Territorial Authority/School Facilities Partnerships
A Guide
Territorial Authority / School Partnerships: A Guide

Prepared for

By

February 2011
Executive Summary

Facility partnerships are increasingly being considered to meet the sporting and leisure needs of both the wider community and school students. Research from New Zealand and internationally demonstrates that they can be extraordinarily successful. However, this success in the vast majority of cases comes about from careful planning rather than by luck. Partnerships are not like other development propositions and must be treated differently in terms of planning, design, development and operation.

Partnerships can take many forms and be as simple as small operational funding arrangements, or as complex as the development of multimillion dollar school and community recreation centres. The reasons for schools and councils entering into facility partnerships are almost as varied as the partnerships themselves. The most commonly cited reasons include being able to leverage additional capital, developing larger more complex facilities, gaining access to strategic sites and generating better operational synergies to name but a few.

No two partnerships are ever the same; however there are a series of important considerations that hold true for most, if not all partnerships. The first of these is that partnerships are often complex and therefore take time, considerably more time than if the project was being undertaken by just one organisation. The second is that success often comes down to intangibles, such as the underlying philosophy of the partners. The third is that planning is vital yet many partnerships are guilty of either not planning appropriately, or focusing on the wrong areas at the wrong times, often at great unnecessary expense.

The majority of partnerships can be envisaged to have four general phases. These are:

1. Preliminary strategic planning and needs analysis (in the case of state schools this must include initial Ministry of Education (MOE) approval in principle.)
2. Project planning and needs analysis.
3. Negotiation, detailed project planning and design.
4. Operation.

Within each of these ‘phases’ there are a range of high level best practice steps. The majority of these steps remain applicable to most facility partnerships. Some of the most important include such things as:

- Review community and school needs at the outset of a project (your project should be needs led and not design led).
- Consider site / facility location issues very early in the process.
- Talk to your potential partners early on in the process.
- Seek official Approval in Principle (AIP) from the MOE.
- Only undertake as much work as is required to get to the next phase (do not overspend).
- Undertake research on issues such as funding, operational costs, revenue streams and management.
- Undertake a preliminary feasibility analysis first. If this is positive only then undertake a full feasibility analysis.
- Hold discussions and negotiate with your potential partners as you continue to move through the process.

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1 These guidelines apply to state (non-integrated) schools, referred to in these guidelines as ‘state schools’. Private schools and integrated schools are owned by their proprietors who would negotiate these partnerships with territorial authorities. However, all schools, including integrated and private can benefit from the information in these guidelines.
• Have an agreement signed between the parties – for facilities on state school sites the MOE uses mandatory standard agreements.
• Detailed concept design should only take place after all the core research, operational and partnership issues have been resolved.

The most cost effective opportunity to maximise partnership benefits starts in the very early planning stages. It is essential that robust planning, modelling and negotiation take place prior to any design process beginning. Investing time and money in planning will return significant capital and operational benefits.
Case Studies

The following partnerships were selected by Sport and Recreation New Zealand (SPARC) to be examined as case studies.

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<tbody>
<tr>
<td><strong>Oamaru Field Mowing Partnership</strong></td>
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<tr>
<td>Waitaki District Council currently pays for the mowing of three school fields in Oamaru in return for the community having access to each school’s playground.</td>
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<tr>
<td><strong>Te Rapa Primary School and Hamilton City Council</strong></td>
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<tr>
<td>Hamilton City Council and Te Rapa Primary School have undertaken a ‘pool partnership’ to use the schools existing pool to provide water space to the local community over the summer months.</td>
</tr>
<tr>
<td><strong>Aorere College Community Sports Fields Partnership</strong></td>
</tr>
<tr>
<td>The partnership between Aorere College and Manukau City Council is for the community use of the College grounds outside of school hours.</td>
</tr>
<tr>
<td><strong>Berhampore Primary School Pool Partnership</strong></td>
</tr>
<tr>
<td>Wellington City Council and Berhampore Primary School undertook a ‘facility partnership’ to upgrade the school’s existing swimming pool, which was reopened in October 2009.</td>
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<tr>
<td><strong>Aquinas Community Share Partnership</strong></td>
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<tr>
<td>Tauranga City Council and Aquinas College have undertaken a partnering approach to the development of the Aquinas Action Centre (indoor sports), outdoor hard courts and sports fields which opened in 2005.</td>
</tr>
<tr>
<td><strong>Merivale Action Centre Partnership</strong></td>
</tr>
<tr>
<td>Tauranga City Council and Merivale Primary School formed a partnership to develop the ‘Merivale Action Centre’ to meet the indoor active recreation needs of the school and the local community.</td>
</tr>
<tr>
<td><strong>Henderson Artificial Hockey Turf Partnership</strong></td>
</tr>
<tr>
<td>Henderson High School and Waitakere City Council are partnering to develop an artificial hockey facility to be constructed on Henderson High School land. The hockey turf is due to open for school and community use early in 2011.</td>
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<th>Larger Scale Partnerships</th>
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<tr>
<td><strong>AMI Sports and Fitness Centre Partnership</strong></td>
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<tr>
<td>The North Canterbury Sports and Recreation Trust (NCSRT) was established in 1982 to build the AMI Sports and Fitness Centre in Rangiora. The Trust is a partnership between representatives of the North Canterbury community, Waimakariri District Council and Rangiora High School</td>
</tr>
<tr>
<td><strong>Tamaki College Community Recreation Centre Partnership</strong></td>
</tr>
<tr>
<td>Tamaki College Community Recreation Centre is a partnership between Tamaki College, the Centres management Trust and Auckland City Council. The 2001 partnership developed a dual use recreation centre containing two 2/3 basketball courts and six tennis courts.</td>
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Note: Additional projects were also examined during the development of the reports but were not used as case studies although data gathered was utilised in the body of the report.
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1.0 Introduction

Facility partnerships between Schools and Councils (Territorial Authorities) are a comparatively new, often ad hoc, but growing development within New Zealand. Internationally in places such as the United Kingdom they have a far longer history, dating back to the 1960s.

The reasons for schools and councils entering into facility partnerships are almost as varied as the partnerships themselves. The most commonly cited reasons include:

- Being able to leverage additional capital – “Gaining more bang for your buck”.
- Developing larger more complex facilities.
- Gaining access to strategic sites.
- Generating better operational synergies (school use during the day and community use outside school hours, or ‘dual use’).
- Minimising unnecessary facility duplication.
- An ability to access other partners’ skills.

Partnerships can take many forms and be as simple at the smaller scale as sharing the operational costs of mowing a school field in return for community access, or at a larger scale as complex as the development of a multimillion dollar school and community recreation centre.

This document has been developed to highlight some of the opportunities and challenges presented by facility partnerships. Most importantly it sets out how these challenges can be overcome and potential opportunities maximised by outlining a series of high level best practice steps. As every partnership will be different in scale and nature some steps may be more pertinent to a particular partnership project than others.

The main body of the document has been set out under a series of ‘phases’, each with sub headings which can serve as a general step by step guide. Each ‘phase’ is then summarised with a simple flow diagram. Prior to examining these ‘phases’ a series of important partnership project considerations are discussed and which should be kept in mind when progressing potential partnership investigations.

Important note for state schools and Councils

Any lease or licence of state school land or facilities must have MOE consent. This is a requirement of section 70B of the Education Act 1989:

“the land, building, or facilities are not needed or used for the purposes of the school during the time covered by the lease or licence; and the lease or licence is in the public interest; and the lease or licence is for a purpose associated with educational outcomes and will bring educational benefit to the school or its community, or to any other school; or is for a community purpose, and will bring no educational disadvantage to the school”.

Before giving consent the MOE needs to be satisfied that the project fits within section 70B, there are tangible benefits to the school, the school will not be diverted from its primary purpose i.e. teaching children, the health and safety of everyone at the school has been considered and the Crown’s ownership rights in the property are protected. Talk to the MOE in the first instance to avoid raising expectations.
2.0 Methodology

The methodology used to develop the report drew on both international and domestic best practice and experience (Figure 1). A series of interviews were also conducted throughout New Zealand with people who had developed, or were operating school / Council partnerships.

Figure 1: Summary Report Methodology.

- Secondary Data Review
- United Kingdom Best Practice
- Review of Ten New Zealand Partnerships
- Consultants 15 Years of Partnership Development Experience

Analysis

Report Developed
3.0 Important Considerations

Before starting to examine the merits of using a partnership approach in your own local context it is important to keep in mind a series of important considerations so that you progress with ‘your eyes wide open’. Partnerships can be immensely rewarding, generating significant benefits for all partners. However, few are straightforward. It is important to keep at the forefront of your mind a handful of key considerations before even deciding to begin. The first of these considerations is the complexity and time that will be required, the second is your potential partner’s philosophy, while the third is the cost of investigating a partnership.

3.1 Complexity and Time

The degree of complexity will in part be determined by the size and nature of the partnership. Some, like Councils mowing school fields in return for community access to a playgrounds could be termed “set and forget partnerships” because of the low capital and operational costs involved. Other partnerships which involve millions of dollars of capital expenditure and hundreds of thousands in operational expenditure are far more “hands on” and involved.

The more capital intensive the development the more complex it is likely to be. Even a direct School and Council partnership by their very nature involves multiple stakeholders. These include the Schools’ Board of Trustees, the school principal, the Ministry of Education (MOE), Council Officers and Councillors. This picture becomes more complex if other community entities are also involved, such as a facility Trust. Not surprisingly “partnerships take time”, considerably more time than a traditional development project.

It pays to accept this situation from the outset and plan for it. For example, all partners have different requirements and processes which are placed on them. Council Officers need to get Committee resolutions to proceed at certain stages, while state schools will need to gain MOE sign off on agreements to lease land or buildings. Understand these processes and the timeframes involved and above all be patient and realistic.

3.2 Partners Philosophy

So often the eventual success of a partnership comes down to intangibles like the underlying philosophy of the school and the Council (and any other partners). At the heart of this is the concept of the school being a central hub for the community. If the partners don’t embrace this philosophy of their own free will it is likely that the partnership will not reach its full potential.

Partnerships will also be both ‘reactive’ and ‘proactive’. That is one potential partner will be the proponent while other will be reacting to the partnership concept as it is presented. In many instances it will be the school and/or the community that will be the proponent, while the Council reacts. However, this is not always the case and under certain circumstances Councils can be the proponents.

It is important to consider that traditionally in New Zealand the proponent of a partnership will have spent longer thinking about what they are seeking to achieve and developed expectations
that may not necessarily align with those of their potential partner. It is important to remember this and not to assume that your expectations are shared, at least not at the beginning.

3.3 Investigation Costs – “Mind Your Money”

The majority of partnerships are likely to emerge from one potential partner having identified a perceived need and acting as a proponent for the concept. However, there is no guarantee that the other potential partners that will be needed to bring it to fruition will necessarily see the partnership opportunity in the same light.

For this reason it is important to consider spending your money in increments, rather than all at once, during the investigation and conceptualisation stages. Certainly don’t go out and spend money on concept plans until you have proven that a need for the partnership exists, or in the case of state schools before the school has AIP from the MOE to enter into an agreement using school property. These are some of the most significant mistakes that can be made.
4.0 Phase One Preliminary Strategic Planning and Needs Analysis

The first phase of the partnership process is arguably the most important as it involves laying a solid foundation. There is significant potential for projects to lose direction if this first phase of work is not done, or not done well. This phase involves conceptualising the idea, determining the idea’s alignment with identified needs and benefits and considering site and location issues.

The greatest opportunity to optimise any partnership project occurs at the planning stage. This is also the most cost effective time to optimise a project as the further along the development path one progresses the higher the associated costs are (through professional fees and construction costs) and the less opportunity there is to make changes.

4.1 Conceptualising an Idea

All projects will begin with a general idea which will evolve into a concept. It is important to capture the heart of an idea and record why and how it developed. In most cases this can be achieved by simply recording on a single page a description of the idea and why and how it developed. In some instances this one page outline will be able to reference back to other documents such as Council research or school master plans. This one page summary is the starting point for the project moving forward.

The key learning to emerge from examining existing partnership projects was that those that adopted a strategic and planned research, planning and development approach reported having made fewer decisions that they later regretted. These partnerships were also less likely to have to modify buildings, or seek unforeseen operational assistance post development. This planning starts with conceptualising your idea.

Tips For Schools, Trusts and Councils

- Develop a one page outline of your organisation’s partnership ‘idea’ which will include:
  - a short description of the idea.
  - an outline of why it is needed.
  - an outline of how it developed.
- Where possible link back to other documents which may have helped inform the idea.
- Consider this one page “idea” summary as a starting point for further research and discussion. Above all do not ‘overinvest’ your time and resources in the idea, or believe that it is ‘cast in stone’ at this early stage.
- Speak to the MOE. There is no point in continuing if the MOE is unlikely to approve the proposal.
- Be realistic about time frames and adopt a strategic planned approach to your project’s research, planning and redevelopment.
4.2 Needs and Benefits Alignment

One of the most important considerations for any new facility partnership is the return on investment that the different partners will obtain from their partnership. For a Council this return on investment is often measured in terms of the ‘community benefit’ derived from the facility when it operates. For a school the return on investment must be primarily measured in terms of the benefits accrued to students.

Any new school facility is likely to return benefits to the school’s students. However, for Councils the equation is more complicated as they often operate a network of facilities across communities with potentially different needs. Councils, through strategic planning will have in all likelihood identified gaps in provision and in particular areas of community need. Addressing these gaps and needs should also have been prioritised through the Long Term Council Community Plan process (LTCCP) and internal strategy documents.

The most beneficial partnerships are those that develop from an identified strategic need. An ad hoc facility partnering approach may lead to community needs of higher strategic importance being displaced by those of lower significance.

Historically many of New Zealand’s first facility partnerships between schools and councils were ad hoc in the way they developed. However, through time (and greater contact with countries with longer traditions of school council partnerships) this approach has gradually changed. Many New Zealand councils now operate partnership policies which formalise the evaluation of potential partnerships. This makes it less likely that ad hoc development partnerships of the past will continue.

<table>
<thead>
<tr>
<th>Case Example: Tamaki College Community Recreation Centre &amp; Council Needs Analysis Research</th>
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<tr>
<td>In the late 1990s Auckland City had undertaken community needs research in the Tamaki area which clearly identified the strategic need for a Community Recreation Centre. This research coincided with Tamaki College’s existing gymnasium being condemned.</td>
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<tr>
<td>The College examined the research and submitted an application to the Council under their new ‘Facility Partnership Policy’. The application was successful and the College was then able to go on to utilise the Council’s research to support additional successful grant funding applications.</td>
</tr>
<tr>
<td>Tamaki College Community Recreation Centre was one of the first major projects entered into by Auckland City Council under their ‘Facility Partnership Policy’ in 2001.</td>
</tr>
<tr>
<td>Since the Facility Partnership Policy’s inception Council has entered into 40 partnerships and contributed approximately $23 million towards an estimated $60 million of capital development projects.</td>
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</tbody>
</table>
Potential partners should test the alignment of their partnership idea with existing needs research and consider how it may bring benefits not only to themselves, but also to their potential partner. Once schools have looked at Council research (or research from other sources such as government departments and universities), and / or the Councils have looked at information such as school plans, the proponents of the partnership idea will be ready to hold preliminary discussions with one another.

Where state schools (or other MOE land) is involved and before expectations are raised, talk to the MOE. Make sure what is being proposed meets Education Act requirements and MOE policies.

As you move through the partnership process it is very important to document what has been agreed. This should start at the very beginning, and in the initial research and preliminary discussion stages could be as simple as recording key meeting points and distributing them via e-mail.

**Case Example: Waitakere Hockey Facility Development**

Waitakere City Council identified the need for a hockey turf in mid 2005. The Council commissioned a feasibility and site assessment study to identify potential sites and partners for the turfs development. The research selected three potential development sites, one reserve and two school sites. The two schools were asked to submit proposals to the Council if they were interested in a partnership.

Henderson High School was selected as the favoured site and partner. This has now resulted in the development of a three way partnership between the School, Council and The Auckland Hockey Association who had been identified as a key stakeholder. The facility is due to open in 2011.
Tips for Schools and Trusts

➢ Talk with Council and, where state schools and Ministry land is involved, the MOE before you commit significant school resources into planning.

➢ Do your research before approaching your Council. Read relevant Council strategies and plans and their LTCCP. Establish if Council has identified any strategic community needs within your area which align with your school’s needs.

➢ Understand that Council planning often takes time and your timeframes may not necessarily be shared by Council.

➢ Moderate your expectations in light of what your research illustrates. Remember that if Council research and planning has been undertaken and it does not illustrate an immediate need for the type of facility the school requires Council is unlikely to be a significant facility partner.

➢ If no or limited research or strategic planning is available to assist you, discuss this finding with the Council.

➢ Remember Council is likely to receive numerous approaches from organisations wishing to receive facility development assistance. Councils will at times have to make hard decisions about what is, or is not funded.

➢ Remember Councils only fund the ‘community benefit’ proportion of a project and are not tasked with directly supporting ‘educational or school benefits’ as such.

Tips for Councils

➢ If Council is the proponent of a partnership make sure all the available secondary data on the potential educational partner has been reviewed.

➢ Understand the need for MOE approval for the use of state school sites, or for schools to invest in community projects.

➢ Keep your research current to enable planning decisions to be made on robust data.

➢ Make sure your research, plans and strategies are easily accessible to Schools. Consider listing all your documents relevant to Schools on your website as downloadable PDFs, or listing projects by name and subject so Schools can request copies.

➢ Develop a partnership policy so that schools understand Council expectations and your approach to partnerships. These policies also enable the presentation of facts to Councillors to be clear and help with transparent decision making.

➢ If your Council has a policy then regularly review and update it.
4.3 Site Location/Site Separation

Assuming two or more of the potential partners agree after preliminary discussions that there is sufficient alignment to warrant further investigation then location will likely be the next important consideration when developing any potential facility partnership.

The site should first be examined from a strategic level (as part of Council’s overall strategic planning). In simple terms the first question is ‘does the proposed facility type and school location fit within the context of Council’s strategic planning?’ This question will normally have been addressed as part of the needs and benefits alignment stage in preliminary discussions. If the answer is yes the second question is ‘does the school have a quality building site within (or beside) its grounds?’

Keep in mind there is little need for more than a schedule of spaces\(^2\) and bulk and location plans\(^3\) at the beginning of the process. This will be sufficient to determine if the proposed site can accommodate what is being planned, or what site tradeoffs may be required (such as moving prefabricated classrooms or courts). It will also enable an approximate development cost to be established (based on $ per m\(^2\) rate). Start considering also how this sum could be funded.

For a school a quality site may be a zone where similar physical education or sports facilities can be grouped together. A cluster may comprise courts, gym facilities and fields which can be located anywhere on or beside school grounds. The school will need to consider, in conjunction with the MOE, all the demands on its property, before committing any space.

For a Council determining the quality of a site is likely to involve a greater range of attributes. At the top of this list is ‘road frontage’; this is particularly important if the partnership is envisaged to involve significant levels of capital and potentially operational expenditure. Partnership facilities that are located within schools without road frontage become ‘buried’ out of sight and often receive lower levels of community use. Such facilities also run the risk of being perceived primarily as school facilities and not community ones.

This perception is detrimental as some segments of the community, who may historically have had poor educational experiences, may be less likely to utilise ‘school’ facilities. The recent trend to gate schools after hours has also raised the perception that the general community is not welcome in schools at these times (often regardless of an individual school being gated or not).

Not having road frontage does not rule out a partnership. However, it does have a bearing on the type of facility partnership and level of funding Council would likely deem appropriate. The best example of non road front facilities would be small scale school pools used for activities such as ‘learn to swim training’. Although many of these existing pools are located within schools without road frontage, with appropriate pro active management structures and levels of capital investment they can return both school and community benefits (see Berhampore Primary School case example).

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\(^2\) A list of potential spaces within the proposed building and their sizes. For example, an office at 10 m\(^2\), a weights area at 80 m\(^2\), circulation space at 80 m\(^2\) and so forth.

\(^3\) The sum of the schedule of spaces to give a gross floor area (GFA) in m\(^2\) (the ‘bulk’) which can then be overlaid over a scale plan of the site.
Another finding from the examination of operational partnerships was that facilities with good road frontage and quality landscaping and facility design were actually able to reduce the instances of vandalism within school grounds.

‘Dual use’ (simultaneous use) facilities can also only be achieved successfully if they have road frontage. This is primarily because security reasons prevent the general community being able to walk through school grounds during school hours. Road frontage enables two entries, one for the school at the rear and one for the general public from the road.

Another important consideration is the degree to which the proposed facility can be located to create a perceived separation from the school, at least in the eyes of the community. This partial separation is important, particularly if the facility is planned to be ‘dual use’. The community needs to feel comfortable that they have a right to use the facility. Creating this perceived separation does not need to constrain the school and can be achieved with good road frontage, hard and soft landscaping, and the use of surrounding buildings. The school also gains benefits from this separation through such things as improved security, less community intrusion on school activities and greater revenue generation.

**Case Example:** Berhampore Primary School Pool, A non Road Frontage Facility Partnership

Wellington City Council and Berhampore Primary School undertook a ‘facility partnership’ to upgrade the school’s existing swimming pool, which was reopened in October 2009. The partnership was designed to revitalise an existing asset, which had lain unused for ten years; this provided both the local community and the primary school with water space.

Although the pool did not have road frontage this was not essential given the primary purpose of the partnership was for ‘organised learn to swim classes’, and not for drop in casual use. An operational partnership was also formed between the School and Harbour City Water Polo Club (the ‘Little Makos ‘Swimming School’) to run the pool. This has lead to a proactive outreach management approach which has seen user numbers grow.

Council’s capital contribution to the partnership was $15,000, which would appear from early analysis to represent a good ‘community use’ return on investment.
The level of expansion potential the proposed site offers the partners is another vital consideration. The need to future proof is often forgotten in the initial development stages, but can often emerge at a later date. Future parking requirements are also often overlooked an important consideration during the process.

**Case Example: AMI Sports and Fitness Centre, An Examples of Road Frontage / Separated facility**

The AMI Sports and Fitness Centre in Rangiora is located on MOE land and is adjacent to Rangiora High School’s tennis courts and sports fields. The High School (MOE) land is divided by a road, with the main school buildings on one side and on the other school fields, tennis courts and the Sports and Fitness Centre. A parking area adjacent to the Centre also serves the playing fields and tennis courts. This configuration affords the Centre excellent street frontage.

‘Dual school / community use’ is also considered important as it maintains a higher level of community buy in and a “sense that the facility is a community asset and not just a school asset”. Modifications to the original design were required to achieve this with the introduction of features such as a separate school entry.

**Case Example: Tamaki College Community Recreation Centre, An Examples of Road Frontage / Separated facility**

The School initially proposed to develop the Recreation Centre at the rear of the school site, accessed down a driveway. Council opposed this location and made their funding conditional on the facility being positioned on the site of the schools existing tennis courts, a site which offered excellent road frontage. This approach also offered multiple accesses, with the community entering from the road and the school from the behind. ‘Robust’ negotiating between the School and Council followed.

The loss of the courts was compensated by bringing the replacement of the courts into the main project budget. All partners now agree that the final road front location lead to a more functional building. A greater degree of perceived separation was also created by positioning the facility between the school’s marae and residential housing.
Tips For Schools and Trusts

- Consider the nature of your potential project and how it could be positioned within (or beside) the school (consider potential school and community / ‘Council requirements together).
- Talk to the MOE about positioning in terms of wider, or longer term, school planning on state school sites.
- Restrict any design work to simple ‘bulk and location’ plans. These should be sufficient to determine the feasibility of physically fitting your potential facility onto different site locations.
- Consider development costs at a high level (use $ per m² cost).
- Think ‘outside of the box’ if you are examining a significant facility relocating features such as prefabricated classrooms, tennis courts and fences need not be a significant issue in order to get the optimal partnership site.
- Develop a list of negotiable and non negotiable site requirements and be prepared to walk away if the potential costs do not justify the benefits.

Tips for Councils

- Develop a list of negotiable and non negotiable site requirements and consider presenting these in either a policy or guide form which is available to schools.
- Explain the reasoning behind certain Council site requirements.
- Discourage schools from doing costly detailed architectural concept designs when simple bulk and location plans would suffice at the early planning stages.
- Always consider future proofing when examining site options.
4.4 Phase One Flow Chart

Figure 2: Phase One - High Level Stages

- Develop the Preliminary Idea or Concept
- Test Your Idea’s Alignment with Available Council & School Research (‘Strategic’ and ‘Needs’ Research)
- Initiate Discussions Between Potential Partners and Seek initial MOE Approval in Principle (AIP)
- Go / No Go Decision
- Consider Revising Your Idea or Concept if Required
- Develop a Preliminary ‘Schedule of Spaces’ and ‘Bulk & Location Plans’
- Go / No Go Decision
- PHASE TWO
5.0 Phase Two Project Planning and Feasibility Analysis

The second phase of the process builds on the findings from Phase One and involves exploring feasibility issues in more detail. The first stage involves undertaking a preliminary feasibility assessment. This will involve considering issues such as capital development funding, operational costs, revenue, and governance and management. Based on this preliminary assessment the proponent may chose to stop, go back and refine the original concept or proceed to a more in depth feasibility analysis.

5.1 Preliminary Feasibility

This first part of the feasibility process is best controlled by individuals that have no financial interest in the scale of the downstream project (i.e. not external drafts people, architects, engineers, project managers, and quantity surveyor or construction firms). You are in essence gathering a holistic range of high level material to evaluate the merits or feasibility of proceeding further.

This is best termed a ‘pre feasibility’ assessment and can be either done internally within your own organisation if you possess the necessary skills and time, or externally by a sports and leisure consultant. Any necessary design and technical skills can be sub contracted on an as needed basis. Areas covered within this pre feasibility will include such things as capital development funding, operational costs, revenue generation, governance and management and general planning research.

Tips For Schools, Trusts and Councils

- Make sure you project is “needs lead” rather than “design lead”.
- To avoid conflicts of interest think about the order in which you seek external advice. Commissioning a short summary feasibility review from a sports or leisure consultant can help you frame your thinking around school and community needs, capital costs and indicate the potential success of a partnership proposal prior to spending significant fees on architects, engineers and fundraisers.

5.1.1 Capital Development Funding (“Capx”) Considerations

One of the most cited reasons for a partnership project taking years to develop is capital development funding. The easiest funding projects are those with two willing partners, each with their own capital. However, many New Zealand facility partnerships (even those between schools and councils) are dependent on multiple funders. The greater the number of funders the more complicated the fundraising task becomes.

Each funder has its own processes and timeframes and it can at times be difficult to align all of the necessary funding in the right order. Many funders do not make significant capital grants to schools, nor do they contribute to council owned projects. For many larger development projects this has given rise to the popularity of Trusts, as both capital raising and operational entities.
One of the most critical aspects to successful fundraising is **being realistic about your funding target**. This involves doing one’s research. For example, review information on the different funding organisations application processes and timeframes, examine past grant allocations, talk with staff at the different charitable funders and discuss with other organisations in your local area how they went about their capital development fundraising. Remember the funding environment is constantly changing.

Undertaking this **funding research** is invaluable and should be started as early as possible (ideally in conjunction with formulating your project concept and completing preliminary bulk and location plans). This level of research also enables the school to have an understanding of funding issues prior to talking with professional fundraisers. Professional fundraisers can play a critical role in certain types of projects while in others they may not be as important. If the school or council has undertaken their own base research (and / or considered the issues as part of the preliminary feasibility) they will be in a better position to judge the merits of and the need for a professional fundraiser.

There were some early examples of partnerships projects where fundraisers were perceived to have had an undue influence over guiding the nature and scale of the project for their own financial gain. To **avoid a conflict of interest** when bringing in external expertise research, feasibility analysis and planning should be kept separate from fundraising. There is also a distinct difference between structuring and assessing a potential project’s funding streams and the actual act of fundraising itself. The former can be undertaken by suitably qualified consultants or the school, council or Trust itself (if it has experienced staff /members).

A key output from the preliminary feasibility analysis will be the development of a **preliminary funding plan and programme**, which sets out the target budget and how and when it is to be reached. The earlier funding research is particularly beneficial at this stage as it ensures the sums sought from each potential funder remain realistic.

At the more detailed feasibility stage the plan should be developed further to also set out what level of support material is required for the different funding applications and when they need to be lodged. Some applications will require a more advanced level of documentation (such as developed designs, and building and resource consents).

Record what is required to develop the necessary reports and plans to meet these application requirements. A degree of ‘seed’ funding may be required to pay for the services of suitably qualified consultants (such as leisure / sports consultants, architects and resource planners). Applications to funders which require detailed documentation normally occur near the end of the fundraising process after a significant proportion of the necessary funding has already been secured.
Tips For Schools and Trusts

➢ Be prepared to do your research - review information on the different funding organisations application processes and timeframes, examine past grant allocations, talk with staff at the different charitable funders and discuss with other organisations in your local area how they went about their capital development fundraising.

➢ Develop a funding plan and programme which sets out the target budget and how and by when you plan to reach it. Use earlier funding research in order to ensure the sums sought from each potential funder remain realistic.

➢ To avoid a conflict of interest when bringing in external expertise research, feasibility analysis and planning should be kept separate from professional fundraising.

➢ Don’t get ahead of yourself by commissioning costly architectural concepts before you have looked at your likely funding thresholds. Talk with a Project Manager or Quantity Surveyor about approximate m² rates for different facility types so that you can compare this against your funding research and can estimate the cost and affordability of different facilities.

➢ Don’t do any more design work than is absolutely necessary to fulfil each stage of the fundraising process.

Tips For Councils

➢ Communicate to Schools that they do not require detailed design plans developed prior to first approaching Council to see if funding is a possibility.

➢ Encourage Schools to undertake their own funding research before ‘progressing’ a project.

➢ Communicate to Councillors how the holistic charitable grant funding process works.

➢ Make it clear in all Council reports that there are likely to be minimum funding thresholds that Council will need to at least meet in order for a project to have any hope of progressing (Note: millions of dollars of Council grants to partnership projects are ‘carried over’ across multiple years because these minimum thresholds are not reached and project funding stalls. This ties up funding that could otherwise have gone to projects which might have progressed).

➢ Think strategically about the size of your individual grant allocations; at times it is better to support fewer projects with larger grants than it is to support many projects with smaller grants.
5.1.2 Operational Costs (“Opex”) Considerations

Operational costs are often one of the last things that many School, Trust and Council partnerships focus on. However, this is one of the most vital areas of planning and should actually be focused on very early on in the process. After all it is all very well building a facility, but if it cannot be operated to its full potential, due to restricted operational costs, the partners and funders will not receive a full return on their capital investment.

Starting to think about operational costs should actually begin at the project’s outset. Once you have an idea of the type of facility you are considering and its approximate size you can undertake preliminary research on the general operational costs by talking with existing facility managers.

By the time you reach preliminary feasibility there are also clear long term operational and short term development tradeoffs that need to be considered. For example, increased capital expenditure at the outset can enable additional sustainability features to be incorporated into a facility, which over the life of the building will generate significant operational savings. This may involve making hard decisions about the size and style of the initial building, or alternatively involve increased fundraising.

At the feasibility stages the operational cost estimates should be going through continual refinement. Recognise that at this time the full extent of costs will not have become apparent. A high level of cost accuracy will not be achieved until at least a year into the facility’s operation. Costs will then gradually increase over time. This is due to factors such as increased wear and tear; staff salary and wage increases, and general inflation on cleaning and maintenance materials.

Another key consideration once an outline of preliminary costs is established is how these costs are to be covered, and what if any contribution each potential partner may make. Remember that state schools receive operational funding for MOE-funded property, but must find their own operational funding for any school-funded property such as property built with grants, or fundraising.

One of the major cost items that should be considered is depreciation. Many partnership projects report that they do not account for depreciation, or if they do, it is not done at a commercial rate. The general assumption made by many of the entities which own and / or manage partnership facilities is that when it is time to undertake a major refurbishment or replacement project, capital grant funding will be available to pay all or the majority of the capital cost. At both preliminary and detailed feasibility stages depreciation should be identified and addressed so that it can be discussed between partners at a later stage. Never ignore the issue.

Note that the MOE depreciates school property. Where schools put their own non-MOE funding into a project (for example using fundraising), they need to depreciate this portion of the development separately. Schools should talk to their MOE financial advisor about this.

Another important consideration is modelling two or three operational scenarios covering different potential eventualities, say a high, medium and low. Never in the first instance assume that revenue generated from users can necessarily offset all your operational costs. However, if you are one of the lucky few partnerships where this may be a possibility, still develop your fall back scenarios and
different ways to cope with these. This is likely to involve negotiation between partners at a later stage.

All of the high level operational cost data gathered should be incorporated into the preliminary feasibility analysis. This will be expanded upon and tested more robustly during the detailed feasibility and later business plan stages. It is at these stages the data can be compared to more detailed revenue and market projections so a more holistic picture can be developed.

**Case Example: Merivale Action Centre’**

Tauranga City Council and Merivale Primary School formed a partnership to develop the ‘Merivale Action Centre’ to meet the indoor active recreation needs of the school and the local Merivale community.

Council provides an annual operational contribution to assist with facilitating ‘community access’ and the ongoing maintenance of the facility. This involves Council providing a 50% share of the Centre’s ongoing maintenance costs. These vary from year to year depending on what maintenance is required.

The other proportion of Council’s operational contribution is used to pay for an external management company to run the facility outside of school hours. This is done to enable the community to get maximum use of the facility and the Council to get a return on its capital investment. Council views the Action Centre to be a core part of its network of community facilities and thus looks to provide a similar level of service to other facilities in their network.

The Council has acknowledged that providing an annual operational contribution towards the facility is fundamental to ensuring that the facility is operated to its full potential. Without an operational contribution it was felt the facility would in effect be set up to fail.
Tips For Schools and Trusts

- Begin your research on operational costs early and be realistic. Resist the temptation to start looking at arguably more interesting topics such as the detail of ‘facility design’. One could say:

  “...you get easily picked up and swept away by the detail of the architecture, like a pretty picture in a travel brochure, when what you really should be doing first up is reading when the cyclone season is! Consider the ongoing operational cost first, or you may regret it later.”

- Operational cost data gathered should be incorporated into preliminary and detailed feasibility studies and later into a detailed business plan. Include different operational cost scenarios.

- Consider long term operational and short term development tradeoffs early on in the project planning.

- Discuss operational issues with your partners (potential partners) as early as possible in the process.

Tips For Councils

- Raise the issue of ongoing operational costs early on in discussions with potential facility partners.

- Encourage schools and Trusts to consider operational issues as early as possible and to undertake preliminary and later if warranted detailed feasibility analysis.

- When submitting reports to Council Committees regarding partnerships ensure that operational funding issues are also addressed together with capital funding. Consider:
  - the implications if any, of not committing operational grants.
  - the pros and cons of running the community use component of the facility internally, or under a Council contract, and covering all of the associated operational costs.
5.1.3 Revenue Considerations

Many facility partnerships between, schools, trusts and councils seek to generate revenue in order to cover some or all of the facility’s operational costs. In a small handful of instances certain facilities are even able to make operational surpluses. However, many of these same facilities are not, or are not fully accounting for depreciation and /or are receiving ‘operational subsidies’ or ‘maintenance grants’. Therefore in general the vast majority of facilities have operational costs which are greater than their level of revenue they generate from users.

Given these findings it is important to be very realistic when examining a facility’s revenue generation potential, especially at the preliminary feasibility stage. As with operational costs it is important to start considering revenue generation as early in project planning process as possible. Many of the same research processes which apply to operational costs also apply to investigating potential revenue.

Attention should be directed towards determining such things as potential target markets, the size of markets, local market rates (what you can charge) and the type and sustainability of various revenue streams.

Revenue research at the preliminary feasibility stage will assist (together with other research streams) in the refinement of the facility’s ‘schedule of spaces’. It is important that this work be done ahead of any detailed concept design work. The preliminary and (if warranted) detailed feasibility studies will help build up a picture of the proposed facility’s revenue streams and financial sustainability, providing information which later can be used to create an ‘informed’ design brief.

A fundamental failing in many facilities is a lack of consideration of how revenue issues need to be factored into the schedule of spaces and the facility’s design. Many spaces have minimum thresholds, below which they become less functional and unable to deliver adequate revenue. Other spaces may need to be linked in certain ways to optimise their full revenue potential. There is little point in having a series of revenue projects in a business plan if the facility that is designed and developed is unable to facilitate these due to design constraints.
Case Example: AMI Sports and Fitness Centre, An Examples of Revenue Planning

When the AMI Sports and Fitness Centre was first built in 1985 it was designed with a very small weights room. The space was too small to work as a revenue generating gymnasium and was not a sufficient enough of an attractor to stop Rangiora residents from travelling out of the area to participate in organised and casual fitness programmes elsewhere.

When the Centre expanded its facilities, increasing the size of the weights area and adding additional aerobics and cardio spaces, it was able to introduce branded programmes such as ‘Les Mills’ classes and attract casual drop in memberships. These steps dramatically transformed the Centre’s revenue generation. In essence it became more than just a facility with courts for hire.

Tips For Schools and Trusts

- Undertake revenue research at an early stage in the project with the use of methods such as those outlined for examining operational costs.
- Undertake a market research exercise to establish what other facilities are in your general catchment and what they are offering users (including their fee structures).
- Consider revenue generation issues in the development of the schedule of spaces and your design brief.
- As a general rule consider that:
  - having two internal courts enables greater revenue generation as you can run casual leagues on a ‘pay for play’ basis.
  - the appropriate sizes of weights and aerobics spaces are important.
  - don’t design a facility around basketball courts as netball courts are larger (hiring a facility for netball may provide another revenue option).
  - casual ‘pay for play’ leagues and ‘memberships’ will generate more revenue than the straight hiring out of a court or room.
- Revenue generation is linked to the quality and type of management approach which is adopted.
Tips for Councils:
➢ Assist in making your organisational knowledge available.
➢ Explain the Council’s general position on revenue generation to potential partners (for example, councils are not normally interested in duplicating multiple community facilities in the same area and having them compete against one another).

5.1.4 Governance and Management Considerations

At the preliminary and later detailed feasibility stages consideration needs to be given to how the proposed facility may be governed and managed as these issues impact on the modelling of revenue and operational costs.

In New Zealand the ownership and governance of assets which are within partnership arrangements are varied. Less capital intensive partnerships, or those that only involve two partners (e.g. a school and a council) are more likely to remain under the governance of the land owning partner (normally the school). Examples here may be community ‘access’ partnerships for school sports fields or playgrounds, or in the case where schools and councils are the primary capital funders, a recreation centre.

Where multiple funders are required and/or the concept for a facility originates from outside of either a school or a Council, then Trust ownership and governance is more common. This model enables all the potential partners to have a say via their appointed trustees. Given the variety of partnerships there is no one size fits all best practice governance structure.

There are a number of different management approaches that can be adopted for facility partnerships. In general terms the four main categories are:

1. School management
2. Trust management
3. Council management
4. Private contract management

Which approach is most appropriate will largely depend on the aspirations of the different partners and the level of funding each is contributing. At the preliminary and detailed feasibility stages the exact approach may not have been fully defined and it will be necessary to outline the potential pros and cons for each and make an assumption about which are likely to be most beneficial.

The approach adopted will influence the modelling of both the operational cost and revenue. For example, school management may result in increased staffing costs for the school. These must be managed by the school in a way that avoids the MOE subsidising the community use of the facility, (for example by paying these costs out of revenue from the facility, or its own non-MOE funding).
Tips For Schools and Trusts

- Investigate the different governance and management models to see which of the different approaches is likely to work most effectively for your potential project.
  - talk with other schools and trusts that operate facilities.
  - draw up various models and a list of potential pros and cons for each.
  - consult with the Ministry of Education (MOE) at both a regional and head office level requesting written feedback.
  - talk with your potential partner/s (such as council and funders).
  - seek advice from experienced advisors (ideally from individuals familiar with working on existing partnership projects).

Tips For Councils

- Consider what Council wants from the project long term and take this into consideration.

5.2 Full Feasibility

Should the preliminary ‘pre feasibility’ assessment have a positive outcome then the next step is a more robust and holistic full feasibility study. Again this work can either be done internally or externally depending on your circumstances.

One consideration that should be kept in mind is that you may want to use your feasibility study in potential funding proposals. If this is the case there are advantages in having it undertaken by a leisure and sports consultant, or having your own work reviewed independently. Again to avoid any perceived or actual conflict of interest the lead consultant should have no significant financial benefit in the facility’s development.

The full feasibility should cover all of the areas addressed in the preliminary feasibility, but in a greater level of detail. This stage of feasibility assessment can also bring in a level of very preliminary concept design.

Once the feasibility study is completed and assuming the project is viable more in-depth negotiations can occur between the potential partners. If Council operates a partnership policy then the preliminary and full feasibility studies may also be used as part of the proposal evaluation process.
Tips For Schools, Trusts and Councils.

- At a basic level the full feasibility study should include material on:
  - needs.
  - strategic alignment.
  - schedule of spaces.
  - preliminary design brief.
  - very preliminary concept plans.
  - governance.
  - management.
  - operational costs.
  - revenue streams.
  - operating models (high, medium and low).
  - capital development costs.
  - capital fundraising plan.

5.3 Phase Two Flow Chart

Figure 3: Phase Two High Level Stages

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PHASE ONE

Commence The Preliminary Feasibility

Undertake Preliminary Revenue Research
Undertake Preliminary Operational Cost Research
Undertake Preliminary Governance/Management Research
Undertake Preliminary Capital Cost Research (including Development costs & Funding Opportunities)

Complete Preliminary Feasibility Analysis

Go/No Go Decision

Undertake Full Holistic Feasibility Study (Examining All Research Areas)

Go/No Go Decision

PHASE THREE
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6.0 Phase Three Negotiation, Detailed Project Planning and Design

Phase three marks the start of the more detailed partner negotiations, detailed project planning and design. The first step in this phase is the negotiation of agreements between the partners. The second is establishing the project management structure and making key consultant appointments. The final stage is that of project planning and design. The other two steps within this phase will need to occur prior to a facility being developed and include the completion of capital fundraising and the tendering of the construction contract. These are taken as given and are not discussed in this report.

6.1 Negotiation, Agreements and Documentation Considerations

As the potential partnership progresses it is likely that more formal agreements will begin to be required. Where the facility is on a state school or MOE land, the MOE, as landlord, has a set of standard agreements that must be used. These include a heads of agreement, lease of the land or buildings, a construction licence and a licence back to the school to use the facility. These agreements must not be altered without MOE consent. At the approval in principle stage the school will be advised by the MOE which agreements to use.

However, before developing the formal property agreements, you may start with a memorandum of understanding\(^4\) (MOU). This outlines what the different parties have come together to do. Should the potential partners have come together earlier, for example to undertake joint feasibility investigations then an MOU should have already been developed and signed off.

At this point it would be wise to start developing a service level agreement\(^5\) outlining each partner’s roles and responsibilities. The service level agreements should set out what each partner will receive in the way of services, or outcomes from their investment in the partnership, and how these will be measured. This measuring is normally done via a series of key performance indicators\(^6\) (KPIs) which can be attached to the lease or heads of agreement. It is important that careful consideration be given to these at the time of drafting and agreeing. Remember that all documentation, including KPIs, must be written so that they can be read and understood by a person who has no background knowledge of the partnership.

The MOE’s property agreements start with the heads of agreement\(^7\) (HOA) which sets out what has been agreed to at that point. Following this are the formal contracts, which in the case of state schools, the MOE leases and licences to occupy the school land or buildings.

Many of the conflicts that arise between partners do so when one or more of the original negotiators, who worked on the partnerships development, depart. If there is ambiguity in any of

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\(^4\) MOU - A document describing a bilateral or multilateral agreement between parties. It expresses an alignment of will between the parties, indicating an intended common line of action. It is often used in cases where parties do not imply a legal commitment.

\(^5\) SLA - part of a service contract where the level of service and responsibility for operational delivery items is formally defined.

\(^6\) KPI’s - are quantifiable measurements, agreed to beforehand, that reflect the critical success factors of an organisation.

\(^7\) HOA - A non-binding document outlining the main issues relevant to a tentative partnership agreement.
the documentation there is no guarantee that the old understandings will remain with the arrival of new staff. This is why using the MOE standard agreements is so important.

A key subject in any partnership negotiation should be discussion on how operational costs are to be covered, and what if any contribution each partner will make. Recognise that at this time the full extent of costs will not have become apparent and that the costs will in all likelihood increase through time. Any partnership agreement should build in a mechanism to address these escalating operational cost issues. If it is one partner’s intent not to cover such costs then this should also be explicitly stated from the outset.

One of the major cost items that should be discussed is depreciation. Another important consideration is the development of operational shortfall scenarios and different ways to cope with these. This is likely to involve negotiation between the partners. Set out clearly how you plan to cope if revenue does not meet expectations and /or operational costs are greater than first expected. State clearly what each partner’s responsibilities will be in such eventualities.

Adopting this approach enables all the potential partners to fully understand the ongoing implications of the partnership, removing significant ambiguity which could cause later conflict. The golden rule at this stage of a partnership’s development is “never assume anything”.

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**Case Example: Waitakere Hockey Facility Development**

Henderson High School and Waitakere City Council are partnering to develop an artificial hockey facility at the School. The turf is due to open for school and community use early in 2011. The Auckland Hockey Association has also been identified as a key stakeholder in the future operational success of the facility.

A ‘Trust’ was set up to develop the Waitakere Artificial Hockey Turf which is made up of two representatives from Henderson High School, two representatives from Auckland Hockey and two community representatives.

Due to multiple partners and stakeholders being involved in the development the importance of documenting their respective roles and responsibilities was recognised. The Trust documents outline each partner’s responsibilities in respect to turf governance and management.

The Trust also has individual partnership agreements with the Council, School, Auckland Hockey and the Ministry of Education which outline roles and responsibilities. For example:

- There is a 33 year lease agreement between the Ministry of Education and the Trust for use of the turf site.
- The ‘Trust’ will have a partnership agreement with the School which will allow the School full use of the hockey turf between 8:30am to 4:00pm during week days.
- The ‘Trust’ will have a partnership agreement with Auckland Hockey Association to provide regular hockey competitions for the hockey turf.
- The ‘Trust’ will have a partnership agreement with the Council where the Trust will guarantee the artificial turf will be available from 4:00pm – 9:00pm on weekdays and from 8:00am – 9pm on the weekends for hockey training and competitions.
6.2 Project Management and Consultant Appointments

By their very nature partnership projects involve considerable negotiation between partners, particularly during the design stages. It is therefore an advantage to have an external and neutral consultant such as a project manager (PM) involved who can assist in negotiations. If the project is to be internally project managed by one of the partners then this neutral function could be performed by another consultant.

Note that schools and councils must follow the MOE’s project management requirements when building on a state school site. This ensures all government contracting requirements are met and public funding is being spent wisely. These requirements are available on the MOE’s website: www.minedu.govt.nz.

The project manager should be the first consultant appointment in the design process phase. When writing the brief for the project manager make sure to request that tenderers outline their past experience in multi stakeholder partnership projects. Effectively having two or more clients is a unique situation and it is important that the project manager can demonstrate an ability to deal with a multi client situation.

The second appointment will be an independent quantity surveyor (QS). It is important that like the PM the QS is appointed to the client group directly. It is not advisable to have the QS as part of the design team as the client is reliant on receiving impartial advice and this is best done through a direct client consultant relationship.
The final appointment stage is that of the **design team** or in certain circumstances a **design and build contractor**. It is important that the partners understand fully the differences between the two types of services and the pros and cons of each. As a general rule of thumb the old adage of “you get what you pay for” holds true. In some instances the design build approach delivers a cheaper end product which may be appropriate for simpler, or lower cost partnership buildings. However, the client partners will normally have considerably less control over the design process and less input throughout development in general.

A more traditional design and tender approach is likely to give the partner clients more opportunity to participate in the design process and develop an optimised building. For those partnerships that involve the development of ‘dual use’ facilities, or more complex multi use sport facilities, the traditional design tender approach is recommended. This is particularly true if sustainable design features are envisaged to be included in the facility.

With a traditional design tender approach it is more streamlined to appoint a team rather than all the sub disciplines separately. This places the onus on the lead consultant (traditionally the architect) to select a team that they can work with. The client will sign one contract with the lead consultant who in turn will have sub contracts with the other design team members (such as traffic engineers, engineers and landscape architects). This reduces the clients’ risk significantly.

The tender documents should be slanted towards facility partnership projects and make it explicit that tenderers are required to outline:

- Past experience working on multiple client projects.
- Past experience with sports and leisure projects of the nature being proposed.
- Past experience of developing ‘operationally cost effective buildings’.
- Past experience of developing ‘revenue generation’ into buildings (taking account of revenue generation).
- A list of all the things they have learned from examining sports and leisure facilities once they are operational (ideally using examples from their own work).

### Tips for Schools, Trusts and Councils.

- **Follow the MOE’s project management requirements.**
- **Tender and appoint an independent project manager and a quantity surveyor directly to the client.**
- **The PM should be in charge of running the project control group (PCG).**
- **Consider the pros and cons of the design build and traditional design and construction tender approaches.** In general very simple partnership developments may be suitable candidates for the design build approach, but larger or more complex projects will generally not be.
- **Note that there are numerous variations on the design build and traditional design and tender approaches.** Talk to Council staff, PM, Sports and Leisure Consultants and building owners about their experiences.
- **Either tender and appoint a “design team” under a single lead consultant (traditionally the architect), or tender a design build contract.**
6.3 Project Planning and Design

One of the most common mistakes made during the development of facility partnerships is that insufficient time is spent laying the groundwork for a robust and detailed design brief. This cannot be done “on the fly”. Before an architect or draftsman begins any form of detailed concept a significant amount of preliminary research should have been completed relating to:

- Strategic need.
- Funding.
- Operational cost.
- Revenue.
- Management.
- Governance.
- Schedule of spaces.
- Bulk and location plans.

### MOE design requirements

Schools are unique as they have large numbers of young people using them throughout the school day. For this reason the MOE has developed a number of specific design standards, some of which are mandatory and others which are recommended as best practice.

These are available on the MOE website: the website [www.minedu.govt.nz](http://www.minedu.govt.nz)

Reducing the operational costs should be an important consideration and become an explicit statement in your project’s design brief. Keep in mind that as a rule it is easier to raise capital than it is to raise operational funding.

During the design process the client should be asking the design team, what are the operational cost implications of this design approach or proposed material selection? How can we design our facility to reduce our operational costs? Unless these types of questions are being constantly asked operational issues tend to slip aside during the design process.

Again do your research, designers and architects design buildings; they do not necessarily evaluate the operational costs of their buildings after they are built. Many ‘award winning’ buildings have striking aesthetics, but are costly to operate. It is in the clients’ own interests to champion the designing of buildings that reduce operational costs.
Case Example: The Importance of Material Selection in Reducing Operational Costs

Material selection is an important consideration that can have an impact on a facility’s ongoing operation costs. One partnership facility reported that their design team had selected acoustic roof tiles and acoustic panels to reduce sound reverberation. It had been raised at the time by members of the Project Control Group (PCG) that the tiles and panels may not be as robust as was needed in a community / school environment. However, the design team reassured the client that the manufacturers stated the material specifications were sufficient.

Within a month of opening the wall panels had been significantly dented from ‘ball strike’ and some of the ceiling panels had also been broken. The panels were replaced and strengthened at an additional cost. It transpired that the ceiling tiles had been sourced from Europe and there were delays in sourcing stock which was also more costly than an Australasian equivalent.

This example underscores the importance of both asking the correct questions and carrying out your own investigations, which may include product testing. Also keep in mind that products sourced from Australasia, or that are in common use, are likely to be cheaper and more accessible.

Just like operational cost issues revenue issues also need to be considered in the design brief. State clearly that the final facility design must maximise its full revenue generation potential. The client and the design team should be continually asking, will this design decision have an impact on the facility’s potential revenue generation? And if so how?

If the earlier research and feasibility work has been carried out correctly a very robust design brief should have already been developed. This brief will be finalised when the design team has been appointed. It is considered essential that in addition to the schedule of spaces the finalised brief contains specific references to:

- MOE design requirements.
- Operational efficiency.
- Revenue maximisation.
- Future proofing (ability to expand or redevelop the building at a later date).
- Community and student users.
- The way in which the facility will be managed.

Prior to starting any design work consider taking the entire project control group on a field trip to visit a range of existing facilities. Talk with facility managers about what they perceive works well operationally and what does not. Take the time to learn from other peoples’ lessons, both good and bad.
Case Example: Avoid ‘Architectural Capture’ – Do the Boring Bits First.

A secondary school submitted a proposal for a multi court recreation centre and associated support facilities to a Council under the Council’s partnership scheme. The School’s initial concept had been to improve open air court spaces for students.

The project architects were invited to assist the School with conceptual planning and development on the basis of work they had undertaken for other schools. Over time the initial concept grew from simple origins to become a multimillion dollar recreation centre which required partnership funding to develop.

The school developed concept plans for the project at the cost of tens of thousands of dollars without undertaking a great deal of holistic planning in core areas. The School’s proposal was eventually rejected by Council as it had no strategic alignment with any of Council’s needs research, nor had due consideration been given to other issues.

A simple holistic pre feasibility assessment would have saved the school tens of thousands of dollars that could have been used to go towards covering some of their existing courts.

Tips for Schools, Trusts and Councils.

- Prior to starting any detailed concept and design work do your preliminary and feasibility research around issues such as:
  - strategic need
  - funding
  - operational cost
  - revenue
  - management / Governance
  - schedule of spaces
  - MOE design requirements
  - bulk and location plans

- Make sure that your consultants understand that you place importance on lowering potential ongoing operational costs. State this as a requirement in your design brief.

- Ensure the finalised design brief contains specific references to:
  - operational efficiency.
  - revenue maximisation.
  - future proofing (ability to expand or redevelop the building at a later date).
  - community and student users.
  - the way in which the facility will be managed.

- Don’t hold back on asking your design team about the operational implications of various designs and proposals.

- As your plans develop seek feedback (design reviews) on the operational costs associated with designs from other facility managers or sports consultants.
6.4 Phase Three Flow Chart

Figure 4: Phase Three High Level Stages

[Flow chart diagram]

- PHASE TWO

- Appoint the Project Manager, Quantity Surveyor and Design Team

- Complete Design Process and All Detailed Construction Tender Documents

- Negotiate Partnership Agreements and Contracts (State Schools Must Use MOE Standard Agreements)

- Secure Full Funding Prior to Letting Capital Development Contracts

- Tender and then Commence Capital Development

- PHASE FOUR
7.0 Phase Four Operation

The final phase of the process, that of the operation of the facility, will be greatly aided by the quality of the work undertaken in the earlier phases. Key stages moving forward will include governance, management and monitoring.

7.1 Governance Considerations

Given the variety of partnerships there is no one size fits all best practice governance structure. However, the core principles of good governance still apply.

Where issues do arise at times is in the relationship between governance and management. In the case of a simple two partner relationship it is important that the governance entity understands its roles and responsibilities under any partnership agreement. In the case of more complex partnerships which have a defined management role it is important that lines between governance and management are clearly defined and documented to enable ‘managers to manage’. It is advisable to read one of the numerous books on management and governance (the MOE and Sport and Recreation New Zealand (SPARC) are a good starting point for advice). If required it may also be possible to attend training courses on sport and facility governance.

The governance entity should establish clear performance requirements with management. For example, it should be a requirement to develop a detailed asset management plan and make sure that the lifecycle of the facility is taken into consideration (costs escalate as a building ages). The governance body should also request that management regularly report on issues such as how operational costs and revenue are tracking against budget.

Consideration should also be given to monitoring customer satisfaction. So as not to unnecessarily duplicate work monitoring can be linked in part to the partners’ key performance indicators (KPIs) (see section 6.1). The governance entity should request this information regularly, not just once annually.

The governance entity should also be concerned with issues such as succession planning, both within its own structure and within the management of the facility. The research indicates that facilities that suffer a large “churn” at both the governance and management level without any form of succession planning tend to underperform.

Tips For Schools, Trusts and Councils

- Read one of the numerous books on management and governance (the MOE and Sport and Recreation New Zealand (SPARC) are a good starting point for advice).
- Clearly define the lines between governance and management.
- Establish key performance indicators and undertake regular reporting (see section 6.3).
- Develop a succession plan.
**Case Example: Canterbury Sports and Recreation Trust (AMI Centre)**

The North Canterbury Sports and Recreation Trust (NCST) was established in 1982 as a partnership between representatives of the North Canterbury community, Waimakariri District Council and Rangiora High School. The Trust owns sixty percent of the original AMI Sports and Fitness Centre (and all of the expanded facilities) while the MOE owns the remaining forty percent.

The Centre is managed by a CEO who reports to the NCSRT. Responsibility for employing Centre staff rests with the CEO. A perceived strength of the Trust is that it is comprised of ‘skilled’ individuals with business and legal experience. Management also see the staff as a critical component of the Centre’s success and ‘incentive’ schemes have been used to recruit, motivate and retain the “best people”.

An agreement exists which outlines the roles and responsibilities of the three partners. The NCSRT is responsible for preparing an annual report outlining community use levels and other key facility issues. This report is then provided to the High School, The District Council and relevant charities.

The Trust is involved in activities which extend beyond operating the Centre and include operational programmes such as primary school coaching programmes and sports scholarships. In 2010 the NCSRT also purchased a building and expanded its operation to offer gymnastics and trampoline in a converted light industrial building approximately a kilometre from their main Centre.

It is reported that some of the Trust partners have concerns about the growth of the NCSRT into new areas of activity. However, to date these concerns have been resolved.

### 7.2 Management Considerations

As outlined earlier there are a number of different management approaches that can be adopted for facility partnerships. Which approach is most appropriate will largely depend on the aspirations of different partners and the level of funding each is contributing. In general terms the four main categories are:

1. School management
2. Trust management
3. Council management
4. Private contract management

**School management** is arguably most appropriate if:

- The partners have agreed that the main community demand outside school hours is for structured formal hire. That is hire to sports clubs or community organisations which organise their own activities and just want a suitable space to utilise.
- Or, the partnership is for a short, fixed term period each year which can be managed by a paid fixed term contractor, such as in the case of an open air swimming pool.
If this model is adopted operationally it is important that the school runs two sets of accounts one for the school and one for the facility. This information may be required later if the partners wanted to ever re-examine the management of the facility. It also enables the school to gain a full picture of the facility’s true costs. This is likely to be of assistance when setting fee charges with partners or users.

Modern technology has greatly improved the ability to facilitate this type of management with reprogrammable access swipe cards and lighting systems and remote site monitoring through the internet with web cameras and door lock monitors. All of which mean the need for school staff to remain on site after hours is diminished.

However, this type of management system favours smaller facilities (with for example those with one court or smaller spaces). Larger facilities by their very nature are more expensive and have likely required greater levels of external (non-school) funding. As most of these funders do not directly fund schools, preferring to support the “community use” component of a facility, larger funding amounts are likely to come with a greater “community use” requirement. This requirement may include ‘dual’ school / community use during the day as well as formal bookings and casual, drop in “pay for play” use.

Case Example: Te Rapa Primary School Pool

Hamilton City Council and Te Rapa Primary School have undertaken a ‘pool partnership’ to use the school’s existing pool to provide water space to the local community over the summer months.

Responsibility for pool governance and management remains with the School. The employed pool staff member is responsible for increasing community and sporting group usage of the pool.

A service level agreement is provided by Hamilton City Council which outlines the roles and responsibilities of both the Council and the School. The agreement outlines the financial, operational, reporting and management commitments and practises that both parties have agreed to.

Both parties identified that good communication existed between the partners which allowed for solutions to be found to any potential management problems. Open communication was seen as one of the cornerstones of the partnership’s success.

Council also facilitates an annual meeting with the four schools involved in the pool partnership programme which allows the transfer of key learnings and effective practise amongst the schools. At these meetings it was identified that there is the potential to utilise Council’s communication channels to promote the partners’ pools more and to investigate the possibility of leveraging off the Council purchasing agreements to reduce maintenance and upgrade costs.
The larger facilities require greater levels of staffing which extends beyond traditional teachers working hours; this would include evenings, weekend and holiday periods. Another issue which starts to emerge at this point is a conflict of interest (or potential for a perceived conflict of interest) between the school’s requirements and those of the community. This is often most acute in dual use facilities, or when the school seeks after school access.

**Trust management** has been popular in a number of partnerships because it has enabled all the partners to have a degree of control over the appointment of the Trust’s facility manager and the management direction. It is also seen as being advantageous in attracting external operational funding, although this is often limited. Trust managed facilities perceived that they were able to better respond to their local community’s needs than were comparable facilities which were answerable to a central management system.

The Trust management model is often used on slightly larger facilities which are more complex and do not suit school management. However, the trust model does have some potential drawbacks which should be considered. The majority of trusts own a single facility and are not part of a wider network which can deliver certain economies of scale in areas such as marketing and provide greater ‘brand awareness’ (meaning the community is instantly able to recognise the facility as a community asset). Many believe these types of benefits lead to greater community use.

**Direct Council management** of partnership facilities is not as common in New Zealand as it is in other countries. This has largely been due to the fact that Councils and Schools have tended not to be the sole capital funders of partnerships. The need for other funding has given rise to the development of Trusts as a funding vehicle, which in turn tends to require a non council management approach (to avoid the perception that Council had unfairly leveraged money for core council assets).

In certain instances councils have paid for professional community facility managers to manage facilities, or the community use hours of a partnership. Often these management firms have held contracts managing other council facilities and are viewed as being experienced and proven. This approach also enables the partnership facility to be ‘branded’ as part of a recognised community ‘network’.

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**Tips For Schools, Trusts and Councils**

- In advance discuss the process that would be implemented if the selected management approach was not delivering the benefits that were envisaged by the partners.
- Monitor the performance of the chosen management approach.
**Case Example: Aquinas Action Centre**

The Aquinas College is the owner of the Aquinas Action Centre, hard courts and sports fields. There is a formal ‘community shared agreement’ in place that guarantees community access to the sporting facilities. The community shared agreement secures community access to the Centre for a perpetual term.

Council also engage a management service company to manage the use of the indoor facility and sports fields and hard courts after school hours, which also includes the booking of the facility during community priority hours.

The Council sets the pricing policy and charges for the use of both the Action Centre and the sports fields. The community have access to the indoor facility from 5pm-9pm during the week and 9am-7pm on the weekends as well as during school holidays. Community access to the sports fields and hard courts is from 5 pm during the week with the school having access from 9am to 5pm. The weekends are entirely for community use.

An ‘operational committee’ has been set up to ensure that the intent of the ‘community shared agreement’ is met. The committee also reviews the strategic planning of the services and is tasked with maintaining effective communication. It is comprised of two representatives from Tauranga City Council and two representatives from Aquinas College with a rotational chair.

A detailed operational protocol document has been developed to assist the committee to identify the roles and responsibilities of each partner in the operation of the facility. This has proved beneficial as a tool to advance the resolution of actions and issues.

Council has a dedicated staff member to liaise and develop the relationship with the school and the management company; this was identified as a key to the success of the partnership.

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### 7.3 Monitoring Considerations

Key performance indicators (KPIs) should be established at the start of the partnership and relate to the aims and objectives of the project. These KPIs should be simple to collect, appropriate to the particular project, and reviewed regularly. An increasing trend internationally has been to move more towards outcome based measures rather than quantitative measures to better demonstrate the value and the impact of the facility on the local community.

While there is a need for basic performance measures, such as opening hours, cleaning, maintenance, numbers of community users and satisfaction levels, it is important to ensure that outcome based measures are in place to measure the extent to which activities and services contribute towards the wellbeing of the local community.
There are indications that too great an emphasis may be being placed on the basic performance measures (e.g. number of users), often at the expense of meeting the wider strategic needs of the local community through more targeted programmes. These programmes may not attract the same level of usage, but none the less are strategically important. For example, needs research may have identified an undersupply of badminton space in an area. However, poor KPI setting at the partnership facility could lead to ‘number chasing’ which results in badminton being displaced by a game of basketball.

Evaluation of the data collected should be used to inform decisions on changes to programmes and activities and to be able to demonstrate the impact and success of the facilities. Ensuring that the correct data are collected and evaluated is an important success factor in any facility. If the data collected are not evaluated, don’t inform the progress against the aims and objectives, or don’t provide evidence to enable decisions to be made on programming and management practices, then experience has shown that there is little value in collecting them in the first place.

**Tips For Schools, Trusts and Councils**

- Develop a balanced monitoring approach with both outcome and qualitative measures.
- Monitor regularly and use the data to help inform management decisions.
- Build in a review period so that the measures set out in the original partnership agreement can be re-examined and optimised in line with new strategic and community needs data.
8.0 Conclusion

Facility partnerships are increasingly being considered to meet the sporting and leisure needs of both the wider community and school students. Research from New Zealand and internationally demonstrates that they can be extraordinarily successful. However, this success in the vast majority of cases comes about from careful planning rather than luck. Partnerships are not like other development propositions and must be treated differently both in terms of planning, design, development and operation.

The most cost effective opportunity to maximise partnership benefits starts in the very early planning stages. It is essential that robust planning, modelling and negotiation take place prior to any design process beginning. Investing time and money in planning will return significant capital and operational benefits.

This report has highlighted some very high level issues for consideration. The unique nature of partnerships means that no two are ever the same. However, some general best practice steps are relevant to the majority of partnerships. A series of these general steps are summarised in figure 4.
Figure 4: High Level Partnership Phases and Stages

**Key:**
- Phase 1
- Phase 2
- Phase 3
- Phase 4

**Develop the Preliminary Idea or Concept**

**Test Your Ideas Alignment with Available Council & School Research ('Strategic' and 'Needs' Research')**

**Initiate Discussions between Potential Partners and Seek MOE AIP**

**Go / No Go Decision**

**Develop a Preliminary 'Schedule of Spaces' and 'Bulk & Location Plans'**

**Go / No Go Decision**

**Consider Revising Your Idea or Concept if Required**

**Undertake Preliminary Revenue Research**

**Undertake Preliminary Operational Cost Research**

**Undertake Preliminary Governance / Management Research**

**Undertake Preliminary Capital Cost Research (including Development costs & Funding Opportunities)**

**Complete Preliminary Feasibility Analysis**

**Go / No Go Decision**

**Undertake Full Holistic Feasibility Study (Examining All Research Areas)**

**Go / No Go Decision**

**Appoint the Project Manager, Quantity Surveyor and Design Team**

**Negotiate Partnership Agreements and Contracts (State Schools Must Use MOE Standard Agreements)**

**Secure Full Funding Prior to Letting Capital Development Contracts**

**Tender and then Commence Capital Development**

**Operation & Monitoring**
Appendix 1: Community Use of School Sports Facilities: A UK Perspective

1.0 Introduction

The following summary paper has been developed to provide an outline of the key partnership learnings from the author’s significant experience as a UK based sports consultant and operational experience managing a large partnership facility.

The author has been involved in numerous large scale partnership projects, both from a planning and operational perspective. He has also worked for agencies such as Sport England and is a Visiting Fellow at the World Academy of Sport Executive Centre at Manchester Business School. The learnings contained in the summary are also underpinned by Sport England’s own research findings.

It is intended that these learnings can be used to add validity to findings from a domestic summary of selected New Zealand education and council partnerships. The summary was also designed to highlight any significant high level areas that may not as yet have emerged within the New Zealand context. This summary should therefore be seen as a companion document to the main report.

For ease of reference this summary of learnings has been arranged under a series of headings. The summary begins by examining the history and structure of United Kingdom partnerships. Attention is then turned to summarising the benefits partnerships provide schools and community sport. A series of success factors are then considered. These include:

- an examination of the importance of strategic planning,
- community use agreements,
- facility design,
- management structures,
- monitoring and evaluation,
- maintenance and renewals, and
- revenue costs.

The final section outlines a series of United Kingdom online secondary data references which would be useful to individuals interested in developing partnerships.

2.0 History / structure

Community use of school sports facilities has been an established practice in the United Kingdom for many decades. The first partnerships between schools and local authorities date back to the 1960’s. This is important in that some partnerships are now almost into their fiftieth year, which provides a wealth of learnings.

Over this time partnerships between schools and local authorities (to develop community use of schools sports facilities) have become well established and accepted as a beneficial approach to maximise the resources available to both the school and the wider community.
This community use approach has been widely supported by schools, local authorities, Sport England (the Government agency responsible for grassroots sport) and communities alike.

The approach has been strengthened further in England through the Building Schools for the Future programme (BSF) launched in 2003. The BSF is the biggest single government investment in improving school buildings for over 50 years. The aim is to rebuild and renew the whole secondary school stock in England over a 10-15 year period to the cost of £45 billion.

Central to the BSF programme is the Government’s aim of:

‘Working together to create world-class, 21st century schools – environments which will inspire learning for decades to come and provide exceptional assets for the whole community’ (DfES)

The BSF builds on the previous experience of school / Local Authority partnerships and has heralded a new form of working relationships between schools, Council and its partners which is focused on serving the community.

The BSF programme is charged with ‘putting schools at the heart of the community.’ A case study on how a sports specialist college has planned for BSF is appended to this paper.

3.0 Facility Partnership Benefits

There are many good reasons why United Kingdom schools and colleges should and have developed partnerships to ensure that their facilities provide opportunities for the wider community. Some of the most frequently cited examples put forward by partners for entering into their partnerships include:

3.1 Benefits to the School

1. *Increasing educational attainment, improving attendance and pupil attitude and engaging ‘at risk’ pupils.*

- Large scale educational studies show that school sport can boost attendance levels among school children, reduce bad behaviour and increase self esteem. A total of 11,000 pupils aged from 11 to 16 were given extra PE and after-school activities over a three year period and as a result, 75% of the pupils showed better behaviour and overall attendance increased by 10%.
- OFSTEAD inspections of schools which focus on sport show that they help increase wider educational attainment.
- Evaluation of Lottery Funded sports facilities on school sites have consistently shown evidence of increased standards of attainment in PE since the time the new sports facilities opened.
- Evaluation of the New Opportunities in PE and Sport programme identifies that improved attendance and attitudes go hand in hand with increased educational attainment.
• The different learning environment provided by sports programmes, including peer and adult role models, helps engage pupils at risk.

2. Delivering extended school services

• Where schools have facilities that are suitable for use by the wider community it has been shown that the schools are able to provide a wider range of activities to their pupils by working in partnership with other providers.

3. Attracting more funding

• Developing a community partnership approach to sport opens up a range of other funding sources that would otherwise not have been available to the school.

4. Developing better facilities

• Where the plans of the local authority and the Local Education Authority align, developing a partnership approach enables an improved range of facilities and services that either entity on their own would have been unable to provide.
• In many cases local authorities with old, high cost sports facilities have been able to develop new facilities in partnership with schools. In return they have been providing the partnership ongoing revenue support and expert management experienced in working with the community.

3.2 Benefits to Community Sport

1. Wider range and better facilities for community sport

• Accessing school facilities provides the community a wider range of sports facilities, leading to increased participation and a more active community. Investment in school facilities in areas lacking in provision enables demand to be met that may otherwise have gone unsatisfied for many years (effectively leveraging capital to bring development timeframes forward).

2. Healthier communities

• An increase in sports participation leads to healthier communities, both physically (with improvements in terms of cardio-vascular disease, strokes, osteoporosis) through increased exercise, and mentally with improvements in mental health (through social bonds formed with other participants, increased self esteem and confidence). These benefits are now extremely well documented internationally.
3. **Safe, strong, sustainable communities**

- Trust and ‘community capital’ are built through increased activity and improving public health and through the social bonds and informal networks that arise from community sport. Schools whose facilities are open to the whole community can play a large role in supporting these developments, acting as both a catalyst and a hub for wider community activities.

4. **Economic vitality and workforce development**

- Community sport provides opportunities for volunteering, e.g. sports coaches, and provides opportunities for individuals to gain new qualifications and skills. These skills can in turn be used to aid employment opportunities.

4.0 **Key Success Factors / Lessons Learnt**

4.1 **Strategic planning**

The first step in developing any community use facility is to identify how the proposed facility and the vision for sport in the school align within the overall strategic framework for sports facilities and services within the local community. Failure to plan strategically with other schools and outside agencies can lead to duplication and programmes or facilities that cannot be sustained. The biggest mistake in planning new sports facilities is to adopt a design-led rather than a market-led approach.

Local authorities take a lead role in the strategic planning for a local community. In the United Kingdom this strategic planning includes a ‘Children and Young Peoples Plan’, ‘Strategy for Change’, ‘Community Strategy’ and ‘Local Area Agreement’, all of which outline the plans and aspirations for the local community.

In addition there is often a more detailed ‘Cultural Strategy’, which will include an audit of facilities, venues, clubs and organisations. Local communities will have been consulted during the development of this strategy. The importance of aligning with the wider strategic planning, and identifying how any particular project can impact on the community, is central to the successful development and operation of a community use facility.

While projects are often initiated by either the school or the Local Authority; where they are very successful is when there is a clear strategic alignment to deliver wider community outcomes. To engage with the Local Authority there needs to be a clear understanding of what outcomes are aiming to be achieved.

If a proposed project doesn’t align with the wider strategic planning and delivery of community outcomes, then it is unlikely that the Local Authority will be involved. If it does align, then the School and Local Authority are likely to be ‘equal partners’ in developing the partnership.
Key Tips

- Partnership projects should only proceed if the partners’ vision(s) align (i.e. the school’s sports needs align with the community’s strategic needs).
- The most successful partnerships occur when there is a clear strategic alignment to deliver wider community outcomes (i.e. the Council and the School are very community outcome orientated).
- Where there is limited alignment with the strategic community needs to deliver community outcomes Councils should consider the overall value of entering a partnership.
- Be strategic and do careful research to avoid duplication. The Council should take a proactive role to identify potential partnerships to meet the strategic need.
- Always adopt a market-led approach never a design-led approach.
- To insure long term equitable partnerships schools and local authorities are now more likely to be the ‘lead agency’ in a development.

4.2 Community Use Agreements

One of the key factors in nearly all successful community use facilities is the development of a Community Use Agreement that sets out clear aims and objectives. The agreement will include which party controls which facility component and at what times, the number of staff required and who employs them, financial arrangements including fees and charges, who retains what income, the treatment of energy and other operational costs, responsibility for health and safety and all other aspects relating to the shared use of the facility.

Sport England has developed a template ‘Community Use Agreement’ which has been used by the majority of the United Kingdom’s community use partnerships. This agreement has been developed in consultation between Sport England, the Department of Education and Skills (DFES) and representatives of Local Education Authorities and Local Authorities.

While this document is regularly amended to meet the requirements of each individual project it establishes a clear understanding of the roles, responsibilities and expectations of each party and ensures consistency and that a new agreement is not totally re-negotiated for each individual community use project.

The need for clearly defined roles and responsibilities between partners from the outset cannot be over stated. A copy of the Draft Community Use Agreement template is appended to this paper.
Key Tips

- A ‘community use agreement’ is an essential part of any partnership.
- The ‘community use agreement’ should be negotiated (at least in draft form) prior to any design work being undertaken.
- A copy of the Draft Community Use Agreement template can be downloaded at: http://www.sportengland.org/idoc.ashx?docid=93d0893a-6d4e-4423-a0f1-5d4ae4962c4&version=-1

4.3 Facility Design

There are many different approaches taken to the design of shared facilities. Experience has clearly shown that sports facilities should be specifically designed for use by community groups when not required by the school and that the demands for school usage should in no way compromise either the use of the facility by the community, or management by commercial operators (acting on behalf of a local authority). In essence facility design is lead by community and commercial operator needs, and not by the educational needs of the school.

In many recent community use facilities, the facilities have been designed to provide community access throughout the day to parts of the facility, such as the health and fitness areas, while still providing the school with primary use of the main sports hall and changing rooms. This provides opportunities to generate additional income during ‘off-peak’ periods. It is important to design the building to facilitate simultaneous use by the school and community, with each having dedicated access and changing rooms.

A key consideration in the design of the facility is the overall location on the school site; again the demands of the school should not compromise the use of the facility by the community. As such, facilities that are highly visible with separate road access and car parking that can be operated independently from the school are more successful.

Where facilities are located ‘at the back’ of the school and are difficult to access by the community, they are often perceived as ‘not for community use’, resulting in lower levels of use and a greater impact on the day to day business of the school.
Key Tips

- Facility design is best lead by community and commercial operator needs and not by the educational needs of the school.
- Dual use facilities, that is facilities designed to accommodate school and community use at the same time, are the ideal design model.
- Facilities that are highly visible with separate road access and car parking that can be operated independently from the school are more successful.
- Don’t just rely on architects; get independent sports planning advice regarding sports functionality, operational systems, revenue optimisation before starting the design process.
- There are a number of good guides on designing joint use sport facilities including Sport England’s Design Guidance Note ‘Designing for Sport on School Sites’ which can be downloaded at:


4.4 Management Structures

There are a range of opportunities available to manage the community use of school facilities. These range from directly managed by the school through to contracted management as part of a Public Private Partnership (PPP), or Private Finance Initiative (PFI) agreement (which in the United Kingdom can be combined with the design, build, finance and operation of the overall school facility).

Whichever management approach is preferred a clear understanding of the management strategy structure and associated staffing levels are required to inform the facility design brief and to ensure that the school and community requirements can be met. Again all these things should be clearly established before any design work is undertaken.

Many smaller scale community sports facilities are managed directly under the school’s control, usually through an existing staff member. While this is a low cost option, careful consideration needs to be given as the staff member is unlikely to have experience in sports management (sports businesses are very different from education businesses). They must also be given sufficient time by their employer (the school) to making the facility a community as well as a school success.

As the majority of the community use is outside of school hours this role of facility manager is very different from normal educational roles and has been most successful where schools have established a new position to manage the community use. This approach works well where there are regular club bookings that require little or no ongoing supervision. Where there are casual bookings, or a large number of different groups, this approach is less likely to maximise the community use of the facility.
The most common management structure is for the community use component of school sports facilities to be managed by the local authority (or their contracted commercial leisure management company as part of a wider district wide sports facility management contract). This provides a number of benefits including:

- Greater sport facility management expertise.
- Ability to link in easily with the wider facility network.
- Shared marketing and booking systems.
- Improved staff training and consistency of service.
- Enables the school to focus on educational issues (rather than noncore sports facility management).

This approach is only a viable option with larger facilities where there is the potential to generate sufficient revenue, or where there is ongoing revenue subsidy from the local authority.

**Key Tips**

- **Whatever management approach is adopted a clear understanding of the management strategy structure and associated staffing levels are required to inform the facility design brief and to ensure that the school and community requirements can be met.**

- **Many smaller scale community sports facilities are managed directly under the school’s control, usually through an existing staff member. This approach works best when the facility is predominantly utilised by a select number of clubs or organised user groups (it works poorly for casual community use and can place significant additional management and organisational responsibility on the school).**

- **The most common management structure is for the community use component of school sports facilities to be managed by the local authority (or their contracted commercial leisure management company) as an integral part of an overall network of community facilities. This is the best approach if the facility is designed for casual community use.**

### 4.5 Monitoring and evaluation

Key performance indicators (KPIs) should be established at the start of the partnership and relate to the aims and objectives of the project. These KPIs should be simple to collect, appropriate to the particular project, and reviewed regularly. An increasing trend has been to move more towards outcome based measures to better demonstrate the value and the impact of the facility on the local community.

While there is a need for basic performance measures, such as opening hours, cleaning, maintenance, numbers of community users and satisfaction levels, it is important to ensure that outcome based measures are in place to measure the extent to which activities and services contribute towards the wellbeing of the local community.
Experience has shown that if too great an emphasis is placed on the basic performance measures (e.g. number of users), management practices can become developed around maximising the use (such as a programme of 5-a-side football), often at the expense of meeting the wider strategic needs of the local community through more targeted programmes. These programmes may not attract the same level of usage but none the less are strategically important (for example needs research may have identified an undersupply of badminton space). Poor KPI setting which can lead to ‘number chasing’ can inevitably displace activities which may have a higher local strategic importance.

Evaluation of the data collected should be used to inform decisions on changes to programmes and activities and to be able to demonstrate the impact and success of the facilities. Ensuring that the correct data are collected and evaluated is an important success factor in any facility. If the data collected are not evaluated, don’t inform the progress against the aims and objectives, or don’t provide evidence to enable decisions to be made on programming and management practices, then experience has shown that there is little value in collecting them in the first place.

**Key Tips**

- **Key performance indicators (KPIs) should be established at the start of the partnership and relate to the aims and objectives of the project (keep the KPIs simple to collect and relevant).**

- **An increasing trend in the United Kingdom has been to move more towards outcome based measures to better demonstrate the value and the impact of the facility on the local community.**

- **Targets based solely around maximising usage and income generation can be misleading as they can result a limited programme of activities and the facility failing to meet the wider community needs.**

**4.6 Repairs, Maintenance and Renewals**

The extended hours of use and intensity of use of the schools’ sports facilities under a community partnership impacts on the day to day repairs and on the frequency of planned maintenance. In many early community use partnerships the impact of this increased usage was often overlooked, or there was an assumption that the community revenue generated would meet any additional costs.

In reality very few facilities were able to generate the community revenue required to meet both these costs as well as the increased staffing costs required to ensure high levels of utilisation and co-ordinated management and promotion. In essence community partnership facilities receive heavy wear through both peak daytime school use and peak afterschool community use.

It is essential that all the costs of community use are identified and considered at the project development stage through the development of a business plan. An accurate well researched and developed business plan helps to avoid future impacts on the level of service offered to community
users. In some United Kingdom facilities, poor maintenance budgeting led to reduced staffing, or declining maintenance levels in an attempt to balance the budget. This often perpetuated a downward spiral in community outcomes.

Minimising repair, maintenance and renewal costs also needs to be considered during the initial design of a facility.

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<tr>
<td>In some early community use partnerships the impact of repair and maintenance was not fully considered nor future responsibilities identified, or there was an assumption that the community revenue generated would meet any additional costs. Do not make this mistake.</td>
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<tr>
<td>An accurate well researched and developed business plan helps to avoid future impacts.</td>
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<tr>
<td>Minimising repair, maintenance and renewal costs also needs to be considered during the initial design of a facility.</td>
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<tr>
<td>In the majority of large scale dual use facilities the repair and maintenance costs are fully accounted for and integrated into management contracts. In the majority of large scale dual use projects, the facility is identified as a Council facility on a school site with the school as a core day time user.</td>
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4.7 Revenue Costs

The finances of a community use facility should be separated as far as reasonably practical from other school budgets; and there needs to be an agreed method of apportioning costs associated with the school and community use. There are many different models that have been used for apportioning costs (for example, based on hours of use, numbers of users, square metre rates). Whichever method is used it is important that it is clear, definite and agreed by all parties.

Experience has shown that a new community use facility takes time to become established and for community programmes to develop to their full potential. Ensuring a fair and equitable partnership between all the partners is key to ensuring a sustainable community use facility that has the necessary resources to operate the community programmes to enable the facility to deliver the desired community outcomes.

The most successful community use facilities have all developed a long term partnership between the school and the Council with a series of agreed community outcomes. In these projects the Council has committed management expertise and long term revenue support.

Should the facility not receive the level of revenue support required to enable community programmes to be developed, experience has shown that the level of usage of these facilities has been lower and the value of the capital investment has not been fully maximised.
The underlying principle behind all successful community use facilities is the development of a partnership approach rather than the Council divesting its responsibility. This approach is central toward the building of the facility and more importantly the ongoing operation and development of community programmes.

While partnerships have been established where the Local Authority has only provided capital investment into a facility, experience has shown that without expertise, and ongoing operational support, to develop community programmes the community benefits have not been maximised.

**Key Tips**

- Partners need to ensure the finances of a community use facility should be separated as far as reasonably practical from other school budgets and there needs to be an agreed method of apportioning costs associated with the school and community use.

- A new community use facility takes time to become established and for community programmes to develop to their full potential. Reduced revenue generation over this period of building needs to be factored into the facility's operational plan (normally with increased levels of subsidisation).

- Unless long term revenue support is provided the full value of the partners capital contributions are unlikely to be fully realised (i.e. you cannot simply make a capital contribution and walk away expecting to receive the full operational benefit).

- The majority of successful dual use facilities are where the Council provides ongoing revenue support and operates the facility as an integral part of the community network.

### 5.0 Conclusion

This summary has been based on the author’s own United Kingdom experience of school, local authority partnership projects and supported by a review of available secondary data. The learnings although based on practical experience are supported by similar finding researched by organisations such as Sport England.

On balance partnerships are a very good way of developing sporting benefits for both schools and the wider community. Dual use facilities are an integral part of many Councils’ network of sport and recreation in the UK. The majority of facilities have been Council initiated to meet an identified gap in community provision with the Council having a lead role in the development, management and long term asset management.

The most cost effective opportunity to maximise partnership benefits starts in the very early planning stages. It is essential that robust planning, modelling and negotiation take place prior to any design process beginning. Investing time and money in planning will return significant capital and operational benefits.
Additional Reading

Additional background information for further reading includes:


Appendix 2: New Zealand Case Study Facts

Note: the MOE considers each project on a case by case basis – it cannot be assumed from the following that because a project was agreed in the past it will automatically be agreed today. Each school has different needs, demands on its space and governance capability which will be considered before a project gets MOE consent under section 70B of the Education Act.

AMI Sports and Fitness Centre Partnership

<table>
<thead>
<tr>
<th>Partnership Type</th>
<th>Large Scale Capital Partnership</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>The total building cost in 1985 was $895,000</td>
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<tr>
<td></td>
<td>North Canterbury Sports and Recreation Trust (NCSRT), $395,000</td>
</tr>
<tr>
<td></td>
<td>MOE (Rangiora High School), $370,000</td>
</tr>
<tr>
<td></td>
<td>Waimakariri District Council, $50,000</td>
</tr>
<tr>
<td></td>
<td>Lottery Grants, $100,000</td>
</tr>
</tbody>
</table>

What the School / MOE Provides
- The land on which the Centre is built
- Part of the capital funding
- Community access to the Centre during and after school hours
- Ownership of 40% of the original building (MOE)

What the Council Provides
- Part of the capital funding
- Contribution to the annual maintenance

What the Trust Provides
- Ownership of the majority of the Centre (60% of original building and 100% of all new buildings)
- Administration and Management of the Centre

Project’s Origins

The project was developed in the early to mid 1980s when key community members identified that Rangiora had no indoor sports facilities. Prior to its development many residents reportedly travelled to Christchurch to use facilities, or did not participate in indoor activities at all.

The key aspects to the development of the indoor sports facility were:

- At the time both the Council and the High School individually had insufficient funding to develop stand alone facilities to the desired standard.
- The NCSRT was formed as an umbrella entity to draw community, school and council partners together to enable resources to be combined.
- The AMI Sports and Fitness Centre in Rangiora was developed in 1985 after being initiated by the North Canterbury Sports and Recreation Trust (NCSRT).
The Centre is owned and operated by the Trust and now contains two squash courts, two basketball courts, an aerobics area, a weights and cardio area as well as auxiliary spaces such as changing rooms, reception and offices.

The facility is located on MOE land and is adjacent to Rangiora High School’s tennis courts and sports fields.

Due to the elapsed time since the partnership was initiated (25 years) it was not possible to access either secondary data (because it had either been destroyed or archived), or interview the project’s initial proponents. The interviewees and limited secondary data that were available indicated that it was “extremely unlikely” a needs analysis or a holistic feasibility analysis was undertaken prior to the development. However, as no indoor facilities existed in the town at the time it was considered likely that a need would have been acknowledged within Council, although addressing it may not have been a priority without the actions of the NCSRT.

**Governance and Management**

The NCSRT was established in 1982 as a partnership between representatives of the North Canterbury community, Waimakariri District Council and Rangiora High School.

The governance of the indoor sports facility is the responsibility of the NCSRT. The management of the indoor sports facility is by way of a CEO who reports to the NCSRT. Key components of the management of the facility are:

- Responsibility for employing Centre staff rests with the CEO.
- Operation of the facility is the responsibility of the CEO
- An agreement exists which outlines the roles and responsibilities of the partners
- The NCSRT is responsible for preparing an annual report outlining community use levels and other key facility issues. This report is then provided to the High School, the District Council and relevant charities.

The Trust is involved in activities which extend beyond operating the Centre and include operational programmes such as the primary school coaching programmes and sports scholarships. In 2010 the NCSRT also purchased a building and expanded its operation to offer gymnastics in a converted light industrial building approximately a kilometre from their main Centre.

It is reported that some of the Trust partners did have concerns about the growth of the NCSRT into new areas of activity. However, to date these concerns have been resolved.

Council reports that they do not currently have any key performance indicators (KPIs) in place for the NCSRT. The Council’s annual maintenance contribution towards the Centre could, if required be linked to KPIs. However, the Council has adopted a “more pragmatic small town approach” which was reported to have worked well to date.

**Capital and Operational Funding**

The project’s major funders were the NCSRT (via a series of smaller fundraising initiatives) with $395,000, followed by the MOE (School) $370,000, Lottery Grants $100,000 and Council $50,000. The total building cost in 1985 was $895,000.
The Centre currently operates an operational surplus, much of which is directly attributed to the expansion of the fitness centre and the development of the aerobics space, together with the introduction of recognised (marketable) programmes such as ‘Les Mills’.

Prior to this income was constrained because the facility was attracting too few casual or individual fitness centre memberships and as a result was reliant on the less lucrative court hire.

The current surplus has enabled the Trust to purchase and service a mortgage on the new gymnastics facility and continue operation programmes.

Any potential losses that could arise are deemed to be the responsibility of the Trust. However, management believe a loss situation is unlikely given the experience of the management team and the trustees. The Centre is also perceived to hold a dominant market position within Rangiora.

The Trust receives an annual grant of $20,000 from the Council which goes towards maintenance costs. The Trust does not currently operate a sinking fund for maintenance. It is anticipated that when larger maintenance costs do arise these will be covered by operational surpluses and / or contributions from the Trust partners.

**Facility Design**

The Centre’s site selection process was largely driven by pragmatic issues such as access to ‘free’ (MOE) land and proximity to the High School. The High School (MOE) land is divided by a road, with the main school buildings on one side and on the other the school fields, tennis courts and the Sports and Fitness Centre.

The key design aspects in relation to the indoor sports facility development are:

- A parking area adjacent to the Centre also serves the playing fields and tennis courts. This configuration affords the Centre excellent street frontage. However, without the loss of the school’s existing tennis courts any future Centre expansion potential would be limited. Management believe that in hindsight it would have been beneficial to have taken longer to master plan the original site, taking into account such things as expansion opportunities.

- The design of the Centre has evolved over time with additional spaces such as the fitness areas being added or expanded as required. This has undoubtedly impacted on some aspects of the Centre’s functionality

- ‘Dual’ school / community use is also considered important as it maintains a higher level of community buy in and a “sense that the facility is a community asset and not just a school asset”. Modifications to the original design were required to achieve this; for example by the introduction of a separate school entry.

- The Centre also contains many of the design features and construction materials used in early to mid 1980s sports facilities. Some of these materials may have an adverse impact on the Centre’s ongoing maintenance costs. Due to the Centre’s age many of the sustainability features incorporated into more modern sports facilities are understandably absent.

- The Trust has optimised and expanded its facilities over time with the largest changes being the increase in the size of the weights, aerobics and cardio spaces. These optimisation steps have had significant benefits on membership and as a result revenue.
**Sporting Impact**

The sporting benefits of the development are seen as:

- The Centre reports 15 regular organisations, outside of the Rangiora High School, as being users.

- These organisations range from sports clubs through to community health focused entities.

- The fitness centre has 1,200 members and a “large number” of casual users who participate in squash and other activities.

- The ability to have a ‘drop in’ style of facility that accommodates the community at any time of the day has helped greatly to increase the participation.

- The Centre is attracting approximately 15,000 visits per month.

  - Activities include Les Mills Aerobics Classes (30 per week), weights room and fitness studio (5,000 visits per month) and Indoor Sports Competitions (768 people per week).
Aorere College Community Sports Fields Partnership

Project Description
The partnership between Aorere College and Manukau City Council is for the community use of the College grounds outside of school hours.

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<tr>
<th>Partnership Type</th>
<th>Small Scale Operational Partnership</th>
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<tr>
<td></td>
<td>The Council undertakes end of season maintenance and provides advice and technical expertise as required.</td>
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</table>

What the School Provides
- Community use of the College grounds outside of school hours
- Routine maintenance of the fields (mowing and ground marking etc)

What the Council Provides
- Council undertakes field renovations between the seasons in Autumn and Spring to keep the quality of the sports fields at the same level as other Council owned grounds
- Manages community bookings through the Council Park booking system
- Provides portable toilets for community use
- Technical expertise and advice on grounds maintenance and improvements to College facilities, as required.

Project Origins
The Council had initially identified that there was an unsatisfied demand and inadequate provision of both open space and sports fields in the Mangere and Papatoetoe wards. In 1992 the Council adopted a recommendation to facilitate the use of potential open space sites, on land other than that owned by Council (such as schools), for community use. Later the same year the Council also adopted a Recreation Strategy which had a specific goal to improve the co-ordination and utilisation of recreation opportunities between Council and the local schools in Manukau.

The project was developed in 1992 when the Council approached a number of schools and Colleges across Manukau in areas where there were identified shortfalls in open space and sports fields.

Some of the key points in the development of the partnership with the College and Council were as follows:

- Discussions between the Council and Aorere College were initiated and this lead to the partnership in 1992 between Aorere College and Manukau City Council for the community use of the College grounds outside of school hours.

- At the time the College fields, while providing a large open space, tended to be wet in winter allowing only limited use. The College also identified they had limited resources, both financial and technical, to undertake the maintenance required to improve the field condition.
• When the initial agreement was signed the then College Principal identified the partnership as a means of increasing the holistic community utilisation of the College sports grounds in a controlled and organised fashion.

• The partnership with the Council, while increasing the use of the fields, also increased their quality.

• The level of investment in end of season maintenance by the Council was four to five times what the College would have traditionally been able to spend. This enabled the College to have a far higher quality of sports field and greater use than would otherwise have been possible.

• The agreement now includes the use of 6 hectares of school grounds, including two rugby, one football and six outdoor netball / basketball courts.

• One of the key factors in the successful establishment of this partnership was the role of the then College Principal. His vision for the College was one of a school which prided itself on the community relations it forged and the role that it could play in helping the local sporting community.

It was identified that, in addition to providing additional community sports fields, the benefits to the College have been:

• Increased control over use of the grounds outside of school hours due to the Parks Booking System and Council Park Rangers which has led to a subsequent decrease in vandalism and graffiti.
• Increased use of the College grounds which is seen as important to a ‘community’ orientated school.
• Increased hygiene through use of portable toilets.
• Improved ground standards and the general appearance of the whole College site.
• Increased access to specialist advice, help and equipment for the College ground staff.
• Increased commitment from community members to the College.

The Council also assists in other ways, outside of the official partnership, which the College sees as a benefit. As an example it was recently identified that the College fields required an upgrade to the drainage.

• Under the agreement this was the responsibility of the College, however, while the Council were unable to assist financially with the cost of the work they provided project management support, developed technical specifications and managed the tender process for the College. These were all skills that the College did not have.

• It was acknowledged by the College that it was initially disappointed that the Council could not contribute financially to the drainage works, however their support and assistance was invaluable. However, it was now conceded that had the Council contributed financially it may have raised the expectation and obligation on the College to provide even more community use of the fields.
Governance and Management

An Open Space Partnership Agreement between the College and the Council has been in place since 1992. The agreement sets out the roles and responsibilities of both parties and is reviewed every two years. Key components of the agreement have been identified as:

- The agreement identifies that the College will provide access to the sports fields, undertake the daily maintenance, including field marking, provide and empty the additional litter bins required, and supply a list of recommended work for the autumn and spring maintenance.

- In return the Council will undertake renovations between seasons to provide a surface equal to those of its own fields, provide port-a-loos, provide turf culture advice to College ground staff, ensure orderly use of the fields through the use of the Parks booking system and the Ranger service, provide access to the Graffiti hotline and Council call centre, monitor the site to ensure that Council Bylaws relating to reserves are applied.

- The Council is to provide the school / Board of Trustees with a regular report on the community use of the fields.

While there is a formal agreement both the College and the Council identified that the key to the successful operation of the fields was good communication between the partners and an understanding of the issues each organisation faces.

One recent change to the agreement was that the College fields were bought under the same Council Bylaws as Council reserves during periods of community use.

This has enabled a Council Ranger to visit the fields occasionally and monitor their use. It was identified that the College does not have the resources to do this on a regular basis and the Ranger visits are considered an important factor in helping manage the community use of the fields (and indirectly helps protect the College).

The College identified several important factors that have been a benefit from the agreement. These are:

- During community use hours the College still maintains some control over which community groups utilise the fields, and retains the final say over bookings.

- As a result the College is utilised by a number of community based sports clubs which have all been shown to take responsibility for their own use and respect the College facilities.

- The College also allows a number of ‘one off’ bookings, although they do acknowledge that these can be more problematic.

The development of the relationship and respect for the facilities between clubs, Council and College is considered by the College to be one of the most important factors enabling a successful partnership.
Capital and Operational Funding

The Council is responsible for field bookings and collecting user charges.

This approach was considered to be beneficial to both parties, with the Council being able to provide a standard service to its residents, while the College does not have the responsibility of managing bookings and collecting fees.

The College stated that they do not have the resources within the School to manage this process.

Facility Design

The College sports grounds are located at the front of the site and have a separate road access. The key benefits of the location of the sportsfields for community use are:

- No access is required into the College buildings area; as part of the agreement the Council provides port-a-loos at the side of the field.
- The main College buildings are located at the rear of the site with a fence separating them from the fields. This restricts access to the rest of the College.

The fence restricting access to the rest of the College site was a later addition developed in response to increased vandalism.

While the sporting groups using the fields were not considered to be causing the problem it was identified that often a large number of ‘hangers on’ around the teams were responsible for the majority of the vandalism.

The fence now enables the College to better control the level of access throughout the main buildings and any negative impacts of community use are now minimal.

Sporting impact

The College fields provide a valuable sporting resource in an area with limited facilities. The Council provides the College with a report on the community bookings on a quarterly basis, with the most recent report identifying the fields are regularly used for mid week training and weekend competition by the following users:

- Lauvuila Tongan Rugby Association.
- Papatoetoe Rugby Football Club.
- Manukau Sangam Social Soccer.
- Baba Singh United Soccer Team.
- Papatoetoe Softball Club.

- In addition the College identified that the fields are regularly used for touch rugby.
- It was difficult for the College to identify the full sporting impact on the school, in terms of participation changes as the agreement has been in place for some considerable time.
- However, the College did say that school sports teams benefited from better quality fields and fewer field cancellations.
- In addition to the sporting impact it is considered that use of the fields promotes the College as an important community asset adding value to the local community.
Partner Comments

“The partnership that Aorere College have with Manukau City Council is great. The school receives expert turf management and advice when required from council staff and in return they have the use of our fields when they are not in use by the school. It is mutually beneficial and highly valued.”

Janet Danks, Administration Manager, Aorere College

“These partnerships mean the Council has access to additional land without the cost of ownership. This takes the load off Council’s facilities and is a cost effective way to help meet the high demand for sports fields in Mangere and Papatoetoe. Depending on the acuteness of need at the particular location and the needs of the school, the Council offers various incentives to the other party.”

Robert Findlay, Manager Park Recreation, Manukau City Council
Te Rapa Primary School and Hamilton City Council

Project Description

Hamilton City Council and Te Rapa Primary School have undertaken a ‘pool partnership’ to use the schools existing pool to provide water space to the local community over the summer months.

<table>
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<tr>
<th>Partnership Type</th>
<th>Small Scale Operational Partnership</th>
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<tbody>
<tr>
<td></td>
<td>• Hamilton City Council provides an annual $10,000 operational grant</td>
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</tbody>
</table>

What the School Provides

• Community access to the outdoor pool for the community outside school hours during the summer months.

What the Council Provides

• Operational grant to the school to employ a paid life guard to manage the pool during the community hours
• Pool expertise in terms of pool operations
• Pool equipment surplus to Council’s requirements

Project Origins

Hamilton City Council currently provides three pools for its residents: one regional pool ‘Water World’, a sub regional pool the Gallagher Aquatic Centre, and a local pool being the Municipal Pool (an open air pool) at the south end of Victoria St.

The Hamilton City Council recognised that their current pool provision was not providing enough recreational water space for residents over the summer months. It has been identified that user demand doubles at the pools during summer.

Analysis was undertaken by the Council which concluded that the option of partnering with schools to provide community pool access over summer would be a more viable alternative in the immediate term than developing new Council aquatic facilities.

As a result Council developed ‘school pool partnerships’ to assist with meeting wider community demands for recreation pool space over the peak demand summer months. These partnerships involve the Council granting an operational subsidy to the schools which in turn allows them to employ trained lifeguards and cover the summer maintenance costs. This allows the pools to remain open over the summer holiday period (outside traditional school hours).

There are currently four schools involved in the school pool partnership programme. Each school has been selected because of their strategic geographic location, filling an identified gap in the Council’s aquatic network. The Council has seen the pool partnership as a strategic success and is committed to continuing with the programme into the future.

Te Rapa Primary School was identified as a potential school to partner with for community use of their school pool due to:

• The Te Rapa area was identified as a growth area of the city and which Council recognised was placing additional pressure on the existing local pool network.
• It was identified that an increase in access to aquatic space was required within the Te Rapa area.

• The Te Rapa School’s pool was relatively new being opened in 2002 with a Council contribution towards the capital costs.

• Te Rapa Primary School Board of Trustees and Principal had always recognised that the school should be seen as a ‘community hub’ and had a philosophy that the community should be accessing and interacting with the school and its facilities.

Since the Te Rapa Primary School has been involved in the pool partnership with Council they have witnessed the benefit of bringing the wider community into the school, which in turn has created a greater sense of ownership. The School reports the tangible benefits of this have been a decrease in school vandalism. The School, like the Council is also committed to continuing with the partnership into the future.

**Governance and Management**

A service level agreement is provided by Hamilton City Council which outlines the roles and responsibilities of both the Council and the School. The agreement outlines the financial, operational, reporting and management commitments and practises that both parties have agreed to.

Key components of the service level agreement are:

• School responsibility for pool governance and management.

• School to employed pool staff member who is responsible for increasing community and sporting group usage of the pool.

• School provides community access to the pool after school during the summer months including the summer school holidays

• Council will provide technical advice from Council pool staff to assist with the pool operations

• Council also facilitates an annual meeting with the four schools involved in the partnership programme which allows for the transfer of key learnings and effective practise to be shared amongst the schools. At these meetings it was identified that there is the potential to utilise Council’s communication channels to promote the partners’ pools more and to investigate the possibility of leveraging off the Council purchasing agreements to reduced maintenance and upgrade costs.

• Council to provide an annual operational grant to assist with the employment of the paid lifeguard

In terms of managing the service level agreement both parties agreed that good communication existed between the partners which allowed for solutions to be found to any potential management problems. Open communication was seen as one of the cornerstones of the partnership’s success.
**Capital and Operational Funding**

The Hamilton City Council provides an operational grant which is based on $2.90 cents plus GST per public patron. The grant is capped at $10,000 per summer.

The grant assists the school to pay for a trained lifeguard to supervise the pool during summer opening hours, operation of the pool and minor maintenance.

The School has identified that there is a huge benefit in being able to employ a dedicated staff member to operate the pool over the school holidays. In particular this allows the employment of an ‘expert’ to operate the pool and increases the focus on maximising community and club use. Without such assistance the school reports it would not have the expertise nor time to fully maximise usage.

The School charges a minimal entry fee to use the pool which also assists with the operation and maintenance of the pool. A small amount is also set aside annually to cover minor upgrades as part of the pool’s asset management plan.

However, there is no long term funding set aside by either the School or Council to contribute to the significant pool upgrades that will be required in the long term. Funding of significant upgrades for the pools will need to be addressed at a later date should the Council wish longer term community use.

Aside from the Council’s operating grant the School also identified that the additional support provided by Council under the partnership was also valuable. This included:

- The provision of second hand items such as lane ropes that become available when council upgrades their own facilities
- Technical advice from council pool staff
- Opportunities for training partner and Council pool staff alongside one another
- Networking opportunities with the other school pool partners to share ideas and key learnings and effective practice. These factors all lead to financial savings and improved service.

**Facility Design**

Te Rapa Primary School has a high quality solar heated 25m pool with an attached 8m x 6m learner pool. Immediately adjacent to the pool patrons can also utilise the three tennis courts or basketball court.

The pool is situated to the side of the school and adjacent to a large community sports park. There is adequate parking, changing facilities and a ‘tuck shop’ which makes the pool a very attractive local recreational facility.
**Sporting Impact**

The Te Rapa Primary School pool partnership began in 2003. The sporting benefits of the development are seen as:

- The community usage of the Te Rapa Primary School pool has increased steadily since it was first opened as a ‘partner pool’ in the 2003 summer school holidays.
- The 2008/09 summer period saw 2,781 public patrons utilising the pool during the school holidays.
- There was also an additional 1,031 patrons utilising the pool outside of the public opening hours. Groups such as sports teams, family groups, local businesses, Christmas functions, childcare groups, flipper ball and other school groups all utilised the pool during summer.

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**Partner Comments**

“Te Rapa Primary School is certainly grateful for the partner pool arrangement we enjoy with the HCC. I believe that the initiative is of significant benefit to both organisations and also the greater north Hamilton community too. The wider community certainly enjoy having the school’s aquatic and hard court facilities open outside normal school hours, during weekends and in the summer holidays”.

“We see good people who are ‘friends of the school’ in and around our grounds over the weekends and holidays. Vandalism is reduced, and initiatives like this also double as a form of subtle school marketing. We see our school as a “caring community school” and our aim is to see people enjoying their time here either as students / staff or as visitors. As a partner pool Te Rapa certainly values the relationship we have each summer with the HCC.”

*Vaughan Franklin – Principal Te Rapa Primary School*

“Hamilton is a land-locked city that has no safe natural water ways for residents to recreate in. Swimming pools are required for residents to enjoy recreational water space activities. The partnership that Hamilton City Council has with its partner pools is critical to the success of providing these safe recreational water spaces for residents. Without these partnerships some residents would need to travel a fair distance in order to enjoy safe recreational water space. Our partnership with Te Rapa Primary enables residents in the north of the city to recreate in water during the summer. Without this partnership council would not be able to provide this service to the residents in this manner that creates localized usage and a neighbourhood focus for swimming facilities. Council values its relationship with the partner pools.”

*Jason Rogers, Hamilton City Council*
Oamaru Field Mowing Partnership

### Project Description
Waitaki District Council currently pays for the mowing of three school fields in Oamaru in return for the community having access to each school’s playground.

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<tr>
<th>Partnership Type</th>
<th>Small Scale Capital Partnership</th>
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<tr>
<td></td>
<td>Waitaki District Council contribute $8,000 for the mowing of the school fields.</td>
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<tr>
<th>What the School Provides</th>
<th>What the Council Provides</th>
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</thead>
<tbody>
<tr>
<td>● Community Access to the school playground.</td>
<td>● Contributes $8,000 for the mowing of the school fields.</td>
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</table>

### Project Origins
The partnership between the Council and School arose from the sale of a small Council reserve to a developer who wished to establish a new supermarket in the north of the town. Council supported the sale to enable the development to proceed and offered to secure community access to three school playgrounds to compensate the community for the loss of the reserve.

Three schools opted to participate in the Council initiative and in return the Council offered to take over the mowing of their school fields in return for guaranteed community access to the schools’ playgrounds.

The partnership between Waitaki District Council and the three schools is estimated to have been in operation for approximately ten years. The playgrounds were developed prior to the partnership being formed.

At the time of initiation the partnerships were not linked to any particular strategic plan or research, however the Council is currently working on a playground strategy which will provide a more strategic focus to playground provision.

### Governance and Management Structures
No formal management agreements were cited by either Council or school representatives. From the Council Officers’ perspective the three school fields were simply included within a contractor’s annual Council mowing contract.

Given the small scale of the partnerships and their apparent informal nature Council has not placed any monitoring requirement on the schools, or any site requirements such as community access signage.

One of the participating school’s principals identified that the partnership works well for the schools because they are not burdened with any additional governance or management work as the playgrounds would exist with or without the partnership. Money that would have been spent on mowing was able to be redirected to educational purposes.
It was suggested that the only potential drawback to the schools was an inability to gate themselves off after hours. However, only one of the three schools was thought to favour locking its gates after hours. The remaining two schools had long standing open access traditions.

**Capital and Operational Funding**

As an operational partnership no capital funding was exchanged. Council estimates that mowing the three fields costs approximately $8,000 per annum.

**Sporting impact**

The level of the sporting impact the partnership has made is difficult to determine given that no use data are available. It is also likely that at least two of the playgrounds would have remained open to the public after school hours regardless of the partnership.

It could be argued that the Council’s mowing of the school fields in accordance with Council mowing regimes may actually create improved casual community use of these assets. However, no data currently exist to substantiate this.
Tamaki College Community Recreation Centre Partnership

Project Description

Tamaki College Community Recreation Centre was one of the first major projects entered into by Auckland City Council under their ‘Facility Partnership Policy’ in 2001. The partnership was to develop a dual use recreation centre containing two 2/3 basketball courts (converting to one full size netball / basketball court with retractable spectator seating), a weights gymnasium, meeting rooms, offices, changing facilities and six tennis courts.

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<tr>
<th>Partnership Type</th>
<th>Large Scale Capital Partnership</th>
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<tr>
<td></td>
<td>The total capital budget of the project was $3.1 million</td>
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<td></td>
<td>School/MoE contributed $600,000</td>
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<td></td>
<td>Auckland City Council (1.1 million)</td>
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<td></td>
<td>ASB Trust contributed $1 million</td>
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<tr>
<td></td>
<td>Other Charitable grant organisations contributed $400,000</td>
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</table>

What the School Provides

- A portion of the school site to develop the indoor recreation centre
- A portion of the required capital funding
- Community access to the indoor recreation centre outside of school hours.

What the Council Provides

- A third of the required capital funding
- ‘In kind’ ‘Project’ and ‘Asset’ Management’ expertise.
- ‘In kind’ ‘Trust’ development expertise.

What the Trust Provides

- Governance and management services such as:
  a) Bookings during the agreed community hours
  b) All annual maintenance
  c) The depreciation

Project Origins

In the late 1990s Auckland City had undertaken community needs research in the Tamaki area which clearly identified the strategic need for a Community Recreation Centre.

Coinciding with this research Tamaki College’s existing gymnasium had just been condemned. The College had been given a limited amount of money by the Ministry of Education to develop a new gymnasium but this was not sufficient to develop a facility to cater for the recreation needs of their students.

Auckland City Council had been operating its Facility Partnership Policy for an 18-month period when Tamaki College approached them to partner in the development of a recreation facility. The following process resulted in the successful facility partnership application:
• Tamaki College submitted an application to Council under the Facility Partnership Policy.

• The initial application was a joint one between the College and Youhtown (an Auckland youth programme and facility provider).

• By the time Council formally committed funding to the project Youhtown had dropped out of the partnership leaving the School and the Council as the primary partners.

• Council accepted the partnership application but made it conditional on the negotiation of a satisfactory MOU and a Facility Partnership Agreement between Council and the School’s Board of Trustees.

• Council approved the funding as they considered they were “buying community access” in a facility that if not undertaken in a partnership may not have been developed for many years.

• The school considered they were contributing toward an asset that was far larger than they could have developed on their own.

• The final Partnership Agreement was signed prior to construction tenders being let. Part of the agreement specified that all the capital funding for the project had to be in place prior to tenders being let and that the Board of Trustees would take responsibility for any cost overrun above the project’s contingency budget.

• The partners agreed to the appointment of an independent project manager who in turn oversaw the appointment of the architects and sub consultants. The school’s Board of Trustees provided the initial design budget to enable the design process and the fundraising to be run concurrently.

• Both partners agreed that an independent Management Trust should be developed to run the facility.

The Tamaki College was one of the early Auckland City facility partnerships. Since the Facility Partnership Policy’s inception Council has entered into 40 partnerships and contributed approximately $23 million towards an estimated $60 million of capital development projects.

**Governance and Management**

Although the building is ‘owned’ by the Board of Trustees the project is structured so that an independent Management Trust is responsible for its operation.

The Management Trust is comprised of:

• College Representatives x 2
• Council Representatives x 1
• Community Representatives x 1
• Centre User Representatives x 1
• Centre Manager (non voting)
• And a secretary (non voting)
There are three key agreements in place between the partners to assist with the operation of the facility. The agreements are:

- The Management Trust has an annual operating agreement with the Council in return for an annual operational grant which provides guaranteed community access to the facility
- The School Board in turn has an agreement with the Management Trust which outlines the Trust’s roles and responsibility in managing the facility
- Council has the original Facility Partnership Agreement with the School Board for the development of the facility

The partnership has not been without operational challenges. One that has been cited by two of the partners is the loss of understanding of the nature of the partnership arrangements that can occur when staff move on. New staff often take time to come up to speed with the old agreements and general partnership history. This has identified the importance of keeping accurate records.

The Management Trust believes that the community has also been delivered a quality asset earlier than would have otherwise been the case, a view also shared by Council. Management sees itself as being responsive to the community and acting as a champion of community access. In essence the Management Trust sees its role as a neutral party independent of the School and Council which is tasked with making sure the partnership is fulfilled equitably for all partners (including the community).

All the partners agree that the benefits of the partnership far outweigh any of the challenges and that on balance all are far better off from coming together than “going it alone”.

**Capital and Operational Funding**

The total capital budget was $3.1 million. This was funded through contributions from the School/MoE ($600,000), Auckland City Council (1.1 million), ASB Trust (1 million), and $400,000 from other charitable grant organisations.

It was considered important that the business plans reflect the nature of the community the Centre was there to serve and that revenue targets reflected the management philosophy. For example, if you are in a lower socio economic area, setting high revenue targets would lead to increased fees and the growth in users from outside the area.

To ensure maximum benefit from the large capital investment and in recognition of the target community coming from a lower socio economic area the following actions were implemented.

- The Council pays an annual $100,000 operational grant to allow a wide provision of community programmes at affordable user rates.
- The School also contributes $33,000 to the Centre’s Management Trust in recognition of their operational use.
- The quality of the outcomes sought by the operational grants is monitored through a series of KPIs.
As a result the Centre has run a cash surplus every year since opening and hireage of the different spaces is reported to be “near maximum capacity” (outside of school hours). Although management report that there have been issues with certain Council KPIs, primarily because they perceive they tend to be more ‘numbers driven’ rather than based on ‘hours and type of use’ they remain supportive of the KPI concept.

**Facility Design**

The design phase of the facility was a robust process which involved various levels of negotiation between the College and Council for the requirements of the students and the community. This was considered critical to both the College and Council given the scale of their investments. Both the partners now agree that this approach has lead to a more functional building.

Council and the College both had members on the development’s project control group which developed the final facility design. Some of the negotiation centred on the location of the facility.

- The School initially proposed to develop the Recreation Centre at the rear of the school site accessed down a driveway.
- Council opposed this location and made their funding conditional on the facility being positioned on the site of the school’s existing tennis courts which offered excellent road frontage.
- This approach also offered multiple access, with the community entering from the road and the school from the behind. The loss of the courts was compensated by bringing the replacement of the courts into the main project budget.

The facility was also designed to be dual use so that the school and the general community could use different parts of the Centre at the same time.

After school hours the majority of the Centre reverts to community use. The design also incorporates a number of features to encourage the community to use the spaces. For example, people on the street are able to look into the main gymnasium floor via two large ball resistant glass windows.

**Sporting impact**

The Tamaki Community Recreation Centre opened in 2000. The sporting benefits of the development are seen as:

- The development has been very successful in providing the local community with a range of sporting opportunities.
- The multi use nature of the Centre has seen it used for many activities, such as indoor soccer, basketball, touch, volleyball, badminton, netball, aerobics and dance.
- The fitness centre also operates with a $10 joining fee and a $2.50 per visit charge. This has enabled members of the community who would otherwise not access commercial fitness centres (due to high joining fees) to attend.
• The Centre also actively runs programmes that are targeted at the local community in order to attract “traditional non users” into physical activity.

• One of the perceived benefits to the school of the partnership is the ability to utilise a facility of far superior quality than to the one they would have been able to develop alone.

• The school has gained access to a fully equipped fitness gym with $200,000 worth of equipment and substantially more court space and teaching areas than would have otherwise been the case.

• The School’s prominence and that of its sports academy in the local community, are also believed to have been enhanced.

Partner Comments

“The partnership that exists between Auckland City Council, Tamaki College, and The Tamaki College Community Recreation Centre has been a positive relationship for all sides even though there are at times conflicting demands.

From the community side having a quality facility in the immediate area has had major benefits, local people are able to access a low cost facility and continue to access that in the long term. Without the support of the Council and its facility partnership scheme many of the people who currently use us would be priced out of recreational activities or would not have the means to access the recreational activities or space currently on offer at this centre.

Managed locally the facility contributes to the health and well being of the local community and at the same time to the wider Auckland community through less strain on other essential service such as healthcare.

This facility is well used by all segments of the community 7 days a week and with a growing waiting list there is certainly more scope for the expansion of the community facility partnership now and into the future”.

Lee Jones, Centre Manager, Tamaki College Community Recreation Centre.
Aquinas Community Share Partnership

Project Description
Tauranga City Council and Aquinas College have undertaken a partnering approach to the development of the Aquinas Action Centre (indoor sports), outdoor hard courts and sports fields which opened in 2005.

<table>
<thead>
<tr>
<th>Partnership Type</th>
<th>Large Scale Capital Partnership</th>
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<tbody>
<tr>
<td></td>
<td>Aquinas College contributed $1.35 million.</td>
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<tr>
<td></td>
<td>The Tauranga City Council contributed $1.35 million</td>
</tr>
</tbody>
</table>

What the School Provides
- A portion of the school site to develop the indoor recreation centre
- Half of the required capital funding for the indoor recreation centre
- Full capital funding for the hardcourts, sportsfields
- Community access to the indoor recreation centre outside of school hours.
- Community access to the hard courts and sports fields for specified hours
- An equal share of the operational costs

What the Council Provides
- Half of the required capital funding for the indoor recreation centre
- An equal share of the operational costs
- Engage a management company to manage the use of the indoor facility after school hours
- In kind ‘Project’ and ‘Asset’ Management’ expertise.

Project Origins
The Aquinas College was a new college that was being developed in the Pyes Pa area of Tauranga. This particular area was identified as a growth area by Tauranga City Council and the recent district plan change meant an additional 13,000 people could potentially be accommodated within the Pyes Pa area.

The college was in the planning stage when the Establishment Committee of the Aquinas College Board of Trustees first approached the Council in 2001/02 regarding the possibility of partnering in the development of sports facilities under a Council ‘community share agreement’. The Council had other ‘community share’ projects for school halls and playgrounds in place at the time.

Aquinas College opened in January 2003 with the land only grassed for sports fields. The hard court space was to be developed the following year in 2004 and a classroom was being utilised for PE classes during wet weather. There was no formal indoor gymnasium.
From the College’s initial request for support Council undertook the following process:

- Council undertook a detailed and robust evaluation in 2003/04 on the potential options and benefits a partnership could offer to the wider community of Pyes Pa.
- The Council’s demand analysis and consultation identified that although an indoor sports facility was not an immediate requirement for the local community it would be in the long term. It was determined that developing the indoor sports facility ahead of the population growth (developing lead infrastructure versus lag infrastructure) would bring growing benefits to the community over time.
- Council had secured land in Pyes Pa for active recreation and were looking to develop it in the short term for sports fields. However, Council identified an opportunity where by accessing the School’s sports fields the land could service the community’s sports fields needs for the next 10 years. This meant that Council could delay its sports field’s development in the Pyes Pa area and focus the money into other areas of higher need.
- The College prepared a detailed formal proposal for a community share agreement taking into consideration the findings from the Council evaluation, analysis and community consultation.
- The College was able to demonstrate that the Board of Trustees and the Principal saw the new school facilities as part of a ‘community hub’ which should be shared by the community.
- The final College proposal was extended from a one court design in the original concept to the flexible layout allowing two 3/4 courts to be developed.
- The Council agreed in 2004 to contribute up to $1.35 million to secure community access to Aquinas College’s indoor sports facility, sports fields and hard courts. A ‘heads of agreement’ was developed and signed by the Council and College reflecting the agreed partnership principles and needs of both the community and College.
- A formal ‘Project Management Structure’ was put in place with the School managing the project but using Council expertise in the projects design, funding and eventually its operation. The expertise that Councils provided in this phase of the project was identified as a key to the successful development of the facility.
- The Aquinas Action Centre Indoor facility was officially opened under a ‘community share agreement’ in 2006.

This project was initiated when the Council still had an informal practice of developing ‘community share agreements’. In subsequent years the Tauranga City Council has developed their more formal ‘Community Share Agreement Policy’, which was adopted in 2005. The Aquinas Action Centre partnership was used as a practical example to help inform and develop the final ‘Community Share Agreement Policy’.

The Council has also now developed a ‘levels of service’ policy for indoor court space which is utilised as part of the ‘Community Share Agreement Policy’ in accessing community needs for indoor recreation space.
It was identified from a Council perspective that having strategic documents and levels of service for sports facilities is critical in assessing whether potential projects should or should not be supported by Council. If a potential project does not fit strategically then it will not be supported.

**Governance and Management**

The Aquinas College is the owner of the Aquinas Action Centre, hard courts and sports fields. There is a formal ‘community share agreement’ in place that guarantees community access to the sporting facilities. The community share agreement secures community access to the Action Centre (indoor) for a perpetual term. The sports fields ‘community share agreement’ will continue until such time as the council develops sports fields and hard court space on council land within the Pyes Pa area.

Some of the key aspects of the agreement are as follows:

- The Council engages a management service company to manage the use of the indoor facility, which also includes the booking of the facility during community priority hours.
- The School manages the community access to the sports fields and hard courts after school hours.
- The Council sets the pricing policy and charges for both the Action Centre and sports fields.
- The community has access to the indoor facility from 5pm-9pm during the week and 9am-7pm on the weekends, as well as during school holidays. Community access to the sports fields and hard courts is from 5pm during the week with the school having access from 9am to 5pm. The weekends are split between school use in the morning and community use in the afternoons.
- An ‘operational committee’ has been set up to ensure that the intent of the ‘community share agreement’ is met. The committee also reviews the strategic planning of the services and is tasked with maintaining effective communication. It is comprised of two representatives of Tauranga City Council and two representatives of Aquinas College with a rotational chair. The Council management contractor also attends these meetings.
- A detailed operational protocol document has been developed to assist the committee to identify the roles and responsibilities of each partner in the operation of the facility. This has proved beneficial as a tool to advance the resolution of actions and issues.
- Council provides a dedicated staff member to liaise and develop the relationship with the school and the management company this was identified as a key to the success of the partnership.
- There is a 50 – 50 share of the annual operational costs.
- The School is responsible for any community booking of the facility during school hours when it allows a limited amount of community use.
Capital and Operational Funding

The Tauranga City Council provided $1.35 million in 2006 towards the capital development costs of the Aquinas Action Centre, while Aquinas College also contributed an additional $1.35 million.

The operational funding aspect of the indoor facility is covered by:

- Council provides for a 50% share of the ongoing maintenance of the facility, which varies from year to year depending on what maintenance is required.
- The College provides the other 50% share of the ongoing maintenance of the facility.
- Council also funds an external management company to manage the facility outside of College hours. The company is responsible for the bookings of the indoor facilities for the agreed community priority use hours. This management service company also manages other council indoor facilities which allows for continuity of services and a similar level of provision to other council facilities.

The Council identified that providing an annual operational contribution (including the management company fee) towards the facility is fundamental to ensuring the facility is operated to its full potential. Without an operational contribution it was felt the facility would be set up to fail.

Depreciation for the facility has not been considered at this stage, although as part of the agreement Council can choose to reinvest in upgrades or not. It was acknowledged that future agreements should consider depreciation from the beginning of the partnership with the roles and responsibilities of the partners being clearly set out.

Facility Design

The indoor sports facility consists of one full sized netball/ basketball court (also useable as two three quarter basketball courts), a fitness gym, meeting and dance group spaces, and kitchen and changing facilities. The outdoor facilities include 6 hard courts for netball and tennis together with 3 sports fields for football, rugby and cricket.

Council’s input into the design of the facility was important as it was a significant community facility that was being developed. The design process was as follows:

- The design of the indoor sports facility had formal input from both the Council and the College all the way through the design process.
- Both the Council and College had to approve the preliminary and final architectural drawings as part of a ‘heads of agreement’ between the two parties.
- Council’s staff and Council’s management contractor provided expertise in the requirements of a community recreation indoor facility and this resulted in a more functional building for the community.

Council’s expertise also helped enhance the concept of the College’s original one court facility into a flexible layout allowing the court space to be used as two 3/4 courts. This configuration allows for greater flexibility of programming and use.
**Sporting Impact**

The Aquinas Action Centre was opened for community use in 2007. The sporting benefits of the development are seen as:

- Since development the usage of the facility has steadily increased both in terms of activities and hours of use. Much of this has been attributed to the external management approach of the community use aspect of the Centre.

- The hours of community use were 1,080 in 2008/2009 with a total patronage of 18,843. It is anticipated the demand for the facility will continue to grow as the Pyes Pa population grows.

- Aquinas College also utilises the Action Centre extensively for their students PE and sporting activities. The council funding has allowed the indoor sports facility to be extended from a one court design in the original concept, to the more flexible layout of two 3/4 courts. This has facilitated significantly greater school use.
Merivale Action Centre Partnership

Project Description

Tauranga City Council and Merivale Primary School formed a partnership to develop the ‘Merivale Action Centre’ to meet the indoor active recreation needs of the school and the local Merivale community.

<table>
<thead>
<tr>
<th>Partnership Type</th>
<th>Medium Scale Capital Partnership</th>
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<tbody>
<tr>
<td></td>
<td>Tauranga City Council contributed $225,000.</td>
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<tr>
<th>What the School Provides</th>
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<tbody>
<tr>
<td></td>
<td>A part of the school site to develop the indoor recreation centre</td>
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<tr>
<td></td>
<td>A portion of the required capital funding</td>
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<tr>
<td></td>
<td>Community access to the indoor recreation centre outside of school hours.</td>
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<tr>
<td></td>
<td>A share of the operational costs.</td>
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<th>What the Council Provides</th>
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<tbody>
<tr>
<td></td>
<td>A portion of the required capital funding</td>
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<tr>
<td></td>
<td>A share of the operational costs.</td>
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<tr>
<td></td>
<td>Engaged a management company to manage the use of the facility after school hours</td>
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Project Origins

The Merivale community, which is drawn from a predominately lower socioeconomic area, was identified as having limited access to active indoor recreation space. The School had originally planned to build a school hall to cater specifically for its expected roll growth. However, during the initial planning stages of the project there was a significant drive from the local community for the provision of an active youth recreational space which would be safe and provided activities for local children, both after school and at the weekends.

Because of the community drive the school hall development was amended to try and accommodate a more multi-purpose facility which would be able to be accessed by the community and youth for active recreational programmes.

These initiatives culminated in the School making a submission to the Council in the 2001/2002 financial year for capital funding support to develop the ‘Merivale Action Centre’.

Council did have other community share facility arrangements in place at the time for school halls and play grounds throughout the city. The proposal was reviewed under the Council’s relevant policies and the following process was undertaken:

- Council officers undertook an evaluation and assessment of the facility needs of Merivale and associated areas. This evaluation highlighted a limited provision of indoor active recreation space.

- The activities and programmes carried out by the community had also outgrown the space available at the Merivale Community Centre.
• The Council identified the strong support from both the Board of Trustees and the School Principal that the facility was seen as a community facility for the local area.

• The ‘Community Facilities Development Support Policy’ and the Council’s staff evaluation were utilised when approving a financial contribution towards the Centre’s capital development.

The Merivale Action Centre was opened in 2005 and started providing community programmes and activities. The proposed new facility was always seen by the school as a potential catalyst to bring the community and the School closer together. Since its opening the School has noticed an increase in parent involvement within the school and a decrease in school vandalism.

**Governance and Management Structures**

The Merivale Primary School is the legal owner of the Merivale Action Centre and has a detailed ‘Community Share Agreement’ and ‘Operational Protocols’ with Council; these outline the roles and responsibilities of each partner in the facilities operation. Some of the key aspects of the agreement are as follows:

• The community has access to the facility from 7am to 9am and 3pm to 9pm during the week with the school having access from 9am to 3pm. The weekends are entirely for community use.

• There are quarterly meetings that take place between the Council, School and facility management staff to address strategic and operational issues. The Council also has dedicated staff to liaise and develop the relationship with both the School and management company. This was identified as a key to the partnership’s management success.

• The original agreement provided for a 70% Council / 30% School contribution to annual operational costs. Due the nature of the actual use and the hours available to the each partner the parties are currently working on amending the agreement to a 50 – 50 share of the annual operational costs.

• The School is responsible for any community booking of the facility during school hours, when a limited amount of community use is allowed.

• Under the agreement Council is responsible for the management of community use outside of school hours. Council has engaged a management company to manage the use of the facility after school hours, which also includes taking community bookings.

The benefit of this approach is it has enabled dedicated community management expertise to be introduced which in turn has resulted in a steady increase in the use of the facility by the wider community. The School acknowledged that it would not have been able to dedicate the required time and expertise to manage the facility, or achieve similar community patronage, without this management model.

• Council provides a dedicated staff member to liaise and develop the relationship with the School and the management company; this was identified as a key to the success of the partnership.
**Capital and Operational Funding**

The Tauranga City Council provided $225,000 in 2004 towards the capital development costs of the Centre, which at the time was the largest financial contribution the council had made towards a shared facility partnership.

The operational funding aspect of the indoor facility is covered by:

- Council provides for a share of the ongoing operations and maintenance costs of the facility; this varies from year to year depending on what maintenance is required.
- The School provides the other share of the ongoing operations and maintenance costs of the facility.
- Council also funds an external management company to manage the facility outside of school hours.

The Council has acknowledged that providing an annual operational contribution (which includes the management company fee) towards the facility is fundamental to ensuring that the facility is operated to its full potential.

Without an operational contribution it was felt the facility would in effect be set up to fail. The Council provides an annual operating contribution to all of its own facilities in order to allow them to provide an adequate level of service. Council views the Action Centre as being of similar standing, in part due to its current level of community use.

There is currently no long term fund set aside by either the School or the Council to contribute to a significant facility upgrade that will be required in the longer term.

**Facility Design**

The Merivale Action Centre is a multipurpose indoor facility which consists of a multiuse sports hall, a kitchen, ablution facilities and a mezzanine (spectator) area. The facility was opened in 2005 and has enjoyed a good level of community use.

The Merivale Action Centre is set near the front of the school grounds adjacent to staff and visitor parking which is seen as a key to the community connecting with the facility.

The design of the indoor sports facility received input from both the Council and the School all the way through the design process as a partnership requirement. This has benefited the final design of the facility due to:

- Allowed for both the school and community needs to be understood and catered for within the final design.
- Council was able to provide expertise in the requirements of a community recreation indoor facility which has resulted in a more functional building for the community.

The School acknowledge that the community use aspects of the design which attract the community would not have been able to be developed without Council capital funding.
**Sporting Impact**

The Merivale Action Centre was opened in 2005. The sporting benefits of the development are seen as:

- Community use has increased from 710 hours in 2005/2006 year to 1467 hours in 2008/2009 year.

- Patronage has increased from 10,145 in 2005/2006 to 17,261 in 2008/2009.

- A wide variety of community groups utilise the facility with a focus on programmes and activities for the local youth. Basketball, volleyball, indoor soccer, badminton and martial arts are some of the many activities undertaken.

- The Merivale Primary School utilises the indoor facility to a significant extent during the day. Uses include P.E, sports, school productions and assemblies.

- Other local schools also utilise the facility for their end of year productions as they don’t have indoor facilities of sufficient size to house them.

The original design of the school hall (pre the partnership model) would not have allowed for the large number of community and school sports activities that are currently undertaken. Both partners believe the Council’s additional capital funding support, which allowed the ‘hall’ to be developed into an indoor sports facility, has had an extremely positive impact, both on the School and the community’s recreational activities.
**Berhampore Primary School Pool Partnership**

**Project Description**

Wellington City Council and Berhampore Primary School undertook a ‘facility partnership’ to upgrade the school’s existing swimming pool, which was reopened in October 2009.

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<th>Partnership Type</th>
<th>Small Scale Operational Partnership</th>
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<tbody>
<tr>
<td></td>
<td>The capital development budget for the whole project was $50,000. Wellington City Council provided $15,000</td>
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<tr>
<td></td>
<td>Berhampore Primary School contributed $10,000</td>
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<td></td>
<td>Charitable grants contributed $25,000</td>
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<tr>
<th>What the School Provides</th>
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<tbody>
<tr>
<td>Community access to their pool</td>
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<tr>
<td>Structured Swim School for community access</td>
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<tr>
<td>A portion of the capital funding</td>
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<tr>
<td>Operational costs</td>
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<tr>
<th>What the Council Provides</th>
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<tbody>
<tr>
<td>A portion of the capital funding</td>
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**Project Origins**

The introduction of tomorrow’s schools funding models and the introduction of new more stringent regulatory standards has led to a decline in school pools within Wellington. It was identified that of 82 schools only 11 had pools that were still functioning. The remaining schools utilise the Council pools at additional travel and financial cost to students. Learn to swim programmes within schools have also decreased.

There was a series of key issues that occurred within Wellington City that led to the council partnering with schools, and in particular Berhampore Primary School, for community access to their school pools. These were:

- The Wellington City Council undertook an aquatic facility strategy the objective of which was the equitable provision of aquatic space across Wellington City. The strategy identified geographic areas within the City that had low provisions of aquatic space and prioritised areas for future aquatic development.

- The aquatic strategy identified approximately $14 million of aquatic development was required to meet the community demand. It was also identified that by partnering with schools to provide community access (to school pools) the Council could assist provision in the key areas of local need, whilst reducing their estimated capital spend by approximately $5 million.

- The strategy identified that the area surrounding Berhampore Primary School required additional access to aquatic space.

- Wellington City Council also prioritised ‘learn to swim’ as a key area it should support. Particularly when community access to aquatic space could be secured within a school environment.
At the time of the School’s proposal, Council was experiencing pressure on its own pools, especially from the ‘learn to swim’ (due in part to school pool decommissioning) and ‘club’ users. This in conjunction with the inability for many youth to swim adequately, led Council to identify ‘learn to swim’ as a priority for support.

Aquatics Clubs and Associations had also advised Council that they were unable to meet the demand for those wanting to be involved in aquatics sports due to the lack of appropriate facilities. Council identified that the use of school pools would assist with decreasing the pressure on Council pools, particularly for ‘learn to swim’, and potentially free up more capacity for general community and club use. It was for these reasons that the Council supported the proposal.

During this time the Berhampore Primary School pool was not in operation although the school was looking to reopen the pool again. The following stages occurred in the reopening of the school pool:

- Berhampore Primary School had struggled to make use of their pool for a number of years and was eager to make better use of the strategic asset rather than treating it as a liability.

- A series of personal connections gave rise to the initial formation of the partnership. A family who were involved in the Harbour City Water Polo Club and who also had strong family connections to Berhampore School, acted as the initial catalyst. Through these connections the family was aware of the Wellington City Aquatics Strategy, the school’s unused pool and the club’s need to develop a stream of potential new swimmers / players.

- This culminated in the family approaching Berhampore School with the idea to redevelop the swimming pool and establish the Little Makos swim school. This provided the project with both an operational and a capital development component. Once the Schools Board of Trustees and the Principal had agreed to the concept the Council was approached for funding support.

- A partnership between the School and the Council was developed to revitalise the existing school pool to provide both local community and the primary school with water space.

- An operational partnership was also formed between the School and Harbour City Water Polo Club (the ‘Little Makos’ Swimming School) to run the pool.

The Wellington City Council agreed to contribute capital funding towards the Berhampore School’s pool in return for community access to it, and the pool reopened in October 2009.

**Governance and Management Structures**

The governance of the pool rests with the School’s Board of Trustees. A service level agreement is currently being drafted to outline the roles and responsibilities of the different partners. The Little Makos and Berhampore School will also enter into a more formal arrangement after an initial operational ‘shake down period’. An informal arrangement had been reached prior to commencement, which attributed responsibility to the School for:

- Long term asset management
- School and the Makos having joint responsibility for operational costs

However, it was considered important that the facility be run for a year to test the accuracy of the business plan prior to a formal arrangement being developed.
Currently the Mako’s are the interface between the School and the public and are responsible for marketing and running the ‘learn to swim’ lessons and in essence are managing this aspect of the pool’s use.

**Capital and Operational Funding**

The capital development budget for the project was $50,000. The Wellington City Council provided $15,000 towards the capital upgrade while the School’s own investment was $10,000. The Ministry of Education did not make a capital contribution towards the redevelopment. The balance of $25,000 was obtained through a series of charitable grants.

The Makos are responsible for preparing budgets and paying all the pool operational costs, such as gas heating and cleaning costs. This approach takes significant pressure off the School.

The School viewed the partnership as a “no lose” situation as prior to redevelopment they had taken their children out of school to participate in ‘learn to swim’ lessons. An eight lesson swimming course for a class at the local pool cost approximately $1,600 in transport costs alone, with the swimming lessons being an additional charge.

**Facility Design / Site**

The pool is located a short distance inside the school gates, but is positioned in such a way that it is not visible from the street. The pool’s design is that of a traditional raised concrete primary school pool surrounded by a high wire mesh fence.

Having a proactive facility manager undertaking marketing initiatives has assisted in overcoming the fact the pool has little direct physical exposure to the road.

The most significant benefit of the refurbishment has been the inclusion of gas heating. Although this has come at an operational and capital cost both the School and the Little Mako’s report it has made a ‘huge benefit’. Not only has the pool’s season been extended by more than 10 weeks, but students are more attentive and eager to enter and stay in the water when it is maintained at between 27 and 30°C

**Sporting impact**

It is difficult to determine the partnership’s full sporting impact given that it has been in operation for less than a year. However, early indications are very positive. The impacts to date have been recorded as:

- Two additional schools are now utilising the pool for ‘learn to swim’ classes as it is far closer than the nearest Council pool. Students are also getting significantly longer teaching time in the pool which has aided skills development.

- The Makos after school lessons have also been growing in size, as has participation in the community open days. Only time will be able to determine the longer term benefit of the partnership to the growth of aquatic club membership. However, the School, Council and the Little Makos are all very positive about the partnership’s first season in operation.

- The Council’s support of Berhampore School is seen as a pilot for a possible wider funding model for other school pools.
• Targeted programmes are offered for refugees and special needs children around the area, and community open days are also run.

• By hosting students at their own school pool and using the ‘Makos’ to teach them, the school benefits by not only paying less than they historically had paid, but also by:
  - Having no travel time which enables a longer time in the pool actually learning to swim. Historically students received 80 minutes per term in a pool learning; now they receive 60 minutes per week (over the pool season).
  - Having representative swimmers / polo players who have been trained internationally acting as swimming instructors (via the little Mako’s partnership).
  - Having a heated pool that is now open 4+ months each year rather than the previous 6 week opening period for the old unheated pool.

These benefits are reported to have additional financial impacts as the calibre of the teaching attracts additional swimming students into the programmes and the heating of the pool enables a more financially viable operating period.

The immediate operational benefits for the ‘Little Makos’ (and Harbour City Water Polo Club) has been employment for some of their players. Longer term it is hoped that the youth being trained today will move into aquatic sports, such as water polo.
**Henderson Artificial Hockey Turf Partnership**

**Project Description**

Henderson High School and Waitakere City Council are partnering to develop an artificial hockey facility to be constructed on Henderson High School land. The hockey turf is due to open for school and community use early in 2011.

<table>
<thead>
<tr>
<th>Partnership Type</th>
<th>Large Scale Capital Partnership</th>
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<tbody>
<tr>
<td></td>
<td>Waitakere City Council has contributed $1.8 million.</td>
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<tr>
<td></td>
<td>Henderson High School will be contributing $600,000.</td>
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<table>
<thead>
<tr>
<th>What the School Provides</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A part of the school site to develop the artificial hockey turf</td>
</tr>
<tr>
<td>• A portion of the required capital funding</td>
</tr>
<tr>
<td>• Community access to the hockey turf outside of school hours.</td>
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<table>
<thead>
<tr>
<th>What the Council Provides</th>
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</thead>
<tbody>
<tr>
<td>• A portion of the required capital funding</td>
</tr>
<tr>
<td>• 'In kind' ‘Project’ and ‘Asset’ Management’ expertise.</td>
</tr>
<tr>
<td>• ‘In kind’ ‘Trust’ development expertise.</td>
</tr>
<tr>
<td>• Access to the turf in school hours.</td>
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<thead>
<tr>
<th>What the Trust Provides</th>
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<tbody>
<tr>
<td>• Governance and management services such as:</td>
</tr>
<tr>
<td>d) Bookings of the hockey turf during the agreed community hours</td>
</tr>
<tr>
<td>e) All annual maintenance</td>
</tr>
<tr>
<td>f) The depreciation of the hockey turf</td>
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</tbody>
</table>

**Project’s Origins**

The Waitakere artificial hockey turf concept was first raised after the completed Auckland Hockey Association Facilities Strategy identified that a new “full size artificial hockey turf” was one of the top five medium term priorities (2002-2007).

Waitakere City has no full size artificial hockey turfs within its boundaries. A number of schools within the city had developed smaller scale multi-purpose turfs, but these were undersize, or not of sufficient quality to host competitive club hockey games. For Waitakere residents wanting to participate in competitive hockey they had to travel a considerable distance outside of Waitakere City.

The following process was undertaken to progress the development of the artificial hockey turf.

- Waitakere City Council developed the concept further by undertaking a holistic feasibility study in 2004 to allow the Council to make an informed decision regarding a potential artificial hockey turf’s viability. The study focused on three key areas:
  - Appropriate site(s) for the location of an artificial hockey turf.
  - Appropriate governance / management structure under which a turf could be developed.
  - Estimated costs associated with a development and a breakdown of how these costs could be funded.
The findings of the feasibility study identified three potential sites: Henderson High School, Waitakere College and Te Atatu South Park. For development and operational reasons the favoured sites were the two schools with Te Atatu South Park being a fallback position should a partnership with the schools fail.

The two secondary schools were then approached by Council to gauge their level of potential interest in the concept of partnering to develop the artificial hockey turf. The concept involved Council contributing capital funds towards the turf if it was developed on school land and provided community use was guaranteed.

Council approved the capital funding towards the development of the artificial hockey turf and endorsed that a partnering approach with either High School be considered.

Both secondary schools were supportive of the concept and were requested by Council to provide a proposal demonstrating the benefits of developing the artificial hockey turf on their land. Henderson High School was chosen by Council as the preferred site to progress the development of the artificial hockey turf and both the School and the Council entered into an agreement.

Henderson High School perceived the partnership made sense because it:
- Improved community links to the school
- Increased community ownership in the school
- Improved the school’s profile which would support roll increases
- Provided a multipurpose turf that the school could utilise for sports and P.E.
- Increased the strength of hockey within the School.

The feasibility study identified that the preferred governance and management model should be a ‘Trust’ model, whereby the ‘Trust’ would have full responsibility for the turf.

It was also recommended that the Auckland Hockey Association should be a key stakeholder in the development of the artificial turf. They were therefore invited to be a member of the ‘Trust’. This was done because it was recognised that the hockey association would be the main organisation responsible for developing competitions, clubs and the overall community use of the turf.

The construction of the artificial turf will commence shortly and is scheduled to be opened in 2011.

**Governance and Management**

Waitakere City has a strong history of developing sporting facilities under Trust models, the most well known example being the ‘Trusts Stadium’. In line with the feasibility study recommendations a Trust model was chosen as the preferred turf governance and management approach.

- The ‘Trust’ which was set up to develop the Waitakere Artificial Hockey Turf is made up of two representatives from Henderson High School, two representatives from Auckland Hockey and two community representatives. The Trust has full responsibility for the governance and management of the turf. The Trust also has individual partnership agreements with the Council, School, Auckland Hockey and the Ministry of Education which outlines clear roles and responsibilities.
• There is a 33 year lease agreement between the Ministry of Education and the Trust for the site on which the hockey turf is to be developed. It has been a lengthy process to get an agreed lease between the Ministry of Education and the Trust.

• It was recognised that a clearer process and clearer lines of communication with the Ministry of Education would be of benefit in negotiating future school and council facility partnerships.

• The ‘Trust’ will have a partnership agreement with the School which will allow the School full use of the hockey turf between 8:30am to 4:00pm during week days.

• The ‘Trust’ will have a partnership agreement with Auckland Hockey Association to provide regular hockey competitions for the hockey turf.

• The ‘Trust’ will have a partnership agreement with the Council where the Trust will guarantee the artificial turf from 4:00pm – 9:00pm on weekdays and from the 8:00am – 9pm on the weekends for hockey training and competitions.

• The ‘Trust’ will be responsible for the booking of the hockey turf during the community hours.

**Capital and Operational Funding**

The total project cost will be $2.4 million with Waitakere City Council contributing $1.8 million and Henderson High School $600,000. The High School acknowledged that without Council’s contribution this facility could not have been considered, let alone developed on the school site.

The project’s second stage, a pavilion including kitchen and changing facilities will likely require funding assistance from charitable trusts.

In terms of the ongoing maintenance and depreciation:

• The business plan for the artificial hockey turf has been developed and demonstrates that the operational costs, including maintenance, will be covered by facility revenue. The partners anticipate that the facility will require no Council or School ongoing operational subsidy.

• The future long term upgrades of the facility, for things like turf replacement, is budgeted to be covered by the turf’s hire revenue. A sinking fund contribution is being added to hire costs on an annual basis to cover this.

• The artificial hockey turf will also be developed utilising higher quality materials than many existing turfs. This ‘front loading’, with its higher initial capital costs, is anticipated will lower the cost of the annual maintenance to the Trust and in turn the users.
**Facility Design**

The Henderson High School site was chosen as the preferred location due to the following characteristics:

- Central location within the city.
- Access to key transport modes such as rail and bus.
- Excellent street frontage (improved community access and use).
- Predominantly an industrial area (minimises residential disruption from night lights and traffic).

Some of the key benefits of the design process were identified as:

- All partners (Council, School and Auckland Hockey) had input into the design and layout of the facility. This allowed for the different needs of the partners to be incorporated into the final design.
- Council’s expertise in project management and facility development were acknowledged by the School as being invaluable.
- Future proofing for a second stage of development was seen as essential.

**Sporting Impact**

The Waitakere Artificial Hockey Turf is to be opened in early 2011. The sporting benefits of the development are seen as:

- The hockey playing population of Waitakere will not have to travel to North Shore, Central Auckland or Manukau to participate in their sport.
- Auckland Hockey has agreed to develop and organise school and Saturday competitions on the site.
- Auckland Hockey will look to establish and base new Waitakere hockey clubs on the site.
- The site will be utilised heavily for training during the week by the intermediate and secondary schools and by the club teams.
- Henderson High School will have a multi-purpose artificial hockey turf where their students can practise multiple sports during the winter season, especially when other sports fields may be closed.
- School and community use will see the turf used for up to 14 hours per day.
Appendix 3: Relevant Web Links

International Reports on Community Facility Partnerships


Selection of relevant local government ‘Community Facility Partnerships’ policy links


Sport and Recreation New Zealand (SPARC) Document Links