMCA officials suggested that the Town’s demographic profile and significant population growth are sufficient to support a Milton YMCA even if a new Mississauga development came to fruition.

Milton
Public
Library

Milton Public Library representatives understand the need for collaboration that result in practical savings by gaining order of magnitude efficiencies to contain costs. This can be achieved through shared space or joint use buildings that eliminate the need to duplicate building systems, etc. as well as collectively rationalizing the optimal use of tax-based support for programs and services between the Community Services Department and the Milton Public Library. The library currently collaborates with outside organizations in its efforts to advocate for children’s learning and literacy, such as its relationship with the Y camp that brings campers into the library for story time. There is also recognition that creative types of relationships are becoming increasingly important as a mechanism to lessen the financial burden on taxpayers across the region.

Milton Public Library officials are aware of other library situations where technology has assisted in containing operating costs especially in the areas of payroll – which is the most significant operating costs item of library systems. It would therefore seem advisable to undertake a review of technological advancement that may be applicable to new developments involving the Library.

The Library views its mandate, services and programming as fundamentally different from the raison d’être, programming and service delivery model of the Community Services Department. Both the Department and Milton Public Library personnel support a meeting of the minds with respect to opportunities to collaborate. The development of the Sherwood Community Centre may represent a useful departure point for meaningful joint planning involving the Library and the Community Services Department.

Halton
District
School Board
(HDSB)

The Halton District School Board has two elementary schools and one secondary school planned for the Boyne development area – contingent on funding from the Ministry of Education. These projects should be reviewed as potential candidates for partnership with the Town. School Board officials believe in general that misalignment of planning cycles inherent in the school and municipal funding cycles is the single most significant impediment to developing meaningful partnerships involving large capital projects.

Officials cited Burlington’s Hayden Secondary School and the Haber Recreation Centre as a good example of where planning cycles happened to align to the extent where both the School Board and municipality were able to benefit from capital and operating cost savings. Ironically, the province is promoting partnerships but imposes strict time lines for planning and funding school developments which often impede the creation of appropriate

collaborative projects. Additionally, school board and municipal approval processes are also different which sometimes creates difficulties even when cooperation has been contemplated well in advance.

School officials suggested that potentially the Community Schools Consultation Committee could be a useful vehicle through which more effective long-term planning could be organized. Representatives from the Halton and Halton Catholic Boards sit on the Committee as do municipal staffs and elected officials. Potentially, a subcommittee or working group could be reactivated with a specific focus on the joint facility pre-planning, or the Town could meet one on one with School Board reps to further discussions on potential joint ventures.

There may be opportunities to increase the effective use of the information contained in the Board's Long-Term Accommodation Plan that is annually prepared to identify accommodation pressures and other issues regarding future developments. Similarly, the Town annually provides the HDSB with the municipality's long-term capital development plans. Potentially, a more structured approach to the use of the valuable information contained in both documents could lead to more thoughtful advance planning in potential joint use developments.

Halton
Catholic
District
School Board
(HCDSB)

The Halton Catholic District School Board's School Capital Priorities report (that is currently being reviewed by the Ministry) identifies that Oakville and Halton Hills will be the recipients of the Board's next two school developments. Given the Town's demographic profile, it would seem that Milton will be primarily in need of elementary schools in the near term; however, the impact of full day kindergarten has brought into question the actual long-term facility needs of elementary schools in the future.

HCDSB officials support the notion that the Community Schools Consultation Committee could be a useful vehicle to examine potential joint capital development projects early in the planning cycle. While Accommodation Plans and other capital planning documents are prepared in advance of provincial funding decisions, at least HCDSB and municipal officials could be fully apprised of potential opportunities should funding approvals be received.

Information sharing – in both formal and informal settings – was cited by HCDSB officials as critical to moving the yardsticks in terms of joint capital developments. In their view, political buy-in will only be possible with frequent and frank dialogue involving senior decision makers from both the Board and the municipality. They suggest that Town and HCDSB staff facilitate semi structured get-togethers to create a forum through which members of Town Council and Board Trustees can dialogue about collaboration and other forms of cooperation through which creative joint developments could be formulated.

Emphasizing the need for frequent and effective communication, HCDSB pointed to its relationship with the YMCA – which operates pre and post school programs out of Board properties. The program is extremely successful because it allows parents to drop children off at school at 7:00 AM and pick them up at 6:00 PM without any worry of the transition between pre and post school supervision. HCDSB and the YMCA are currently engaged in discussions to expand the program to include grade five and older children. HCDSB and the Town of Milton also have successful example of collaboration, including the recent Milton Indoor Turf Centre partnership agreement.

Expectedly, HCDSB officials identified monetary and territorial issues as the most significant impediments to cooperation on joint venture projects. Rationalization of subsidies, operational controls, cost recovery formulas, etc. are often the impediments to collaboration. However, both of the

Halton school boards and municipalities in Halton have a good track record of cooperation and generally “get along”. This goodwill could translate into a level of trust that could prove to be fertile ground for future joint planning discussions.

Promising Practices

There is no single answer or partnership structure that can be utilized by all municipalities contemplating a collaborative association with external entities. However, it is clear that with careful planning and deliberate forethought, partnerships and other forms of relationships can produce positive capital development, program and financial results. And, while the structure and particulars of each relationship must match the circumstances of the project’s situation, there are some common themes that are emerging as more partnership examples emerge.

- *Establish clear and attainable expectations* – while most agree with the principle of partnerships, frequently potential partners do not accurately articulate what they expect the relationship to produce. Early in the process – certainly before detailed partnership discussions – each prospective partner should identify its specific reasons for partnering and the anticipated outcomes of the relationship. An example of this would be to predetermine acceptable and unacceptable partnership results of a potential project. For example if Milton were to consider an agreement with an operating partner, would there be any business nuances that would not be acceptable to the municipality. In certain jurisdictions, membership fees or other facility access restrictions have only been discovered after the partnership has been consummated. It is much less cumbersome to identify these potential irritants in advance so that collaborative mitigation strategies can be developed.
- *Identify and strategize about potential risks* – risks are inherent in every relationship. Potential partners should ponder the type of risks involved in the contemplated arrangement and where possible identify methods of eliminating or otherwise reducing the risk’s impact on the project.
- *Determine a mutually agreeable partnership process* – potential partners need to understand the process that will be used to examine, structure and consummate potential relationships. Agreeing to a process that identifies milestones, deliverables, approval processes and a process schedule will ensure that each partner is aware of its responsibilities and commitments.
- *Create a communication strategy and reporting mechanism* – effective communication is an important component in the process of creating a successful partnership. The strategy should identify the manner in which partners will communicate with each other and the mechanism through which each partner will report to and receive approval by its senior officials.

Action Plans

E1. The following general action plans are intended to assist the Town prepare for and undertake partnership discussions:

- a) Establish or reconfirm the Town’s expectations for partnerships and direct project leads to develop project specific goals and objectives.
- b) Identify potential risks and appropriate mitigating activities make project leads aware of how to deal with risks while deliberating with partner candidates.
- c) Designate project leads as the Town’s point people in developing each potential partnership.
- d) Establish a communication strategy that project leads will use in discussions with potential partners.

- e) Evaluate the Town's partnership framework to examine different types of partnerships – i.e. types of partnerships that should be pursued, approaches to public/public or public/private relationships, response to unsolicited proposals, etc.
- E2. Through discussions with Wilfrid Laurier University officials:
- a) Pending Provincial funding, initiate planning meetings to establish the premise of the relationship between the Town and the University.
 - b) Establish specified objectives, procedures, reporting systems and a timetable that would be enacted immediately after a positive decision by the Ministry.
 - c) Identify capital investment opportunities available through Laurier's funding relationship with the Ministry.
 - d) As part of the planning meetings, address the most preferable operating relationship for the Mattamy National Cycling Centre.
 - e) Determine the University's anticipated use for the fitness centre within the Mattamy National Cycling Centre to help in profiling the high performance and community use aspect of the fitness centre.
 - f) Determine an appropriate rate and fee schedule charged to the University for students' use of the Mattamy National Cycling Centre facilities.
 - g) Identify the University's desired use of other municipal facilities for intramural and varsity programs.
 - h) Explore joint programming opportunities or the possibility of using students in certain program delivery roles.
- E3. Through discussions with Y.M.C.A. of the Greater Toronto Area officials:
- a) Re-engage the Y.M.C.A. to confirm that Milton remains a viable location for a future YMCA development and determine any conditions that would compromise the Town from being considered a reasonable candidate.
 - b) Validate that the Y.M.C.A. will only pursue capital partnership relationships if it believes that a fundraising campaign has a reasonable chance for success – if confirmed would thereby eliminate Sherwood as a partnership candidate project.
 - c) Determine a process and schedule that positions the Y.M.C.A. and the Town to pursue a capital development partnership in future projects (such as in Boyne).
 - d) Examine the potential of a relationship for contract service delivery (such as day care) or a landlord tenant relationship in existing or future Town buildings.
- E4. Through discussions with Milton Public Library representatives:
- a) Work with the Milton Public Library to establish and/or agree upon: the mandate of each party relative to programming and service delivery; shared principles; areas of existing or potential service duplication; methods to ensure service alignment; service areas where

common policies and procedures are advisable (i.e. user fees, facility allocation and scheduling, revenue generation, cost recovery, etc.); and a program model for Sherwood Community Centre and Library.

- b) Determine appropriate charge back rates and room rental charges for one department's use of space that is carried in the other department's budget (finalize lease agreements).
- c) Through advanced pre-planning, identify opportunities where joint service delivery models are appropriate and advisable – i.e. common customer service desk at branch library located in future community centres.

E5. Through discussions with Halton District School Board and Halton Catholic District School Board officials:

- a) Organize a joint planning meeting involving the Town and both Boards to discuss appropriate methods to pre-plan potential capital partnership relationships so that a potential partnership can become a reality when Ministry funding approval is received.
- b) With Board representatives, establish a methodology to maximize the effective use of the information contained in the Boards' Long-term Accommodation Plans and the Town's 10 Year Capital Plan.
- c) With Board representatives and utilizing the Community Schools Consultation Committee as a communication vehicle, establish a protocol to maximize the effective exchange of capital planning information between the Town and the Boards.
- d) In consultation with both Boards, explore service delivery relationships (non-capital partnerships) such as extending the HCDSB's pre and post school Y.M.C.A. program to include appropriate Town locations.
- e) Establish an appropriate mechanism to allow Town Councillors and Board Trustees to engage in semi-formal discussions about potential joint venture projects.