

Report to Municipal Council



Meeting Date: September 18, 2024	Report Date: September 11, 2024
Reason Before Council: Policy Direction / Approval	Priority: Normal
Department: Planning & Development	Type of Meeting: Regular Meeting

Report Title: Tender Results – Strategic Plan

Recommended Resolution:

That Council review the submitted proposals and provide direction to staff.

Because of the limited time in which we have to award the tender, Council may choose to discuss the merits of the proponents, and:

Options:

1. Come to a decision on the preferred proponent and award the tender; or,
2. Defer decision to the following meeting with possible additional direction to staff (i.e., reference checks, additional research, allow for further time for Council to review). Deferring could be to a Special Meeting or to the next Committee of the Whole of October 3.

Analysis & Background:

I went over the proposals, and they generally fall in the following groups:

1. smaller local firms (VS Solution and Karen Jones Consulting);
2. small to medium sized firms from outside of the region (Compass Point Consulting, Capital Park, Overlap); and,
3. large consulting firms (Nordicity, EYG, Capstone).

The size of the firm does not necessarily matter as long as the project staff have the necessary skills and experience to deliver a product that will be useful to the Municipality.



Looking at past work for similar sized municipalities, knowledge of Northern Ontario and its challenges should be a key criterion for selection.

My recommendation is either Karen Jones Consulting Inc. for a local firm or Capital Park Consulting, though most of the listed firms have different strengths and could be considered as well for the project.

From my experience with the Strategic Plan process both here and in Markstay-Warren, it is key to get a consultant that will provide fruitful recommendations and not pander to individuals or small groups but consider the greater good of the community.

My Review of proposals

Understanding of Municipal Government Sector; especially the challenges/opportunities of the Municipality of St.-Charles; most appropriate methodologies and schedules to achieve project goals. 25

Overlap: has completed multiple government strategic plan though examples given are of medium to large southern Ontario Municipalities. The proposal did not connect to a small Northern Ontario Municipality.

Karen Jones Consulting: The proposal has clearly demonstrated a knowledge of small Ontario town and previous clients' experiences that are similar to St.-Charles.

Capstone Project Solution: The proposal did demonstrate knowledge of Municipal Government Sector and completing similar project for other municipalities.

Capital Park Consulting: They have completed similar projects, of interest is they have completed a Strategic Plan for French River.

Compass Point Consulting: Competent staff and demonstration of Government Sector knowledge.

VS Group: The proposal has demonstrated a knowledge of small Ontario towns and previous client experiences that are similar to St.-Charles.

Nordicity: This is a very large firm with many resources and experience in this field. They would have full understanding of the Government sector.

EYG Innovation & Strategy Consulting: The list of past clients had the City of Greater Sudbury and MSDSB showing their knowledge of Northern Ontario challenges but did not have any references linked to smaller municipalities in Northern Ontario.

Experience on Similar Projects and Past Performance; demonstrated experience and ability to complete a project of this scope, related experience and successful completion of similar projects, ability to meet deliverables and timelines, references of previous projects. 20

Overlap: Timeline as proposed is acceptable, no apparent issues in meeting core requirements of the proposal. The firm as presented is experienced and possess capacity and knowledge. The proposal again is lacking in linking to smaller northern Ontario towns.



Karen Jones Consulting: The proposal has identified similar sized Northern Ontario completed projects. No concerns on the proposal. Has completed Strategic Plans for similar sized communities in Northeastern Ontario.

Capstone Project Solution: Possesses the experience and ability to complete project however similar to other proponents, little experience in Northern Ontario.

Capital Park Consulting: The proposal is complete, and the proposed team meet the criteria's requested.

Compass Point Consulting: Smaller team (2 key individuals), their recent projects are all based in Southern Ontario, though there is no concern of their capacity to complete a Strategic Plan.

VS Group: The proposal has identified similar sized Northern Ontario completed projects. Has completed Strategic Plans for similar sized communities in Northeastern Ontario.

Nordicity: They have completed many similar projects and no doubt on ability and experience, though again no experience (at least in the proposal) of completing similar studies on smaller towns in northern Ontario. The smallest was Fort Francis (pop. 7500)

EYG Innovation & Strategy Consulting: This firm demonstrated their high ability and capacity to deliver a high-quality product however did not demonstrate experience with smaller municipalities in the North.

Complete, Comprehensive, Creative and Clear Proposal; Completeness (covers all areas outlined) and quality of proposal, creative/innovative (solutions for Municipality vs. Generic), comprehensive (covers all tasks/aspects in sufficient detail); clear, logical, and easy to follow presentation and compliance with the requirements of the RFP. 20

Overlap: The proposal is complete but does not speak to a small northern Ontario municipality.

Karen Jones Consulting: Clear proposal demonstrated clear understanding of the realities and knowledge of the Municipality of St.-Charles.

Capstone Project Solution: Some reference to St.-Charles specific information, concern is knowledge of Northern Ontario challenges.

Capital Park Consulting: The proposal is put together very well and has all the required components. Could have included additional specifics to St.-Charles proposal.

Compass Point Consulting: The proposal has the core requirement of the identified project goals. It is clear and concise.

VS Group: The proposal was a bit confusing but contained all the required points, with reference to northern Ontario work. I would have preferred a more clearly defined proposal.

Nordicity: The proposal did refer at many points the Municipality of St.-Charles, but other than stating facts, there was no impression that they familiar with performing Strategic Plans in smaller towns.

EYG Innovation & Strategy Consulting: High quality proposal with some research into St.-Charles data.

Timelines: Schedule for the completed work, decision-making points, and responsibilities of the municipality, specifically referencing the proposed timing of the public consultation process. 10



Overlap: Detailed schedule, project timeline clearly defined.
Karen Jones Consulting: Detailed schedule, project timeline clearly defined.
Capstone Project Solution: Detailed schedule, project timeline clearly defined.
Capital Park Consulting: Detailed schedule, project timeline clearly defined.
Compass Point Consulting: Detailed schedule, project timeline clearly defined.
VS Group: Detailed schedule, project timeline clearly defined, proposal could have been clearer.
Nordicity: Detailed schedule, project timeline clearly defined.
EYG Innovation & Strategy Consulting: Detailed schedule, project timeline clearly defined.

Proposed Fee; Cost effectiveness and the best overall team. 10

(Mileage not considered when evaluating proposal, all proposal were within the \$50,000 budget allocation + \$5,000 meeting costs.)

Overlap: \$47,765+HST
Karen Joanes Consulting: \$47,000 +HST
Capstone Project Solution: \$46,063 +HST (Travel cost removed)
Capital Park Consulting: \$48,750
Compass Point Consulting: 47,840 + HST (travel cost removed)
VS Group: \$46,678 + HST
Nordicity: ***\$55,510 (travel included, within \$55,000 budget if travel removed)
EYG Innovation & Strategy Consulting:49,750 + HST

Project Manager, Study Team & Disciplines; Leadership, management, communication and presentation skills and qualifications of project manager, qualifications/skills of multi- disciplinary team) appropriate skills sets devoted to tasks. 15

Overlap: Professional team with extensive knowledge.
Karen Jones Consulting: Smaller team, well balanced skills.
Capstone Project Solution: Professional team, well balanced, some expertise is from outside of Ontario but should be fairly similar in the process.
Capital Park Consulting: Well rounded company.
Compass Point Consulting: Smaller company but with proven completed projects.
VS Group: Smaller team, some variance in skill that could be better rounded.
Nordicity: Solid team with extensive knowledge.
EYG Innovation & Strategy Consulting: High caliber team, completed major projects.

Attachments:

- Tender Information
- Eight (8) proposals

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