



MUNICIPALITY OF ST. CHARLES

TEN-YEAR STRATEGIC PLAN:  
(LONG-TERM VISION, MEDIUM-TERM  
OBJECTIVES & SHORT-TERM ACTION PLANS)

# STRATEGIC PLAN DEVELOPMENT PROPOSAL

CREATING A VISION FOR  
TRANSFORMATIONAL CHANGE:  
THROUGH COMMUNITY ENGAGEMENT



## PROPOSAL CONTACT

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Elevate Your Greatness Inc.

## ELEVATE YOUR GREATNESS

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## What Clients Say About EYG Strategy Engagements?

“Simon is not only a strategy guru, but he also has the ability to translate and distill complex business processes and scenarios into succinct models and plain language to help clients move forward.”

**Jenny O’Donnell, Chief Human Resources Officer,**  
Toronto Metropolitan University (Formerly Ryerson University)

“Simon is that rare strategist who earns respect and establishes rapport the moment he walks in the room. Most importantly, Simon is an honest broker who employs directness and courage when facilitating and communicating with clients. This approach results in work where the difficult questions are addressed, everyone is heard and all involved feel an equity stake in the future success of the organization.”

**Scott Butler, Executive Director**  
Ontario Good Roads Association

"Simon’s enthusiasm and energizing delivery helped to kick start our transformational journey."

**Kathy Kestides, Director, Transformation and Strategy**  
City of Vaughan

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Denis Turcot, Chief Administrative Officer  
The Corporation of the Municipality of St. Charles  
2 King Street East, St. Charles, ON P0M 2W0

### Ref: Strategic Planning Conditions, Timelines & Deliverables

Elevate Your Greatness Inc. (EYG) is pleased to provide this proposal in response to Municipality of St. Charles' (RFP: 2024-6) for strategic planning consulting, consultation and facilitation services to create its ten-year Community Strategic Plan 2025-2035.

EYG understands the key outcomes and deliverables in this engagement, include:

- **Table Stakes: create a transformational strategic plan and roadmap** to propel Municipality of St. Charles and its community' economic growth, employment and community development over the next decade. The plan must reflect the aspirations of the Council, leaders and staff, service providers and community agencies, and its residents, through dynamic engagement process inform long-term goals, and aligned medium-term objectives and immediate actions plans. The strategic planning process must also take into account current organizational capabilities, review existing service levels and external challenges and opportunities.
- **Phase 1: Project Set-Up, Service Reviews & Environmental Scan** – working closely municipal leaders and staff, undertake a review of economic development opportunities, an efficiency reviews current services and infrastructural investments needed to support growth, employment, tourism development, revenue diversification and an enhanced quality of life. The interim report should present data analysis, trends and insights to inform strategic, service, innovation and organization improvement opportunities.
- **Phase 2: Strategic Plan Consultations** – conduct a series of dynamic strategic planning facilitations, interviews, surveys and consultations with the Council and leadership, staff, service and community providers and St. Charles's residents to create a compelling Community Strategic Plan – with revised vision, mission, strategic objectives and aligned measurable goals.
- **Phase 3: Strategic Plan Development** – in collaboration with municipal leaders and staff distill data, insights and findings, and the results of consultations a crisp, future-proof and fiscally responsible Community Strategic Plan, with supporting decision rationales and aligned actions plans.
- **Final Deliverable:** an approved Community Strategic Plan by March 28, 2025.

To help you reach this goal, EYG's strategy, public engagement and transformation expert - Simon Trevarthen - will support Municipality of St. Charles' Council and leadership to facilitate, guide and develop an inspiring, innovative and realistic strategic plan that drives the community's improvement and future development.

With gratitude



Simon Trevarthen  
Chief Transformation Officer,  
Elevate Your Greatness Inc.

## Section 1: Visioning A Bold Future! Growth, Service Excellence & Community Development

### 1.1 Understanding St. Charles & the Community's Transformational Needs?

The Municipality of St. Charles (St. Charles) is a tight knit and proud Northern Ontario rural community with 1,471 residents, covering 314.5 km<sup>2</sup> and lies within the broader Sudbury district. A single tier municipality, the town provides an array of services, including: asset management; local infrastructure; fire department, public library, garbage collection, landfills and recycling; and municipal licencing and zoning; and administrative services. The municipality has a total budget of \$6.5 million in expenses, with \$1.6 million in capital expenses. The town works closely with economic development, healthcare, policing and social services providers to support its residents.

### 1.2 Municipality of St. Charles: Community Profile

The town is located 60km east of the Greater Sudbury, off highway 17. The community boasts strong civic engagement, great farmland, economical real estate and land for development, and the natural beauty of the West Arm of Lake Nipissing and Lake Nepewassi. Annually, thousands of tourists come hike, explore, fish, hunt and enjoy its ecological attractions. Local employment opportunities for young people remain a challenge, leading to many moving away or commuting to the Greater Sudbury.

St. Charles' median household income is \$76,000, with 81.4% of residents owning their own home. The key industries and occupations, include: trades and transportation (26.8%); sales and services (23.2%); business, finance and administration (18.5%); and education, law, community and government services (11.1%).

The community has an unemployment rate on par with the national average (6.4%) but less than Northern Ontario's average (7.4%). The community is 58% Anglophone and 41% French speaking. The community's largest demographic are locals aged over 65 years old (26.8%), followed by those aged 55 to 64 (23.9%). Family aged residents aged 25 to 34, and 35 to 44 represent 6.6% and 8.5% of the population.

### 1.3 Why a Community Strategic Plan? Sustainable Growth, Investment & Quality of Life

St. Charles is looking to the future and is seeking a shared vision and priorities for the community's future development and improvement. The Community Strategic Plan should set vision and priorities for the next ten years, and act as a long-term roadmap on how to achieve them. Vital to the Community Strategic Plan's development is a sustain and broad ranging public, stakeholder, service provider and community consultation process designed to articulate an aspirational and realizable vision, mission, and strategic goals that will St. Charles a data-driven roadmap for change, transformation, and economic growth and fiscal responsibility. The following pages describe how EYG will support the accomplishment of this inspiration goal.

Key objectives for the Community Strategic Plan, the engagement process and the plan's measurable benefits, include:

1. **Right Sizing Community Facilities:** increasing municipal operational efficiencies through planned growth aligned to the community's changing demands.
2. **Improved Infrastructure:** agreed on a clear set of "strategic" infrastructure priority critical to support economic development, such as roads, utilities, and public facilities – need to attract business, new residents, and investors.
3. **Investment Attraction:** a bold municipal and community strategic plan that promotes St. Charles to investors and business as a stable and attractive, welcoming entrepreneurs and industry.
4. **Tourism Development:** leveraging the community rich natural beauty, promote and growth the local tourism industry – visitor spending, numbers and local business revenues – while preserve natural ecology.
5. **Improve Quality of Life:** create a roadmap of critical investments in public safety, education, healthcare and recreational opportunities that enrich the community fabric and thus attract and retain families. Leverage St. Charles relatively economic land prices as "pull factor" in a region where housing affordability is one of the most pressing issues for regional families.
6. **New Revenue Streams:** lessen the dependence on property taxes and build greater fiscal sustainability through revenue diversification and economic opportunities.
7. **Workforce Development:** align strategic workforce develop programs and education initiatives to support a more skilled labour force attractive to business investment.

#### 1.4 Community Strategic Plan: Development, Deliverables and Engagement

We recognize that broad, inclusive and dynamic consultations are critical to the development of St. Charles strategic plan. As a result, **we recommend six in-person facilitated sessions** to garner aspirations, ideas, challenges and opportunities from the different stakeholder groups, such as:

- 1 - Day Strategic Priority Setting and Planning Session for Council and Leaders
- 1 - Day Municipal Staff and Service Providers
- ½ - Day Session for local Business and Economic Development Stakeholders
- Two-Half Day Facilitated Public Engagement Sessions
- (Once Draft Strategic Plan is Complete) –Facilitated Session to Finalize the Community Strategic Plan with the Council, Leaders and Staff

In addition, we will work with the municipality to develop, design and distribute a community survey to solicit public priorities, goals and ideas. In addition, the team will design and deliver:

- Detailed Workplan: Outlining Strategic Planning Process
- Conduct Interviews with Council Members, Leaders and Key Staff
- Core Service Reviews
- Interim Report: Trends, Insights & SWOT analysis
- Design and Delivery of Facilitated Strategic Planning Sessions
- Stakeholder Feedback Report
- Interim and Final Community Strategic Plan – Write, Design and Refine, based on feedback.
- An aligned Communications Plan and Operational Action Plans.

## Section 2: Elevate Your Greatness Inc. Company Profile

### 2.1 Company Profile

Founded in 2013, Elevate Your Greatness Inc. (EYG) is a Canadian (federally) incorporated strategic planning, facilitation/public engagement, and change management firm that support public sector government and agencies, broader public sector institutions, municipal governments, healthcare and social services organizations, non-for-profits and professional associations.

Working closely with our client, we craft dynamic, future-proof, and people-centred strategic plans. At EYG, we have honed our skills in working with diverse stakeholders and sectors, including extensive public consultations with up to 750 people. We bring energy, passion, and creativity to every project, igniting change and crafting the “art of the possible.” We blend traditional strategy with innovation, “human-centred” design, organizational review and strategic foresight methods, ensuring our goals are not only creative and insightful but also ready for the future.

### 2.2 Strategic Planning, Municipal & Community Engagement Experience

EYG has successfully completed change, strategy and transformation projects across the public sector. We have facilitated public and stakeholder engagement, working with clients, including:

- federal, provincial and municipal government ministries/departments – York Region, Peel Region, Niagara Region, Halton Region, Town of Whitby and the City of Vaughan;
- **Northern Ontario clients, including: City of Sudbury, Manitoulin-Sudbury District Services Board, Northern Leadership Program, Ontario Ministry of Northern Development, Science North and Child and Community Resources (Sudbury);**
- broader public sector agencies – LCBO, Teranet, Ontario Provincial Police, Peel Regional Police, UHN Hospital, Sick Kids Hospital, Toronto Metropolitan University (Ryerson); and
- professional associations – Ontario Good Roads Association, charities and not-for-profit organizations.

You can find a full list of our past clients, media, and videos of our dynamic approach to facilitation at: [www.elevateyourgreatness.com](http://www.elevateyourgreatness.com)

### 2.3 Professional Experience: Overview

Our reputation is built on working collaboratively to fashion aspirational and achievable strategies. Our team of three strategists all have distinct experience in the public sector, non-for-profits, education and post-secondary learning, while offering bilingual facilitation.

Simon Trevarthen, our founder, will lead this engagement. He has over 15 years of strategic planning, innovation and facilitation experience. Previously, he led transformation projects with Ontario Government and was the Chief Innovation Officer for one of Canada’s largest colleges. He has also been consultant with Bearing Point/KPMG. He holds two masters’ degrees – one in innovation, the other in economics -, is a Certified Management Accountant (CMA) and has a Black Belt in LEAN Six Sigma. (See *Appendix A: Professional Experience & Qualifications*)



## Section 3: Proposed Strategic Planning & Community Engagement Approach

### 3.1 Strategic Planning Project Overview

A robust strategic plan must strengthen and stretch an organization's capabilities in a focused direction and be grounded on improvement to its core services, people, policy/regulatory and process constraints. We know that excellent strategic planning is a delicate balance between aspirational goals and operational realities. In short, it must motivate, drive continuous improvement, and be realistic and measurable.

Throughout EYG will engage internal and external stakeholders through dynamic, facilitated (in-person and virtual) sessions, interviews and surveys that absorbs stakeholders' ideas and distills them into a few strategic goals with aligned actionable strategies. An effective strategic plan must also address the community and the organization's aspirations, drive toward service excellence, evolve with resident expectations, mobilize talent and provide financial accountability. In addition, the development of KPIs to measure progress toward greater service excellence, efficiency and operational effectiveness. *(Please Appendix A: Strategic Planning Development – Detailed Approach)* for a comprehensive step-by-step approach.

To meet the need of St. Charles Community Strategic Plan process, we recommend the following deliverables and outcomes of this engagement, include:





## Project Set-Up: Expectations, Objective and Workplan (Oct. 2024)

- Deliverable: Approved Strategic Planning Workplan & Approach.

## Phase 1: Project Set-Up, Service Reviews & Environmental Scan (Oct. – Nov., 2024)

1. Detailed Workplan: Outlining Strategic Planning Process
  - Onboard with CAO (Project Sponsor) and senior leaders to clarify expectations, timelines and engagement goals.
  - Approved Timelines, Strategic Planning Workplan and Project Governance
2. “Establishing the Lay of Land”: Leaders, Council, Staff & Stakeholder Insights
  - Leadership & Stakeholder Interviews: conduct interviews (individually) with Council members, municipal leaders, key staff and stakeholders.
3. Core Service Reviews
  - Internal Organizational Capacities, Existing Services Levels and External Challenges and Opportunities
4. Deliverable Interim Report: Trends, Insights & SWOT analysis
  - Based on interviews, core services reviews, reports, insights and economic research
5. Stakeholder Communications/Consultation Strategy

## Phase 2: Strategic Plan Development and Consultations (Nov. – Jan. 2024/25)

6. Design and Delivery of Facilitated Strategic Planning Sessions
7. In-person: Council, Leadership, Service Providers, Local Business and Public Consultations
  - 1 - Day Facilitated: Strategic Priority Setting and Planning Session for Council and Leaders
  - 1 - Day Facilitated: Municipal Staff and Service Providers
  - ½ - Day Session for local Business and Economic Development Stakeholders
  - Two-Half Day Facilitated Public Engagement Sessions
  - (Once Draft Strategic Plan is Complete) – a 1 Day Facilitated Session to Finalize the Community Strategic Plan with the Council, Leaders and Staff
8. Options for Public and Community Engagement
  - Community Survey on Priorities, Aspirations and Opportunities
  - Public Engagement Survey Design, Disseminated and Results Collected

## Phase 3: Strategic Plan Development (Jan. – March, 2025)

9. Interim and Final Community Strategic Plan
  - Executive Summary
  - Critical Strategic Issues and Opportunities
  - Vision, Mission and Values Statements
  - Long-Term Strategic Goals
  - (aligned) Medium-Term Objectives
  - Shorter-Term Action Plans, tied to Key Performance Indicators (KPIs)
  - Decision Rationales and Recommendations

10. Supporting Communications Plan
11. Additional Deliverable: Fully Graphically Designed Strategic Plan
  - Full/Shorter Versions for Public and Stakeholders
  - Flash Cards and Posters for Community/Municipal Offices
12. Final Project Report
  - Project Evaluation, Performance and Engagement Review



# Appendix



## Appendix A: Strategic Planning Development – Detailed Approach

### Project Set-Up: Expectations, Objective and Workplan (Oct. 2024)

- Onboard with CAO (Project Sponsor) and senior leaders to clarify expectations, timelines and engagement goals.
- **Deliverable:** Approved Strategic Planning Workplan & Approach.

### Phase 1: Project Set-Up, Service Reviews & Environmental Scan (Oct. – Nov., 2024)

#### Data, Finding and Benchmarking

- **Documentation Review:** analyse current municipal strategies, service and financial documents, data and reports. Review of regional and local economic development sector documentation, including: infrastructure, agriculture, tourism, housing development and employment opportunities. Review relevant organizational documents, such as previous strategic plans, service and performance reports, financial statements and service level agreements. Create strategic foresight landscape of regional/local economic, technology and social trends, using public, municipal or partner data sources.

#### “Establishing the Lay of Land”: Leaders, Council, Staff & Stakeholder Insights

- **Leadership & Stakeholder Interviews:** conduct interviews (individually) with Council members, municipal leaders, key staff and stakeholders. membership organization leaders and senior leaders’ team to identify key strategic themes, operational priorities, client/service improvement opportunities and sector issues.
- **Participant Preparation:** Before the interviews, each participant will receive a brief package outlining the definitions, descriptions, and critical elements of successful strategic plans, performance management and improvement frameworks.
- **Municipal Support:** the consultant will work with the municipal led to develop a stakeholder engagement profile, tirage and setting up interviews.

#### Core Service Reviews

- **Systematic Core Review:** working with municipal leaders undertake a review of core operational services to identify cost savings, service improvement areas, investment and partnership opportunities. Based on existing data, performance reports, leadership insights and key performance indicators (KPIs).
- **Method:** program and service review models to understand effectiveness, efficiencies and value-for-money opportunities. This work would build on the KPMG *Municipality of St. Charles Municipal Core Service and Organizational Review*.

#### Project Accountability

- **Progress Updates:** regular feedback, project updates with project sponsors and municipal staff on data collection, organizational and strategic insights.

#### Phase 1: Deliverables- Data Collection Insights and Findings Report

- **Deliverable:** A data, findings and innovation summary report will identify the “current state” and “strategic improvement focus areas”.

- The interim summary report will also outline the program and service delivery improvement and community/economic sector opportunities.
- Insights gathered will inform SWOT/environment scan. Throughout interviews, document review, service and data reviews, the attention will be to identifying recurrent strategic goals, themes, values and direction.

## Phase 2: Strategic Plan Development and Consultations (Nov. – Jan. 2024/25)

### Stakeholder Communications/Consultation Strategy

Stakeholder engagement is critical to the success of building a representative, dynamic and inclusive Community Strategic Plan. As a result, we recommend a series of in-person consultations with different stakeholder groups held over a over two weeks to generate ideas, develop priorities and community aspirations. These consultations will be facilitated, and the sessions will be designed, in collaboration with municipal team.

As stakeholder engagement is critical to the success of the development of St. Charles Community Strategic Plan, **we recommend six in-person facilitated sessions** to garner aspirations, ideas, challenges and opportunities from the different stakeholder groups, such as:

- 1 - Day Strategic Priority Setting and Planning Session for Council and Leaders
- 1 - Day Municipal Staff and Service Providers
- ½ - Day Session for Local Business and Economic Development Stakeholders
- Two-Half Day Facilitated Public Engagement Sessions
- (Once Draft Strategic Plan is Complete) – 1 Day Facilitated Session to Finalize the Community Strategic Plan with the Council, Leaders and Staff

In addition, we will work with the municipality to develop, design and distribute a community survey to solicit public priorities, goals and ideas.

### Strategic Planning Sessions and Survey Design

- Working with leadership sponsor, the consultant will develop a design for strategic planning sessions based on the insights, reports, interviews and data review.
- Community Survey on Priorities, Aspirations and Opportunities
- Strategic Planning Sessions Design – co-created/approved by sponsor

### Strategic Planning Session 1: “High-level” Goals, Objectives and Milestones

- **Session 1: Facilitated (in-person) Council and Municipal Leadership Strategic Planning– Full Day Session.**
- In-person facilitated strategic planning session for the community leadership to develop vision, mission, and a series of ten-year strategic “high-level” goals, objectives and milestones. Building on the insights gained from the data report and environmental scan.

- After the strategic planning session, further touchpoint interviews with leaders, staff and stakeholders. From these dialogues a draft of the Strategic Plan will be developed for membership reaction.

#### Strategic Planning Session 2: Staff & Community Service Providers

- **Session 2: Facilitated (in-person) Strategic Community Priorities– Full Day Session.**
- In-person facilitated strategic planning session for municipal staff and community service providers, including: municipal services providers, (local) non-for-profits, community healthcare, public safety, education and social services leaders to identify key priorities, challenges and solutions
- Building on the insights gained from the data report and environmental scan.

#### Strategic Planning Session 3: Local Businesses & Economic Development

- **Session 3: Facilitated (in-person) Strategic Community Priorities– Half Day Session.**
- In-person facilitated session with select local business leaders, developers, chambers of commerce and economic development leads to identify key challenges, growth and economic development opportunities to attract investment, jobs and industry to the community.

#### Strategic Priority Planning Session 4 & 5: Public Engagement Session

- **Session 4 & 5: Facilitated (in-person) Community Engagement “Ideas Days” Half Day Session.**
- Two informative, engaging and dynamic (in-person) facilitated public community sessions to gather community insights on their aspirations, ideas and priorities.
- Marketing/Communications: the consultant will work with the municipal to develop marketing materials and the outreach approach.

#### Community Engagement Survey

- Working closely with the municipal team, the consultant will design a public engagement survey to posted online to garner public ideas, insights and priorities as a follow-up to residents who attended in-person sessions or where unable to participant. The survey results will inform the strategic direction and development of the strategic plan.

#### Phase 2: Deliverables- A Consultation Summary Report- Key Themes, Priorities & Actions.

##### Project Accountability

- **Progress Updates:** regular feedback, project updates on leadership insights, KPIs development and the progress toward a strategic plan.

### Phase 3: Strategic Plan Development

#### Key Performance Indicators Development

- Based on the organizational, sector current state and key service operational improvement areas, the consultant will work with the respective leaders and their teams to develop a series of aligned SMART (Specific, Measurable, Attributable, Relevant and Timely) KPIs that can measure actionable progress toward the strategic goals. The development of performance metrics and balanced scorecards can work in parallel to the facilitated stakeholder sessions.

## Community Strategic Plan Design, Development & Refinement

- Working closely with Council and municipal leadership, EYG will draft, refine and amend several versions of the strategic plan to ensure it accurately reflect the organization’s direction, goals and aspirations. The draft Strategic Plan developed and circulated for Council and leadership comments.

### Deliverable: Interim Strategic Plan – For Comment and Review

- Draft Community Strategic Plan, including:
  - o Executive Summary
  - o Critical Strategic Issues and Opportunities
  - o Vision, Mission and Values Statements
  - o Long-Term Strategic Goals
  - o (aligned) Medium-Term Objectives
  - o Shorter-Term Action Plans, tied to Key Performance Indicators (KPIs)
  - o Decision Rationales and Recommendations

### Strategic Planning Session 6: Draft Strategic Themes Presented and Aligned Operational & Communications Plans Developed

- **Second Council and Leadership Session - Finalize Strategic Planning– Full Day Session.**
- The Council and leadership have the opportunity to provide comments and refine the Strategic themes/goals and aligned operational actions, alongside the KPIs.
- **Implementation Action Plan:** A project/implementation plan will also be developed with SMART short/medium/long-term objectives.
- **Communications Plan:** The session will also develop an organization and community communications plan on how/who needs to be informed of the Strategic Plan.
- After the session the revised Strategic Plan will be circulated for comments and feedback. Steering Committee/Members will have ample opportunity to provide additional feedback.
- **Communications Plan:** The session will also develop an organization and community communications plan on how/who needs to be informed of the Strategic Plan.

After the session the revised Strategic Plan will be circulated for comments and feedback. Council, leadership and staff will have ample opportunity to provide additional feedback on the draft Strategic Plan.

### Phase 3: Deliverable: Final and Approved Strategic Plan Developed

- Final “polished” strategic plan developed and approved by Council/Leadership early March, 2025.

### Community Strategic Plan Design Finalized and Approved.

- Final Print/Online (Long/Short Form) Community Strategic Plans design and approved.
- Strategic Plan posters and other communications products finalized and approved

### Project Evaluation & Close Out

A project review meeting with the municipal leadership to evaluate the strategic planning process, engagement and final strategic plan.



## Appendix B: Professional Experience & Qualifications

### Professional Profile: (Simon Trevarthen) Strategy, Facilitator & Change Maker

**Simon T. (Trevarthen)** MDes, MA & CMA, founded EYG and is our principal strategy consultant, transformation adviser, and creativity facilitator of change, strategic planning, and innovation. With over a decade of experience as a professional facilitator, Simon can energize audiences while delivering personal, professional, and business growth insights.

Simon is a not-for-profit and public sector strategist, facilitator, and innovator who ignites passions and helps community, public sector, municipal, and government leaders unpack complexity and create change, inspiration, and innovation. Simon's facilitation and engagement style is dynamic, fun, refreshing, and thought-provoking. He leads clients to develop robust and innovative "future-proof" strategies that are linked to measurable, operational goals. He deeply understands strategy and aligns it with objectives, key results (OKRs), service innovation, "human-centred" design, and strategic foresight. ([See Appendix F: Client Testimonials, page XX](#))

His core strengths are as a strategist, innovator, and business catalyst willing "to get in the mud of a problem" to bring fresh and dynamic approaches to strategy execution. Simon has spoken to over 50,000 people at conferences, training seminars and facilitation sessions. As an innovation ecosystem and culture change executive, Simon delivers strategic growth and transformational change for large, complex public sector organizations, building industry coalitions to make positive social impacts.

He consistently achieves the objectives of Boards, Presidents/CEOs, and leaders by defining and executing sound innovation and growth strategies, innovation centres and culture change. He is known as an inspirational communicator and influence leader who balance financial discipline, entrepreneurial flair and relationship building while mentoring and developing highly engaged teams.

His understanding of the government and the not-for-profit sectors runs deep, and he has over 15 years of experience in public policy, funding models, governance, and service redesign. He has developed strategic plans, culture change approaches and innovation strategies and delivered leadership training and keynotes on transformation for Fanshawe College, the Toronto Stock Exchange, LCBO, The Hospital for Sick Children, WorkTango, Flow Water Inc., Science North, Teranet, Ontario Provincial Police, Lee Valley Tools, Ontario Government ministries, Ontario Heritage Trust, Ontario Good Roads Association, Service Ontario, Northern Leadership Program, Crown Capital Partners, MaRS Discovery District, YMCA Toronto, Town of Whitby, the City of Vaughan, Sudbury and Mississauga, and the Regions of York, Niagara, Peel and Halton.

A lifelong learner who holds two master's degrees (one in Strategic Foresight and innovation), trained in LEAN/Six Sigma (black belt), and a Certified Management Accountant (CMA) and has several coaching certifications.

## Professional Experience: [www.linkedin.com/in/simontrevarthen](http://www.linkedin.com/in/simontrevarthen)

- **Chief Innovation & Open Assets Officer** for one of Canada's largest post-secondary colleges, leading its innovation transformation cultural change and brokered its flagship \$58 million innovation investment toward its successful opening. Innovation Village is a (95,000 sq. ft.) regional innovation incubator, technology showcase, experiential learning, partner collaboration centre, and research hub.
- **Chief Transformation Officer**, EYG Strategy & Innovation Consulting, Simon has led over 150 creativity, strategy and change consulting workshops and engagements. He has spoken globally to over 50,000 leaders at conferences, seminars and board workshops on creativity, embedding innovation and, motivating teams to greatness, embracing change, and implementing practical innovation. One unique ability is large, dynamic, and engaging staff, stakeholders and public engagement of up to 750 people. Clients include start-ups, financial institutions, government agencies, municipalities, professional associations and not-for-profit organizations.
- **Director of Business Innovation** with the Ontario Government, I led a diverse team of 22 designers, innovators, and consultants to complete over 35 strategic healthcare innovation co-designs with clinicians, healthcare providers and administrators to improve patient experience, outcomes, integration and performance. By way of one example only, my team developed and implemented a provincial Supply Chain Strategy and task force that led to \$500 million in healthcare savings through program innovations across 144 hospitals and 600 long-term care homes.
- **International Innovation Consultant:** Canadian International Development Agency/IPAC, Kampala, Uganda. Led four World Bank and CIDA funded to build and transform the National Leadership College as a regional incubator, innovation centre and leadership development college.
- **Senior Manager (Consultant) Knowledge-Economy**, with Bearing Point (KMPG) reforming the Jordanian national education system.
- **Senior Roles in Public Policy, System Transformation and Communications** for the Ontario Government with the Treasury Board, Ministry of Finance, Education, Healthcare and Cabinet Office.
- **Journalist and Media Spokesperson in post-conflict environments:** I acted as the media spokesperson for Médecins Sans Frontières (MSF) during the Kosovo war, Bosnia and across the Middle East with Reuters in Israel and the Palestinian territories.

## Professional Certificates & Qualifications:

- Masters of Design (MDes.) Hon., Strategic Foresight & Innovation  
Ontario College of Art & Design University
- Masters of Art (MA) Hons., Economic & Politics  
London Imperial College University (UK), School of African & Oriental Studies
- Certified Management Accountant (CMA)  
Certified Public Accountant, CPA Ontario
- LEAN Six Sigma Black Belt  
EZSigma Group
- Other coaching and facilitation certificates, strategy, innovation, & transformation professional development courses.

## Appendix C: Comparable Municipal, Northern Ontario & Strategy Projects

### 1. Manitoulin-Sudbury District Services Board: Regional Child Care Strategic Plan

EYG was hired the strategic planning consultant to engagement over 60 child care and speciality service providers organizations into the development of regional child care strategic plan for Manitoulin-Sudbury area, covering rural, urban and indigenous communities.

EYG facilitated five full-day stakeholder meetings to gather input for the development of the Plan. Between network plenary sessions, leadership interviews, surveys, and working groups focused on key areas, the Network reviewed the plan's development and agenda for upcoming meetings. The resulting *Manitoulin-Sudbury Network for Children and Families Strategic Plan (2024-28)* is regional vision and roadmap for how we as leaders seek to transform the early childhood system across the Manitoulin-Sudbury District over the next four years. At each meeting, the Manitoulin-Sudbury Network for Children and Families members explored system leadership, innovation, and the importance of removing barriers to low-income children and families and ensuring access, diversity, equity, and inclusion.

The plan comprises four commitments (Goals), supported focus areas, actionable short-term strategies, and longer-term aspirational and visionary ideas. While the Plan focuses on describing each goal and its aligned actions, it also identifies key milestones, resources, and partnerships.

[A copy of the \*Manitoulin-Sudbury Network for Children and Families Strategic Plan \(2024-28\)\* accompanies this proposal.](#)

### 2. Fanshawe College: Strategy with Academic, Industry & Community Consultations

Led and guided the strategic planning and community stakeholder consultations to develop Fanshawe College's *Innovation and Open Assets Strategy: Vision 2030*. The year-long consultative process included: the board of directors, the college's administrative and academic leadership, researchers and the academic community, industry and community partners.

Consultations took place at roundtables, workshops and community forums. Simon led the facilitations, developed the progress reports, board and executive presentations and wrote/authored the final innovation strategy. He developed, socialized and executed strategy, which included steering its \$58 million Innovation Village project to completion and re-visioning.

In building buy-in for this new vision, he imagined and oversaw the creation and administration of a \$1 million "Spark" Innovation Fund to discover, highlight and fund innovation collaborative projects, and created a "innovation pathways" program to scale new innovation capabilities and commercialization, while acting as a launchpad for Fanshawe's planned technology incubator and applied research hub.

Fanshawe College is one of Canada's largest public community colleges with 42,000 students and \$412 million in annual revenues.

[A copy \*Innovation and Open Assets Strategy: Vision 2030\* is attached to this proposal.](#)

## Appendix D: Professional Fees & Budget

### Strategic Plan Facilitation & Development (Based on 45 Days of Consulting Advice)

<b>Project Step-Up &amp; Planning</b>		
<b>Phase 1: Project Set-Up, Service Reviews &amp; Environmental Scan</b>		
<ul style="list-style-type: none"> <li>• Documentation Review &amp; Initial Stakeholder Consultations</li> <li>• Organizational/Community Benchmarking</li> <li>• Detailed Workplan: Outlining Strategic Planning Process</li> <li>• Council and Leadership Interviews &amp; Synthesis</li> <li>• Core Services Reviews &amp; Interim Report</li> <li>• Progress Updates, Survey &amp; Engagement Summary Report               <ul style="list-style-type: none"> <li>○ Strategic Themes, Improvement Opportunities &amp; Priority Actions</li> </ul> </li> </ul>		
Subtotal Phase 1: Oct. – Nov. 2024		<b>\$13,819.44</b>
<b>Phase 2: Strategic Plan Development &amp; Consultations</b>		
<ul style="list-style-type: none"> <li>• Strategic Planning Sessions Design</li> <li>• Facilitated Stakeholder Sessions</li> <li>• 1 - Day Facilitated: Strategic Priority Setting and Planning Session for Council and Leaders</li> <li>• 1 - Day Facilitated: Municipal Staff and Service Providers</li> <li>• ½ - Day Session for local Business and Economic Development Stakeholders</li> <li>• Two-Half Day Facilitated Public Engagement Sessions</li> <li>• (Once Draft Strategic Plan is Complete) – a 1 Day Facilitated Session to Finalize the Community Strategic Plan with the Council, Leaders and Staff</li> <li>• Public Engagement Survey: Design, Development &amp; Results</li> </ul>		
Subtotal Phase 2: Nov. 2024 – Jan. 2025		<b>\$19,900.00</b>
<b>Phase 3: Strategic Plan Development</b>		
<ul style="list-style-type: none"> <li>• Draft &amp; Final Strategic Plan Written, Developed &amp; Designed               <ul style="list-style-type: none"> <li>○ Vision, Mission &amp; Strategic Objectives</li> </ul> </li> <li>• Leadership Interviews, Feedback &amp; Progress Updates</li> <li>• <b>Session 2:</b> Facilitated (in-person) Council/Leaders Final Strategic Planning– Full Day Session (Draft Strategic Plan presented)               <ul style="list-style-type: none"> <li>○ Communications Plan, Action Plans, Timelines &amp; Innovations</li> </ul> </li> <li>• Leadership Feedback, Revisions &amp; Updates</li> <li>• Strategic Plan Finalized</li> </ul>		
Subtotal Phase 3: Nov. 2024 – Jan, 2025		<b>\$16,030.56</b>
<b>Subtotal</b>		<b>\$49,750</b>
HST		\$6,467.50
Project Total		<b>\$56,217.50</b>

PLEASE NOTE: Fees, quoted in Canadian dollars, are based on delivering all elements of the strategic plan and the sessions' activity, design, delivery and facilitation. EYG's accommodation, flights, mileage and travel costs are not included in these fees. However, they will be within the \$5,000 travel budget described. **If our budget aligns differently with your vision of the fees and the scope of work, we would be happy to discuss this further.**

## Appendix E: Client References

Three references of similar innovation, strategic planning & igniting organization change

Reference 1: Rural Economic Development Strategy	
Name	Scott Butler
Position	Executive Director, Ontario Good Roads Association
Address	1525 Cornwall Road, Unit 22, Oakville, ON L6J 0B2
Contact Information	Tel: 416-564-4319 Email: <a href="mailto:scott@ogra.org">scott@ogra.org</a> Website: <a href="https://goodroads.ca/">https://goodroads.ca/</a>
Description of Project	<p><b>Facilitated strategic planning sessions with senior leadership and Board of Directors on the organization's future, sector opportunities and impact for its municipal membership.</b></p> <p>Create a strategy for rural and remote municipalities that leverages best practices for policy and funding changes with provincial and federal partners. Association of Municipalities of Ontario (AMO) and Ontario Good Roads Association (OGRA) had brought together over 300 mayors and councillors from small and northern municipalities.</p> <p>With OGRA, (Simon Trevarthen/ Project Lead &amp; Facilitator) facilitated half-day summits with 300 elected municipal leaders. We co-created strategic advocacy priorities for its government relations work and created an inventory of innovative approaches to economic growth, infrastructure planning, and services shared with its members.</p>

Reference 2: Igniting Cultural Change Transformation	
Name	Laura Mirabella, FCPA, FCA
Position	Commissioner of Finance and Treasurer, Regional Municipality of York
Address	17250 Yonge Street, Newmarket, ON L3Y 6Z1
Contact Information	Tel: 905-830-4444 ext. 71600 Email: <a href="mailto:Laura.Mirabella@york.ca">Laura.Mirabella@york.ca</a> Website: <a href="http://www.york.ca">www.york.ca</a>
Project Description	Designed, presented and facilitated a series of innovation, change and inspiration seminars for entire region's leadership and staff team, aligned to Commissioner's strategic transformation of the business, financial and operations function serving two million York Region residents.

### Reference 3: Strategic Plan with Extensive Community Engagement

Name	Amy Winnington-Ingram
Position	Integrated Human Services Manager, Manitoulin-Sudbury District Services Board
Address	210 Mead Blvd, Espanola, ON, P5E 1R9
Contact Information	705-862-7850, ext. 162 Email: <a href="mailto:amy.winnington-ingram@msdsb.net">amy.winnington-ingram@msdsb.net</a> Website: <a href="https://msdsb.net/">https://msdsb.net/</a>
Description of Project	<b>Development of Regional Child Care Strategic Plan:</b> Engaged by Manitoulin-Sudbury District Services Board (DSB) to facilitate, develop and design the early childhood education leadership network's strategic plan 2024-28. The year-long strategic planning process involved five plenary sessions with over 60 not-for-profit stakeholders and sector and community participants. The strategic plan contained a new vision, mission and values statements, environment scans, goals, objectives and a SMART implementation plan. The engagement also included leadership interviews, surveys and data reviews. EYG developed, designed and wrote the final approved strategic plan.

## Appendix F: Client Testimonials

"Simon's gift is the way he generates excitement for transformation."

**Laura Mirabella, CAO & Finance Commissioner, Region of York**

"You made my first meeting with all 200+ of my leadership team a resounding success."

**Katherine Chislett, Commissioner, Community & Health Services, York Region**

"Simon is that rare strategist who earns respect and establishes rapport the moment he walks in the room. Most importantly, Simon is an honest broker who employs directness and courage when facilitating and communicating with clients. This approach results in work where the difficult questions are addressed, everyone is heard and all involved feel an equity stake in the future success of the organization."

**Scott Butler, Executive Director at Ontario Good Roads Association**

"Simon has the ability engage an auditorium full of employees or executives, all to rave reviews"

**Jenny O'Donnell, Chief Human Resources Officer, Toronto Metropolitan University**

"Simon provided exceptional learning... a great presenter, knowledgeable and engaging."

**Maryann Horan, Director, Human Resources, City of Sudbury**

"Simon's enthusiasm and energizing delivery helped to kick start our transformational journey."

**Kathy Kestides, Director, Transformation and Strategy, City of Vaughan**





## WHAT CLIENTS SAY?

“Simon is not only a strategy guru, but he also has the ability to translate and distill complex business processes and scenarios into succinct models and plain language to help clients move forward.”

**Jenny O’Donnell**  
Chief Human Resources Officer  
Toronto Metropolitan University  
(Ryerson University)

