



Recreation, Community and Culture

Recreation Facility Space Allocation Procedure

Introduction

Purpose:

The purpose of this document is to outline the process for allocating space to Community Programs, Qualified Program Providers and User Groups to enable fair and equitable access.

The Allocation procedure and matrix have been developed by utilizing the [Framework for Recreation](#) principals and goals.

Scope:

This procedure is the administrative process for the Recreation Facility Space Allocation Policy. It applies to all public recreation facilities that are available for permitted use through the City of Burlington's Recreation, Community and Culture department. This inventory includes but not limited to arenas, sport fields, recreation and community centres, gymnasiums, meeting rooms and swimming pools, inclusive of school board assets under any reciprocal agreement between City and Halton District School Board or Halton Catholic District School Board.

It does not apply to municipal administrative buildings, municipal golf course, facilities that are managed by a Board of Directors as directed by City Council or facilities that are leased or operated under a license agreement such as Joint Ventures.

Roles:

Senior Manager, Community Development	Accountable for the oversight of the Recreation Facility Space Allocation Policy
Manager, Community Development	Responsible for the implementation and management of the Recreation Facility Space Allocation Procedure and operating revenue budgets

Manager, Customer Support and Analytics	Responsible for the contract management with related administrative paperwork, accounts receivable and in-season communication
Supervisor, Sport Development and Aquatics	Acts as the Relationship Manager for respective Qualified Program Providers. Determines the initial space allocation as part of the Allocation Team and supports with conflict decision making. Acts as the subject matter expert for facility type.
Coordinator, Customer Support	Acts as Customer Support and Analytics staff liaison that supports Relationship Manager and their Qualified Program Providers and provides customer service support to Ad Hoc renter and Closed/Private/Seasonal groups as part of Allocation Team. Completes Facility Rental Contract management, account reconciliations and monthly accounting.
Customer Support Team	Provides customer service and allocation support to all Qualified Program Providers and User Groups including processing monthly payments.
Allocation Team	Collectively, responsible for the coordination of the seasonal space allocation, including Manager, Supervisors -Sport Development/Aquatic and Coordinator, Customer Support.

General Guidelines

1. The needs of the Burlington community are serviced with an appropriate blend of opportunities and choices to meet expressed community needs, local demographics including age, ability, gender, socio-economic status, either directly delivered or those program/services offered through community program providers.
2. If a new high priority need is identified by the ministries responsible for sport, recreation and culture or related levels of government then special considerations on how space is allocated for program offering that meets that need will be considered through the decision-making process. Space may be given to existing users as well as New/Emerging organizations where such considerations help the department build capacity in the community by supporting programs which addresses new high

priority needs This could also include high growth activities or directly align with the service strategies for sport, recreation and culture in the community to the extent that facilities are available.

3. The use of facilities is maximized, and the annual approved revenues established in the department's current budget are achieved.
4. Facilities will be granted as outlined in the order of priority list below. Space allocated to individual and/or organization may change year to year depending on overall demand and inventory.
5. New inventory/new availability will be allocated utilizing the principles of the Framework.
6. When the demand for space is high or oversaturated, various strategies will be used to mitigate including relationship managers encouraging collaboration among groups up to a competitive bid process.
7. When reasonable and feasible, the City will recognize a new emerging organization and/or trend and will allocate time to enable it to establish in the community. This will be accommodated only to provide for unmet Community needs. The City will use unallocated time first to meet the needs of a new applicant and reserves the right to reasonably reallocate hours from existing users, if warranted.
8. Qualified program providers and user groups are not permitted to book fields and facilities that will go unused except for the purpose of ensuring that sufficient time is available as a contingency, to prevent a curfew situation for tournaments or league games. Unused fields and facilities (no shows) reflect badly on the contracted permitted holder and on the City of Burlington and are not acceptable. Groups not using fields as requested and allocated may be subject to further consequences up to an including loss of allocated space and future requests.

Allocation Timeframes

Allocation will be completed on an annual basis for two seasonal allocation periods:

- Fall/Winter/Spring (FWS)
- Summer

The following gives the timeframe for allocation based on facility type as all allocation periods are not consistent.

Facility	Allocation Seasons
Ice	Fall/ Winter – September to April Spring/Summer – May to August

Arena Floor	Summer – April to August
Community Centres (Rooms/Auditoriums & Gyms)	Fall/Winter/Spring – September to June Summer – July to August
Grass Sport Fields and Diamonds	Summer – May to Thanksgiving weekend
Artificial Turf	Summer – April to December (weather dependent)
Pools	Fall/Winter/Spring – September to June Summer – July to August

Note: Season timing may change depending on inventory availability or business needs. Overlap may seem to occur in cases where facility type can provide both concurrently such as in arenas where some arenas will have ice and others will have floor or pools with indoor and outdoor pools.

Allocation Procedure

- Each season allocation considerations will be determined by a number of items:
 - a. inventory available to allocate,
 - b. demand on space,
 - c. the alignment with the Framework, as well as;
 - d. past allocation and usage.

Space allocated to individual and/or organization may change year to year depending on the overall demand, inventory and In Good Standing Status.

- Space will be allocated in the following priority order:
 - A. All Community Programs (including City of Burlington and Qualified Program Providers) that are open to all ages and abilities.
 - B. Concurrently
 - i. Qualified Program Providers & City of Burlington Community Programs – Mixed Services
 - ii. Tournaments and Special Events application requests
 - C. Seasonal Closed/Private User groups serving Burlington residents and Non-Recreation Users groups serving Burlington residents
 - D. In Season Opens: Ad Hoc one-time use and Out of Town users.

Note: Tournaments and Events will not be approved until all Qualified Program Providers and City of Burlington Community Programs are allocated. All Tournaments and Events are negotiable based on volume of requests for space and the impact on regular play. Special approval outside of allocation will be given to Events/Tournaments at Provincial and National level play. Notification will be given to all qualified program providers and user groups in advance as to the impact on the appropriate allocation season.

Each seasonal allocation will follow a three-step process as outlined in the chart:

Step 1	➤ Users identified in priority A and B that are In Good Standing with the City will be required to provide their intent for the use of space for the upcoming allocation season. ➤ Users identified in priority A and B will receive a space offer for core hour allocation to meet the hours from previous like season and their alignment with the Framework for Recreation. This will be in the form of a first Booking Report. Groups will be informed in writing of approval and timelines requirements. When there is a high demand on space or a conflict, the Decision-Making Model (below) will be used to make a final decision. • Adjustments to core hour allocation from the identified priority order A and B groups are considered and negotiated. • Final Booking Reports and Facility Rental Contract sign offs are approved within identified timelines. If a Qualified Program Provider is looking for additional hours beyond their core hour allotment, this is possible at the end of Step 2. These additional hours will be permitted on a separate Facility Rental Contract and will not be added to the core hours for next allocation season.
Step 2	➤ New requests for all A and B priority groups will be allocated based on availability. ➤ Based on what is available, groups within priority order C will be allocated space. When space demands outweigh availability, a lottery may be implemented.
Step 3	➤ Remaining space is opened for in season and D users to access on a first come first served basis.

Staff will not approve facility rental requests:

- That are from groups and/or individuals recognized as promoting racist, sexist or other similar viewpoints offensive to the generally accepted standards of the Burlington community.
- That present potential health and safety issues for City of Burlington employees, residents and/or visitors.
- That have any outstanding restrictions under the Public Conduct Policy and/or the Trespass By-law, and
- From individuals and/or organizations that are not in good standing with financial accounts.
- Any activity which may not be compatible with the facility and/or could result in significant damage.

Late Applications or missing seasonal allocation deadlines

Deadline dates are established annually by the City and may be different depending on facility type e.g. Ice. Requests received by the deadline dates are allocated according to the priority schedule and general principles described in this document. **For Qualified Program Providers and User groups that do not meet timelines stipulated, hours may be offered to other groups.**

Cancellation of Space

User groups may experience cancellations and/or adjustments to their seasonal allocation. In the event of unplanned closures, the Recreation, Community and Culture Department will act to redistribute permitted time in collaboration with contract holders and as a result, can impact all users of that facility type. The intention is to work with users to find alternate space at the same time with minor adjustments to time, days and location.

When this is not possible and alternate space is not feasible, options will include: re-scheduling the impacted group at the new time, reducing a portion of time across all the impacted rentals, making residency users as priority and taking into consideration other unplanned interruptions that group has experienced. The City reserves the right to make all final decisions regarding unplanned closures and redistribution.

Demand on Space

To respond to emerging trends and special considerations for high priority needs, City will hold a 5% growth block of space each allocation depending on the facility type. Should an organization request use of the growth block and are confirmed that they

meet the emerging trend or priority need, the Relationship Manager will work with the group on the space offer. However, this try-it opportunity does not guarantee use of the growth block time the following allocation. Groups must adapt their core hours or request additional hours the following allocation to accommodate the new programming. Should there be no requests that fit the growth block criteria, the space will be added back into the allocation season.

When new program growth demand for space exceeds availability, City staff will evaluate historical use, current demonstrated need (registration levels, waitlists, etc.), sport trends and consider the request of growth percentage that may adversely affect other organizations. A competitive process i.e., Request for Proposal might also be considered for designated space allocation based on facility type, prime hours and/or program mix/type of sport.

Growth – Existing Qualified Program Providers

All Qualified Program Providers will have core hours that will be allocated as base starting point each year. These will be determined from past season and will reflect changes due to returned time and/or penalties. Each organization must express interest for potential growth to their Relationship Manager in advance of seasonal allocation period within the communicated timelines. This would include switching programming within agreed core hours and/ or looking for additional hours on top of core hours offered.

For situations where an individual or group chooses to leave and offer a program separate from the approved Qualified Program Provider, their relationship status will remain with the original organization. They would need to reapply as a new applicant. Typically, if they are offering the same program as the existing provider, this will be viewed as a duplication of services, and their application will not be approved.

New Qualified Program Providers

Should a New/Emerging organization wish to become a Qualified Program Provider, they must meet the following:

An individual or organization providing recreation programs and activities will be considered as a 'partner' with the City if the following criteria are met;

- open for the entire community to participate and meets Residency requirements
- booking Bulk Space for a season
- is In Good Standing
- demonstrates alignment with Framework for Recreation principles, and
- has completed program provider application and received final approval.

Application Process for new Qualified Program Providers

All new organizations looking to become a Qualified Program Provider must complete and receive confirmation they have been approved. Applications will provide background information about the organization and/or group, how it aligns with the Framework of Recreation and their desired program offering. This will be evaluated with 2 possible outcomes:

- **Is successful in demonstrating that it is unique and fills a gap within the program mix that meets the needs of Burlington residents.**
 - It will also be up to the organization to demonstrate that there is volume of participants and interest to be sustainable. At which time the respective Relationship Manager for the facility type will be assigned and move the applicant onto the next step in approval process; or
- **Is determined that it is a duplication of programs already offered and will be denied approval to become a Qualified Program Provider.**
 - Organizations will still be able to rent space as a seasonal renter once allocation is "in season" and based on what is available. If there are changes to their scope of application and/or the duplication no longer exists, they can reapply in the future.

Successful applicants will be asked to complete a follow up interview conversation with the respective Relationship Manager. This will confirm any points of clarity of what was shared in the application form, opportunity to dive deeper and ask further questions and determine whether the organization will receive final approval. During this conversation, the Recreation Facility Space Allocation policy and procedure will be explained as well as any other expectations.

All applications will receive a written confirmation of the outcome (approved or denied) and their next steps. Number of core hours will be dependent on what is available based on the demand for the space. Relationship Manager will work with the provider to come to a confirmed core hour value.

Decision- Making Model

When same space has been requested by qualifying groups during the allocation process and/or the demand on space exceeds availability, the chart below represents the decision-making model to assist with allocating the space in a fair and equitable way. The model aligns with the Framework for Recreation Principles and Goals. The requested space will be allocated to the user groups that meets more of the criteria in the decision-making model. Information will be collected through Relationship Manager annual meetings and/ or will be asked to provide the appropriate documentation as evidence.

Contractual Obligations	Outside of the allocation process, are there other contractual obligations that have previously been established? (e.g., ice users, outcome of an RFP)
Fundamentals	What level of play does the recreation experience support? Is it fundamental and support broader interests that reach most of the population or a particular skill level which lessens the population participating?
Affordability	Does the provider have an affordability strategy or a financial assistance program to support participation?
Inclusive	Does the program provider have an inclusivity approach or policy on participation? Is this request providing a program for a New, Emerging, or Underserved group?
Variety	Is the allocation request and subsequent program offerings allow for a variety of offerings when looking at the total program mix at the location requested?
Historical Use	What historical patterns should be considered based on prior use? How will this allocation impact the end user?
Fiscal Opportunities	Does this request optimize financial opportunities by the city to further reduce the end burden on the taxpayer?
Complementary	Does the program offering complement the rest of the market? Is there a level of over saturation of a program provided?
Compatibility	Does the space request work logistically and physically in the space being requested?
Utilization	Does this request optimize or maximize the use of the space being requested? Is it the right fit for the inventory asset?

Consequences for Non compliance

Consequences may result from Contract Misuse or misbehaviour that has not risen to the level of Misconduct as defined in the Public Conduct Policy. Any behaviour related incidents that may be considered as Misconduct will be addressed in accordance with the Public Conduct Policy.

Consequences for Contract Misuse or other misbehaviour that has not necessarily risen to the level of Misconduct under the Public Conduct Policy will be determined on a case-by-case basis and evaluation will take into consideration the nature of the incident, the severity of the behaviour, and the stage of occurrence or re-occurrence. Depending on the severity of the actions, potential consequences could range from a warning, short term suspension, season removal of contracts up to and including, termination of designation as Qualified Program Provider for future allocation. The organization as the permit holder is responsible for the actions of coaches, players, parents, visiting teams and all other present for the purpose of the use of the permitted space.

Steps that will be followed should an incident occur and/or continue:

First Step	• Email or verbal communication from the Relationship Manager to discuss the incident and action plan to mitigate future occurrences and progressive consequences should the behaviour continue.
Second Step	• In consultation with Manager and Senior Manager of Community Development, continued occurrence may result in progressive consequences, including but not limited to: Public Code of Conduct investigation, contracts revoked, short-term suspension or core hours for next allocation period will be reduced. • Discuss next steps and final consequence should the behaviour continue
Third Step	• Director approved probation period enacted, which may include: ▪ Loss of designation as Qualified Program Provider, and ▪ Contracts may be cancelled Once In Good Standing after probation period, • can request space through Rentals • could re-apply to be a Qualified Program Provider

Note: City staff who will provide information related to situation could include a combination of Relationship Manager, sport ambassadors, parks staff and/or operations. Public complaints and/or comments will also be taken into consideration as part of the decision where relevant.

Appeals

Appeals of a decision associated with contract denials or revocations of recreational facility space, contract misuse or misbehaviour must be made in writing to Director of Recreation, Community and Culture within 10 business days of the decision being communicated. The Director of Recreation, Community and Culture has delegated authority from Council to approve or deny a facility rental (Delegated Authority By-law 07-2022).

Recreation Facility Space Allocation Procedure will be a living document and will be adjusted, reviewed and updated as other related documents/ policies and procedures change, as appropriate, including the proper communication and notification to all parties impacted. The entire procedure will be reviewed every 5 years.

Definitions and Acronyms:

For the purpose of this procedure, unless otherwise stated, the following definitions shall apply:

Term	Definition
Ad Hoc Renter	Any person and/or organization renting City of Burlington space that signs a Facility Rental Contract for a one time or short period, e.g., birthday party or a 3-day workshop.
Affordability	Everyone should have access to affordable recreation, in that, it is cheap enough for people to be able to buy. Where fees apply, the City will ensure affordability is considered broadly, with access to financial assistance programs for those who require support.
Agreement	Formal document signed by the participating parties that outline the objectives, terms and conditions of the relationship. Agreements might be in the form of a memorandum of understanding, program and activity provider agreement, sponsorship agreement, license agreement, lease agreement,

	service level agreement or joint venture agreement.
Booking Report	A working document intended for negotiation and planning of space needs to be used to review prior to final Facility Rental Contract are signed.
Bulk Space	Ongoing weekly time commitment for seasonal session
Closed/Private Seasonal group	A renter who uses Bulk Space and whose purpose of Facility Use is for a closed/private seasonal group that is not open to the entire community to register.
Commercial Group	Canada Revenue Agency (CRA) defines a commercial or for-profit business as an activity or enterprise carried out with the primary intention of earning a profit for its owners or shareholders.
Community Programs	Activities or experience that somebody takes part in or does as relate to one's recreation interests. Activities include both passive (e.g., table-top activities) and active (e.g., exercise classes) recreational pursuits, like skill programs (e.g. swimming lessons), drop-in programs (public skating), registered programs (camps), culture-rich programs (e.g. theatre and music), and community events, all that are either hosted by or through the City.
Complementary	The City prefers to complement recreational experiences rather than compete with others in the recreation market space. Complementary experiences are different but together form a useful combination of skills or qualities which enhance or emphasize each other.
Contract Misuse	Any behaviours that is not in accordance with the Terms & Conditions fo Facility Rental Contract. Examples include: arriving before or leaving later than contracted times, leaving space in a mess with garbge and debris, disrespecting City staff or members of the public, not showing up for contracted times, "hoarding" space or misuse of facility space as a whole. It will also cover actions such as alcohol in public spaces or smoking in spaces that it is not allowed, outstanding financials and use of facility outside of time on Facility Rental Contract.
Core Hours	The base number of hours allocated to a group for weekly rentals for allocation season, ensuring consistent access to the space.

New/ Emerging Organization	An organization requesting access to facilities, meeting some or all of the criteria set out in New Qualified Program Providers section of this document. Programs/ services to be delivered must be new and unique to the City and are not currently being delivered. The status of new and emerging will apply for a maximum of 2 years.
Evidence-Based	Evidence-based decision making is a process that is grounded in the review and analysis of all relevant data. Evidence will be derived by demographics, data and feedback forums among other methods.
Facility Rental Contract	Outlines the location, dates, day of week, times, and hourly rates of facility booking as well as the terms and conditions of use and payments that an Ad Hoc renter, Qualified Program Provider or User Group must sign
Framework of Recreation	City of Burlington's Recreation, Community and Culture Department's Vision, Values, Principles, and Goals for the provision of recreation in the community. This Framework forms a set of rules, ideas, and beliefs to be used every day. Department's Framework must align with the broader corporate/city vision and direction which is established by City Council.
In Good Standing	Any group whose account is up to date financially and has no outstanding Public Conduct investigations or consequences.
Inclusive	An inclusive organization is one that strives to demonstrate leadership by creating an atmosphere and culture where all residents feel safe and welcome, allowing everyone to participate with dignity and respect.
Misconduct	Behaviour that is likely to cause, or has caused, an unjustified disruption or distress to staff, volunteers, Members of Council, or members of the public as outlined in the Public Code of Conduct Policy.
Non - Profit	Under the Income Tax Act, a non-profit organization is an association organized and operated exclusively for social welfare, civic improvement, pleasure, recreation, or any other purpose except profit (for example, a club, society, or association). Group must provide official non-profit number as proof.

Open to Community	Any on-going recreation experience, program or activity that is open to the broader community to register and participate in the area of Sport, Recreation or Culture.
Out of Town/ Non-resident	Any individual or organization renting City of Burlington facilities and does not pay property tax to the City of Burlington.
Public Conduct Policy	Policy that guides staff in identifying and responding to behaviour that may constitute misconduct. Applies to all persons in attendance at any City property and also applies to interactions with staff or others by phone, email or other form of communication.
Qualified Program Provider	An individual or organization providing recreation programs and activities will be considered as a 'partner' with the City if the following criteria are met; • open for the entire community to participate and meets Residency requirements. • books Bulk Space for a season • is In Good Standing and • demonstrate alignment with Framework principles. • has completed program provider application and been approved.
Recreation	Recreation is an activity or experience that results from freely chosen participation in physical, social, intellectual, creative and spiritual pursuits that enhance individual and community wellbeing.
Relationship Manager	A City staff liaison assigned to program provider that helps with goals and direction, development and supports through allocation.
Residents	Residents are people who live in, own property in or own or operate a business in the City of Burlington. Residency can be verified through, for example, a current utility bill, assessment notice or telephone bill with a current address.
Residency	Must demonstrate 80% of the participants are Burlington Residents through rosters, postal code confirmation and/or confirmation from sport governing body.
User Groups	Inclusive of Closed/Private Seasonal User Groups and Non-Recreation User Groups who service the Burlington residents

Documents and Sources:

- Framework for Recreation (PR-11-19)
- Recreation Facility Space Allocation Policy (RCC-13-23)
- Facility Rental Contract – Terms & Conditions
- Public Conduct Policy (CL-08-23)
- Trespass By-Law
- Special Events Application Process
- Approved Rates and Fees
- International Sport Hosting Policy