

 <p><b>Department of Community, Culture and Recreation Services</b></p>	<b>Title: Community, Culture and Recreation Services Affiliation Policy</b>	
	Date Approved: December 13, 2010	Approved by: Council
	Date Revised:	Approved by:

**Policy Statement**

The purpose of the Community, Culture and Recreation Services (CCRS) Affiliation Policy is to create a formal relationship between the City of Waterloo and eligible organizations that acknowledges the importance of the organizations’ services to the community and identifies how the City will support these efforts.

**Rationale and Need**

*Community organizations* are of great benefit to the residents of Waterloo because they provide programs and services the City might not otherwise be able to offer due to financial and/or organizational constraints. The goal of the affiliation policy is to help build capacity for affiliated organizations in the delivery of high quality, inclusive, and well organized programs. With this goal in mind, the City wishes to balance the needs of the affiliated community organizations with good governance principles of affordability, accountability, accessibility and transparency. The Affiliation Policy will provide a mechanism to support these organizations by potentially providing *foundational operating grants, in-kind services, and access to space for programs or services in recreation and leisure activities*. Affiliation processes will also establish a formal relationship that will be monitored and managed through *Affiliation Service Agreements* between affiliation organizations and the City.

**Definitions**

Community Organization: is a group organized and operating in a not-for-profit mode through which people are brought together into an organization that acts in their shared interest

Affiliated Community Organization: is a community organization that works collaboratively with, and is formally recognized by, the City of Waterloo in a manner that is consistent with City Policy for affiliation status

Waterloo Organization: an organization with a mandate to provide programs and services for Waterloo residents.

K-W Organization: an organization with a mandate to provide programs and services for Waterloo and Kitchener residents

Regional Organization: an organization that depends on a regional geographic area to attract sufficient volunteers and participants to provide viable programs and services that are considered a benefit to Waterloo residents

Foundational Operating Grants – a type of Operating Grant that can be awarded to eligible Affiliated Organizations that have entered into a Service Agreement with the City of Waterloo.

In-Kind Services: a City of Waterloo in-house service or benefit such as a facility rental discount, storage space, insurance coverage or administrative services etc.

Program or Service: an activity related to *recreation and leisure* that promotes quality of life and social wellbeing of residents provided by a community organization.

Recreation and Leisure: includes sports, arts, culture, heritage, and neighbourhood building

Affiliation Service Agreement: a formal written agreement between the affiliated community organization and the City of Waterloo that specifies the mutual responsibilities and benefits to the respective parties

## **Principles and Guidelines**

### **Corporate Strategic Alignment:**

The Affiliation Policy is aligned with a number of strategic imperatives in the Corporate Strategic Plan. The Affiliation Policy provides a mechanism to support community organizations in the delivery of programs and services that promote a *healthy and safe environment*. It also supports a *commitment to excellence* by encouraging leadership and innovation, and by providing a mechanism to manage the customer relationship. *Partnership and collaboration* is established through the formalized nature of Affiliation Service Agreements negotiated between the affiliated community organization and the City.

### **CCRS Service Delivery Policy Alignment:**

The Affiliation Policy strategically aligns with guiding principles outlined in the CCRS Service Delivery Policy. Common affiliation criteria and clear service delivery expectations with respect to inclusion address a principle of *fairness and inclusion*. The principle of *service integrity and evaluation* is supported through the use of Affiliation Service Agreements which encourage high quality service delivery and ensure ongoing evaluation and compliance. The service agreement development and monitoring process allows staff to plan, facilitate, and evaluate the effectiveness of community support, responding to the principle of a *defined department leadership role*. Furthermore, provision of a *balanced array of recreation and leisure opportunities* is encouraged by a policy that affiliates with organizations amongst a spectrum of interest areas: recreation, leisure, sports, arts, culture, heritage, and neighbourhood building. Finally, the policy provides a means to facilitate the department's preferred method of service delivery.

### **Affiliation Criteria**

To be recognized as an *Affiliated Community Organization*, the community organization must meet all of the following criteria, as well as enter into an Affiliation Service Agreement with the City of Waterloo:

- A community need or desire that is evident through the existence of sufficient volunteer leadership, active participants and an ability to generate revenue to sustain the program or service.
- Provision of an activity, program or service that is not provided by an existing affiliated community organization.
- A primary objective to provide recreation and leisure programs or services for the residents of the City of Waterloo.
- A mandate that is consistent with the CCRS Department Vision and Mission as outlined within the CCRS Master Plan

- Good standing with governing provincial body, if applicable.
- Operates under the governance principles of a not for profit organization, demonstrated by an elected volunteer board of directors or executive, adherence to constitutional bylaws, provision of financial statements, and annual general meetings.
- Services or programs are open to all residents who meet the program/service parameters. Membership cannot be restricted by race, colour, gender, creed or economic circumstance, but limiting factors such as skill level, facility limitations, age and geographical location will be considered.
- Resident participation levels at a recommended benchmark of a minimum 40% Waterloo residency for *Waterloo organizations* and *K-W organizations*, and a minimum 20% for *Regional organizations*. Organizations that do not meet residency targets must commit to achieving the targets within a negotiated timeframe.
- Entry into an Affiliation Service Agreement negotiated between the organization and the City of Waterloo, and demonstrated compliance with all of the terms of the agreement.

Organizations that are not eligible for affiliation include:

- Individuals
- Organizations in arrears with the City of Waterloo, unless a reasonable repayment plan is presented and reviewed by staff
- Organizations or programs that are precluded by the Municipal Act or fall under the sole responsibility of other levels of government, i.e. health care, day care, education institutions, social support.
- Funding Organizations who distribute cash to individuals or other organizations
- Commercial Business
- Service Clubs, except through partnership with affiliated organizations

### **Foundational Operating Grants**

Foundational Operating Grants may be provided to affiliated organizations. To be considered, the affiliated organization must have been affiliated with the City of Waterloo for five years. The recipient organization must not be the responsibility of higher levels of government, and/or precluded under the Municipal Act, for incorporating religious material or services as an example. Lastly, the funds must be used in the direct delivery of service benefitting the residents of Waterloo and cannot be granted out to third parties.

### **Service Agreements**

Affiliation Service Agreements are used to identify, monitor and manage the conditions and benefits of affiliation with eligible community organizations. Note, whereas most terms of agreement will be standard and consistent, there is flexibility within the Service Agreement to respond to the specific needs of a community organization and to detail a plan to progressively implement any standards that are not currently in place.

Consistent terms of agreement within the Service Agreement will specify both the City's responsibilities and the expectations of the community organization. For example, terms of agreement will indicate a staff liaison who will offer guidance and support to further the organization's capacity, when required and/or requested. The City may provide affiliated organizations with allocation of facility space, based on the current space allocation policy. Additional support will be provided by screening applicants who wish to apply for program subsidy due to low income, and will provide access to volunteer recognition programs or services.

The responsibilities of affiliated organizations will also be outlined to ensure quality programs and services for community residents, to ensure compliance with all levels of legislation, and implementation of best practices with respect to risk management, volunteer screening, inclusion, accommodation, self-evaluation etc. Standard terms of agreement are outlined in the draft Service Agreement template, attached as Appendix A.

Some terms of agreement may vary based on the development stages and needs of each affiliated organization. Variable terms of agreement may include whether Foundational Operating Grants will be provided, the level and type of In-Kind Services, and the length of the Service Agreement. Reporting and incorporation expectations may vary based on the level of financial or in-kind support. Resident participant targets may vary as well.

Affiliated organizations that have entered into another current City of Waterloo agreement will also enter into an Affiliation Service Agreement. However, the Affiliation Service Agreement will not supersede any conditions outlined in the original City of Waterloo agreement.

### **Operational Procedures and Standards**

Interested community organizations complete an Affiliation Application. If the organization satisfies the affiliation criteria, staff will negotiate an Affiliation Service Agreement which confirms the organization's affiliated status, and specifies the mutual responsibilities and benefits of affiliation. The General Manager of CCRS approves all Affiliation Service Agreements, in accordance with the By-law to Delegate Authority to the General Manager of Recreation and Leisure Services (No. 09-087), and subject to the approvals that may be required as a result of individual policies, ie space allocation, community cash grants. City Council will receive an Annual Summary of all Affiliations. The summary will also reflect the financial contributions made by affiliate organizations to the City of Waterloo.

In the event an organization meets the affiliation criteria but the agreed upon benefits and responsibilities do not fit within the parameters outlined in the Affiliation Service Agreement Template, an Affiliation Service Agreement will be negotiated but may be subject to legal review and council approval.

### **Implementation and Monitoring Procedures**

The Manager of Community & Neighbourhood Services, or his/her designate, is responsible for negotiating, implementing and monitoring the conditions of Affiliation Services Agreements.

### **Mandatory Policy Review**

It is recommended that this policy be reviewed once during every Council term, until such a time as a new CCRS Master Plan is approved.

**Parties interested in exploring affiliation with the City of Waterloo are asked to contact Beth Rajnovich, Manager of Community and Neighbourhood Services at 519-747-8770 or [beth.rajnovich@waterloo.ca](mailto:beth.rajnovich@waterloo.ca)**