

**Community Planning and Economic Development**  
**April 10, 2014**

**TO:** Chair and Members of Community Planning and Economic Development

**SUBMITTED BY:** ORIGINAL SIGNED BY:  
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Jennifer Church, Managing Director of Government Relations and  
External Affairs

**DATE:** April 3, 2014

**SUBJECT:** International Partnership Policy

**ORIGIN**

On August 6, 2013 Halifax Regional Council approved the signing of a new MOU with the City of Aberdeen and further directed staff to:

1. Continue with the existing HRM twinning arrangements and activities and conduct a feasibility review of each relationship for review and consideration of Regional Council;
2. Carry out a review of the HRM Twinning Policy to determine updates or enhancements as required; and
3. Report to Community Planning and Economic Development Committee and subsequently to Regional Council with recommendations in regard to policy changes.

On October 1, 2002, Halifax Regional Council approved the criteria and protocol to enable the municipality to respond to requests in a timely and professional manner from International and Canadian cities seeking to be a “twin” or become a sister city with Halifax Regional Municipality, with the recognition that the HRM Twinning Policy is one of the key components of the Municipal Cultural Policy.

**LEGISLATIVE AUTHORITY**

HRM Charter, section 71(1)(a) – The Municipality may solicit and encourage the establishment and development of new, and the establishment, development and expansion of existing institutions, industries and businesses in and around the Municipality...

HRM Charter, section 79(1)(m) - The Council may expend money required by the Municipality for promotion and attraction of institutions, industries and businesses, the stabilization and expansion of employment opportunities and the economic development of the Municipality.

### **RECOMMENDATION**

It is recommended that Community Planning and Economic Development recommend that Halifax Regional Council:

1. Repeal the HRM Twinning Policy;
2. Adopt the proposed Administrative Order 2014-003-GOV *Respecting International Partnerships* as set out in Attachment 1; and
3. Maintain the relationships identified in this report (Hakodate, Norfolk, Campeche, and Aberdeen) and categorize Norfolk and Aberdeen as Economic Partnership Agreements, and Hakodate and Campeche as Friendship Partnership Agreements.

### **BACKGROUND**

Halifax has undertaken civic contact with other communities for more than 100 years. The first formal arrangement was made in 1957 between Halifax and Sherbrooke, Quebec. In October 2002, Regional Council approved a Twinning Policy which highlights the benefits of establishing relationships with other communities. This policy outlines the criteria and protocol to be applied in considering requests from other cities. The assessment of a potential sister city, as outlined in the 2002 policy, is based on economic, cultural, community-based, and tourism criteria. The process for evaluation includes staff assessment of the request, research to verify details of authenticity and identify local partnering opportunities, and completion of a questionnaire by the applicant.

The prime purpose of twinning is to facilitate improved economic opportunity, cultural understanding, social development, and goodwill. At present, HRM has existing relationships with Hakodate, Japan; Campeche, Mexico; Norfolk, Virginia; and Aberdeen, Scotland. The agreements with Norfolk and Aberdeen are the only existing relationships vetted using the 2002 Twinning Policy. The most recent partnership agreement, the MOU with Aberdeen in relation to the World Energy Cities Partnership, was approved by Council in August 2013. The motion to approve this MOU included a request for staff to review both the 2002 Twinning Policy and existing twinning arrangements.

### **DISCUSSION**

#### **Policy Review**

The 2002 Twinning Policy contains criteria and a process for determining the suitability of proposed sister city arrangements, but lacks clear procedures for establishing and maintaining

approved relationships. The policy does not include a clear definition of ‘partnership’ nor propose the development of specific outcomes of mutual benefit to the partnering communities. A more effective policy would clarify the roles, responsibilities, and expectations for both partners, as well as the process which HRM will employ to administer agreements with existing and potential future partners.

To create a policy that ensures best practices are taken into account, a jurisdictional scan of other Canadian cities has been completed. There are 65 cities involved in managing over 150 twinning/sister city relationships in Canada, but very few of these cities have formal procedures in place. The most comprehensive programs and policies exist in Edmonton, Toronto, Richmond, Calgary, Grand Prairie, Thunder Bay, Winnipeg, Abbotsford, Windsor, and Victoria.

Results of the jurisdictional scan indicate a number of best practices in creating an effective twinning policy. First, relationships with a focus on economic development create concrete benefits for both parties, and responsibility often lies with economic development staff or organizations. In Calgary, review and management of relationships is the responsibility of Calgary Economic Development (CED), which is an agency equivalent to the Greater Halifax Partnership (GHP). In examples such as this, economic development is the primary “lens” in assessing potential relationships, with social and cultural benefits as important but secondary outcomes. The focus on economic development in the proposed International Partnership Administrative Order, consistent with HRM’s economic development priority area, is a shift from the previous focus on cultural development in the 2002 Twinning Policy. However, cultural linkages remain as important secondary criteria.

Established policies in other jurisdictions clearly define different categories of partnership. This was referenced in the 2002 Twinning Policy, and is utilized to varying degrees in other jurisdictions. The proposed International Partnership Administrative Order defines three distinct categories of relationship:

1. Economic Partnership Agreement;
2. Friendship Partnership Agreement, and
3. Historic Partnership.

Another best practice is signing written agreements, and/or activity plans, which include identified time frames. One aspect of this practice is conducting a review process at the end of the time frame to revisit and potentially renew the arrangement. The agreements should contain outcomes, and specific activities to achieve these outcomes. In the proposed International Partnership Administrative Order, the period has been established as a minimum of five years for each partnership. HRM has not conducted a comprehensive review of existing relationships in previous years, so the practice in the proposed International Partnership Administrative Order presents an opportunity to evaluate and improve relationships with partners.

In relation to achieving the outcomes established in activity plans, relationships must be properly resourced to ensure success. Funding should be identified to support costs of maintaining international relationships, such as hosting and travel. The operating procedures supporting the

proposed International Partnership Administrative Order will require the development of an annual plan and budget for specific activities. Specific identified activities under Economic Partnership Agreements will be funded by GHP as part of their service level agreement with HRM, and supported by other funding sources as required. Funds from HRM and other sources will be identified on a case-by-case basis for Friendship Partnership Agreements.

A key success factor identified by the jurisdictional scan is community support. Successful relationships involve a high degree of engagement in both partner cities and are supported by a committee consisting of community organizations, citizen representatives, elected officials, and/or staff. A working committee allows those from the community who have an interest in each relationship to be represented, and helps to ensure that partnerships are maintained over the long-term. Community support will be identified as key criteria in the operational procedures developed to support the Administrative Order.

Finally, in order to ensure maximum benefit, formal relationships should be aligned to priorities or areas of specific municipal interest (i.e. economic sectors). In the case of HRM, these are identified through the development of Council's Priorities, as well as the content of major plans and strategies approved by Regional Council such as the Economic Strategy and Welcoming Newcomers Action Plan.

In summary, the proposed International Partnership Administrative Order reflects the following principles:

- Primary focus and initial screening based on economic development benefits;
- Defined levels of "partnership";
- Inclusion of written agreements, activity plans and specific resource commitment;
- Supported by community stakeholders and active committees; and
- Alignment with HRM Council priorities or strategic objectives.

Draft operational procedures to support the proposed International Partnership Administrative Order have been developed by staff, who are responsible under the proposed Administrative Order for the development and revision of these procedures, which include the selection and evaluation criteria by which Council will determine whether to enter a partnership.

#### Review of Existing Relationships

Existing relationships have been reviewed based on the findings of the policy review, consultation with community members engaged in those relationships, and best practices from other jurisdictions. Existing partnerships are those for which HRM has had contact with international or local stakeholders within the past year. In that context, existing relationships are Hakodate, Japan; Campeche, Mexico; and Norfolk, Virginia. There are varying degrees of activity for each of these relationships. For example, Norfolk has a formal local committee that meets monthly and communicates with a similar committee in Norfolk, while there are local stakeholders for Hakodate and Campeche that have sporadic contact with HRM. The Aberdeen MOU was not reviewed as it was recently approved, in late 2013, by the current Council.

It is recommended that these four relationships be maintained and organized according to the new categories as per the third recommendation in this report. The existing partners (and relevant local stakeholders) will be apprised of the new policy and asked to jointly develop an agreement. As an Economic Partnership, the local committee supporting the Norfolk relationship will be asked to develop a joint MOU. Letters of intent will be developed to support the Hakodate and Campeche Friendship Agreements. As noted above, the MOU with Aberdeen will remain in effect as it was recently approved by Regional Council.

### **FINANCIAL IMPLICATIONS**

Identified activities under Economic Partnership Agreements will be funded by the Greater Halifax Partnership as part of their service level agreement with HRM, and supported by HRM funding sources as required. Funds from HRM and other sources will be identified on a case-by-case basis for Friendship Partnership Agreements and Historical Partnerships, and financial implications for these will be identified in future reports to Council.

### **COMMUNITY ENGAGEMENT**

Local stakeholders have been consulted for each of the existing partners identified in the report.

### **ENVIRONMENTAL IMPLICATIONS**

Implications not identified.

### **ALTERNATIVES**

Regional Council may continue operating under the direction of the 2002 Twinning Policy.

### **ATTACHMENTS**

1. Proposed Administrative Order 2014-003-GOV Respecting International Partnerships.
2. List of HRM's current and past twinning relationships.

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A copy of this report can be obtained online at <http://www.halifax.ca/commcoun/index.html> then choose the appropriate Community Council and meeting date, or by contacting the Office of the Municipal Clerk at 490-4210, or Fax 490-4208.

Report Prepared by: Paul Johnston, Coordinator of Corporate Affairs, 490-6616

ORIGINAL SIGNED BY:

Report Approved by: Jennifer Church, Managing Director of Government Relations and External Affairs, 490-3677

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## ADMINISTRATIVE ORDER NUMBER 2014-003-GOV RESPECTING INTERNATIONAL PARTNERSHIPS

**BE IT RESOLVED AS AN ADMINISTRATIVE ORDER** of the Council of the Halifax Regional Municipality under the authority of the *Halifax Regional Municipality Charter*, as follows:

### **Short Title**

1. This Administrative Order may be known as the *International Partnerships Administrative Order*.

### **Interpretation**

2. In this Administrative Order,

- (a) “CAO” means the Chief Administrative Officer of the Halifax Regional Municipality;
- (b) “Council” means the Council of the Halifax Regional Municipality;
- (c) “Economic Partnership Agreement” means a memorandum of understanding between the Council and an international community with a primary focus on common economic development goals and objectives;
- (d) “Friendship Partnership Agreement” means a memorandum of understanding between the Council and an international community that marks a cultural or historical relationship;
- (e) “Historic Partnership” means an international community with which the Council formerly had an economic or friendship partnership, but the relationship has been discontinued owing to lack of involvement and no further ceremonial action is taken and public committees are disbanded;
- (f) “international community” means a local government located outside of Canada;
- (g) “international partnership committee” means an ad hoc committee struck by the CAO upon request by the Council to evaluate requests to Council for international partnerships;
- (h) “local committee” means a community group that supports the ongoing activities of a partnership, and is not a committee of Council;
- (i) “Mayor” means the Council member elected at large to be the chair of the Council;
- (j) “operating procedures” means the process by which this Administrative Order is implemented.

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**Purpose**

3. The purpose of this Administrative Order is to support international partnerships with other local governments that are approved by Council.
4. The purpose of this Administrative Order will be implemented by developing processes for establishing, administering, and reviewing formal international partnerships including:
  - (a) establishing clear criteria for entering into international partnership agreements;
  - (b) outlining a defined process for selecting an international partner and determining the nature of the relationship;
  - (c) developing specific activity plans and outcomes international partnership agreements;
  - (d) establishing a formal review process for international partnership agreements; and
  - (e) limiting the number of Economic Partnership Agreements that Council will enter to ensure sufficient resources are available to support each relationship, and that the goals and objectives of such Agreements are realized

**Roles and Responsibilities**

5. The Mayor and the Council may approve partnerships, revise this Administrative Order, and may act as representatives on local committees as required.
6.
  - (1) HRM staff will coordinate the process of identifying and screening potential international community partners, including the examination of relevant relationships or agreements with local partners and stakeholders.
  - (2) The Council delegates to the CAO the power to develop and revise operating procedures to support this Administrative Order, including selection and evaluation criteria.
7.
  - (1) The Council delegates to the CAO the power to constitute an ad hoc committee to be known as the International Partnership Committee.
  - (2) The committee shall consist of members of the Office of the Mayor appointed by the Mayor and members of HRM staff appointed by the CAO to reflect HRM's focus of interest in the partnership request.
  - (3) The Mayor and the CAO may be members of the Committee.
  - (4) The Committee may consult with HRM staff, local partners, and stakeholders as it deems necessary.

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- (5) The Committee shall:
- (a) evaluate requests for international partnerships; and
  - (b) recommend potential partners to the Council

**Categories of Partnerships**

8. There shall be three categories of formal partnerships between HRM and international communities:

- (a) Economic Partnership Agreements;
- (b) Friendship Partnership Agreements; and
- (c) Historic Partnerships.

**Economic Partnership Agreement**

9. The primary purpose of an Economic Partnership Agreement is economic development, including economic exchange, business development, and technological advancement through building business links, increasing HRM's profile, attracting investment, and promoting trade.

10. An Economic Partnership Agreement may build on HRM's cultural identity and diversity by developing opportunities to encourage the sharing of knowledge and greater understanding of different cultures as they relate to HRM's Welcoming Newcomers Action Plan and encouraging cultural, social and educational exchanges.

11. An Economic Partnership Agreement shall include:

- (a) the anticipated goals and outcomes of the Partnership;
- (b) the communications protocols;
- (c) the commitment to provide each party to the Agreement with an annual report outlining the activity for the previous year;
- (d) an outline of the frequency, number of participants, and responsibilities of the host for exchanges or in person visits;
- (e) the names of the local committees that will support the Agreement in each partner city;
- (f) the term of the Agreement, not to exceed 5 years.

12. Council will enter into and carry out no more than five (5) Economic Partnership Agreements at any one time.



**Friendship Partnership Agreement**

13. The primary purpose of a Friendship Partnership Agreement is facilitating international good-will through community-level events and public celebrations such as flag raisings, based on cultural or historic relationships between HRM and international communities.

14. Friendship Partnership Agreements shall include:

- (a) the anticipated goals and outcomes; and
- (b) the term of the agreement, not to exceed 5 years.

**Historic Partnership**

15. The primary purpose of a Historic Partnership is to recognize a city that was once an Economic or Friendship Partner of HRM. An existing partnership will be re-classified as a Historic Partnership when there is no contact between the partner cities for a period longer than one year and/or when either partner city opts to end the formal agreement.

**Alignment to HRM Priorities and Strategies**

16. Council will pursue partnership opportunities or accept requests from international communities for partnership agreements that align with the priorities and strategies of Council.

**Resource Commitment**

17. Council may allocate funds in the annual budget to accomplish its partnership commitments. Such budget shall be project, program or a combination of project and program driven and may include costs such as travel, hosting, communications, ceremonial, staffing and administrative costs.

18. Requests for partnerships may be made by any external organizations or international communities or by HRM staff or Council.

**Approval Process**

19. All requests for international partnerships shall be received through the Office of the Mayor. Upon receipt of such request, the Office of the Mayor shall screen the request to determine whether it is a viable partnership, and may do so in consultation with staff as it deems necessary.

20. Where the Office of the Mayor determines there is a viable international partnership, it will request that the CAO constitute an International Partnership Committee to evaluate the partnership against the criteria set out in the procedures.

21. The International Partnership Committee shall recommend to Council those partnerships that, in the opinion of the Committee, satisfy the criteria for approval.

22. The International Partnership Committee shall prepare an annual information report to Council listing all partnership requests received that the Committee determined did not satisfy

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the criteria for approval in the previous calendar year, and a brief summary of the reasons for such determination.

23. Council shall consider whether to enter into a partnership agreement with the international community recommended by the International Partnership Committee and Council may:

- (a) enter into an economic partnership agreement and direct staff to prepare a memorandum of understanding for Council's consideration;
- (b) enter into a friendship partnership agreement and direct staff to prepare a memorandum of understanding to include certain terms, and authorize the Mayor to execute it; or
- (c) decide not to enter into a partnership agreement.

**Scope**

24. Nothing in this Administrative Order shall be interpreted to limit or otherwise prescribe Council's general discretion to participate in international visits or discussions with international communities outside of formal partnership agreements.

\_\_\_\_\_  
Mayor

\_\_\_\_\_  
Municipal Clerk

I, Cathy Mellett, Municipal Clerk of the Halifax Regional Municipality, hereby certify that the above noted Administrative Order was passed at a meeting of Halifax Regional Council held on XX, XX, 201\_.

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Cathy Mellett, Municipal Clerk

### **Status of Current and Past HRM Twinning Activity**

#### **CURRENT RELATIONSHIPS:**

As per the criteria in the report, HRM has four existing relationships:

- Hakodate, Japan (1982) – now classified as a Friendship Partnership Agreement;
- Campeche, Mexico (1998) – now classified as a Friendship Partnership Agreement;
- Norfolk, Virginia (2006) – now classified as an Economic Partnership Agreement;
- Aberdeen, Scotland (2013) – now classified as an Economic Partnership Agreement;

#### **HISTORIC PARTNERSHIPS:**

The following are previous relationships that have remained inactive for a period of 5 or more years. In these instances, there is little background information, history, or knowledge of costs:

- Calderdale (Halifax), United Kingdom (1987)
- Sherbrooke, Quebec (1957)
- Freetown, Sierra Leone (1994)

#### **PAST REQUESTS:**

Below are some previous requests for partnership, for which very little information exists:

- Ningbo, China (1995)
- Hangzhou City, China (1998)
- Stavanger, Norway (1998)
- Belfast, Ireland (2000)
- Coral Springs, Florida (2000)
- Haifa, Israel (2000)
- Fengcheng, China (2001)
- Georgetown, Guyana (2001)
- Gottingen, Germany (Unknown)
- Piraeus, Greece (2001)
- Xiamen City, China (2002)
- Ulsan, South Korea (2003)
- Lancut, Poland (2004)

#### **OUTSTANDING REQUESTS:**

There is one known outstanding request for twinning relationship:

- Kiel, Germany.