



Capstone 

Response to Request for Proposal 2024-6

The Corporation of the Municipality of St. Charles
Community Strategic Plan

September 9, 2024

Submitted by:

Cynthia Giles, President & CEO

Capstone Project Solutions Inc.

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September 9, 2024

Denis Turcot, CAO
2 King Street East
St. -Charles, Ontario

RE: Corporation of the Municipality of St. Charles Community Strategic Plan (RFP 2024-6)

Dear Denis,

Capstone Project Solutions is pleased to respond to the Request for Proposal for the Creation of a Community Strategic Plan for the Municipality of St. -Charles. Based on the information presented, we understand that the Municipality is seeking to engage a team to define a clear Strategic Plan for the Municipality and its residents. Our Proposal introduces your team to our Municipal Strategic Subject Matter Experts, who have a wealth of experience with developing Strategic Plans and Organizational Reviews for Ontario municipalities and our Project Manager/Business Analyst who has extensive experience managing projects within the public sector.

Our team has extensive hands-on experience in collaborating closely with government bodies, particularly on a municipal level within Ontario. Allow us to introduce our proposed resource team for your Community Strategic Plan:

- **Rob Browning, Ontario Municipal Services Subject Matter Expert** - Rob has over 30 years' experience in municipal roles across Ontario including working as a City Manager, General Manager, and Fire Chief. Rob comes with extensive experience in strategic planning and significant local knowledge with Ontario municipalities and has also worked at Provincial and Municipal levels across the country.
- **Susan Shannon, Ontario Municipal Services Subject Matter Expert** – Susan has over 30 years of experience working in Ontario municipalities as CAO and advising municipal councils and staff on policy development, emergency services and the development of implementation plans. Susan specializes in conducting comprehensive organizational reviews, optimizing municipal service delivery, and facilitating strategic planning processes tailored to meet the unique needs of each community.
- **Nosa Ekhaton, Project Manager/Business Analyst** – Nosa comes with over 10 years' experience working within various roles in Project Management including Project Manager, Business Analyst, and Statistical Analyst. Nosa excels at compiling large amounts of information that allows for informed decision-making and problem-solving.

We understand this engagement aims to address important strategic initiatives for the Municipality of St. –Charles and we are excited at the prospect of collaborating with you. Capstone is confident that our response will meet the Municipality of St. – Charles' needs. Thank you for considering Capstone Project Solutions for this opportunity and please feel free to reach out with any questions or concerns.

Warm regards,



Cynthia Giles, President & CEO
Capstone Project Solutions

Company Background

Who We Are

Capstone Project Solutions is grounded in over 25 years of industry knowledge and a proven track record of meticulous project planning and seamless delivery. Originating with a focus of project management services, Capstone has evolved into a comprehensive business solutions provider. Our journey has seen us cultivate a robust network and foster connections across Canada, enabling Capstone to curate an exceptionally seasoned resource pool. Our accomplished professionals have collaboratively engaged with Municipalities and Provincial, private, and nonprofit organizations; successfully steering a diverse array of projects. At Capstone, we are unwavering advocates for process optimization, standardization, and the practical application of industry best practices. Your success is not just a goal for us; it is a commitment woven into every facet of our approach.

What We Do

Our team of Project Managers, Business Analysts, IT Specialists, Change Managers, and other Subject Matter Experts have up to 45 years of industry knowledge and practical deployments. All our work adheres to the PMI standards of excellence. We are proud of our team for their individual services, knowledge areas, and commitment to our clients' success. Their combined experience within all types of industries and multi-faceted projects allows Capstone to skillfully support your team throughout the project lifecycle. Our resources can work effectively on their own or in collaboration with a team. Our most recent partnerships included collaborations with the Township of North Huron, Barrie Fire and Emergency Services, the Nova Scotia Emergency Management Office, and British Columbia Health Services. During these engagements, our team's extensive experience and adept relationship-building capabilities were instrumental in efficient and effective project delivery. Through proactive involvement, our team has honed essential skills that we believe will greatly benefit the success of this engagement.

***Capstone we believe in and support a diversified workforce.
We consider your whole business while we deliver on your projects,
programs, and business growth engagements.***

Capstone Achievements

- Completed several Corporate Strategic Plans for Ontario Municipalities.
- Development of a global Emergency Services Consulting Group.
- Diverse industry experience – Higher Education, Emergency Services, Municipal and Provincial, Health, Accessibility, Oil and Gas

Internal Policies

- Implemented sustainability and environmental policy
- Implemented diversity and inclusion practices and policies.
- Developed community and social responsibility programs

Awards

- 2023 Tech Forward Awards Diversity & Inclusion Champion Award Finalist

Certifications

- Accessibility for Ontarians with Disabilities Act (AODA) Certified
- Women In Business Certified (WBE)
- Our resources have current industry certifications and accreditation.

Why Choose Us?

Certified Canadian Women Business Enterprise

Capstone Project Solutions Inc. is a certified Canadian Women Business Enterprise (WBE) operating in Nova Scotia, Ontario, and British Columbia.

As a Women's Business Enterprise (WBE), we proudly embrace the definition of an organization where women maintain a majority ownership stake of at least 51% and wield operational control. Our WBE certification serves as a crucial pillar in the entrepreneurial landscape, actively promoting diversity and inclusion within our organizational framework. This commitment underscores our unwavering dedication to fostering opportunities for historically underrepresented groups, particularly women-owned business.

When you partner with us, you engage with a diverse and inclusive team. Your organization could benefit from:

- ✓ Fulfillment of Supplier Diversity Goals & CRR
- ✓ Potential for Tax Incentives and Rebates
- ✓ Access to Unique Networks & Markets
- ✓ Enhance Innovative Solutions and Perspectives
- ✓ Community and Economic Impact

Capstone Philosophy

We are committed to upholding the Project Management Institute's Code of Ethics and Professional Conduct. Part of Capstone's client success model is to ensure each of our customers receives the high-quality service they expect from Capstone. The Capstone philosophy upholds four critical missions and principles that we believe keep our services grounded, client-centered, and aligned with the highest standards of professionalism. These core principles guide our team in delivering exceptional project management and fostering a culture of integrity, transparency, and collaboration. By staying true to these values—innovation, accountability, teamwork, and client satisfaction—we strive to go beyond meeting expectations and consistently exceed them, making Capstone a trusted partner in every project journey.

Capstone's Values:

Engage

- Elevating Engagement through dynamic knowledge-sharing webinars.
- Nurturing Growth by fostering collaboration through impactful mentorship programs.

Empower

- Strengthening Community Ties to lead positive change through strategic partnerships.
- Championing Diversity through workforce empowerment and by prioritizing workplace diversity.

Promote

- Continuous Learning Culture that offers diverse development opportunities.
- Employee Success that propels growth with targeted goals and robust career path development.







Sustain

- Ecological Commitment by initiating programs to reduce our ecological footprint.
- Environmental Practices that implement energy-efficient measures, waste reduction, and eco-friendly operations for lasting impact.

Capstone Client Portfolio

Capstone's extensive client portfolio exemplifies our ability to address a diverse range of challenges across various industries. Committed to fostering strong relationships and drawing upon years of experience, we have consistently delivered valuable solutions and support to clients in multiple sectors. Our expertise extends beyond project execution, encompassing comprehensive policy reviews and strategic planning. From enhancing emergency services in British Columbia, to guiding municipal transitions in the City of Barrie and drafting Accessibility Standards schedules, Capstone has demonstrated a proven track record of success. Collaborations with the City of North Huron, the City of Barrie, BCEHS Office, Health Authority, IWK, and Seniors and Long-Term Care demonstrate our proficiency in strategic planning, service integration, and process improvement. We take pride in our contributions to vital initiatives and are prepared to bring our expertise to new challenges, reaffirming our commitment to excellence. Our esteemed portfolio of clients includes:

	<p>Collaborated with the Township of North Huron to develop a four-year Strategic Plan that provided a future direction for Ontario's Township of North Huron. This project integrated diverse perspectives into a cohesive strategy.</p>		<p>Reviewed the audit recommendations for the Office of the Fire Marshal, focusing on Conflict-of-Interest Practice, Organizational Structure, Competencies, and Quality Assurance & Performance Management, subsequently, providing an options analysis for responding to these Audit recommendations</p>
 <p>Department of Environment and Climate Change</p>	<p>Provide project management support services during a period of high-volume of work due to an anticipated increase level of activity. Capstone supports key project management functions, while maximizing the use of key SMEs to meet goals and commitments, and helping to ensure deliverables are on time, on budget, and of high quality.</p>	 <p>Department of Education & Early Childhood Development</p>	<p>Provide project management consulting services within the Education Innovation, Programs and Services (EIPS) Branch. The objective of this initiative is to develop comprehensive project management plans, templates, and training to support projects within EIPS branch.</p>
	<p>Providing Project Management support by implementing a project management model and project delivery strategy. PUC is a private utility services company owned by the Corporation of the City of Sault Ste. Marie, Ontario.</p>	 <p>Department of Cyber Security and Digital Solutions</p>	<p>Supporting the modernization of the Registry of Motor Vehicles' service delivery and adapting to future needs for flexibility, required by a new legislative framework. The Project will improve road safety and compliance, services, and create user-friendly operation.</p>
	<p>Implemented a Project Management Office within Dalhousie's ITS department to increase project visibility and project financial performance and resource allocation.</p>	 <p>Department of Community Services</p>	<p>Created a comprehensive comparison between two case management systems to help DCS work towards updating and streamlining services for its clients.</p>
 <p>British Columbia Emergency Health Services</p>	<p>Managing the Next Generation 911 technical implementation of enhanced functionality for critical ambulance emergency services across the province.</p>	 <p>City of Barrie Emergency Services</p>	<p>Assessed and analyzed Barrie's Emergency Services department for the Next Generation 911 transition. Provided recommendations and Procurement support for the NG 9-1-1 transition for future implementation.</p>
 <p>Accessibility Act</p>	<p>Provided Project Management support to draft an implement schedule addressing Accessibility Standards in a Built Environment.</p>	 <p>Nova Scotia Emergency Management Office</p>	<p>Provided Project, Business Analysis, Change Management, and other core services to transition NS EMO to Next Generation 911 technology and improve business processes across Nova Scotia.</p>

	<p>Supported the review and investigation of increased services and eligibility criteria for the Sexual Offence Legal Representation Program.</p>		<p>Assisted Foresight Atlantic to develop business process and policy improvements by providing recommendations for next steps and continuous development.</p>
 <p>Clinical Engineering and Health Human Resource</p>	<p>A review and analysis of a service provided by a third-party organization, and how it integrated with the internal service delivery of Nova Scotia Health Authority, IWK and Seniors and Long-Term Care.</p>		<p>Aided Clinical Supply Chain team transition to Nova Scotia Health. Developed tools to help drive and sustain accountability among team members and improve departmental efficiency, recommendations for new/amended work processes and organizational changes, as well as change management plans.</p>
 <p>IWK Health Centre Izaak Walton Killam Hospital</p>	<p>Collaborated with the IWK, to develop and facilitate a strategic plan for the Women's and Newborn Health Program. Assisted in preparing and conducting a strategy session with key IWK Health team members, focusing on women and gender-diverse strategy.</p>		<p>Assisting the NSDFA to implement infrastructure improvements to all three provincial fish hatcheries to mitigate the impact of climate change by improving their water treatment systems to collect effluent water, treat/recondition and reuse water throughout the sites.</p>

Capstone Locations

We pride ourselves on promoting alternative work arrangements and maintaining offices strategically positioned for accessibility via public transportation, thereby contributing to a greener, more connected future.



Dartmouth, NS

99 Wyse Road
Suite 470
B3A 4S5

Barrie, Ontario

49 High Street
Suite 3400
L4N 5J4

Blyth, Ontario

390 Queen Street
N0M 1H0

Vancouver, BC

885 West Georgia Street
V6C 3G1

Edmonton, Alberta

10180 101 Street
T5J 3S4

Our resources are ready to work remotely and or onsite as services are required. Spanning across Canada, Capstone has key locations to better serve our client's needs. Wherever you are, our dedicated team is readily available to support your endeavors.

Capstone's Experience with Similar Projects

Our Ontario Municipal Services SME are versatile in handling diverse projects, from crafting long-term strategic plans to addressing specific recommendations for organizational improvement. Their recent project engagements align closely with the St. -Charles requirements, showcasing their proficiency in strategic planning, organizational review, and stakeholder engagement.

The Township of North Huron Corporate Strategic Plan:

For this engagement, Rob Browning as the Municipal Services Subject Matter Expert collaborated with the Township of North Huron to complete the Township's Corporate Strategic Plan. Conducted from July to October 2023, through stakeholder engagement, workshops, and data analysis, the team developed a strategic roadmap aligned with the Municipality's vision and goals. Deliverables included a Final Strategic Planning Report, project documentation, and presentations to the Council.

The Township of North Kawartha – Strategic Planning:

In 2015, Rob Browning served as a Subject Matter Expert in a strategic planning exercise for the Township of North Kawartha. Acting as an interim CAO, Rob facilitated focus groups, collected insights from Council, staff, and the community, and synthesized the data into a draft strategic plan. The resulting document was presented to Stakeholders and adopted by the Municipal Council. This project showcased Rob's ability to guide strategic planning processes effectively.

Town of Penetanguishene Corporate Strategic Plan:

In 2019, Susan Shannon conducted a series of interviews and facilitated working sessions with the Town of Penetanguishene's Council and staff. A key focus of the project was an extensive public consultation process which included interviews with community stakeholders, public open houses, and the development of public surveys. Through a series of interactive activities with the Council, staff workshops and a feasibility analysis with senior staff, the Strategic Plan was finalized to reflect the Town's priorities and provide guidance for implementation of the community's goals moving forward.

Townships of Wollaston, Limerick and Tudor & Cashel Service Delivery:

In 2020, Susan Shannon guided these three municipalities through a multi-municipal administration servicing study that identified potential resource sharing and collaboration opportunities that would improve efficiencies and reduce costs for municipal services overall. The project included a review of current state staffing resources and service delivery. Susan identified and documented services shortfalls and specific resources needed for the municipalities to allocate resources.

Meet Your Team

Name	Role on Project
Rob Browning	Ontario Municipal Services Subject Matter Expert
About Rob	
<p>As a former City Manager, General Manager of Strategic Services, and Chief Administrative Officer for several Ontario municipalities, Rob brings much experience creating positive outcomes for organizations, communities, and staff. With over thirty years of senior municipal leadership experience, he has an extensive knowledge of all areas of municipal operations. Additionally, Rob is a Canadian Association of Municipal Administrators (CAMA) member and a former director of the Ontario Municipal Administrators Association (OMMA). He has chaired the Emergency Services Steering Committee formed by the Mayors and Regional Chairs of Ontario (MARCO) and Ontario Big City Mayors (Previously called LUMCO).</p> <p>Throughout his career, Rob has led a variety of large municipal projects, including leading and developing corporate strategic plans. Rob’s knowledge of Ontario municipalities, networks, and strategic practices has assisted councils in identifying areas where services can be more efficiently delivered ensuring that resources are optimally utilized. Recently, Rob led the Corporate Strategic Planning project for the Township of North Huron where a four-year strategic plan was delivered. The Strategic Plan is currently serving as an organizational roadmap, offering clear guidance for future initiatives, and fostering resilience for the Township of North Huron.</p>	
Skills	
<ul style="list-style-type: none"> • Strategic and Operational Planning • Capital Project Management • Strategic Leadership • Municipal Emergency Service Operations • Human Resource Management • Municipal Regulatory Frameworks • Public Partnership Projects 	<ul style="list-style-type: none"> • Emergency Services Amalgamation • Services Amalgamation • Finance and Budgeting • Council/Staff Relations • Change Management • Fire Department Accreditations • Quality Systems Fire Department Assessments
Education	
<ul style="list-style-type: none"> • Certified Municipal Manager (CMM) III with Fire Service Executive Designation • Graduate Master’s Certificate in Leadership, Innovation and Change • Master’s Certificate in Municipal Management • Leadership Development Program • Organizational Development 	<ul style="list-style-type: none"> • Fire Protection Technology Diploma • Fire Department Management Program, Office of the Fire Marshal of Ontario • Emergency Planning Courses, Canadian Emergency Preparedness College • Qualified Peer Assessor and Team Leader, Centre for Public Safety Excellence • Master Trainer/Facilitator, Ontario Fire College • Leadership Excellence Program

Name	Role and Responsibilities on Previous Projects	
Susan Shannon	Ontario Municipal Services Subject Matter Expert	
About Susan		
<p>For more than thirty years, Susan has worked in and with Ontario municipalities. She has partnered closely with municipal councils to guide them through strategic planning, restructuring, service delivery reviews, and organizational reviews. Susan’s previous career as a Municipal Chief Administrative Officer provides an experienced-based, internal understanding of municipal and provincial affairs and operations. Susan is results-driven and adept at identifying municipalities’ current state challenges, opportunities, and creating action plans for meaningful change to move forward. Additionally, she brings executive experience, superior research skills, professional care, and objectivity to each project she undertakes.</p> <p>As an Ontario Municipal Strategic SME, Susan thrives working alongside municipalities in developing strategic plans and organizational reviews. Most recently, Susan completed an Organizational Structure Review for Niagara Region to help determine the best alignment of divisions, functions, and service delivery to identify duplications and crossovers. These types of reviews help municipalities streamline their operations, improve service delivery, and better meet the needs of their residents. Additionally, Susan has completed several strategic plans for municipalities of varying sizes within the last five years. This past year, Susan worked with a team to update the Municipality of Strathroy-Caradoc’s strategic plan and to develop a new strategic plan for the Municipality of Strathroy-Caradoc’s Police Services Board.</p>		
Skills		
<ul style="list-style-type: none"> • Strategic Planning • Workshop Facilitation • Organizational Reviews • SWOT Analyses • Council/Staff Relations • Municipal Leadership 	<ul style="list-style-type: none"> • Municipal Service Delivery Reviews • Project Co-ordination • Emergency Services – Issues Management & Planning • Jurisdictional Reviews • Human Resource Management 	
Education		
<ul style="list-style-type: none"> • Municipal Administration Program, AMCT Designation • AMCTO Certified in Municipal Law, Tax Collection, By-Law Preparation, Municipal Accounting and Finance and Municipal Human Resources • Community Economic & Social Development Research Methods 		

Name	Role on Projects
Nosa Ekhaton	Project Manager & Business Analyst
About Nosa	
<p>Nosa is a certified Project Management Professional (PMI-PMP), with over 10 years of experience in project management, business analysis, and process improvement within provincial government, non-profit organizations, finance, and information technology. Nosa’s ability to foster collaboration with stakeholders from diverse backgrounds and to drive organizational goals for strategic projects aligns project objectives with broader organizational visions. His extensive background in business analysis, including working with stakeholders to gather requirements and facilitate workshops, has honed his stakeholder management skills. He excels at keeping stakeholders and steering committees engaged and informed on a project’s progress, ensuring alignment and transparency throughout.</p> <p>Nosa's extensive background in Project Management spans multiple roles, including Project Manager, Business Analyst, and Statistical Analyst. These diverse roles have given him the ability to view projects from various perspectives, ensuring the project is adaptable and focused. Most recently, as the Project Manager for the Nova Scotia Department of Education and Early Childhood Development’s Project Management Consultancy Services Project, Nosa was responsible for managing the development of comprehensive project management plans for eight projects within the EIPS branch, creation of an overarching project management plan, standardization of project templates, and staff training on project management software. Throughout this project, Nosa worked with multiple stakeholders and kept the tight deadline on schedule and costs within budget.</p>	
Skills	
<ul style="list-style-type: none"> • Schedule Management – Advanced skills in MS Project • Cost Management • Workshop Facilitation • Public Sector Experience 	<ul style="list-style-type: none"> • Current State Analysis • Gap Analysis • Gathering Future State Requirements • Stakeholder Engagements
Education	
<ul style="list-style-type: none"> • Certified Project Management Professional (PMI- PMP) • Scrum Fundamentals Certified (SFC) • Information Technology Infrastructure Library (ITIL) v4 • Masters of Banking and Finance, University of Benin, Nigeria • B.Sc. in Economics and Statistics, University of Benin, Nigeria • Certified Business Analysis Professional (IIBA-CBAP) 	

Please see **Appendix A** for Resources’ Full Resumes

*"I had the pleasure of working with **Rob Browning** when he was our interim CAO for the Township of North Kawartha. I was a Ward Councilor when Rob joined our team in late 2015. It was a time of upheaval and change within our municipality and his leadership and guidance was vital in moving our organization forward. He helped modernize a number of internal processes related to finance, budgeting, and internal communications. He led us through strategic visioning and planning exercises, and he assisted us in the recruitment and hiring of a new CAO. Rob was only with us for a year, but he was a great asset when he was here. I know this to be true as I am now the Mayor of North Kawartha. His ideas and strategies continue to have a positive influence and impact on our municipal organization."*

Carolyn Amyotte
Mayor, North Kawartha Township

*"Thankful for **Susan Shannon's** guidance in helping Council with securing our new CAO. We appreciated what she did to help rebuild our staff. I see every day the work she has done through the Human Resource and Organizational Review. It was a pleasure working with Susan."*

Michael Cameron
Mayor, Municipality of the Village of Merrickville-Wolford

Our Understanding of Your Project

Capstone understands that the Municipality of St.-Charles is seeking a vendor with experience and expertise in developing strategic plans tailored to the unique needs of Ontario communities like St.-Charles. Significant global, national, and provincial changes have occurred since St. -Charles' last Strategic Plan, particularly affecting smaller municipalities like St.-Charles. The housing shortage and the rise of remote work have made communities like St. -Charles more attractive, leading to both new opportunities and challenges that need to be addressed. We recognize the critical importance of developing a robust Community Strategic Plan for St. -Charles that clearly outlines short, medium, and long-term goals for the municipality's future, benefiting not only the community but also its employees and Council.

The St. -Charles 2025-2030 Community Strategic Plan Will:

- ✓ **Review Existing Service Levels and Capacities:** Assess current departmental service levels and the internal organizational capacities needed to address future municipal opportunities and challenges.
- ✓ **Incorporate Long-Term Vision and Values:** Establish the long-term vision, values, and guiding principles for the Municipality, supported by clear objectives, priorities, and actionable plans to achieve these goals.
- ✓ **Provide a Framework for Change:** Provide a guiding framework to navigate the Municipality through significant changes in economic, employment, and community growth.
- ✓ **Ensure Fiscal Responsibility:** Develop strategies that are financially sustainable and responsible for the Municipality.
- ✓ **Identify Key Priorities:** Highlight mid- to high-level priorities addressing challenges identified through existing documents, jurisdictional scans, interviews, and expert insights.
- ✓ **Integrate Community Vision:** Reflect the vision and aspirations of residents, organizations, funding agencies, and Council, ensuring that the Plan aligns with the broader goals of all stakeholders. This approach will help St. -Charles strategically manage its growth, ensuring that the community remains vibrant and resilient for years to come.

Workplan and Timelines

Ongoing Project Management Services

- Conduct bi-weekly project team meetings and provide bi-weekly progress updates via status reports.
- Provide change order management, register updates, impact assessments, approval/denial communications.
- Conduct identity risk management, prioritization, ownership assignment, mitigation planning, register updates, monitoring, and management.
- Provide issue identification, resolution, escalation, register updates, monitoring, and management.
- Compile decision log updates and communication to the project team.

- Manage performance monitoring of deliverables, communication to the project team, and updates to the deliverable tracker.
- Identify and raise any concerns or issues with the Project Contact promptly and suggest solutions to help resolve problems.
- Manage the coordination and facilitation of engagement sessions, including weekly planning meetings.
- Prepare meeting agenda and presentation materials.
- Facilitate the meeting and take minutes.
- Circulate meeting minutes, action items and assignments.
- Update draft documents with feedback provided.

Our Workplan

Phase 1: Project Initiation Stakeholder Engagement

1. Project Kick-Off Meeting with Council, CAO, and Project Stakeholders

- 1.1. Review Statement of Work and align on project objectives, scope, timeline, and deliverables.
- 1.2. Confirm Community's strategic goals and future state requirements.
- 1.3. Discuss and understand the development of the Project Charter

2. Document Kick-off Meeting and Conduct Stakeholder Assessment

- 2.1. Identify St. -Charles' Stakeholders, and Roles and Responsibilities. This includes Clubs/Organizations/Not-for-Profits, and other Government agencies.
- 2.2. Analyze how each stakeholder group will impact the project.
- 2.3. Determine meeting frequency and communication approach with Project Owner.
- 2.4. Determine reporting structure and frequency of status reports with Project Owner.
- 2.5. Analyze potential impacts on the Community Strategic Plan project.

3. Develop Project Documentation

- 3.1. Develop the St. – Charles' Community Engagement Plan that will confirm:
 - 3.1.1. The objective – define the goals of the engagement.
 - 3.1.2. The approach and methodology
 - 3.1.3. Determine key timeline dates
 - 3.1.4. Confirm the project team/working group.
 - 3.1.5. Identify Key Stakeholders to be consulted.
 - 3.1.6. Discuss the scheduling of interviews.
 - 3.1.7. Any associated costs

- 3.2. Draft/Approve Project Charter
- 3.3. Draft/Approve Project Plan
- 3.4. Review and approve Project Schedule
- 3.5. Establish Project Registers and Logs
- 3.6. Draft/Approve Stakeholder Map
- 3.7. Draft/ Approve Communication Strategy

Phase 2: Preliminary Data Collection

1. **Review of Town's Historical Documents**
 - 1.1. Master Plans, Implementation Plans, Strategic Plans
 - 1.2. Approved projects
 - 1.3. Reports
 - 1.4. Current and 10-year forecasted budgets

Phase 3: Strategic Planning Exercise

1. **High-level Current State Review with Council and Staff**
 - 1.1. Preliminary High-level Discussion
 - 1.2. Internal consultations with council and municipal employees including workshops and one-on-one interviews
 - 1.3. Review of approved service levels and resources.
 - 1.4. Strength, Weakness, Opportunity, Threat (SWOT) Assessment:
 - 1.4.1. Complete the SWOT assessment of current state to understand the features and factors that differentiate it from the other Municipalities.
2. **Public Communications – Marketing and Promotion**
 - 2.1. Develop Public Awareness messages for Strategic Planning sessions.
 - 2.2. Develop content for media channels including social media and website content.
3. **Public Consultation**
 - 3.1. Targeted 12 interviews with individuals/groups identified by the Municipality
 - 3.2. Conduct survey for St.-Charles residents
4. **Current State Findings Executive Summary**
 - 4.1. Combined current state findings and public consultation findings.

5. Workshops

- 5.1. Facilitate two – four (4) hour workshops with Council, CAO & Managers to discuss:
 - 5.1.1. Current state vs future state.
 - 5.1.2. Review Vision Statement.
 - 5.1.3. Review Mission Statement
 - 5.1.4. Review Values and guiding principles.
 - 5.1.5. Develop Goals and Identify priorities.
 - 5.1.6. Develop draft strategic statements and actions.
 - 5.1.7. Develop strategies to achieve Goals/Vision in the short, medium, and long term.
- 5.2. Prioritize actions.

6. Draft Report

- 6.1. Submit Draft Report with Council and Senior Leadership Team
- 6.2. Incorporate feedback from Council.
- 6.3. Confirm the revised Vision with Council and Senior Leadership Team.
- 6.4. Present to Council.

Phase 4: Final Presentation

1. Presentation to Council

- 1.1. Present the Final Strategic Planning Report to Council

Our Project Methodology

At Capstone Project Solutions, we apply PMI project management methodologies and approaches in all our engagements. As the project requirements change, Capstone has a diverse group of qualified resources that are flexible and adaptive in their knowledge and expertise across numerous industries and business sectors to build strength and resiliency in each effort. The following key aspects are managed throughout the project life cycle:

- ✓ **Project Scope, Schedule, and Cost Management:** We meticulously manage the Project Scope, Project Schedule, and cost. Costs are managed with the Schedule and Scope as defined in the Project Charter. The change request process is described in the Project Charter and agreed upon before document approval.
- ✓ **Quality Management:** To ensure the highest quality of work, major deliverables undergo a thorough review by the Project Sponsor, other identified project members, or stakeholders. Milestones and approval processes are put in place for all major deliverables, to ensure that the quality of the work meets the highest standards and expectations of project leadership.
- ✓ **Human Resource Management:** Our approach involves proactive management of our Human Resources. Should an unforeseen need arise, any resource changes to our team will be submitted to the Project Sponsor for approval.

- ✓ **Communication Management:** Effective communication is integral to our project management approach. We employ a comprehensive Communication Plan that includes regular status reports, stakeholder updates, and a defined communication matrix outlining who receives specific information and when.
- ✓ **Risk Management:** We emphasize proactive risk management by employing strategies for identifying, assessing, and mitigating risks throughout the project. We will solicit input from project team members on potential risks, update risk registers, and take active steps to mitigate identified risks. Our Risk Management Plan outlines key risk indicators, triggers, and response strategies.
- ✓ **Stakeholder Management:** We prioritize effective stakeholder engagement. This includes identifying key stakeholders, determining their needs, addressing their concerns, and ensuring their expectations are managed throughout the project life cycle.
- ✓ **Procurement Management:** If the project involves external vendors or suppliers, we manage procurement through vendor selection, contract negotiation, and ongoing vendor performance monitoring to ensure successful project outcomes.
- ✓ **Integration Management:** We focus on the seamless integration and co-ordination of project components and phases to ensure they work together effectively to achieve project objectives.
- ✓ **Monitoring and Control:** We implement robust monitoring and control mechanisms to track project progress using key performance indicators (KPIs) and metrics. We will regularly review project timelines, compare planned milestones against actual achievements, and conduct schedule variance analysis. These processes allow us to take proactive measures to keep the project on track and within established parameters.

Our Approach

Phase 1: Project Initiation Stakeholder Engagement

Activities	Approach
Project Kick-Off Meeting (Council, CAO, Project Stakeholders, and Project Sponsor)	<p>Once the project has been awarded, the Capstone team will introduce themselves to your project leadership and determine the earliest availability to conduct a Project Kick-off meeting with the Project Owner and Project Stakeholders.</p> <p>The Project Kick-off Meeting serves as a crucial initiation point, fostering alignment and understanding among the Project Owner and Project Stakeholders. By reviewing the Statement of Work, participants align on project objectives, scope, timeline, and deliverables, establishing a shared vision. The development of the Project Charter lays the foundation for a unified approach. Identifying the project team and key stakeholders ensures clear communication channels and teamwork. This comprehensive kick-off alleviates potential misunderstandings, and sets the stage for successful project execution, thereby promoting a common understanding of goals and fostering a sense of ownership among all parties involved.</p>
Document Kick-off Meeting and Conduct Stakeholder Assessment	<p>Drafting a stakeholder map is a strategic process crucial to the success of all projects. It involves identifying individuals or groups with a vested interest in the project. By understanding and assessing their influence, specific needs and expectations, the stakeholder map serves as a visual</p>

Activities	Approach
	<p>representation that provides a comprehensive overview of the project's key influencers and contributors.</p> <p>Through the stakeholder assessment, the Capstone team will identify an engagement process for each stakeholder or group regarding the circulation of information.</p> <p>This assessment will result in the following:</p> <ul style="list-style-type: none"> • Identification of all St. -Charles stakeholders for the Community Strategic Plan and an understanding of their roles and responsibilities. • A full understanding of stakeholder involvement. • Provision of the stakeholder communication process.
<p>Develop Project Documentation</p>	<p>The Project Charter is a document that formally authorizes the existence of a project and provides the team with the authority to apply organizational resources to project activities. Serving as both a contractual agreement and preliminary scope outline, the Charter is a point of reference for the project lifecycle to ensure alignment of deliverables.</p> <p>Developing the Project Charter includes outlining the project purpose, defining the objectives and business benefits, identifying the Project Scope, reviewing reference documentation, identifying high-level requirements, documenting out-of-scope items, summarizing key dates, listing key stakeholders and their roles on the project, noting project success factors, and project exit criteria. The Charter lists high-level assumptions, constraints, and known risks which guide the planning effort.</p> <p>The Project Plan expands upon the Project Charter, by clearly outlining a comprehensive approach that the project team will employ to effectively manage the project within the established parameters captured in the Project Charter.</p> <p>A well-crafted Communication Strategy encompasses various elements, including clear objectives, targeted messaging, and tailored channels. It begins with a thorough understanding of the project's audience, identifying key stakeholders and their communication preferences. Establishing a cadence for regular updates, milestone reporting, and issue resolution ensures that everyone remains informed and aligned with the project's progress. The strategy should also consider the two-way flow of information, encouraging feedback and open dialogue. Utilizing day-to-day business communication channels, such as meetings, emails, and collaborative platforms, ensures that information is disseminated effectively.</p> <p>Ensuring the project stays on course requires a dedicated approach to schedule review, approval, and maintenance. For the Capstone project team, this process is a critical component of our commitment to transparency and alignment. During the planning phase of this project, the Project Schedule will be proposed to the leadership of St. -Charles for review and adjustment as needed, ensuring we maintain priority of key dates and milestones outlined in the Project Charter.</p> <p>The reviewed Project Schedule undergoes a thorough approval process to obtain consensus within the project team. This step is vital for acknowledging and validating the proposed timeline, ensuring that it reflects the collective understanding and agreement of the team. Project dynamics may necessitate adjustments to the Schedule.</p>

Activities	Approach
	<p>Establishing project registers and logs serves as organized repositories for critical project information, providing a systematic approach to documentation and tracking. Capstone offers a secure and collaborative environment where each team member can log and monitor critical issues, risks, and decisions. The establishment of these registers enhances project governance and contributes to proactive risk management, issue resolution, and comprehensive documentation, resulting in a structured and well-informed project.</p>
<p>Ongoing Project Team Meetings (weekly) and Project Management Services</p>	<p>The Project team Kick-off meeting is an inaugural meeting that serves as an opportunity to introduce team members and stakeholder groups identified during the leadership Kick-off meeting. This meeting's purpose is to clarify roles and responsibilities and to give an overview of the project's objectives, scope, and timeline. The agenda typically includes a review of the approved Project Charter, Project Plan and Communication Plan and outlines key deliverables, milestones, and any critical success factors. Then, the team will review the shared tools, templates and reporting mechanisms approved by leadership. By creating a collaborative and informed environment through the project team Kick-off meeting, teams can align their efforts, establish a sense of collective ownership, and embark on the project with clarity and enthusiasm.</p> <p>The project team conducts weekly reviews of the Project Schedule to assess its alignment with objectives and milestones. This proactive approach allows for early identification of any deviations, enabling timely adjustments and course corrections. Regular maintenance involves adapting the schedule to accommodate changes, reduce risks, and capitalize on emerging opportunities while preserving alignment with project goals.</p> <p>Throughout the project duration, the Project Owner will receive weekly status reports on the Strategic Plan progress. The report will contain completed activities and upcoming activities with up-to-date risk statuses.</p>

Phase 2: Preliminary Data Collection

Activities	Approach
<p>Review of Historical Documents</p>	<p>The review of historical documents is a vital step in understanding St.-Charles and shaping its future. The Capstone team will review the existing strategic plan, relevant by-laws, reports, and policies. This review ensures a comprehensive grasp of past decisions, community needs, and regulatory frameworks. By delving into historical documents, the Capstone team will gain insights into the Community's development trajectory, enabling informed decision-making.</p>

Phase 3: Strategic Planning Exercise

Activities	Approach
<p>High-level Current State Review</p>	<p>Capstone team will have a high-level current state review by engaging relevant council members and other identified stakeholders by completing a series of workshops and interviews. The review process involves analyzing historical documents and an audit with Community staff to ensure all information is captured. This approach involves preliminary discussions to understand the existing landscape, coupled with compiling an Executive Summary of historical findings. This information sheds light on the organization's strengths, weaknesses, and trends; and will add to</p>

	Capstone’s Strength, Weakness, Opportunity, Threat (SWOT) Assessment of the Community. The completion of the SWOT assessment of current state highlights the features and factors that differentiate the Community from the other Municipalities.
Communications	To generate public support and awareness of St. -Charles Community Strategic Plan, Capstone will provide the necessary messaging for the Community’s media channels including the website and social media platforms. The Capstone Project team will engage with our in-house marketing and communications specialist to develop the right message and channel for the Community’s residents.
Public Consultation	The Community Strategic Plan needs to be a true reflection of St. -Charles. The Capstone team will carry out twelve (12) targeted interviews in a combination of virtual and in-person formats with stakeholder groups identified by the Town and provide a short public online survey for residents to complete. A high-level Current State Review will provide the framework for the interview questions. The interviews are designed to capture informative quantitative and qualitative information, while also observing non-verbal communication. Additionally, the survey will gauge the residents’ opinions and attitudes of the Community’s direction. Response data from all the interviews and surveys will be collected and analyzed by the Business Analyst and added to the Public Consultation Report.
Current State Findings Executive Summary	The Current State Findings Executive Summary will be provided with the combined state and public consultation findings.
Workshops	The Strategic Planning workshops involving the Council and staff representatives play an important role in aligning organizational objectives. These joint sessions establish strategic goals and actions by identifying future state requirements to provide a roadmap for success. Defining clear priorities and examining issues in this workshop ensures a focused and well-informed Community Strategic Plan. During these workshops, there will be a review of the Community’s Vision Statement, Mission Statement, Values and guiding principles. Ultimately, this approach engenders a shared vision, enhances communication, and empowers the Municipality of St. -Charles to adapt and thrive in a dynamic environment.
Draft Report	<p>The Capstone team, in collaboration with the project team of the Municipality of St.-Charles, will draft a preliminary Corporate Strategic Plan. This involves a systematic approach to articulate the organization's vision, mission, core values, goals, and action plan. This also requires an in-depth understanding of the internal and external environment, stakeholder expectations, and organizational capabilities. It is crucial to align the plan with the overall vision and values, ensuring coherence across the Municipality of St. -Charles. Identifying key performance measurements and assessment tools is essential for tracking progress and ensuring accountability.</p> <p>The Capstone team will submit the preliminary Draft Plan to the Project Lead and to the Council. Providing a working draft of the Strategic Plan is a critical step for ensuring open-ended communication and gaining stakeholder input to ensure continued alignment with the Municipality of St. -Charles’ objectives. This process enhances the plan's robustness and increases organizational buy-in. The preliminary draft serves as a foundation for refining and finalizing the Corporate Strategic Plan, setting the direction for the organization's future success.</p>

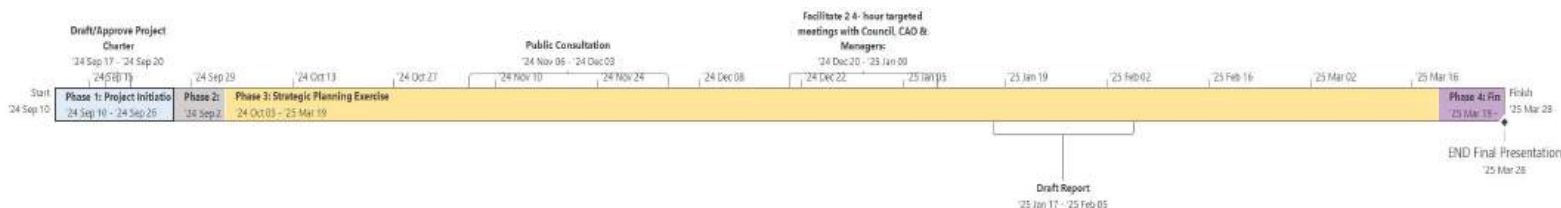
Phase 4: Final Presentation

Activities	Approach
Presentation to Council	The final presentation of the Corporate Strategic Plan provides an overview of the information gathered during the project duration, including insight into the Community’s current state, community input, and the jurisdictional scan. The presentation of the Strategic Plan will incorporate feedback from the draft report and allow for a thorough review and discussion. Additionally, ensuring that the Strategic Plan aligns with the Municipality of St. -Charles objectives garner necessary support.

Deliverables

- Project Charter
- Project Plan
- Project Schedule
- Community Engagement Plan
- Communication Plan
- Project Logs
- Status Reports
- Current State Review
- Public Notice Proofs
- Public Survey
- Focus Group Interview Questions
- Current State Findings Executive Summary
- Draft Report
- Final Report (PDF and Bound Copies) and Slide Deck

Timeline



Please See **Appendix B** for Full Project Schedule

Milestones

Milestone	Completion Date
Kick-off Meeting	September 11, 2024
Approve Project Charter & Project Plan	September 20, 2024
Public Consultation	December 03, 2024
Strategic Planning Workshop with Council & Staff	January 9, 2025
Submit Draft Final Report	March 18, 2025
Final Presentation to Council	March 20, 2025

Proposed Cost

Budget Category	Total Cost
Consultant	\$43,203
Consultant Travel	\$4,950
Event Marketing and Promotion	\$2,860
Total	\$51,013

Time, Task, Resource Matrix (TTRM)

The Time-Task-Resource Matrix (TTRM) for St. -Charles' Strategic Plan outlines all project tasks, their estimated amount of hours to complete, and the team members responsible for each task. Additionally, each task is assigned a value amount to ensure the project stays on budget and within the designated timeframe. For the full TTRM, please refer to **Appendix C**.

Project Name: Development of Community Strategic Plan			INTERNAL HOURS [16 Columns Hidden]				ROW TOTALS	
Client: St. -Charles			1	2	3	4	HOURS	LABOUR COST
Province / State: Ontario			Nosa Ekhtor Project Manager	Rob Browning Subject Matter Expert	Susan Shannon Subject Matter Expert	Lynne-Anne West Marketing Specialist		
RFP: 2024-6			PROJECT SUMMARY					
Proposed Start Date	10-Sep-24	Team Proposed Hours	311					
Proposed Finish Date	28-Mar-25	Total Resource Costs	\$ 46,635					
Working Days	139	Sales Tax (13%)	\$ 6,063					
		Total Costs	\$ 52,698					
		Version 2.0						
WBS #	DESCRIPTION	APPROACH / ASSUMPTIONS / OUTPUTS	*****	*****	*****	*****		
Phase 1: Project Initiation Stakeholder Engagement (5 Rows Hidden)								
	Project Kick-Off Meeting (Council, CAO, and project stakeholders)	Approach: - Review statement of work and align on project objectives, scope, timeline and deliverables. - Discuss and understand the development of the Project Charter - Conduct Project Team kick-off meetings: The project team is aligned on objective, audience, and communication channels, and someone on the team has final approval. Assumptions: St. -Charles Project Team and Capstone Project Team are able to attend meeting and review project scope with minimal adjustment. Outputs: Relationship established, St. -Charles Project team members identified, clarity on project vision and timeline.	2	2	2		6	\$ 312
	Document Kick-off Meeting and Conduct Stakeholder Assessment	Approach: - Identify Stakeholders, and Roles and Responsibilities. This includes individuals, agencies and community groups. - Analyze impact to project - Determine meeting frequency and communication approach. - Determine reporting structure and frequency of status reports. - Draft/Approve Stakeholder Map Assumptions: Input from St. -Charles Project Team and stakeholders. Outputs: Stakeholder Engagement Mapping identifying all stakeholders.	3	2	2		7	\$ 1,038
	Develop Project Documentation	Approach: - Draft/Approve Project Charter - Draft/Approve Project Plan - Review and approve Project Schedule - Establish Project Registers and Logs - Draft/ Approve Communication Engagement Plan - Draft/Approve Communication Strategy Assumptions: St. -Charles team and Capstone Project team are involved collaboratively in drafting the Charter, Project Plan and Communication Plan. St. -Charles provides a stakeholder list and informs on impact. Outputs: - Project Charter - Project Plan - Project Schedule - Communications Strategy	8	2	2		12	\$ 1,668

References

Reference 1

Project Name	The Township of North Huron Corporate Strategic Plan
Customer Name	The Township of North Huron
Project Dates	July 2023 – October 2023
Project Team	Rob Browning, Municipal Strategic SME
Project Description	Capstone collaborated with the Township of North Huron to develop a four-year Strategic Plan that provided a future direction for Ontario’s Township of North Huron. The Strategic Plan’s purpose was to create a strategic roadmap that aligned with the Municipality's vision, mission, and related goals, providing clear guidance for its future endeavors.
Relevance of Reference Project to Proposed Service Area:	<p>Project Initiation Stakeholder Engagement</p> <ul style="list-style-type: none"> • Project Kick-off meeting with leadership (CAO, Project Stakeholders, and Project Sponsor) - Reviewed Statement of Work and aligned on project objectives, scope, timeline, and deliverables. • Conducted Stakeholder Assessment - Identified Stakeholders, and Roles and Responsibilities, determined communication approach and reporting structure. • Developed and Approved Project Documentation - Project Charter, Project Plan, Project Schedule, Project Registers/Logs, Stakeholder Map and Communication Strategy. <p>Preliminary Data Collection</p> <ul style="list-style-type: none"> • Review of historical documents: Existing and relevant by-laws, Reports, Policies • SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis <p>Strategic Planning Exercise</p> <ul style="list-style-type: none"> • Conducted High-level Current State Review and Preliminary High- level Discussion • Compiled historical findings executive summary • Directed Strategic Planning Workshops with Stakeholders • Identified target future state requirements • Drafted Future Vision <p>Final Report and Presentation</p> <p>Actionable four-year strategy</p> <ul style="list-style-type: none"> • Vision Statement, Mission Statement, Values, principles, and goals
Contact Information	Dwayne Evans, Chief Administrative Officer of the Township of North Huron 519-357-3550 x 124 devans@northhuron.ca

Reference 2

Project Name	The Municipality of Strathroy-Caradoc Corporate Strategic Plan
Customer Name	The Municipality of Strathroy-Caradoc
Project Dates	November 2023 - April 2024
Project Team	Rob Browning, Municipal Strategic SME Susan Shannon, Municipal Strategic SME
Project Description	<p>This project involved an update to the Municipality’s existing Corporate Strategic Plan and the development of a new Strategic Plan for the Police Services Board, as required under the Community Safety & Policing Act.</p> <p>The Municipality’s Corporate Strategic Plan 2020-29 provided a strong foundation to start the process for review, discussion, and input. Materials from the Police Services Board, including the “Vision, Mission and Core Values Statements” in their 2018-20 Business Plan and other reports also provided an excellent starting point for their strategy development.</p>
Relevance of Reference Project to Proposed Service Area:	<p>Project commencement activities included start-up meetings with the CAO and Chief and Project Leads for both organizations.</p> <p>A Communication Plan and a series of key communications was also developed for the Municipality to use on their website and on their social media channels, to help keep the community informed throughout the strategic planning process.</p> <p>Phase 1 – Current Situation Analysis</p> <ul style="list-style-type: none"> • Document Review and Analysis • Individual Interviews with Members of Council and Board Members • Individual Interviews with Senior Management and Senior Officers <p>Phase 2 – Strategic Issues and Engagement Framework</p> <ul style="list-style-type: none"> • The team consulted with Council/Senior Staff and the PSB/Senior Officers through a purposeful series of workshops, to identify strategic issues and progressively move each towards the development of their strategic priorities. <p>Phase 3 – Employee and Community Engagement</p> <ul style="list-style-type: none"> • The project also included an intensive program of community engagement to obtain robust and meaningful input from the community and stakeholder groups. Consultants provided a Consultation Report in consultation with: <ul style="list-style-type: none"> • Municipally controlled volunteer organizations • Interest Organizations • Focus Group Sessions by Invitation <p>Phase 4 – Develop Plans and Finalize</p> <ul style="list-style-type: none"> • Final Workshops with the Municipality and the Police Services Board • Joint working session – Technical Review by Senior Teams

	<ul style="list-style-type: none"> • Drafted updated Municipal Plan and new PSB Plan circulated • Last revisions and finalization of both Plans.
Contact Information	<p>Trisha McGibbon, CAO - (519) 245-1070 Colin Grantham, Mayor - (519) 245-1105 Mark Campbell, Police Chief - (519) 245-1250 John Brennan, PSB Chair - (519) 245-1070</p>

Reference 3

Project Name	Village of Merrickville-Wolford Organizational Review
Customer Name	The Municipality of the Village of Merrickville-Wolford
Project Dates	August 2023 - November 2023 – Organizational Review Project March 2024 – July 2024 – CAO Recruitment Project
Project Team	Susan Shannon, Principal Consultant/Project Manager
Project Description	<p>The Consultant was engaged to provide a full review of the Village’s current organizational structure and the alignment of departmental service responsibilities, taking into consideration internal communications and procedures, the allocation of duties, reporting relationships and workplace culture.</p> <p>The Consultant was also invited back to the municipality to assist Council with the recruitment of a new CAO.</p>
Relevance of Reference Project to Proposed Service Area:	<ul style="list-style-type: none"> • Reviewed the current organizational structure and alignment of departmental service responsibilities. • Reviewed the Municipality’s operational policies and procedures including human resources management. • Reviewed corporate documents that informed the project (i.e. By-Laws, Policies) • Developed a series of recommendations regarding current and future organizational structure and staffing needs to: <ul style="list-style-type: none"> ○ Improve clarification of roles and responsibility of management. ○ Improve service delivery to customers. ○ Identify necessary staffing resources. • Strengthened communications/coordination and reporting relationships between departments. • Identified any opportunities for staff development and helped the organization become an employer of choice. • Provided a Final Written Report highlighting findings and implementation recommendations
Contact Information	Michael Cameron, Mayor - (613) 269-4791

Reference 4

Project Name	Project Management Consultancy Services
Customer Name	NS Department of Education and Early Childhood Development (EECD) Education Innovation, Program and Services (EIPS) Branch
Project Dates	July 2024 – August 2024
Project Team	Nosa Ekhaton - Project Manager Business Analyst
Project Description	The Education Innovation, Programs, and Services (EIPS) Branch operating under the Department of Education and Early Childhood Development (EECD) undertook this project to develop comprehensive and professional project management plans for eight (8) major project initiatives within the EIPS branch, as well as an overarching branch project management plan to ensure effective implementation and monitoring of these projects. Additionally, standardized project templates were needed to ensure compliance with project documentation across the EIPS branch as well as build capacity within the EIPS branch by training staff on the new project management software tool and processes.
Relevance of Reference Project to Proposed Service Area:	<ul style="list-style-type: none"> Facilitated initial project meeting with the project sponsor (Ex. Director, EIPS Branch) and project owner to clarify and confirm the scope of work and ensure alignment with overall strategic goals and objectives. Created project charter and obtained approval from the project sponsor. Facilitated project kick-off meeting including the project sponsor, project owner, and key stakeholders (EIPS Directors overseeing each major initiative/project) Collaborated with project teams to review documents associated with each project initiative. Conducted discovery sessions with team members to understand their perspectives on key initiatives. Created project charters and schedules for all projects, as well as project management templates to ensure uniformity in project documentation across the EIPS branch. Developed an overarching project schedule to ensure effective implementation and monitoring of all projects within the EIPS branch. Conducted weekly meetings and presented project progress and status reports to key stakeholders. Facilitated project close out meetings with key stakeholders and prepared the project close out report.
Contact Information	Natalie Dow - natalie.dow@novascotia.ca

Value Added

Capstone provides valuable additional services that will not only support the St. -Charles' Project Team with their Community Strategic Plan initiative, but also address future needs arising from the project.

Collaboration Software: Once engaged with Capstone, the St. -Charles' Project Team will have access to the Project's secured SharePoint site that will allow for a centralized storage and management of project documents that facilitate easy access, version control, and collaboration.

Strategic Plan Best Practices: Our Ontario Municipal SMEs come with over 45 years' experience working within Ontario municipalities and are up to date with best practices and innovative methodologies. This ensures your Strategic Plan is well-rounded and meets the vision of residents, organizations, and Council.

Business Analysis Expertise: Your Project Manager comes with over 10 years of business analysis experience and will be working closely with the Municipal Service SMEs to break down and interpret historical information, surveys, and interviews to identify key trends, uncover insights, and inform data-driven decisions that will shape the strategic plan's objectives and action item.

Change Management Expertise: Capstone provides expertise in organizational change management to help St. -Charles' Team smoothly transition to new processes and tools, ensuring minimal disruption and maximum adoption.

Conclusion

Thank you for the opportunity to work with you to develop your Community Strategic Plan. If Capstone is chosen as the successful candidate, the Municipality should be confident that the proposed team:

- ✓ Understands municipal and provincial organization and culture and stakeholder relationship management.
- ✓ Is knowledgeable of municipal responsibilities and operational requirements.
- ✓ Has successfully completed and implemented numerous municipal strategic plans.
- ✓ Understands the service requirements of the proposed work.
- ✓ Will complete the tasks promptly, ensure staff availability, adhere to a well-structured work schedule, and implement contingency plans if required.

We are excited by the prospect of collaborating with you on this initiative and are confident that our response will meet your needs. We would be pleased to answer any questions you may have and thank you for considering Capstone Project Solutions for this opportunity.

Warm regards,



Cynthia Giles, President & CEO

Appendix A: Resumes

Rob Browning, CMM

Ontario Municipal Services Subject Matter Expert

Profile

Rob is a seasoned professional with a unique blend of experience in municipal and provincial government leadership, emergency services, and community engagement across Ontario. With over 20 years of experience in senior municipal leadership roles, Rob has developed a strong framework for developing and implementing strategic plans and creating a positive council/staff relationship. He is known for his ability to navigate municipal organizational culture while fostering creativity and flexibility to achieve positive outcomes for communities and staff. Rob brings a wealth of policy and by-law development experience and a deep knowledge of Ontario municipalities.

Corporate Strategic Plan Experience

Province of Alberta – Municipal Affairs	2024	Province of Nova Scotia- Office of the Fire Marshal	2023-2024
Township of North Kawartha, Ontario	2024	Township of North Huron, Ontario	2023
Municipality of Strathroy-Caradoc, Ontario	2015	Municipality of Chatham-Kent, Ontario	2009

- Conducted Province wide stakeholder engagement to assist in determining future direction of service delivery.
- Conducted an organizational analysis and provided recommendations to resolve issues from the Auditor Generals report and assist in determining future service delivery.
- Conducted in-depth research of Municipal’s existing resources and reviewed existing Strategic Plans.
- Participated in initial meetings with the Chief Administrative Officer (CAO) to confirm and clarify the scope of work, ensuring alignment with strategic goals and objectives.
- Facilitated focus groups and brainstorming sessions with municipal staff and Council members, fostering open communication and collaboration to gather input and insights for the draft Strategic Plan.
- Developed and implemented a comprehensive public consultation process designed to engage a broad spectrum of stakeholders, including residents, businesses, and community service-based groups. Used methods such as Townhall meetings, focus groups, workshops, and online surveys to reach different audiences.
- Conducted a SWOT (Strength, Weakness, Opportunities, Threats) analysis to identify internal and external factors that may impact municipal strategic direction.
- Created informative and engaging informational materials and presentations to effectively convey the strategic plan’s key points.
- Prepared an initial draft of the corporate strategic plan, ensuring it reflects the input gathered from all stakeholder groups and aligns with municipal’s goals.
- Reviewed and revised the draft strategic plan based on feedback received from the Council, municipal staff, and the public, making necessary amendments to enhance its quality and relevance.

Municipal Experience

Capstone Project Solutions | Municipal & Emergency Services Subject Matter Expert 2021 - Present

- Administer corporate strategic plan activities and final reports for municipal strategic plan projects
- Main resource for reviewing municipal operations, policies and procedures, facilities, and equipment
- Execute municipal policies, procedures and organizational reviews
- Complete municipal emergency reviews including fire masters and community risk assessments
- Provide guidance for planning implementation of Next Generation 911 projects (NG911).

Eastern Ontario Emergency Training Academy | Executive Director 2011 - Present

- Design, develop and implement strategic plans for the organization in a cost-effective and time-efficient manner.
- Responsible for the day-to-day operation of the organization, which includes managing the board of directors and staff as well as fiscal responsibility.
- Implemented an evolving business model that has established financial stability for the academy for many years into the future.

Township of North Kawartha | Chief Administrative Officer (Contract) 2015 - 2016

- Managed the transition of the organization in preparation for a new permanent Chief Administration Officer.
- Provided leadership to Council and staff while creating stability through a period of significant change.
- Assisted the organization in reviewing their business processes and implemented positive changes within the organization.

City of Oshawa | City Manager (Contract) 2014

- Provided leadership and management to +1000 employees and a \$150M budget.
- Managed the transition of the organization in preparation for a new permanent City Manager
- Improved efficiency for City Manager's projects office to increase at departmental production
- Enabled transparency and realigned policies that improved overall service to the community
- Established communication channels with Council and developed a strong working relationship with the mayor.

Township of Asphodel-Norwood | Chief Administrative Officer (Contract) 2012 - 2013

- Hired to manage the transition of the organization in preparation for permanent Chief Administrative Officer
- Provided leadership to Council and staff while creating stability through a period of change.
- Assisted Council in the general leadership and administration of the Township and the recruitment of the permanent CAO.

Municipality of Chatham-Kent | Chief Administrative Officer 2008 - 2011

- Responsible for the leadership and management of 2200 employees and a \$265M budget
- Developed organization and community culture to create a sense of hope and positivity after large economic downturn.
- Ensured compliance with applicable laws, regulations, and ethical standards governing municipal operations
- Established strong relationships within Council and community stakeholders.
- Provided strong leadership in the community, with Council and staff.
- Implemented policies and procedures for day-to-day operations

**City of Kitchener | General Manager, Development and Technical Services
General Manager of Strategic Services | Interim CAO**

2002-2008

- Provided strategic oversight of planning, engineering, building, transportation planning and fire with a staff of 430, an operating budget of \$28m and a capital budget of \$25m annually.
- Lead several departments/divisions including fire, planning, engineering, building, IT, human resources, corporate planning, and economic development
- Facilitated the development of a new courthouse and municipal parking structure in the downtown working with the province and a private landowner.
- Facilitated Accreditation of the Fire Department by the Centre for Public Safety Excellence Ontario.

Susan Shannon, AMCT

Ontario Municipal Subject Matter Expert

Profile

Susan is a well-known and respected municipal strategist and consultant with over 30 years of experience helping Ontario municipalities navigate organizational solutions that are tailored to meet their unique needs. She possesses an experience-based, internal understanding of both municipal and provincial operations and specializes in facilitating strategic planning processes, conducting comprehensive organizational reviews and assisting municipalities with optimizing service delivery to ensure effectiveness and efficiency.

Corporate Strategic Plan Experience

Municipality of Strathroy-Caradoc	2024
Town of Penetanguishene	2019
Townships of Mapleton & Southgate	2019

- Co-facilitated the development of strategic plans including extensive public consultation and working closely with Council and staff.
- Co-facilitated Council workshops and the developed public surveys to ensure their strategic plans reflected community priorities.

Municipal Organization & Service Delivery Reviews

Regional Municipality of Niagara	2024
Village of Merrickville-Wolford	2023
Township of Ryerson	2021
Municipality of Powassan	2021
Township of McKellar	2020
Townships of Wollaston, Limerick & Tudor and Cashel	2021

- Conducted an organization structure review to determine the best alignment of divisions, functions and service delivery to identify duplication and cross-over
- Provided in-depth analyses of current state municipal services and delivery methods to determine areas of improvement
- Reviewed current organizational structures in the municipalities with a look at the alignment of departmental services responsibilities and the allocation of duties, internal communications and reporting relationships and workplace culture.
- Provided high-level benchmarking comparisons of the organizational structures and staffing levels in the municipalities and compare against other municipalities of similar size and nature, locally and across the province.
- Conducted service delivery reviews of municipal operations of departments, develop service profiles, and an implementation plan to help municipalities move forward.
- Guided municipalities through a multi-municipal administration servicing study to identify potential resource

sharing and/or collaboration opportunities

Additional Work Experience

Municipal Subject Matter Expert, Capstone Project Solutions **2024 to Present**

- Administer corporate strategic plan activities and final reports for municipal strategic plan projects.
- Provide guidance on municipal operations, policies and procedures, facilities, and equipment on projects.
- Execute municipal policies, procedures and organizational reviews organizational reviews.
- Provide insight to RFP response including methodology, approach, and scope.

Entrepreneur, Shaping Organizational Solutions (SOS) **2007 to Present**

- Principal of Shaping Organizational Solutions (SOS), organizational and municipal needs specialist.
- Founder & Principal, muniSERV.ca and muniJOBS.ca, online platforms for municipalities, municipal service providers/consultants and municipal candidates.

Project Management, Emergency Services Steering Committee (ESSC) **2007 – 2017**

- Project Coordinator, Emergency Services Steering Committee (ESSC), a joint committee of LUMCO (Large Urban Municipal Caucus of Ontario) and MARCO (Mayors and Regional Chairs of Ontario) municipalities and the Ontario Association of Police Services Boards (OAPSB). Worked with CAO's, Mayors & HR Directors to find cost containment in Ontario's emergency services (police, fire & EMS)

Issues Management, Province of Ontario **2004 – 2007**

- Issues Manager for Ontario's Assistant Deputy Fire Marshal, Office of the Fire Marshal, and the Ontario Fire Marshal. Team Leader and Project Lead to design, author and roll out across the province, a one-day workshop and resource guidebook for municipal councils and senior municipal staff, entitled "Essentials of Municipal Fire Protection – A Decision Makers' Guide"

Municipal Chief Administrative Officer **1989 – 2004**

- **Municipality of West Grey**, the first CAO of this municipality which was restructured in 2000. Conducted service delivery reviews of the operations of the five former municipalities to consolidate operations in a fiscally responsible manner and find efficiencies to modernize the new municipality.
- **Township of Georgian Bay**, conducted an organizational review to enhance operations and ensure staff were appropriately compensated under the new structure

Education & Certifications

- Municipal Administration Program, AMCT Designation
- AMCTO Certified in Municipal Law, Tax Collection, By-Law Preparation, Municipal Accounting and Finance and Municipal Human Resources
- Community Economic & Social Development Research Methods, Algoma University

Nosa Ekhatior, PMP

Project Manager | Business Analyst

Profile

Nosa is a certified Project Management Professional (PMP), with over 10 years of experience in business analysis, process improvement, and project management across information technology (IT), provincial government, non-profit organizations, finance and private sector. Nosa has a proven track record of managing project deliverables and is recognized for consistently delivering project success in diverse environments.

Nosa’s ability to connect with and manage stakeholders from various backgrounds makes him a culturally aware professional, fostering collaboration and driving organizational goals across different sectors. His expertise in stakeholder management has led to the successful implementation of initiatives that enhanced efficiency and support strategic objectives by keeping stakeholders and steering committees engaged and informed on project progress.

Core Competencies and Skills

- ✓ **Project Management:** Over 10 years working within projects managing stakeholders, requirements elicitation, and business process modeling. Skilled in Waterfall and Agile Methodologies, and Software Development Life Cycle (SDLC).
- ✓ **Public Sector Experience:** Worked with various provincial government departments and stakeholder groups, breaking down complex ideas into simple terms and ensuring stakeholders are on the same page.
- ✓ **Project Management Software:** Proficient in the use of Microsoft Visio, JIRA, Trello, Lucid chart, Draw.io, Diagram.net, and Confluence for effective process documentation and project management.
- ✓ **Collaboration:** Superior interpersonal and team-building skills with the ability to interact effectively and develop strong relationships with staff at all levels.
- ✓ **Research and Analytical Skills:** Outstanding research, analytical thinking, decision-making, and problem-solving skills, with the ability to distill complex, large-scale information into clear, easily digestible insights including process mapping, workflow analysis and gap analysis.

Professional Experience

Project Manager & Business Analyst Capstone Project Solutions Inc.	Nov 2023 – Present
Project: Project Management Consultancy Services NS Department of Education and Early Childhood Development (EECD)	Jul 2024 – Aug 2024

The Education Innovation, Programs, and Services (EIPS) Branch within the Department of Education and Early Childhood Development (EECD) undertook this project to develop comprehensive project management plans for several project initiatives within the EIPS branch, as well as an overarching branch project management plan to ensure effective implementation and monitoring of these projects. Additionally, standardized project templates were needed to ensure compliance with project documentation across the EIPS branch as well as build capacity building within the EIPS branch by training staff on the new project management software tool and processes.

- Facilitated initial project meeting with the project sponsor (EIPS Branch Director) and project owner to clarify and confirm the scope of work, ensuring alignment with overall strategic goals and objectives.
- Created project charter and obtained approval from the project sponsor.
- Facilitated project kick-off meeting including the project sponsor, project owner, and key stakeholders (EIPS Directors

overseeing each major initiative/project)

- Collaborated with project teams to review documents associated with each project initiative
- Conducted discovery sessions with team members to understand their perspectives on key initiatives.
- Created project charters and schedules for all projects, as well as project management templates to ensure uniformity in project documentation across the EIPS branch
- Developed an overarching project schedule to ensure effective implementation and monitoring of all projects within the EIPS branch.
- Conducted weekly meetings and presented project progress and status reports to key stakeholders
- Facilitated project close out meetings with key stakeholders and prepared project close out report.

**Project: Project Management Support Services |
NS Department of Environment and Climate Change**

Jan 2024 – Present

This project involved the provision of qualified and experienced project management support services to the Research and Knowledge Mobilization Team (RKM) within the Climate Change Division of the Nova Scotia Department of Environment and Climate Change. The primary objective of this project was to facilitate the implementation of the Province’s Climate Change Plan for Clean Growth over the next two years and manage the increased workload, enhance internal coordination, and improve project management practices and tools within the RKM team.

- Engaged stakeholders through interviews and workshops to understand their needs
- Conducted elicitation sessions with team members to identify use case requirements for a contact management system (MS Dynamics)
- Developed and documented use cases for MS Dynamics
- Created project management templates and tools for ongoing and future projects.
- Communicated effectively with stakeholders to provide updates on project progress.
- Provided project management support services for ongoing projects with external vendors during project initiation, monitoring and closing phases.

**Project: Infrastructural Upgrades to Provincial Fish Hatcheries
NS Department of Fisheries and Aquaculture**

Dec 2023 - Present

The Nova Scotia Department of Fisheries and Aquaculture (NSDFA) undertook this project to upgrade its fish hatcheries in Nova Scotia with a \$1.85 million investment to mitigate climate change impacts. They plan to implement water treatment systems to collect, treat, and reuse hatchery water, ensuring better water quality and quantity for salmonids, which are vital for the province's sport fishery. The project intended completion date is 2027/2028 fiscal year with a yearly phased approach implementation which includes project planning, management and procurement.

- Developed comprehensive project plan, defining scope, objectives, and timelines
- Identified key stakeholders and facilitated workshops and interviews to understand stakeholders need.
- Outlined project tasks, milestones, and deadlines effectively
- Conducted elicitation sessions and maintained continuous communication to ensure project alignment with business goals.
- Conducted current state assessment, SWOT analysis, and developed a proposed future state for the three provincially owned hatcheries.
- Analyzed and documented business processes, requirements, and current/future states.
- Identified pain points, performed gap analyses, and recommended process improvements.
- Engaged external stakeholder groups such as veterinarians and SMEs to gather information on industry standard practices for hatchery performance indicators and metrics thresholds.
- Collaborated with hatchery managers to identify performance indicators and metrics and set thresholds for the

hatcheries.

- Analyzed data (water temperatures and dissolved oxygen) to observe high temperatures trends and periods.
- Collaborated with key stakeholders and subject matter experts to collect information for RFP development/draft.
- Provided project status report and facilitated project progress meetings
- Led the end-to-end energy efficiency procurement process for the department.
- Participated in vendor evaluation and selection process
- Developed and presented reports to stakeholders, communicating findings and recommendations effectively

Business Analyst | Pollard Consults

Jan 2023 – Oct 2023

Project: Implementation of Accounting Management Solution | Cultural Organization (Non-Profit)

Jan 2023 – Feb 2023

This Project implemented a comprehensive Accounting Management System that automated and optimized financial transactions for the organization. The solution provided a robust platform for managing financial transactions, generating financial reports, ensuring compliance with accounting and regulatory standards, and ensuring strategic decision-making through accurate and timely financial data.

- Facilitated stakeholder meetings and elicited business requirements from stakeholders through interviews, existing documents, and workshops.
- Analyzed stakeholder level of interests and influence using the power grid matrix
- Analyzed and documented elicitation results
- Created visual process flow diagrams to map current and desired future states, modelled use cases and developed user stories to communicate requirements clearly
- Developed Business Requirements Documents and translated business requirements into functional and non-functional requirements
- Created and reviewed test cases, ensuring all requirements were met
- Collaborated with multiple teams and stakeholders for the design and functionality of the new solution
- Conducted JAD sessions to communicate proposed system process workflows and functional specifications to stakeholders
- Provided support during User Acceptance Testing (UAT)
- Designed user manual and provided post-implementation support

Project: Contract Management System Implementation | De Monfort Attorney

Feb 2023 – Mar 2023

The Objective of this project was to design a custom solution to manage contract issuance and execution for the procurement department of the organization. Facilitated stakeholder meetings and elicited business requirements from stakeholders through interviews, existing documents, and workshops.

- Conducted various elicitation sessions to understand and document business requirements
- Analyzed the current state of the existing system using the SIPOC technique to identify process gaps and pain points
- Modelled the future state contract management system process using swim lane diagrams.
- Defined the project scope and key stakeholders using the context diagram
- Modeled the future state process based on recommendations from stakeholders
- Identified key business rules and translated them to functional requirements
- Facilitated walkthroughs with stakeholders to validate designs and incorporated feedback

Project: Data Optimization | NS Department of Environment and Climate Change, ICE Division Mar 2023 – Aug 2023

- Prepared for stakeholders' meetings and elicited requirements from stakeholders through interviews, existing documents, and workshops.
- Collaborated with key stakeholders to identify data quality issues and prioritized data optimization efforts based on business impact.
- Collaborated with key stakeholders to identify data quality issues and prioritized data optimization efforts based on business impact
- Analyzed and evaluated large data using statistical methods
- Developed and implemented data optimization strategies and procedures that aligned with business objectives
- Documented data requirements, process definitions, workflow processes, data models, and implementation plans
- Collaborated with data engineers and data analysts to identify and correct data quality issues
- Communicated findings and recommended solutions to stakeholders and the senior management team
- Maintained accurate and up-to-date documentation of data optimization activities
- Prepared and presented executive summary reports to the senior management team

Business Analyst, Operations/Reconciliation Analyst | Ecobank Nigeria Limited Mar 2012 – Nov 2022

Business Analyst Mar 2018 - Nov 2022

- Managed and led the delivery of detailed system requirements and technical specifications in alignment with standards and frameworks.
- Worked closely with project managers to define project scope, objectives, and deliverables, ensuring alignment with business goals.
- Assisted in developing detailed project plans, including tasks, timelines, resource allocation, and maintained accurate project documentation.
- Interviewed system stakeholders to gather and document requirements, recommendations, and ensure continuous engagement.
- Scheduled and conducted project meetings, fostering positive relationships and effective communication among stakeholders, including clients, vendors, and team members.
- Identified potential risks and issues, monitored them throughout the project lifecycle, and worked on mitigating strategies to ensure project success.
- Provided technical leadership by translating business needs into high-level technical requirements and solutions.
- Prepared and presented project reports, status updates, and presentations to project managers, stakeholders, and executive teams.
- Performed monthly reviews and root-cause analysis of current processes using operational metrics, identifying gaps, and developing improvements for enhanced business performance.
- Utilized tools like Microsoft Visio, JIRA, Trello, Lucidchart, and Confluence to communicate and document various stages of the project, including use cases, test cases, and user manuals. Worked with users to understand their processes and identified issues and opportunities for improvement.

Operations/Reconciliation Analyst Nov 2012 – Mar 2018

- Reviewed and authorized transactions processed daily by team members.
- Daily reviewed and reconciled the department GL accounts.
- Identified and managed queries that would crystallize into a potential loss to the bank and escalated to my line manager.
- Ensured irregularities were identified, investigated/reported within agreed SLAs, and items that represent a potential loss to the bank escalated immediately.

- Analyzed current and past financial data in preparation of departmental monthly business reports.
- Ensured statutory reports to relevant authorities were delivered within given timelines.
- Proficient in account reconciliation and settlements as provided by a regulatory authority.
- Ensured proper processing of customers' transactions (inbound payments and outward transfers).
- Resolved complaints and queries from customers across multiple reconciliations.
- Ensured policies and procedures (internal controls) were in place to guide daily operational activities.
- Provided support to internal and external auditors during audit reviews.

Education & Certifications

- | | |
|---|---------|
| • Certified Project Management Professional (PMP) | 2024 |
| • Scrum Fundamentals Certified (SFC) | 2023 |
| • Information Technology Infrastructure Library (ITIL) v4 | 2022 |
| • Masters of Banking and Finance, University of Benin, Nigeria | 2012 |
| • B.Sc. in Economics and Statistics, University of Benin, Nigeria | 2005 |
| • Certified Business Analysis Professional (CBAP) | In view |

Tools

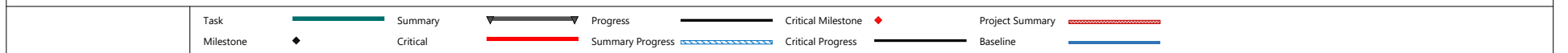
- MS Office 365/Suite – Word, Excel, PowerPoint
- Microsoft Project, Trello, Jira, Confluence
- SharePoint, Microsoft Teams
- Microsoft Visio, Lucid Chart, Draw.io, Diagram.net

Appendix B: Project Schedule

ID	WBS	Task Name	Duration	Scheduled Start	Scheduled Finish	2024 September	2024 October	2024 November	2024 December	2025 January	2025 February	2025 March	2025 Ap
0	0	St. -Charles Strategic Plan	133 days	'24 Sep 10	'25 Mar 28	08-259-099-199-209-250-040-130-200-211-031-101-171-242-012-082-152-232-291-091-101-191-202-022-092-102-293-023-093-103-293-304-004							
1	1	Phase 1: Project Initiation Stakeholder Engagement	13 days	'24 Sep 10	'24 Sep 26								
2	1.1	START Project Initiation Stakeholder Engagemen	0 days	'24 Sep 10	'24 Sep 10	♦ Sep 10							
3	1.2	Project Kick-Off Meeting with Council, CAO, and Project Stakeholders	2 days	'24 Sep 10	'24 Sep 11								
4	1.2.1	Review Statement of Work and align on project objectives, Scope, timeline, and deliverables.	2 days	'24 Sep 10	'24 Sep 11								
5	1.2.2	Confirm Community's strategic goals and future state requirements.	2 days	'24 Sep 10	'24 Sep 11								
6	1.2.3	Discuss and understand the development of the Project Charter	2 days	'24 Sep 10	'24 Sep 11								
7	1.3	Document Kick-off Meeting and Conduct Stakeholder Assessment	3 days	'24 Sep 12	'24 Sep 16								
8	1.3.1	Identify St.-Charles' Stakeholders, and Roles and Responsibilities. This includes Clubs/Organizations/Not-for-Profits, and other Government agencies.	2 days	'24 Sep 12	'24 Sep 13								
9	1.3.2	Analyze how each stakeholder group will impact the project.	2 days	'24 Sep 12	'24 Sep 13								
10	1.3.3	Determine meeting frequency and communication approach with Project Owner.	2 days	'24 Sep 12	'24 Sep 13								
11	1.3.4	Determine reporting structure and frequency of status reports with Project Owner.	2 days	'24 Sep 12	'24 Sep 13								
12	1.3.5	Analyze potential impacts on the Community Strategic Plan project.	2 days	'24 Sep 12	'24 Sep 13								
13	1.3.6	Draft/Approve Stakeholder Map	3 days	'24 Sep 12	'24 Sep 16								
14	1.4	Develop Project Documentation	8 days	'24 Sep 17	'24 Sep 26								
15	1.4.1	Draft/Approve Project Charter	4 days	'24 Sep 17	'24 Sep 20								
16	1.4.2	Draft/Approve Project Plan	4 days	'24 Sep 17	'24 Sep 20								
17	1.4.3	Review and approve Project Schedule	4 days	'24 Sep 17	'24 Sep 20								
18	1.4.4	Establish Project Registers and Logs	4 days	'24 Sep 17	'24 Sep 20								
19	1.4.5	Draft/ Approve Communication Strategy	4 days	'24 Sep 17	'24 Sep 20								
20	1.4.6	Develop the St. - Charles' Community Engagement Plan that will confirm:	4 days	'24 Sep 23	'24 Sep 26								
21	1.4.6.1	The objective – define the goals of the engame	4 days	'24 Sep 23	'24 Sep 26								
22	1.4.6.2	The approach and methodology	4 days	'24 Sep 23	'24 Sep 26								
23	1.4.6.3	Determine key timeline dates	4 days	'24 Sep 23	'24 Sep 26								

Task █ Summary ▾ Progress ▬ Critical Milestone ♦ Project Summary ▬
 Milestone ♦ Critical ▬ Summary Progress ▬ Critical Progress ▬ Baseline ▬

ID	WBS	Task Name	Duration	Scheduled Start	Scheduled Finish	2024 September	2024 October	2024 November	2024 December	2025 January	2025 February	2025 March	2025 Ap
24	1.4.6.4	Confirm the project team/working group.	4 days	'24 Sep 23	'24 Sep 26								
25	1.4.6.5	Identify Key Stakeholders to be consulted.	4 days	'24 Sep 23	'24 Sep 26								
26	1.4.6.6	Discuss the scheduling of interviews.	4 days	'24 Sep 23	'24 Sep 26								
27	1.4.6.7	Any associated costs	4 days	'24 Sep 23	'24 Sep 26								
28	1.5	END Project Initiation Stakeholder Engagement	0 days	'24 Sep 26	'24 Sep 26								
29	2	Phase 2: Preliminary Data Collection	5 days	'24 Sep 26	'24 Oct 03								
30	2.1	START Preliminary Data Collection	0 days	'24 Sep 26	'24 Sep 26								
31	2.2	Review of Town's Historical Documents	5 days	'24 Sep 27	'24 Oct 03								
32	2.2.1	Master Plans, Implementation Plans, Strategic Plans	5 days	'24 Sep 27	'24 Oct 03								
33	2.2.2	Approved projects	5 days	'24 Sep 27	'24 Oct 03								
34	2.2.3	Reports	5 days	'24 Sep 27	'24 Oct 03								
35	2.2.4	Current and 10-year forecasted budgets	5 days	'24 Sep 27	'24 Oct 03								
36	2.3	END Preliminary Data Collection	0 days	'24 Oct 03	'24 Oct 03								
37	3	Phase 3: Strategic Planning Exercise	108 days	'24 Oct 03	'25 Mar 19								
38	3.1	START Strategic Planning Exercise	0 days	'24 Oct 03	'24 Oct 03								
39	3.2	High-level Current State Review with Council and Staff	16 days	'24 Oct 04	'24 Oct 25								
40	3.2.1	Preliminary High-level Discussion	1 day	'24 Oct 04	'24 Oct 04								
41	3.2.2	Internal consultations with council and municipal employees including workshops and one-on-one interviews	5 days	'24 Oct 07	'24 Oct 11								
42	3.2.3	Review of approved service levels and resources.	5 days	'24 Oct 14	'24 Oct 18								
43	3.2.4	Strength, Weakness, Opportunity, Threat (SWOT) Assessment.	5 days	'24 Oct 21	'24 Oct 25								
44	3.2.4.1	Complete the SWOT assessment of current state to understand the features and factors that differentiate it from the other Municipalities.	5 days	'24 Oct 21	'24 Oct 25								
45	3.3	Public Communications – Marketing and Promotion	7 days	'24 Oct 28	'24 Nov 05								
46	3.3.1	Develop Public Awareness messages for Strategic Planning sessions.	7 days	'24 Oct 28	'24 Nov 05								
47	3.3.2	Develop content for media channels including social media and website content.	5 days	'24 Oct 28	'24 Nov 01								
48	3.4	Public Consultation	20 days	'24 Nov 06	'24 Dec 03								
49	3.4.1	Targeted interviews with individuals/groups identified by the Municipality	3 wks	'24 Nov 06	'24 Nov 26								



ID	WBS	Task Name	Duration	Scheduled Start	Scheduled Finish	2024 September	2024 October	2024 November	2024 December	2025 January	2025 February	2025 March	2025 Ap
50	3.4.2	Conduct survey for St.-Charles residents	4 wks	'24 Nov 06	'24 Dec 03								
51	3.5	Current State Findings Executive Summary	12 days	'24 Dec 04	'24 Dec 19								
52	3.5.1	Combined current state findings and public consultation findings.	12 days	'24 Dec 04	'24 Dec 19								
53	3.6	Workshops	53 days	'24 Dec 20	'25 Mar 19								
54	3.6.1	Facilitate 2 4- hour targeted meetings with Council, CAO & Managers:	4 days	'24 Dec 20	'25 Jan 09								
55	3.6.1.1	Current state vs future state.	4 days	'24 Dec 20	'25 Jan 09								
56	3.6.1.2	Review Vision Statement.	4 days	'24 Dec 20	'25 Jan 09								
57	3.6.1.3	Review Mission Statement	4 days	'24 Dec 20	'25 Jan 09								
58	3.6.1.4	Review Values and guiding principles.	4 days	'24 Dec 20	'25 Jan 09								
59	3.6.1.5	Develop Goals and Identify priorities.	4 days	'24 Dec 20	'25 Jan 09								
60	3.6.1.6	Develop draft strategic statements and actions.	4 days	'24 Dec 20	'25 Jan 09								
61	3.6.1.7	Develop strategies to achieve Goals/Vision in the short, medium, and long term.	4 days	'24 Dec 20	'25 Jan 09								
62	3.6.2	Prioritize actions.	5 days	'25 Jan 10	'25 Jan 16								
63	3.6.3	Draft Report	14 days	'25 Jan 17	'25 Feb 05								
64	3.6.4	Submit Draft Report with Council and Senior Leadership Team	14 days	'25 Feb 06	'25 Feb 25								
65	3.6.5	Incorporate feedback from Council.	8 days	'25 Feb 26	'25 Mar 07								
66	3.6.6	Confirm the revised Vision with Council and Senior Leadership Team.	7 days	'25 Mar 10	'25 Mar 18								
67	3.6.7	Present to Council.	1 day	'25 Mar 19	'25 Mar 19								
68	3.7	END Strategic Planning Exercise	0 days	'25 Mar 19	'25 Mar 19								♦ Mar 19
69	4	Phase 4: Final Presentation	7 days	'25 Mar 19	'25 Mar 28								♦ Mar 19
70	4.1	START Final Presentation	0 days	'25 Mar 19	'25 Mar 19								♦ Mar 19
71	4.2	Presentation to Council	7 days	'25 Mar 20	'25 Mar 28								♦ Mar 19
72	4.2.1	Present the Final Strategic Planning Report to Council	1 day	'25 Mar 20	'25 Mar 20								♦ Mar 19
73	4.2.2	Review and finalize deliverables	6 days	'25 Mar 21	'25 Mar 28								♦ Mar 19
74	4.3	END Final Presentation	0 days	'25 Mar 28	'25 Mar 28								♦ Mar 28
75	4.4	END Project	0 days	'25 Mar 28	'25 Mar 28								♦ Mar 28

Task		Summary		Progress		Critical Milestone		Project Summary	
Milestone		Critical		Summary Progress		Critical Progress		Baseline	

Appendix C: Time Task Resource Matrix (TTRM)

Project Name: Development of Community Strategic Plan
Client: St. -Charles
Province / State: Ontario
RFP: 2024-6



PROJECT SUMMARY

Proposed Start Date	10-Sep-24	Team Proposed Hours	337
Proposed Finish Date	28-Mar-25	Total Resource Costs	\$ 51,013
Project Working Days	139	Sales Tax (13%)	\$ 6,632
		Total Costs	\$ 57,645

Version 2.0

INTERNAL HOURS [16 Columns Hidden]				ROW TOTALS	
1	2	3	4	HOURS	LABOUR COST
Nosa Ekhatior Project Manager	Rob Browning Subject Matter Expert	Susan Shannon Subject Matter Expert	Lynne-Anne West Marketing Specialist		
\$ 126.00	\$ 165.00	\$ 165.00	\$ 130.00		

WBS #	DESCRIPTION	APPROACH / ASSUMPTIONS / OUTPUTS
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Phase 1: Project Initiation Stakeholder Engagement (5 Rows Hidden)

	Project Kick-Off Meeting (Council, CAO, and project stakeholders) Approach: -Review statement of work and align on project objectives, scope, timeline and deliverables. - Discuss and understand the development of the Project Charter - Conduct Project Team kick-off meetings : The project team is aligned on objective, audience, and communication channels, and someone on the team has final approval. Assumptions: St. -Charles Project Team and Capstone Project Team are able to attend meeting and review project scope with minimal adjustment. Outputs: Relationship established, St. -Charles Project team members identified, clarity on project vision and timeline.
	Document Kick-off Meeting and Conduct Stakeholder Assessment Approach: - Identify Stakeholders, and Roles and Responsibilities. This includes individuals, agencies and community groups. - Analyze impact to project - Determine meeting frequency and communication approach. - Determine reporting structure and frequency of status reports. - Draft/Approve Stakeholder Map Assumptions: Input from St. -Charles Project Team and stakeholders. Outputs: Stakeholder Engagement Mapping identifying all stakeholders.

2	2	2		6	\$ 912
3	2	2		7	\$ 1,038

	Develop Project Documentation	Approach: - Draft/Approve Project Charter - Draft/Approve Project Plan - Review and approve Project Schedule - Establish Project Registers and Logs - Draft/ Approve Community Engagement Plan - Draft/Approve Communication Strategy Assumptions: St. -Charles team and Capstone Project team are involved collaboratively in drafting the Charter, Project Plan and Communication Plan. St. -Charles provides a stakeholder list and informs on impact. Outputs: - Project Charter - Project Plan - Project Schedule - Communications Strategy - Community Engagement Plan	8	2	2		12	\$ 1,668
	Ongoing Project Team Meetings (weekly) and PM services	Approach: Meet weekly to discuss project status including activities completed, upcoming activities, risk/issue updates, new risks/issues, resource utilization etc Assumptions: stakeholders and Capstone teams are involved and kept up to date with project health and status of work. Outputs: Complete list of project logs, accountability and project trackability	10	5	5		20	\$ 2,910
Phase 1: Project Initiation Stakeholder Engagement { Summary }			23	11	11	0	45	\$ 6,528
Phase 2: Preliminary Data Collection (6 Rows Hidden)								
	Review of Historical Documents - Existing and relevant by-laws - Plans - Reports - Policies	Approach: St. -Charles provides current strategic plan and other relevant data/documents to the project. Assumptions: The project team will have full access to the required information, turn around regarding requests/approval are prompt. Outputs: Collection of early vision statement, goals and objectives for the Strategic Plan; questions for the stakeholder group and upcoming meetins; SWOT assessment.	10	5	5		20	\$ 2,910
Phase 2: Preliminary Data Collection { Summary }			10	5	5	0	20	\$ 2,910
Phase 3: Strategic Planning Exercise (6 Rows Hidden)								
	High-level Current State Review	Approach: The Capstone team will review current state and future state requirements to identify enhancements that would allow the Community St. -Charles to understand what is required to achieve increased productivity and consistency for service delivery. Assumptions: There will be no new documentation introduced, this will be a high-level summary review of existing documents collected. This review will highlight key findings. Outputs: - Findings of Current State Review	15	8	8		31	\$ 4,530
	Public Communications	Approach: Capstone will provide all presentation material for meetings and public consultations. As well, will provide preparation of public notices with CAO approval. Assumptions: Capstone will produce all marketing materials Outputs: Presentation materials & public notice proofs		2	2	8	12	\$ 1,700

Public Consultation	<p>Approach: The Capstone team will work with St. -Charles Team to conduct focus groups interviews in the Municipality to identify the thoughts and dreams of various community members. We will conduct a combination of virtual and in-person 12 1-hour interviews with these focus groups/individuals. In addition, complete a public consultation survey the for St. -Charles residents via Community's website.</p> <p>Assumptions: The project team is aligned on objective, audience, and communication channels, and someone on the team has final approval.</p> <p>Outputs: - Anticipated future state from Community members</p>	10	20	20		50	\$ 7,860
Current State Findings Executive Summary	<p>Approach: The Capstone team will combine the current state and public consultation findings in an executive summary for St. -Charles Team to review before workshops.</p> <p>Assumptions: This executive summary will be reviewed before workshops</p> <p>Outputs: Summary of historical information, interviews and public consultation.</p>	3	3			6	\$ 873
Workshops	<p>Approach: - Conduct 2-4 hour workshops with Council, CAO, Senior Managers, and employees to: - Review Current state vs future state. - Review Vision Statement. - Review a Mission Statement - Develop Core Values and guiding principles. - Develop Goals and identify priorities. - Develop strategies to achieve Goals/Vision in the short, medium and long term. - Confirm the revised vision with the Council and Senior Leadership Team.</p> <p>Assumptions: The project team is aligned on objective, audience, and communication channels, and someone on the team has final approval.</p> <p>Outputs: Draft version of vision mission, value and goals, and strategic plan.</p>	3	20	20		43	\$ 6,978
Draft Report	<p>Approach: - Submit draft report with Council and Senior Leadership Team - Incorporate feedback from Council - Confirm the revised vision with Council and Senior Leadership Team. - Present to council</p> <p>Assumptions: Council will be available to review draft Strategic Plan for review</p> <p>Outputs: Draft Strategic Report</p>	23	20	10		53	\$ 7,848
Phase 3: Strategic Planning Exercise { Summary }		54	73	60	8	195	\$ 29,789
Phase 4: Final Presentation (5 Rows Hidden)							
Presentation to Council	<p>Approach: Based on Future State Analyses, Assessments and recommendations, determine changes required for the Strategic Plan. Additionally, Capstone will present executive summary of the Strategy in a PowerPoint slide deck.</p>	11	12	10	14	47	\$ 6,836
Phase 4: Final Presentation { Summary }		11	12	10	14	47	\$ 6,836
Travel (5 Rows Hidden)							
Travel { Summary }		0	15	15	0	30	\$ 4,950

Team Proposed Hours	98	116	101	22	337
Team Member Allocation	9.4%	11.1%	9.7%	2.1%	
Daily Average Hours	0.7	0.8	0.7	0.2	
Allowable Daily Average Hours	7.5	7.5	7.5	7.5	

Total Resource Costs	\$ 12,348	\$ 19,140	\$ 16,665	\$ 2,860	\$ 51,013
Sales Tax (13%)	\$ 1,605	\$ 2,488	\$ 2,166	\$ 372	\$ 6,632
Total Costs	\$ 13,953	\$ 21,628	\$ 18,831	\$ 3,232	\$ 57,645