



STAFF REPORT

DATE: May 4, 2023

TO: Chair and Directors,
Regional Board

FROM: David Leitch
Chief Administrative Officer

FILE:

RE: LGMA 2023/2024 OVERSEAS MANAGER EXCHANGE PROGRAM

PURPOSE/PROBLEM

To consider a Strathcona Regional District staff application to the Local Government Management Association of BC 2023/2024 Overseas Manager Exchange Program.

EXECUTIVE SUMMARY

The Local Government Management Association of BC (LGMA) 2023/2024 Overseas Manager Exchange Program provides a professional development opportunity for LGMA members to participate in an exchange with a similar association of local government professionals in New Zealand. The exchange visits are timed around the Annual Conference of each host association.

The application process to participate is competitive with a deadline for submission of May 26, 2023. Renée LaBoucane, Manager, Strategic Initiatives is interested in applying.

A requirement of the staff application is the knowledge and approval of the Strathcona Regional District Board to apply and participate in the program and if selected as the successful candidate, the SRD board would have no objection to a 2 week leave with pay to allow staff to participate. Travel and other related costs to participate in the program are covered through the LGMA exchange program and the participant. Travel to New Zealand would take place November 2023.

In return, the SRD would host the New Zealand Exchange Manager in June 2024. SRD staff would facilitate learning opportunities based upon the Manager's role and exchange objectives. Hosting would include travel within the region and engagement with member municipalities, along with travel to the LGMA Conference (BC location to be determined). Costs associated with hosting are incidental and would be included within the Strategic Initiatives travel budget.

ALTERNATIVES

1. THAT the Regional District approve staff participation in the 2023/2024 LGMA Overseas Manager Exchange Program.
2. THAT the Regional District not approve staff participation in the 2023/2024 LGMA Overseas Manager Exchange Program.

RECOMMENDATION

THAT the report from the Chief Administrative Officer be received.

Respectfully:



David Leitch
Chief Administrative Officer

BACKGROUND

The LGMA has partnered for several years with the Taituarā — Local Government Professionals Aotearoa New Zealand to operate an exchange program that provides leadership and development opportunities specifically tailored to the local government environment. The two-week exchange with a partner in New Zealand provides one BC local government manager with professional learning opportunity to further develop management skills, competencies, and knowledge. Through new connections and the exchange of ideas and best practices from complementary jurisdictions, participation in the program provides valuable career development and learning that can be applied back at the SRD.

A summary of the exchange program includes:

- Travel to New Zealand for two weeks in November 2023 to attend the Taituarā Annual Summit and to visit local governments in the country.
- Host an exchange partner from New Zealand who will visit British Columbia for two weeks to attend the LGMA Conference in June 2024 and visit local governments in BC. Participants are hosted by their exchange partner and family on a ‘home stay’ basis.
- Prepare a comprehensive report for LGMA regarding the exchange objectives and how to integrate the knowledge learned.
- Share and present the report to other local government professionals in BC as agreed to by the LGMA.

Prepared by: Renée LaBoucane, Manager Strategic Initiatives

Attachments:

1. LGMA-Taituara Certificate of Employing Local Government
2. LGMA Overseas Manager Exchange Program details.



2023/2024 OVERSEAS MANAGER EXCHANGE PROGRAM

Certificate of Employing Local Government

Please attach completed certificate to application.

I hereby certify that
is making this application with the full knowledge and approval of this Council/Board, and if
selected no objection will be offered to absence from duty for the period of the 2023/24
Manager Exchange.

In addition to leave with pay, the Council/Board offers the following support additional to that
being provided by LGMA (please detail):

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Signed Date
Mayor / Chairperson / Chief Executive



LGMA

LOCAL GOVERNMENT
MANAGEMENT ASSOCIATION
OF BRITISH COLUMBIA

www.lgma.ca



**2023 / 2024
OVERSEAS MANAGER
EXCHANGE PROGRAM**

Program Overview, Conditions, and Application

OVERVIEW

In partnership with the Taituarā — Local Government Professionals Aotearoa New Zealand, this program is one of a range of LGMA initiatives that provide leadership and development opportunities specifically tailored to the local government environment. Through a two-week exchange with a partner in New Zealand, the program provides one BC local government manager with a high-quality professional learning opportunity to develop their management skills, competencies, and knowledge.

By way of networking, new connections, and the exchange of ideas and best practices among professionals from different but complementary jurisdictions, the intent is to add value to the manager's existing organization and to their future performance and career development in local government. As well, in keeping with the LGMA spirit of collegiality and support for the local government system as a whole, knowledge sharing is an important aspect of the program. Applicants will be considered on their ability to define their learning objectives, how they will transfer and share that learning on their return to British Columbia, and on how they define the support for their exchange partner from New Zealand.

In the few weeks involved, an exchange visit is a snapshot rather than a comprehensive study. Nonetheless, professionally, personally, and culturally much ongoing value comes from the exchange on a long-term basis for both managers' families. Contacts made can result in ongoing exchanges of information internationally. Many manager contacts made remain active throughout an exchange manager's career.

TIMING AND WHAT IS INVOLVED

The exchange visits are timed around the annual conference of each host association to allow both managers to attend these events.

The successful LGMA manager will travel to New Zealand for two weeks in November 2023 to attend the Taituarā Annual Summit (November 23-24 in Hastings) and to visit local governments in that country; in return, the successful participant will host an exchange partner from New Zealand who will come to British Columbia for two weeks to attend the LGMA Conference in June 2024 (exact dates and location yet to be determined) and visit local governments in BC.

The host manager and their partner manager work out a program of visits and events that meet the learning objectives of the guest. The normal expectation is that apart from the period of conference attendance, the guest manager is hosted by their partner and family on a "home stay" basis.

TERMS AND CONDITIONS

Exchange Manager Costs and Travel Arrangements

BC Manager to New Zealand:

LGMA will meet the cost of the following to a *maximum* of \$5,000 CDN:

- the lowest cost return economy airfare for the exchange manager from their home in BC to the hosting local government in New Zealand (international and domestic flights if required),

- domestic economy airfare between the hosting local government and the Taituarā Annual Summit in Hastings (if the distance is too far for the host to drive), and
- incidental overnight accommodation associated with that travel directly related to the exchange program.

The program also provides for the participant's registration fees and accommodations for the Taituarā Summit.

Any costs above this amount (eg. meals while travelling to/from New Zealand) are the responsibility of the participant. Any additional travel that is not required to get to/from the exchange location directly is the responsibility of the exchange manager and will not be reimbursed.

When in New Zealand, the program does not cover expenses such as telephone, laundry, meals, or local transport as these are considered local hosting expenses, to be covered by the NZ exchange partner.

As part of their hosting duties, the host exchange manager will normally introduce the BC Manager to local authorities within their region and assume related local transport costs (gas, parking). Additional travel costs may also be avoided by arranging visits to the local authorities in the vicinity of the Annual Summit. If in the course of program planning it is suggested that visits to local authorities further afield would be in keeping with learning objectives, the BC Manager is to discuss this with LGMA prior to making arrangements.

New Zealand Manager to BC:

LGMA will cover the visiting overseas exchange partner's Conference registration, accommodation and meals at the conference, but *not* local transport (ie. rental cars), meals outside of the conference program, laundry, telephone, or any other local hosting expenses; it is understood that such expenses and other hosting expenses not explicitly mentioned above are to be incurred by the host manager. The host manager (or their organization) will also cover their own conference registration costs along with related travel and accommodation. LGMA will provide information to both the host and guest leading up to the Conference to ensure that registration and accommodation arrangements for the guest partner are made.

In making travel arrangements, at least two competitive quotes should be obtained for airfares and submitted to the LGMA office *before travel is booked*. The exchange manager will be initially responsible for all costs and will then claim the portion of expenditure that is eligible for subsidy from LGMA to a *maximum* of \$5,000 CDN.

The payment arrangements are:

- Sixty percent of costs is payable at the commencement of the manager exchange; and
- Forty percent (the balance) is payable upon completion of the exchange, receipt of invoices, and the approval of the report on the exchange.

It is suggested that the LGMA manager get in touch with their partner manager as soon as known to develop the full program and travel itinerary. Each exchange manager will make their own flight and travel arrangements, working in close co-operation with the host for recommendations that may be needed on the domestic portion of travel, and/or any trips they may wish to make after the exchange visit should a vacation be planned. Overland transport by passing from one colleague to another may be possible.

Reporting on the Experience

Within **4 months of completion of the travel to New Zealand** the exchange manager must:

- Submit a report on the exchange to the LGMA for approval. The report must focus on the substantive management policies, technical and community lessons for potential application to British Columbia local government that were observed during the exchange visit. In addition, the report must outline how the participant intends to integrate learning from the exchange into their own work or that of their community over the next 12 months. Once the report is approved, an electronic copy must be sent to the LGMA office to be made available on the LGMA website. A general template for the report format is appended as a guide.
- Identify a minimum of one opportunity outside of the manager's local government where a presentation on the lessons and best practices from the exchange can be presented.

Following **their partner's visit to British Columbia**, the exchange manager must:

- Prepare a 300-350 word article for the LGMA Exchange Magazine on their visit to New Zealand and on the experience of hosting the New Zealand manager.

Within **1 year** of completion of the travel to New Zealand the exchange manager must:

- Report to the LGMA on how and where they have presented on the lessons and best practices from the exchange.
- In addition, the exchange manager **MAY** be asked to participate in a panel discussion on local government overseas or deliver a short presentation at the Taituarā Annual Summit.

Other

A spouse/partner may accompany the manager on the exchange (and the terms of the Taituarā program does allow for a spouse/partner to travel with the NZ manager), however they must cover their own expenses.

Although not a program condition, it is suggested that exchange managers do not take their children overseas during their exchange unless they have reached an explicit agreement about this with their partner. Exchange activity is intensive and tiring at times, and it may not be convenient or possible for the host manager to accommodate children in such circumstances.

APPLYING FOR AN OVERSEAS MANAGER EXCHANGE

Eligibility

The program is open to all managers from local governments in British Columbia who, at the time of travel to New Zealand, have been regular members of LGMA for two or more years. The LGMA has a right to decline applications if members have not paid their membership fees for 2023.

Consideration of Applications

A Committee of the LGMA Board of Directors will approve recommended manager exchanges. Applicants are encouraged to be as specific as possible with regards to their learning objectives/areas of interest and in identifying opportunities for sharing of knowledge gained from the program. Scoring criteria are appended.

How to Apply

Applications for a manager exchange must be made on the attached form and forwarded to:

Local Government Management Association of BC
Overseas Manager Exchange Program
Suite 710A – 880 Douglas Street
Victoria, BC, V8W 2B7
Email: office@lgma.ca

Application Deadline: April 28, 2023

IF YOU ARE SELECTED AS THE SUCCESSFUL APPLICANT

Information and Initial Contact

If you are selected as the successful exchange manager, LGMA will provide you with information and contact details for your overseas partner. It is suggested that you make initial contact early on to begin planning for the visits. Once you and your partner have been in contact the detailed organization of your respective visits becomes your own joint responsibility.

Though every effort is made by LGMA and Taituarā to select appropriate candidates, if this initial contact suggests that there may be serious compatibility issues, please contact the LGMA Executive Director immediately.

Pre-trip Preparation and Requirements

Successful manager exchange applicants are ambassadors for their local government, British Columbia, and the LGMA. This implies a high level of responsibility, and the expectation is that you be willing to commit time to host preparation and execution, as well as time visiting New Zealand.

Advance planning and attention to detail is necessary to fully maximize the overseas exchange experience. You and your partner will be expected to develop a program that will cater to your respective learning needs and objectives for the exchange visit.

Some exchange managers have found it helpful to discuss exchanges with others who have already undertaken an exchange. The LGMA office can provide contact information of members who have already participated in this program.

Tips on How to Develop Your Exchange

- Exchange as much background information as possible about your local government system and own organization (i.e. major projects, accomplishments, and issues).

- Be frank and honest with each other about what you are and are not interested in seeing and learning about, and also with respect to any personal recreation interests.
- It is expected that meeting the learning objectives of your partner will involve visits to local governments other than your own. Visits are often arranged with other organizations within your region, and sometimes also with local governments in the region of the LGMA Annual Conference venue (June 2024, exact dates and location within British Columbia to be determined). It is a good idea to ensure that those contacts your partner will meet are well briefed on their areas of interest to ensure appropriate staff and information are available at the time of the visit.
- Programs usually include the opportunity for your partner to meet with your Mayor or Chairperson, members of your council, staff, media, other local governments, and/or relevant community organizations.
- The exchange program will include attendance at the host organization's Annual Conference. Past experiences tell us that exchanges generally work best where visitors have been able to spend some time with their host before the Conference. This gives them the opportunity to gain more understanding of the country, its local government system, and the issues likely to be discussed at the Conference.
- Finally, it is important not to have too many activities scheduled. Make sure you provide leisure breaks, and keep time flexible should other last minute opportunities arise.

Other Preparation

Before departing for overseas, you should make a special effort to understand the current management and issues of the community you will visit.

To explain the British Columbia situation and issues faced by your own local government to the people you will meet, it may be useful to prepare some resources (such as PowerPoint presentations, photographs, fact sheets or other information). You may be asked to participate in a panel discussion on local government overseas or deliver a short presentation at the Taituarā Annual Summit.

Hosting Your Guest

You should meet or arrange to have your visiting exchange partner met upon arrival in British Columbia, whether coming directly to your community or going to the LGMA Conference first.

As the host of your overseas exchange partner, you have two specific obligations:

- The first is to host your exchange partner (and spouse/partner if accompanying) during the period of the exchange other than the Annual Conference. This enables them to experience the local culture by staying in the host's residence (or, if agreeable to both parties, part of the time in the residences of friends or colleagues in other locations).
- The second is to attend the LGMA's Annual Conference in June 2024 along with your exchange partner.

Once dates for the visit are agreed upon, you should avoid booking out of town appointments and give maximum attention to your exchange partner at the LGMA Conference and in your community.

The reverse arrangements apply when you visit New Zealand around the timing of the 2023 Taituarā Annual Summit, which will take place in Hastings from November 23-24, 2023.

CONTACT US

Should you have any questions or require further information about the Overseas Manager Exchange Program please contact the LGMA office at 250-383-7032 or office@lgma.ca.



2023-2024
Overseas Manager Exchange Program

Application Form

Please complete and submit this application along with any supplementary information noted no later than 4:30 pm, April 28, 2023.

1. Name

2. Contact Details

Home Address

Work Address

Home Phone

Work Phone

Primary Email

3. Position and Responsibilities

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4. Please attach a copy of your curriculum vitae

Include the following information: education, professional qualifications, roles and offices held, previous employment, previous opportunities to study, and any volunteer involvement with LGMA BC or an LGMA Chapter.

5. Please give a brief outline of your local government

Name

PopulationGeographic Size

Number of Employees

Gross Expenditure of your Council

6. Additional Local Government Information. *In a separate document please provide the following:*

- a) Summarize the socio-economic structure of your community.
- b) A brief outline of any particular issues facing your local government (or specific Department).
- c) Please attach a current staff organizational chart.

7. Personal Statement. *In a separate document please provide the following:*

- a) An outline of the specific issues or areas of professional interest you would like to pursue as part of this exchange program.
- b) Your key learning objectives.
- c) In the context of British Columbia local government, what you see as the benefits of taking part in this exchange.
- d) Identify how this exchange will support your professional/leadership development as well as your local government organization.
- e) Identify how you will share the knowledge gained from this exchange with other LGMA members and their organizations.
- f) What specific supports your local government will provide to the Taituarā exchange partner irrespective of their learning objectives/specific issues.

8. Do you intend to take your partner with you at their own cost?

- Yes No

Agreement:

I agree that the decision of the selection panel is final.

If successful I agree to comply with the terms and conditions of the Overseas Exchange Manager Program set forth by the LGMA.

In the normal course of events, I expect to pursue a career in Local Government and have developed a career plan.

I agree if required, to produce a satisfactory medical certificate upon selection and evidence of having purchased adequate medical insurance before departure.

I hereby apply for consideration of selection for the sponsored 2023/24 Overseas Manager Exchange Program to New Zealand.

Signed Date

Please return this application form along with the Certificate of Employing Local Government, your CV, and any supplementary information to:

Local Government Management Association of BC
RE: Overseas Manager Exchange Program
Suite 710A – 880 Douglas Street
Victoria, BC, V8W 2B7
Email: office@lgma.ca

Application Deadline: April 28, 2023



2023/2024 OVERSEAS MANAGER EXCHANGE PROGRAM

Certificate of Employing Local Government

Please attach completed certificate to application.

I hereby certify that
is making this application with the full knowledge and approval of this Council/Board, and if selected no objection will be offered to absence from duty for the period of the 2023/24 Manager Exchange.

In addition to leave with pay, the Council/Board offers the following support additional to that being provided by LGMA (please detail):

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Signed Date
Mayor / Chairperson / Chief Executive

Appendix 1. SUGGESTED FORMAT FOR EXCHANGE REPORT

The table below sets out a suggested format for the reports that are to be prepared within four months following completion of overseas manager exchange visits. This is provided as a guide and is not intended to unduly constrain the effective presentation of information about exchange visits.

Section	Guide to Content
<i>Introduction</i>	<ul style="list-style-type: none"> • General description - went where and when
<i>Executive Summary</i>	<ul style="list-style-type: none"> • Key conclusions and observations
<i>Objectives</i>	<ul style="list-style-type: none"> • Statement of the objectives for the Exchange
<i>Conference Attended</i>	<ul style="list-style-type: none"> • Observations on the conference attended as part of the Exchange
<i>Place (s) visited</i>	<ul style="list-style-type: none"> • Description of the local authority/ies visited
<i>Report on Exchange Objective 1</i>	<ul style="list-style-type: none"> • Key lessons observations etc concerning each exchange objective
<i>Report on Exchange Objective 2</i>	<ul style="list-style-type: none"> • As above
<i>Report on Exchange Objective 3 etc</i>	<ul style="list-style-type: none"> • As above
<i>Other lessons and observations</i>	<ul style="list-style-type: none"> • Report on anything outside the Exchange objectives that seems likely to be of use or interest to other local government managers in British Columbia.
<i>How You Plan to Integrate Knowledge Gained</i>	<p>Takeaways:</p> <ul style="list-style-type: none"> • For your professional / leadership development • Into your work in order to add value to your current or future local government employers • To share more broadly in order to benefit local government colleagues further afield or the “system” as a whole
<i>Appendices</i>	<ul style="list-style-type: none"> • A potentially wide range of supplementary material including: <ul style="list-style-type: none"> ○ Reports documents and other material obtained relevant to research objectives, or conference or local authorities / districts visited. ○ References to additional sources of information that readers might like to investigate such as, reports not themselves appended, websites and links, contacts etc. ○ Other material that seems relevant

Appendix 2. APPLICANT SCORING CRITERIA

Mandatory Criteria	Criteria Met	Criteria Not Met
Certificate of Employing Local Government		
Local Government Organizational Chart included		
Regular member of LGMA for a minimum of 2 years prior to the commencement of the Exchange		

Desirable Criteria	Available Points
Clearly identified issues of specific interest that will be pursued as part of the exchange program	20
Key learning objectives are clearly articulated	15
Benefits to the broader local government system are clearly identified	15
Knowledge-transfer and presentation opportunities are clearly identified, realistic, and will benefit other LGMA member organizations	20
Likelihood that applicant will be able to provide a varied exchange experience for exchange partner. <i>(eg, geographic location, regional issues of interest, visitation opportunities, etc.)</i>	10
Additional support indicated by applicant's local government	10
Applicant has been an active supporter of the local government sector through volunteerism with LGMA BC or a Chapter <i>(ie. as a presenter, committee member, or other volunteer involvement)</i>	10
Total Points:	100

Bonus Points (up to 10):

Role and position of applicant and extent to which applicant's areas of interest can be of wide interest or application across the sector.