



**Request for
Proposal
RFP 2024-6**

**Ten Year
Strategic Plan**



**Submitted by Capital Park Consulting Inc.
9A Fairbairn Street
Ottawa, ON K1S 1T2**

Date: September 9, 2024



September 9th, 2024

Denis Turcot, Chief Administrative Officer
Municipality of St.-Charles
2 King St East, PO Box 70,
St.-Charles, ON, P0M 2W0

Dear Mr. Turcot:

I am pleased to submit our proposal for the development of an innovative, priority-oriented Community Strategic Plan. We recognize that the Municipality is seeking a comprehensive strategy that addresses internal organizational capacities, reviews service levels across all departments, and considers external challenges and opportunities as part of its forward-looking approach.

Our team is uniquely positioned to support St.-Charles through this transformational period. With extensive experience working with municipalities of similar size and scope, we understand the importance of creating a plan that balances fiscal responsibility, meets the expectations of a growing community, and provides a clear roadmap for achieving your strategic goals.

In our approach, we will work closely with Council, staff, and community stakeholders to develop a strategic plan that not only reflects the values and vision of St.-Charles but also identifies high- and mid-level priorities, guiding principles, and actionable steps for implementation. Our proposal outlines a methodology tailored to your specific needs, ensuring that the plan is both practical and adaptable, supported by realistic timelines.

We are excited about the opportunity to work with the Municipality of St.-Charles and contribute to the continued growth and development of your community. Please feel free to contact us with any questions or clarifications regarding our proposal.

Thank you for your consideration. We look forward to the possibility of collaborating on this important initiative.

Yours sincerely,

A handwritten signature in blue ink, appearing to read "Tim Hore", is written over a light blue circular stamp.

Tim Hore, President
Capital Park Consulting Inc.

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1. CORPORATE PROFILE

Capital Park is a management consulting firm whose clients include all levels of government, not-for-profit organizations and non-government organizations (NGOs).

Our services are wide-ranging and include strategic planning, stakeholder engagement, research, program evaluation, environmental scanning, working with municipal councils, boards of directors and senior executives to identify strategic priorities, stakeholder engagement, webinars, interviews, focus groups, change management consulting, and training needs assessments.

More information about Capital Park can be found on our website at: <http://www.capitalpark.ca>.

Name of Consulting Firm:	Capital Park Consulting Inc.
Principal:	Tim Hore, President
Contact Information:	Phone: 613-233-2258 Email: info@capitalpark.ca Or: tim.hore@capitalpark.ca
Size of Company:	Capital Park has nine consultants with a variety of areas of expertise. When necessary, we supplement our internal expertise by adding specialists in specific areas as subconsultants. No subconsultants are required for this project.
Office Location:	9A Fairbairn Street Ottawa, ON K1S 1T2
Ownership and History:	Tim Hore is the sole officer, director and shareholder of Capital Park. There are no affiliates. Capital Park's predecessor, Tim Hore Consulting, began as a sole proprietorship in 2000, and subsequently incorporated as Capital Park Consulting Inc. in 2013.

2. OUR CLIENTS, HISTORY, PROJECTS AND STAFF

OUR CLIENTS AND PROJECTS

The majority of Capital Park's clients are either smaller municipalities or national organizations. Most of our projects involve strategic planning. We believe that one of our special strengths is working with clients on projects that respond to the needs and aspirations of rural Canadians. The most relevant clients and projects are shown in the following tables. Additional details can be provided on request.

STRATEGIC PLANNING EXPERIENCE WITH RURAL NORTHERN COMMUNITIES

Each of these projects has the following features:

- Multi-year strategic plan
- Municipal client
- Located in northern Ontario/Canada
- Population of less than 10,000 residents (as shown on 2021 Canadian Census)

Client	Project Date(s)	Number of Permanent Residents
Township of Billings	2023-2024	753
Township of North Frontenac	2023	2,285
Township of Algonquin Highlands	2023	2,588
Municipality of French River	2023-2024	2,828
Municipality of Highlands East	2023-2024	3,830
Township of Central Frontenac	2023	4,892
Municipality of Sioux Lookout	2019-2020	5,839
Town of Kirkland Lake	2023-2024	7,750
Town of Happy Valley-Goose Bay	2023	8,040

ADDITIONAL MUNICIPAL EXPERIENCE IN STRATEGIC PLANNING

Client	Project Date(s)	Number of Permanent Residents
Township of Perth South	2023-2024	3,776
Municipality of Casselman	2023-2024	3,960
Town of Cobourg	2023	20,519
City of Thorold	2023-2024	23,816
City of Port Moody	2022-2023	33,535
City of Port Moody	2018-2019	33,535
City of Quinte West	2019-2020	46,560
City of Timmins (Long-Term Care)	2020	58,803

ADDITIONAL PUBLIC SECTOR EXPERIENCE IN STRATEGIC PLANNING

The following table shows projects that Capital Park consultants have completed for the public sector and the broader public sector:

Client	Project Date(s)
Transportation Association of Canada (TAC) Foundation	2024
Canadian Air Transport Safety Authority, Human Resources	2022-2023
Independent Living Services of Simcoe County and Area	2020
Resident Doctors of Canada (RDoC)	2018
Hearing Health Association of Canada (HHAC)	2017
Transportation Association of Canada (TAC)	2016
Abbeyfield Canada	2016
Lethbridge College	2016
Tri-County Mennonite Homes Seniors Communities	2016

Please note the following:

- References are provided in Section 5 of this proposal.
- Section 6 provides project descriptions for the four reference projects. Additional information can be provided for other projects on request.
- Additional project experience is provided in the resumes of our proposed project team in Appendix A: Our Resumes.

OUR HISTORY

Capital Park Consulting Inc. originated as Tim Hore Consulting in 2000, specializing in project management and stakeholder engagement for municipalities and local organizations. In 2013, we rebranded as Capital Park Consulting Inc. to better reflect our expanded focus on providing customized strategic planning and advisory services to a broader range of clients.

Since then, we have grown steadily, building a strong reputation for facilitating collaborative processes and delivering results-oriented strategic plans. As our firm evolved, we took on more complex initiatives, including guiding municipalities through long-term growth strategies, conducting organizational reviews, and developing forward-thinking policies.

Our success is evidenced by the fact that much of our work comes through referrals from satisfied clients. In 2023 and the early months of 2024 alone, we completed 13 strategic plans for small municipalities across Canada. Today, Capital Park continues to expand, driven by our core values of collaboration, innovation, and a commitment to sustainable solutions.

OUR STAFF

PROJECT TEAM

Our proposed Project Team is comprised of four experienced professionals.

Name	Role	Years with CPC
Tim Hore, BA, PMP, RMP	Project Principal	24 years
Steve Lichty, LL.B., CHRL	Project Manager	11 years
Suzanne Harrison, B.COMM, MA	Bilingual Consultant	2 years
Dominic Scozzafava, MBA, MPH	Researcher	1 year

ROLES AND RESPONSIBILITIES

The roles and responsibilities of our proposed Project Team members are as follows:

Tim Hore will serve as the **Project Principal**. His responsibilities will include:

- Monitoring the project throughout to ensure quality
- Co-facilitating the planning sessions with Council and senior staff
- Providing input on interim and final reports

Steve Lichty is our proposed **Project Manager**. His responsibilities will include:

- Being the principal point of contact with the Project Authority
- Co-facilitating the planning sessions with Council and senior staff
- Leading any stakeholder engagement activities to be conducted in English
- Primary author of interim and final reports

Suzanne Harrison will serve as our **Senior Bilingual Consultant**. Her responsibilities will include:

- Leading the organizational review tasks
- Leading any stakeholder engagement activities to be conducted in French
- Providing input on interim and final reports

Dominic Scozzafava will be our **Lead Researcher**. He will be responsible for:

- Researching best practices in strategic planning for municipalities
- Compiling and analyzing stakeholder engagement data and results
- Providing input on interim and final reports

Capital Park has **additional resources** that are identified on our website. If any team member should be unavailable for any reason, (e.g. unforeseen illness), Capital Park will be able to provide another consultant with similar qualifications and experience. Please note that we do not anticipate a need to make any changes or substitutions and under no circumstances would we do so without prior approval from the Project Authority.

STEVE LICHTY – PROJECT MANAGER

Steve focuses on organizational planning and development issues, primarily in the public sector and broader public sector. Steve has worked as the Chief Executive Officer (CEO) of a health care organization, a Dean and Director at Georgian College of Applied Arts and Technology, a consultant for government ministries, departments and agencies, and as a lawyer.

Steve has a Bachelor of Laws degree from Western University and certification as a Certified Human Resources Leader (CHRL) from the Human Resources Professionals Association. He also has professional credentials in Planning (Society for College and University Planning), ISO 9000 (Canadian Standards Association), and Long-Term Care Management (Canadian Healthcare Association). Steve's qualifications include:

- Project Manager for strategic plans for the ***Township of Billings, Municipality of French River, Township of Algonquin Highlands, Municipality of Highlands East, Township of North Frontenac, Township of Central Frontenac, Town of Kirkland Lake and Town of Happy Valley-Goose Bay.***
- Has also served as the Project Manager for a strategic planning project for the ***City of Timmins (Long-Term Care)*** and a functional planning project for ***Meno Ya Win Health Centre, Sioux Lookout.***
- On behalf of Human Resources and Skills Development Canada, Steve authored a “how to manual” on Strategic and Operational Planning for use by small and medium-sized enterprises in Canada.

TIM HORE – PROJECT PRINCIPAL

Tim has over 25 years' experience managing strategic planning projects on behalf of government, NGOs, not-for-profits and the private sector. This experience has included managing well over 100 consulting projects including planning and implementing stakeholder consultation processes to inform strategic planning.

Tim has a Bachelor of Arts degree from UBC and holds both the PMP (Project Management Professional) and RMP (Risk Management Professional) designations through the Project Management Institute. Tim's relevant project experience includes:

- Serving as ***Project Principal*** on projects for the ***Township of Billings, Municipality of French River, Township of Algonquin Highlands, Municipality of Highlands East, Township of North Frontenac, Township of Central Frontenac, Town of Kirkland Lake and Town of Happy Valley-Goose Bay*** to develop their new four and five-year strategic plans.
- Serving as ***Project Manager*** on strategic planning projects for the ***Municipality of Sioux Lookout, City of Quinte West and City of Port Moody.***

SUZANNE HARRISON – SENIOR BILINGUAL CONSULTANT

Suzanne Harrison is a bilingual consultant and human resources professional with over 25 years of experience working with both private & public sector organizations. Her areas of expertise include an in-depth knowledge of Canadian and American labour legislation, compensation management and training and facilitation. Suzanne has extensive experience in survey development and administration with a background in data analysis and interpretation. She is also an experienced facilitator of workshops and focus groups, and she is skilled in conducting stakeholder interviews in both English and French.

Her experience includes numerous projects for government and private sector clients that involved conducting interviews and facilitating workshops or focus groups. The projects have included:

- Facilitating focus groups and town hall meetings in English and French to obtain stakeholder engagement data for a new Strategic Plan for the Municipality of Casselman
- Facilitating sessions in English and French with all employees within the Environmental Protection Services (EPS) to obtain input and feedback on current management and human resource practices and writing an output report.
- Interviewing all management staff (65) within the Environmental Conservation Services (EPS) to obtain input on the future direction of the Service, the organization structure and human resource issues.
- Facilitating sessions for the Public Service Commission of Canada with all employees in the Human Resource Directorate regarding the Public Service Survey results.

DOMINIC SCOZZAFAVA– RESEARCHER

Dominic will be our researcher for this project. His responsibilities will include:

- examining strategic planning best practices in the municipal sector
- identifying strategic plans for similar municipalities that have features that may be appropriate
- researching similar rural municipalities to determine benchmarks for organizational models
- assisting in the stakeholder engagement activities, including compiling and analysis of data collected

Resumes are provided in Section 8 of this proposal.

3. OUR WORK PLAN

OUR GENERAL APPROACH

At a high level, the strategic planning process for any organization involves an assessment of the current situation, consultations with stakeholders to determine where it should be focusing its efforts and resources, and a plan for getting from the current state to the desired one. The strategic planning process is illustrated below:



We expect that the Municipality will already have considerable data from previous projects and studies and possibly from resident and other stakeholder input. Our approach is to augment the input already received with additional stakeholder consultations and research to ensure that Councillors and senior administrative staff have a comprehensive understanding of all issues, including potential variations in different parts of the Municipality. The planning sessions that we propose will provide opportunities to debate these issues fully, determine the optimum way forward, design a mechanism to measure progress, and implement a communications plan to explain to residents and other stakeholders the rationale for the decisions made.

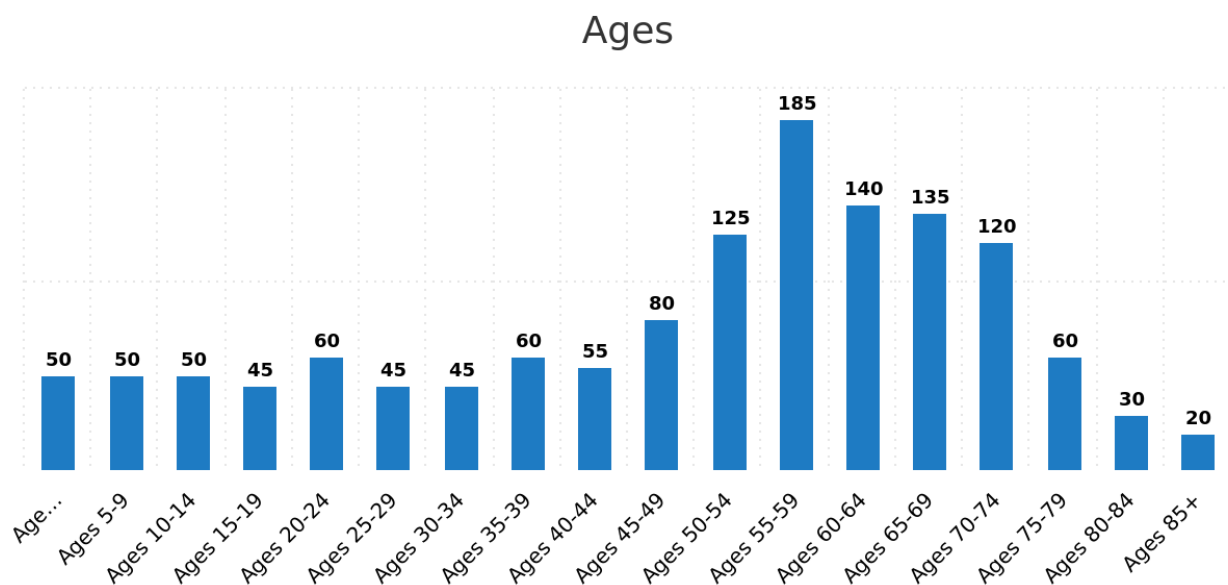
Our work plan below incorporates the tasks and deliverables described in the RFP and shows our team’s suggested approach based on the information we currently have. We plan to use an iterative approach and work closely with our Municipality counterparts and are open to adapting the work plan based on feedback from the Project Authority both at the start of the project and on an “as needed” basis during project implementation.

OUR UNDERSTANDING OF THE PROJECT OBJECTIVES

Our Project Team has significant recent experience assisting similar municipalities to develop comprehensive strategic plans. While every municipality is unique, here are some of the challenges that we anticipate discussing with Council, Municipal Staff, residents and other stakeholders to assist in positioning the Municipality to achieve its future potential while retaining its unique qualities:

Aging Population

As shown in the chart below, much of St.-Charles' population is over the age of 50. How will the Municipality care for its seniors in the coming decades?



The chart above is remarkably similar to the charts for other Capital Park clients, including the Townships of Billings, North Frontenac, Central Frontenac, and Algonquin Highlands and the Municipalities of French River and Highlands East. Our work with each of these municipalities' Councils and staff included discussions about how to respond effectively.

Economic Challenges

St.-Charles, like many small rural municipalities in Ontario, faces a range of economic challenges that impact its growth and sustainability. The community's economy is primarily driven by agriculture, forestry, and small businesses, sectors that have experienced significant pressures in recent years. Global market fluctuations, combined with rising operational costs and competition from larger markets, have strained local businesses, leading to concerns about long-term viability. The decline in traditional industries, and the consolidation in the agricultural sector, have also reduced employment opportunities, contributing to outmigration, especially among younger residents seeking opportunities elsewhere.

Financial Challenges

Another challenge for St.-Charles is its limited tax base, which constrains the municipality's ability to invest in critical infrastructure and services. With a small population spread across a large geographic area, the cost of maintaining roads, utilities, and public facilities is high relative to the municipality's revenue-generating capacity. This financial strain is exacerbated by the need to adapt to changing regulatory requirements, particularly in environmental management and public health, which often demand costly upgrades to existing systems.

Strategic Objectives

The development of a new strategic plan for St.-Charles presents an opportunity to address the municipality's economic challenges by fostering increased efficiency, improved infrastructure, and targeted investment. By aligning municipal facilities with community demand, the plan can help "right-size" operations, resulting in cost savings and ensuring that resources are used effectively to support the planned strategic direction.

A well-crafted plan can also prioritize critical infrastructure projects, such as road upgrades and utility improvements, which are essential for driving economic growth. Better infrastructure not only enhances the quality of life for residents but also makes St.-Charles more attractive to businesses, investors, and potential residents, ultimately boosting local economic activity.

In addition, a clear strategic vision can attract investment by demonstrating St.-Charles' potential for growth and stability. This can lead to increased capital investment and job creation, particularly in areas that align with the municipality's long-term goals. Tourism development, for example, can be promoted through initiatives that preserve natural resources and enhance recreational facilities, drawing more visitors and generating additional revenue for local businesses.

The strategic plan can also focus on enhancing the quality of life in St.-Charles by improving public safety, education, healthcare, and recreational opportunities. With a well-defined direction, the municipality can better manage residential development, especially as many areas face housing shortages. Furthermore, diversifying the municipality's revenue base by identifying new economic opportunities will reduce reliance on property taxes and improve fiscal sustainability.

Finally, the plan should emphasize workforce development by investing in education and training programs. This will create a skilled labor force that is attractive to businesses and supports new business development, particularly as the municipality anticipates growth from new subdivisions. By addressing these key areas, the strategic plan can position St.-Charles for long-term economic resilience and success.

METHODOLOGY

Task: 0. PROJECT START-UP

We will officially start the project with a kick-off meeting via Zoom or Teams with representatives from the Municipality. The purpose of this meeting will be to:

- 1) Confirm the identity of the main contacts for the Municipality, (i.e. the “Project Authority”)
- 2) Review and confirm the work plan
- 3) Discuss and gather relevant background documents and data sets that are in addition to the Resources documents referred to in the RFP
- 4) Confirm project timelines
- 5) Discuss the planning sessions we are suggesting be convened with Council and senior staff, stakeholder consultation visits, the work that will proceed the workshops, and how our team should gather information from the Municipality before the workshops and planning sessions
- 6) Review the planned methodology for gathering stakeholder input including interviews, on-line survey(s), focus groups, and potential town hall meeting(s), etc.
- 7) Establish how regular communications between Capital Park and the Municipality will be handled (from whom to whom, at what intervals, etc.)

Our team is open to any suggestions that Municipality’s’ representatives might have at this stage to update the work plan or change the timing of deliverables to better suit organizational requirements and constraints.

Task: 1 REVIEW AND RESEARCH

Our team will review the available data and information. Additional information that may be relevant could include:

- The results of any relevant surveys (of staff, residents, businesses, etc.)
- The results of any citizen surveys conducted recently
- Business development and tourism plans and analyses
- Minutes and notes from Council meetings (as available)
- Communications/direction received by the Municipality from higher levels of government
- Publications from sector associations, e.g. Association of Municipalities Ontario
- Any other studies and documents or information deemed relevant by the Project Authority

At the end of these efforts, we will write a succinct preliminary report, including a PESTEL analysis to document the political, economic, social, technological, environmental and legal issues that are relevant (Interim Report No. 1), to be shared with the interviewees in the Internal Stakeholder Engagement activities.

Task: 2 INTERNAL STAKEHOLDER ENGAGEMENT

We will conduct individual virtual interviews with each member of Council and with each of the managers in the Municipal Office. The managers will have the option of meeting with the Project Team privately, or together with members of their staff.

Task: 3 ORGANIZATIONAL REVIEW

The organizational review will evaluate internal capacities and service levels across all departments, providing the basis for identifying any necessary changes to support the Municipality in achieving its strategic priorities. Some of this work, e.g. interviews with department heads, will be done with the internal stakeholder engagement activities.

Organizational Capacity Assessment:

- Conduct a review of the organizational structure, staffing, and resource allocation.
- Hold brief interviews with department heads to identify immediate internal challenges.
- On-line survey of all staff at all levels to identify their concerns and to gather their suggestions
- Evaluate key workflows to highlight major inefficiencies.

Service Level Snapshot

- Review service levels in key departments (public works, administration, community services).
- Conduct a quick benchmarking exercise against comparable municipalities.
- Identify critical areas where service can be streamlined or improved.

The results of the internal stakeholder engagement and organizational review tasks will be documented in Interim Report No. 2.

Task: 4 VIRTUAL WORKSHOP WITH SENIOR STAFF/PROJECT STEERING COMMITTEE

The next step will be a two- to three-hour virtual workshop with either Senior Staff of the Municipality or the Project Steering Committee. The purpose of this workshop includes:

Strategic Plan Development

- To review the findings to date and identify any “surprises” in Interim Report No. 1
- To prepare for the external stakeholder engagement activities

Organizational Review

- To identify immediate and medium-term internal needs
- To align internal priorities with the broader municipal strategy.
- To develop a concise action plan with timelines, responsible parties, and key resource needs and to ensure the action plan addresses both capacity improvements and service-level enhancements.

Task: 5 EXTERNAL STAKEHOLDER ENGAGEMENT

Capital Park will implement the stakeholder engagement plan based on the decisions made during the workshop described in Task 4. Methods of engagement are expected to include the following:

- ***On-line surveys of Municipality's' residents*** to find out their opinions and priorities, how they feel about their municipal taxes, programs and services, etc.
- ***Approximately Six (6) Focus groups*** with residents, business owners, local economic development groups, social services organizations and other community stakeholders identified during the workshop
- ***Two (2) Town Hall meetings*** for the general public; it is recommended that one public meeting be held during business hours and one during the evening to provide a broader range of opportunities for input.

The online surveys and focus groups will be conducted virtually. After they have been completed, our team will prepare a presentation summarizing the results together with our overall findings, (Interim Report No. 3).

In order to minimize travel expenses and time, the suggested Town Hall meetings are recommended for the day before the planning session.

Task: 6 TWO-DAY PLANNING SESSION WITH COUNCIL AND STAFF

The planning session will be structured with a mixture of short presentations on best practices interspersed with small group work to discuss the specifics of the strategic plan for the municipality.

The first day's session will include:

- discussing the contents of Interim Reports 1 and 2
- discussing the results of the organizational review
- report on the input from the Town Hall meetings
- reviewing best practices in strategic planning
- analyzing approximately six strategic plans from similar municipalities
- reviewing and either validating or modifying the Vision Statement in the current strategic plan
- reviewing best practices for Mission and Values Statements and determining whether they would be beneficial in the new strategic plan
- conducting a SWOT analysis

The agenda for the second day's session will depend on decisions made on the first day, but is likely to include:

- ***Continuing Discussion on Vision, Mission and/or Values Statements:*** If appropriate, we will modify the current Vision Statement and/or develop new Mission and Values Statements.

- **Strategic Priorities:** What should be the Municipality's highest priorities for the next five years? Do these priorities align with what was heard from external stakeholders? If not, should the priorities be modified, or should a communications plan be developed to explain Council's rationale?
- **Measuring and Reporting:** Discuss how the Municipality will hold itself and its staff accountable for the strategic priorities identified, how to track its success (or failure) in achieving its goals and how to incorporate performance indicators into its existing performance management systems for staff.
- **Next Steps:** Articulation of Next Steps for Council and Staff, (e.g. operational plans, communication plans, etc.)
- **Financial Stability and Sustainability:** Does the Municipality have the capacity to implement the proposed strategic priorities? If not, what additional resources, training, etc. are required? Is the Strategic Plan fiscally responsible?
- **Event Marketing and Promotion:** How would the Municipality like to see the new Strategic Plan promoted? (See Task 10 for some of the options.)

At the conclusion of the planning session, our team will prepare a report outlining the discussions and overall results of the workshop, (Interim Report No. 3).

Task: 7 DEVELOP THE DRAFT STRATEGIC PLAN

Based on the direction received during the planning session, the Capital Park team will work closely with Municipality staff to prepare a preliminary draft of the new Strategic Plan. The sections of the preliminary plan may include:

- Introduction/Purpose of the Strategic Plan
- Mission Statement
- Vision Statement
- Values Statement
- Strategic Priorities/Areas of Focus
- Goals/Objectives/Actions for the current term of Council
- Longer term Goals/Objectives/Actions (eight to ten years)

We will also work with the senior staff to prepare a preliminary Operational Plan to identify significant projects to focus on over the next few years.

Task: 8 PREPARE DRAFT FINAL REPORT

The Capital Park team will also draft the Final Report, which will be intended to consolidate all of the information from the first three interim reports into one document for use as a reference document by current and future Municipality Councillors and staff.

The Final Report will include:

- Description of the process used to develop the Strategic Plan
- PESTEL analysis
- SWOT analysis
- Results of all surveys and interviews conducted on the project
- Proceedings of the strategic planning sessions
- Any other materials deemed relevant

Task: 9 PRESENTATION TO COUNCIL

The draft Strategic Plan and draft Final Report will be presented virtually to Council either as part of a regular meeting or as a special meeting.

Following the presentations, Capital Park staff will revise the Strategic Plan and Final Report in collaboration with Municipality staff and re-submit them to the Municipality for final approval.

Task: 10 COMMUNICATION PLAN

Capital Park's graphic artist will complete the presentation format of the new Strategic Plan, ensuring that it is fully compliant with the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA and will be accessible to people with disabilities. We will produce professional documents suitable for printing in hard copy and posting on-line.

We will discuss with senior management the most appropriate methods to promote the strategic plan. Some of the options are:

1. *Community Launch Event:* Host a public event to unveil the plan, inviting residents, businesses, and local media to participate.
2. *Website Feature:* Create a dedicated section on the municipality's website to highlight the strategic plan, including a downloadable PDF and key goals.
3. *Social Media Campaign:* Use platforms like Facebook, Twitter, and Instagram to share key elements of the plan, including infographics, videos, and progress updates.
4. *Local Media Coverage:* Partner with local newspapers, radio, and TV stations to cover the release of the plan and its significance for the community.
5. *Printed Materials:* Distribute brochures, posters, or flyers at public spaces such as community centers, libraries, and municipal offices.
6. *Email Newsletter:* Send out the strategic plan to residents through the municipal newsletter, providing a summary of the key priorities and inviting feedback.

7. *Council Meetings & Public Presentations*: Present the plan at town hall meetings and public council sessions to engage the community directly.
8. *Partnership with Local Organizations*: Collaborate with local businesses, schools, and non-profits to help spread the word and ensure the plan reaches different sectors of the community.
9. *Direct Mail Campaign*: Send a summary of the plan to households, ensuring that even residents without internet access can review the municipality's new direction.
10. *Signage and Banners*: Place banners and signs in high-traffic areas around the municipality announcing the strategic plan and how residents can learn more.
11. *Press Release*: Issue a formal press release to media outlets and on the municipal website, outlining the plan's objectives and the benefits it will bring to the community.
12. *Engagement Workshops*: Hold follow-up workshops or forums to discuss the plan's implementation and progress, encouraging continued community involvement.

RESOURCES REQUIRED FROM THE MUNICIPALITY

The Municipality will be required to provide the following:

- Appropriate venues, including multi-media, for the planning sessions and public meetings
- Providing appropriate beverages and refreshments for planning sessions and public meetings
- Publicizing the stakeholder engagement activities and selecting focus group participants
- Assisting with the scheduling of planning session, stakeholder engagement activities and stakeholder review activities to enable the project to be completed on schedule.
- Making available the municipal resources required for some of the options listed above to promote the new Strategic Plan.

SCHEDULE OF WORK

The Gantt chart on the next page shows the proposed project schedule, including milestone deliverables and timelines for each task shown. The schedule aligns with the dates set out in the RFP but can be adjusted in consultation with the Project Authority to respond to changing circumstances.

GANTT CHART

Tasks & Sub-Tasks/Week of	30-Sep	07-Oct	14-Oct	21-Oct	28-Oct	04-Nov	11-Nov	18-Nov	25-Nov	02-Dec	09-Dec	16-Dec	23-Dec	30-Dec	06-Jan	13-Jan	20-Jan	27-Jan	03-Feb	10-Feb	17-Feb	24-Feb	03-Mar	10-Mar	17-Mar	24-Mar
Task 0: Project Launch																										
Kick-off meeting	X																									
Task 1: Review and research																										
1-1 Gather background documents and data																										
1-2 Review all background materials																										
1-3 Research sector precedents & trends																										
1-4 Issue Interim Report No. 1			X																							
Task 2: Internal Stakeholder Engagement																										
2-1 Interview Council members																										
2-2 Interview Township managers																										
Task 3: Organizational Review																										
3-1 Organizational capacity assessment																										
3-2 Service level snapshot																										
3-3 Issue Interim Report No. 2							X																			
Task 4: Virtual Workshop																										
4-1 Prepare agenda, documents & activities																										
4-2 Conduct workshop									X																	
Task 5: External Stakeholder engagement																										
5-1 Identify target groups																										
5-2 Develop survey questions																										
5-3 Implement surveys																										
5-4 Conduct focus groups																										
5-5 Prepare Interim Report No. 3																										
5-6 Issue Interim Report No. 3																										
Task 6: Planning Session																										
6-1 Prepare agenda, documents & activities																										
6-2 Facilitate public meetings																										
6-3 Conduct planning session, SWOT, etc.																										
6-4 Issue Interim Report No. 3																										
Task 7: Develop Strategic Plan contents																										
7-1 Determine sections to be included																										
7-2 Finalize mission, vision and values																										
7-3 Finalize strategic objectives and metrics																										
7-4 Prepare draft Strategic Plan																										
Task 8: Prepare Final Report																										
8-1 Consolidate contents of interim reports																										
8-2 Issue Draft Strategic Plan and Final Report																										
Task 9: Presentations																										
9-1 Present draft Strategic Plan and Final Report																										
9-2 Receive feedback and revise documents																										
9-3 Issue revised Strategic Plan and Final Report																										
Task 10: Communication Plan																										
10-1 Develop communications materials																										
10-1 Support communication plan implementation																										


4. OUR EXPERIENCE IN SIMILAR PROJECTS

Section 2 of this proposal provided a list of similar projects. This section offers a more detailed overview of selected projects, highlighting their relevance to St.-Charles and drawing parallels between these municipalities and St.-Charles in terms of shared challenges and characteristics.

Please note that most of our strategic plans are readily available for viewing on our clients' web sites. The four project descriptions in this section include the relevant URL codes.

- **Municipality of French River:** Capital Park Consulting worked closely with the Municipality of French River to develop both their new strategic plan and economic masterplans for key sectors. As neighboring communities, St.-Charles and French River share many of the same challenges, including rural development pressures, balancing economic growth with environmental stewardship, and addressing infrastructure gaps. Both municipalities are focused on enhancing local services while maintaining the rural character of their regions.
- **Billings Township:** Located at the northern tip of Manitoulin Island, Billings Township has a small, dispersed population, much like St.-Charles. Both municipalities face similar challenges related to rural isolation, limited economic diversification, and aging infrastructure. The strategic planning for Billings emphasized community engagement and sustainable development, themes that align closely with the needs of St.-Charles as outlined in its planning context.
- **Township of Perth South:** Perth South, situated in southwestern Ontario adjacent to the City of Stratford, has a planning context nearly identical to that of St.-Charles. Both municipalities are grappling with the shift toward larger farms run by fewer farmers, a shortage of industrial and commercial activities, and the recent arrival of high-speed internet and natural gas access. Capital Park's work in Perth South focused on leveraging these new infrastructure developments while addressing the challenges posed by agricultural consolidation, providing valuable insights for St.-Charles.
- **Municipality of Sioux Lookout:** Sioux Lookout, located in northern Ontario, also offers relevant parallels to St.-Charles. Like St.-Charles, Sioux Lookout faces the challenges of maintaining services for a small population spread across a large geographic area. The municipality has focused on strategic planning to improve economic opportunities, social services, and infrastructure, which mirror the goals of St.-Charles in its own planning efforts. Capital Park's experience in these areas makes their expertise highly applicable to the needs of St.-Charles.

PROJECT DESCRIPTION: STRATEGIC PLANNING FOR FRENCH RIVER

Project Title: Strategic Planning for French River	
Client Organization: Municipality of French River	
Project Dates: July 2023 to February 2024	
Description of the Project	
<p>The Municipality of French River wanted to conduct a comprehensive Community Visioning exercise to produce a new Strategic Plan. The overall objective was to create a multi-part plan to help guide future decisions and define priorities for Council over the term of the current Council, five years, ten years and beyond. (This strategic planning project was conducted concurrently with the development of six economic master plans for the retail, industrial, tourism, recreation, agriculture and health and social services sectors.)</p>	
<p>Capital Park's services included:</p> <ol style="list-style-type: none"> 1. Review of background materials and research 2. Interviews with municipal management staff 3. External stakeholder engagement through six focus groups and online survey 4. In person planning sessions with members of Council and municipal senior staff 5. Development of the contents of the Strategic Plan 6. Review of draft Strategic Plan by Council and senior staff, amendment as required, and issuance of final version 	
<p>The project also produced new Vision and Mission statements as well as new Strategic Priorities, Goals and Actions.</p>	
Stakeholders Involved in the Project	
<ul style="list-style-type: none"> • CAO and senior municipal managers • Councillors and Mayor 	<ul style="list-style-type: none"> • Social services groups and businesses • Residents and other stakeholders
<p>Relevance of the French River project to this Strategic Planning Project: This project demonstrates our understanding of the municipal sector in Ontario and our success in implementing a strategic planning process for the consensus-based drafting of a Strategic Plan document for an Ontario Municipality</p>	
<p>URL: https://www.frenchriver.ca/p/community-visioning-plan-</p>	

PROJECT DESCRIPTION: STRATEGIC PLANNING FOR TOWNSHIP OF BILLINGS

Project Title: Strategic Planning for Township of Billings, Manitoulin Island	
Client Organization: Township of Billings	
Project Dates: Oct. 2023 to March 2024	
Description of the Project	
	
<p>The Township of Billings required a new Strategic Plan that would outline long term vision and values, alongside medium term objectives to be achieved with short term action plans. Capital Park’s work plan included the following components:</p> <ol style="list-style-type: none"> 1. Review background materials and research 2. Internal stakeholder engagement through interviews with members of Council and Township management staff 3. External stakeholder engagement through four focus groups and online survey 4. Two-day in person planning session with members of Council and Township senior management 5. Development of the contents of the Strategic Plan 6. Review of draft Strategic Plan by Council and senior staff, amendment as required, and issuance of final version <p>The project produced new vision, mission and values statements and strategic priorities as well as a SWOT analysis and a PESTEL analysis.</p>	
Stakeholders Involved in the Project	
<ul style="list-style-type: none"> • CAO and senior township managers • Councillors and Mayor 	<ul style="list-style-type: none"> • Social services groups and businesses • Residents and other stakeholders
<p>Relevance of the Billings project to this Strategic Planning Project: This project demonstrates our understanding of the municipal sector in Ontario and our success in implementing a strategic planning process for the consensus-based drafting of a Strategic Plan document for an Ontario Municipality</p>	
<p>URL: https://billingsstp.ca/wp-content/uploads/2024-2028-Strategic-Plan.pdf</p>	

PROJECT DESCRIPTION: STRATEGIC PLANNING FOR TOWNSHIP OF PERTH SOUTH

Project Title: Strategic Planning for Township of Perth South	
Client Organization: Township of Perth South	
Project Dates: December 2023 to May 2024	
Description of the Project	
	
<p>The Township of Perth South required a new Strategic Plan that would outline long term vision and values, alongside medium term objectives to be achieved with short term action plans. Capital Park’s work plan included the following components:</p> <ol style="list-style-type: none"> 1. Review of background materials and researching Strategic Plan precedents 2. Internal stakeholder engagement through interviews with members of Council and Township management staff 3. Virtual workshop with Township management staff 4. External stakeholder engagement through focus groups, online survey and public meetings 5. Two-day in person planning session with members of Council and Township senior management 6. Development of the contents of the Strategic Plan 7. Review of draft Strategic Plan by Council and senior staff, amendment as required, and issuance of final version <p>The project produced new vision, mission and values statements and strategic priorities as well as a SWOT analysis and a PESTEL analysis.</p>	
Stakeholders Involved in the Project	
<ul style="list-style-type: none"> • CAO and senior township managers • Councillors and Mayor 	<ul style="list-style-type: none"> • Residents • Business owners
<p>Relevance of the Perth South project to this Strategic Planning Project: Perth South’s planning context is remarkably similar to that of St.-Charles.</p>	
<p>URL: https://www.perthsouth.ca/en/township-office/resources/Perth-South-Strategic-Plan---Final.pdf</p>	

PROJECT DESCRIPTION: STRATEGIC PLANNING FOR SIOUX LOOKOUT

Project Title: Strategic Planning Consultancy for Sioux Lookout, ON	
Client Organization: Municipality of Sioux Lookout, Ontario	
Project Dates: August 2019 to June 2020	
Description of the Project	
<p>This project was centred on a stakeholder engagement process that included interviews with Sioux Lookout senior managers and Councillors, an online survey of Sioux Lookout residents, focus groups with organizational stakeholders, and follow-up interviews with some of the residents who completed the online survey and had interesting perspectives. The project also included a series of three workshops with Sioux Lookout’s Council, CAO and Clerk, including sessions to develop the stakeholder engagement plan, review stakeholder input, conduct a SWOT analysis and work on drafting a new vision, mission and strategic priorities for the City. Specific tasks undertaken for Sioux Lookout that are relevant to the assignment for this project include:</p> <ul style="list-style-type: none"> • Facilitating three workshops with Sioux Lookout’s Council, CAO and Clerk to plan a stakeholder engagement process and brainstorm the new strategic plan and develop a set of 5 high level strategic priorities, each of which had a series of goals included • Development and implementation of a stakeholder engagement process that included a “town hall” meeting, focus groups, interviews and an online survey • Presenting a final draft of the strategic plan to Council prior to its unanimous approval 	
Stakeholders Involved in the Project	
<ul style="list-style-type: none"> • CAO and Clerk of Sioux Lookout • Senior municipal managers • Councillors and Mayor 	<ul style="list-style-type: none"> • Social services groups and businesses • Residents of Sioux Lookout • Other stakeholders
<p>Relevance of the Sioux Lookout project to this Strategic Planning Project: This project demonstrates our understanding of the municipal sector in Ontario and our success in implementing a strategic planning process</p> <ul style="list-style-type: none"> • Ability to facilitate planning workshops with board members and senior staff • Consensus-based drafting of a Strategic Plan document for an Ontario Municipality 	
<p>URL: https://www.siuoxlookout.ca/en/your-local-government/resources/2020-05-11-Siuox-Lookout-Strategic-Plan-FINAL--Council-Approved.pdf</p>	

5. REFERENCES

We are providing four references from clients who have obtained similar services from Capital Park Consulting Inc. to those requested in the RFP and described in this Proposal. Project descriptions were provided on the previous pages, including the URL code for viewing the strategic plans in their entirety.

Reference No. 1	
Organization and Address:	Municipality of French River 44 St Christophe St, Noëlville, ON, P0M 2N0
Reference Contact:	Marc Gagnon, CAO
Phone & Email:	Tel/Tél.: (705)898-2294 ext./poste 205 CAO@frenchriver.ca
Project Dates:	2023-2024
Description:	Strategic Planning and Economic Masterplans Consultancy

Reference No. 2	
Organization and Address:	Township of Billings, Manitoulin Island 15 Old Mill Road, Kagawong, Ontario. P0P 1J0
Reference Contact:	Todd M. Gordon Deputy CAO/Municipal Project Manager
Phone & Email:	Mobile: 705-923-6189 (preferred) Office: 705-282-2611 (ext. 224) tgordon@billingswp.ca
Project Dates:	2023-2024
Project:	Strategic Planning Consultancy

Reference No. 3	
Organization and Address:	Township of Perth South 3191 Road 122, St. Pauls, Ontario, N0K 1V0
Reference Contact:	Fred W. Tranquilli Chief Administrative Officer
Phone & Email:	Phone: 519 271 0619 x. 231 ftranquilli@perthsouth.ca
Project Dates:	2023-2024
Project:	Strategic Planning Consultancy

Reference No. 4	
Organization and Address:	Municipality of Sioux Lookout 25 Fifth Avenue, PO Box 158, Sioux Lookout, ON, P8T 1A4
Reference Contact:	Michelle Larose Chief Administrative Officer
Phone & Email:	cao@siouxlookout.ca 807-237-2700
Project Dates:	2019-2020
Project:	Strategic Planning Consultancy

6. BUDGET AND COST

We generally quote a lump sum for our services. A lump sum cost is advantageous to our clients because it provides cost certainty, allowing for better budget management and eliminating the risk of unexpected expenses throughout the project.

For this project, we suggest lump sums for all costs, (other than printing, advertising, etc. for Marketing and Promotion), as follows:

Item	Cost	Notes
Development of Strategic Plan	\$48,750 plus HST	Lump sum
Consultant Travel	\$4,840.00 plus HST	Lump sum
Event Marketing and Promotion (Graphics)	\$3,000 plus HST	Lump sum
Event Marketing and Promotion (Printing, Advertising, Media, Etc.)	\$2,000 plus HST	Allowance

A breakdown of the costs is provided below. (Note that HST has not been included.)

FEES FOR DEVELOPMENT OF STRATEGIC PLAN

The following tables show the projected time on task by team member, the fee schedule for the project team members, and the projected cost by task by team member.

TIME-ON-TASK-BY-TEAM MEMBER

Task	Days on task by team member				
	Tim Hore	Steve Lichty	Suzanne Harrison	Research	Total
0 Project Coordination	No charge				
1 Document Review & Research		2.00	0.50	2.00	4.50
3 Internal Stakeholder Engagement	0.25	2.00	0.50	0.50	3.25
2 Organizational Review	0.25	2.00	2.00	1.00	5.25
4 Workshop	0.25	1.00	0.50		1.75
5 External Stakeholder Engagement	0.25	2.00	1.00	1.00	4.25
6 Planning Session	3.00	3.00	0.25	1.00	7.25
7 Draft Strategic Plan	1.75	4.00	1.00	0.50	7.25
8 Draft Final Report		0.50			0.50
9 Presentations and Revisions	0.25	1.00	0.25		1.50
Total in Days	6.00	17.50	6.00	6.00	35.50
Total in Hours	45.00	131.25	45.00	45.00	266.25

FEE SCHEDULE

Consultant	Tim Hore	Steve Lichty	Suzanne Harrison	Researcher
Per Hour	\$200.00	\$200.00	\$200.00	\$100.00
Per Day	\$1,500.00	\$1,500.00	\$1,500.00	\$750.00

FEES-BY-TASK-BY-TEAM MEMBER

Task	Fees by task by team member				
	Tim Hore	Steve Lichty	Suzanne Harrison	Research	Total
0 Project Coordination	No charge				
1 Document Review & Research		\$3,000	\$750	\$1,500	\$5,250
3 Internal Stakeholder Engagement	\$375	\$3,000	\$750	\$375	\$4,500
2 Organizational Review	\$375	\$3,000	\$3,000	\$750	\$7,125
4 Workshop	\$375	\$1,500	\$750	\$0	\$2,625
5 External Stakeholder Engagement	\$375	\$3,000	\$1,500	\$750	\$5,625
6 Planning Session	\$4,500	\$4,500	\$375	\$750	\$10,125
7 Draft Strategic Plan	\$2,625	\$6,000	\$1,500	\$375	\$10,500
8 Draft Final Report		\$750			\$750
9 Presentations and Revisions	\$375	\$1,500	\$375	\$0	\$2,250
Total in Days	\$9,000	\$26,250	\$9,000	\$4,500	\$48,750

TRAVEL EXPENSES

The travel expenses have been set as follows:

Item	Amount
Travel to and from St.-Charles, (mileage using government rates)	\$2,040
Accommodation in St.-Charles, (at cost, with no markup)	\$1,360
Per diems for consultants while traveling, (using government rates)	\$1,440
Total	\$4,840.00

EVENT MARKETING AND PROMOTION

It is understood that there is a maximum budget of \$5,000 for Event Marketing and Promotion. We suggest dividing this budget into two components:

- Capital Park will prepare presentation versions of the strategic plan and other documents for a lump sum fee of \$3,000.
- The \$3,000 fee is based on two days of work for our Graphic Artist at \$1,500 per day.
- The materials prepared will be suitable for print or on-line. The materials will comply with the Accessibility for Ontarians with Disabilities Act (AODA), that public-facing documents must meet certain accessibility requirements to ensure they are usable by people with various disabilities.
- The remaining \$2,000 of the budget will be used as an allowance to be spent in consultation with the St.-Charles CAO and other client representatives. Possible expenses could be:
 - ✓ Printing
 - ✓ Newspaper advertisements
 - ✓ Social media advertisements
 - ✓ Radio advertisements
 - ✓ Refreshments at public events
 - ✓ Other expenses desired by the client

PROPOSED PAYMENT SCHEDULE

The following payment schedule is proposed:

Payment	Milestone	Amount
1	Delivery of Interim Reports No. 1 and 2	\$16,875 + HST
2	Completion of Planning Session	\$23,215 + HST
3	Completion of Project	\$16,500 + HST
Total		\$56,590 + HST

7. VALUE ADDED

Our clients tell us regularly that they appreciate the added value that is provided through our project methodology. Here are some of the best features.

PUBLIC ENGAGEMENT

The Municipality of St.-Charles has placed a high priority on consultation and community engagement and is looking for innovative ideas on how this feedback can be collected. Here are five general recommendations that we make to all our clients.

1. Design a Process That Can Be Replicated

Community engagement should be a culture, not a one-time event. It is highly recommended that the consultation and community engagement processes that are used to develop the Strategic Plan should be simple to replicate for on-going consultation, not labour-intensive, and have minimal cost.

2. Use Existing Communication Channels

The municipality already has multiple communication channels that can be leveraged to publicize this project and to promote stakeholder participation and engagement. These channels will include:

- Website of the municipality
- Facebook accounts of the municipality
- Social media accounts of the municipality
- Social media accounts of Councillors that are used specifically to stay in touch with constituents
- Websites, Facebook and social media accounts of municipal agencies, (e.g. library) and community partners
- Direct mail or email, e.g. tax bills, utility bills, etc., that go to all households and that can include communication about the strategic planning projects

3. Obtain and Use Longitudinal Data

Our Work Plan suggests on-line surveys for residents and other stakeholders. We recommend taking care to develop the survey questions so that they can be used for similar projects in the future. By using identical, (or very similar), questions the Municipality will be able to analyze the longitudinal data and see how priorities of stakeholders change over time.

4. Pay Particular Attention to Under-Represented Groups

In the early stages of the project, we will review any available data that has already been received and see if there are any groups that are not represented. We will take care to design our survey instruments and publicity channels to capture the views of all groups within the municipality. We will also monitor the feedback as it is received and will bring to the attention of the Project Authority if there is a need to modify or enhance the publicity initiatives to obtain more comprehensive feedback.

5. Be Respectful of Stakeholders' Convenience

Our Methodology suggests public meetings, or town hall meetings. The makeup of these meetings will be discussed and confirmed early in the project, but here are some issues to consider:

- Should public meetings be held at different times to make broader participation possible?
- Should public meetings be held at different venues, so that all parts of the Municipality feel included?
- What briefing materials should be made available to attendees? Can this information be shared prior to the meetings to provide more time for participants to consider the issues and plan their input?

LONG-TERM RESOURCE MATERIAL

The Project Team will produce several interim reports throughout the project. At the completion of the project, all of this data and information will be consolidated into one document, the Final Report, to serve as reference material for future Municipality staff and members of council.

For example, when staff are preparing an application for funding, they may be required to show that an environmental scan was completed, or a SWOT analysis conducted, and that there was public consultation. The Final Report will make it easy to find details about when and how these tasks were completed and the results.

ASSISTANCE WITH OPERATIONAL PLANNING

Capital Park's assistance to senior management to develop an Operational Plan adds significant value by:

- translating strategic goals into actionable steps
- ensuring that the operational plan is aligned with the broader vision
- potentially "test driving" changes that may have been made as a result of the organizational review
- facilitating early detection of lack of resources to ensure the successful implementation of the Strategic Plan.

8. OUR RESUMES

TIM HORE, BA, PMP, RMP

PROFILE

Tim has over 20 years' experience managing consulting assignments for government departments, Non-Government Organizations, post-secondary institutions, ministries of education and private sector firms. He specializes in the planning and implementation of stakeholder consultation processes to inform strategic planning. He is an exceptionally strong team leader, with a knack for determining the appropriate scope and level of effort required to make his projects and teams successful.

Tim's strategic planning work helps organizations articulate competing priorities, conceptualize organizational goals, and determine the best path forward to deliver solid organizational results. He founded Tim Hore Consulting in 2000 and rebranded the firm as Capital Park Consulting in 2013 to better reflect its expanding team. Tim has also been a project manager for Bronson Consulting, Global Development Group and Educational Consulting Services Inc.

EDUCATION AND CREDENTIALS

PMI-RMP (Risk Management Professional), Project Management Institute, January 2016

PMP (Project Management Professional), Project Management Institute, January 2010
BA, University of British Columbia, May 1990

EXPERIENCE RECORD

2013-present President, Capital Park Consulting

2010-2015 Principal, Bronson Consulting

2008-2010 Project Manager, Bronson Consulting

2004-2007 Project Manager & HRD Advisor
CARE Canada & Global Development Group

2000-2013 President, Tim Hore Consulting

1993-2000 Senior Consultant/Director of Marketing, Educational Consulting Services

SELECTED PROJECTS

STRATEGIC PLANNING AND STAKEHOLDER CONSULTATION

- Strategic Plan Facilitation and Development for Resident Doctors of Canada (2017-2018)
- Strategic Plan Facilitation and Development for Transportation Association of Canada (2016-2017)
- Strategic Plan Facilitation and Development for the City of Port Moody (2019 and 2022-2023)

- Strategic Planning for the Hearing Health Association of (2017)
- Research for the Global Research Council Meeting in Ottawa (for NSERC, 2017)
- Lethbridge College – Scoping for an International Strategic Plan (2015-2016)
- Strategic Planning for Abbeyfield Canada (2016-2017)
- Change Management Focus Groups for PSLRB (2014)
- Nanotechnology Case Study Consultations for the S&T Integration Board (2012)
- S&T Integration Board Consultations (2011)
- CARE Zambia Senior Management Committee Retreats (2005-2007)
- Lesotho Water and Sewerage Authority Strategic Consultancy (2006)
- National Survey for the ecoENERGY Retrofit for Homes Program (2008-2010)
- Business Process Review for Environment Canada (2008)
- Needs Assessment for Emergency Preparedness, 2010 Vancouver Olympics (2008)
- Study of Innovation in the Not-for-Profit Sector (2006-2007)

OTHER DOMESTIC PROJECTS

- City of Ottawa Municipal Fleet Emissions Reduction Strategy (2008-2009)
- Training Impacts Assessment for the SmartDriver Training Programs (2009)
- Program Impacts Evaluation for NRCan (2014-2015)
- Home Energy Efficiency Toolkit for NRCan (2011 to 2012)
- Youth Energy Efficiency Workshops for NRCan (2010)
- National Lighting Compliance Survey for NRCan (2010)
- ecoENERGY Retrofit Industry Program Recipient Audit Framework (2009)
- AANDC Project Manager training for the Giant Mine Remediation Project (2013-2015)
- Training for Regional Program Officers for AANDC (2011)
- Administrative Services for Overseas Advisors for Agriculture Canada (2007)

INTERNATIONAL

- CARE Zambia Human Resources Classifications Project (2006-2007)
- CARE Indonesia Human Resources Audits (2006-2007)
- Algonquin College – Saudi Arabia Colleges of Excellence (2013-2015)
- Algonquin College –New Campus in Jazan, Saudi Arabia (2012-2013)
- Project Director for Canadian International School, Cairo (2004)
- Teacher Training, Swaziland Ministry of Education (1998-1999)
- Curriculum Development, Swaziland Ministry of Education (1998-1999)
- CIDA Open Learning/Distance Education Project in Zimbabwe (1998)

STEVE LICHTY, LL.B., CHRL

PROFILE

Steve specializes in organizational planning and development issues focusing on the public sector and broader public sector. During his career Steve has worked as the Chief Executive Officer (CEO) of a health care organization, a Dean and Director of a college, a consultant for government ministries and agencies, and as a lawyer.

Steve has extensive expertise assisting clients to develop their strategic plans and then to establish the processes to align their strategic priorities with their annual corporate business plans and the performance objectives of their managers.

EDUCATION AND CREDENTIALS

- Certificate in Long-Term Care Management, Canadian Healthcare Association, 2016
- Certificate in Human Resources Management, Human Resources Professional Association, 2009
- Planning Institute, Society for College and University Planning, 2007
- ISO 9000 Lead Auditor, Canadian Standards Association, 1998
- ISO 9000 Internal Auditor, Canadian Standards Association, 1998
- Bar Admissions Course, Law Society of Upper Canada, 1980
- Bachelor of Laws, University of Western Ontario, 1978
- Undergraduate studies in Business and English, Wilfrid Laurier University
- Courses in negotiations, mediation, conflict resolution and dealing with the media.

EXPERIENCE RECORD

2013 to present	Senior Consultant, Capital Park Consulting Inc.
2014 to 2019	Chief Executive Officer, Tri-County Mennonite Homes
2009 to 2022	Executive Director, Polaris Educational Planners Inc.
2005 to 2009	Director, Organizational Planning/Development, Georgian College
2001 to 2005	Dean, Community and Business Development, Georgian College
1996 to 2001	Executive Director, Polaris Educational Planners Inc.
1988 to 1996	Vice President, Educational Consulting Services Inc.
1985 to 1988	Assistant to the President, Educational Consulting Services Inc.
1980 to 1984	Lawyer, Wade, Waters, Haney and Lichty

SELECTED PROJECTS - STRATEGIC PLANNING

Strategic Planning for Ontario Municipalities (2023): Steve has recently served as the Project Manager for the development of Strategic Plans for the Town of Cobourg, Municipality of French River, and the Townships of North Frontenac and Central Frontenac.

City of Timmins Strategic Plan for Long-Term Care: Steve served as the Project Manager to develop a new Strategic Plan for Golden Manor, a municipal LTC home in Timmins.

Strategic Plan Development for the City Quinte West: Steve was a member of the team that helped the City of Quinte West to develop its new Strategic Plan.

Independent Living Services for Simcoe County and Area: Steve led the visioning and planning processes for a new Strategic Plan to guide a community services agency through several major transitions. The deliverables included a five-year Strategic Plan and a one-year Operational Plan.

Tri-County Mennonite Homes (TCMH) Strategic Plan: Steve led the team for a new strategic plan that introduced a consultative process to involve all stakeholders.

Georgian College Strategic Plan: In consultation with the College Board of Governors, Steve led the development process for a new Strategic Plan. He used an iterative process that enabled stakeholders to review and provide input at all stages.

Human Resources and Skills Development Canada (HRSDC): Steve was commissioned to write a manual on Strategic and Operational Planning for the Small and Medium-Sized Enterprises (SMEs) sector.

SELECTED PROJECTS – PROJECT MANAGEMENT

Ontario Ministry of the Environment: Steve served as the Project Manager on a series of projects to assist the Ontario Ministry of the Environment to respond to the recommendations of the O'Connor Inquiry in the aftermath of the Walkerton incident.

Thai Department of Labour: Steve served as the Project Manager for the transformation of the technical training system into one that is competency-based.

Dubai Civil Defense: Steve was retained to deliver a training program to officers in the Dubai Fire Department to obtain international certification.

Higher Colleges of Technology, United Arab Emirates: Steve was the Project Manager for the design and establishment of the national college system in the UAE. This project was awarded the Comenius Medal for Excellence by UNESCO.

Ministry of Finance, Oman: Steve was retained to develop detailed capital and summary operating budgets for a 25-year period for KG to Grade 12 education.

Yemeni Ministry of Social Affairs and Labour: Steve was the Project Manager for the design of a national polytechnic system in Yemen.

Ontario Ministry of Housing: Steve was retained to develop the training programs to teach municipal service providers the new funding model for affordable housing.

Sioux Lookout Meno Ya Win Health Centre: Steve was the Project Manager for the Functional Programming for a new long-term care facility in Sioux Lookout.

SUZANNE HARRISON, B.COMM, MA

PROFILE

Suzanne Harrison is a bilingual consultant and human resources professional with over 25 years of experience working with both private & public sector organizations. Her areas of expertise include an in-depth knowledge of Canadian and American labour legislation, compensation management and training and facilitation. Suzanne has extensive experience in survey development and administration with a background in data analysis and interpretation. She is also an experienced facilitator of workshops and focus groups, and she is skilled in conducting stakeholder interviews in both English and French.

EDUCATION AND CREDENTIALS

Master of Industrial Relations, Queen's University, 1995
Bachelor of Commerce (Honours), Queen's University, 1992

EXPERIENCE RECORD

2022-Present	Senior Consultant, Capital Park Consulting
2015-Present	Partner, Benchmark
2005-2015	Senior Consultant, Espial Group Inc.
2009-2011	Senior Consultant, Nakina Systems Inc.
2001-2006	HR Consultant and Facilitator, Government of Canada
1996-1998	HR and Corporate Services Officer, Sanga International
1992-1994	Research Analyst, Ernst and Young

SELECTED PROJECTS

Provision of HR leadership for Espial Group Inc.: Espial is a 100+ employee Ottawa based Technology Company. Espial completed a successful Initial Public Offering on the TSX in June 2007. Responsible for recruitment, performance management, compensation, policy development and legal compliance, employee and management development and occupational health and safety. Worked closely with the CFO and Executive team to ensure that HR was delivered in an efficient and timely manner.

Program and Policy Consulting: Reviewed and updated all HR policies and programs for Nakina Systems Inc. to ensure SOX compliance. Implemented several new initiatives such as employee reference checks and drug screening. Responsible for HR activities such recruitment initiatives, compensation and employee training.

HR and Facilitation Services for various Federal Government departments including Environment Canada and the Public Services Commission. Specific assignments included the following projects:

- Developed the 2004-2006 HR plan for Environmental Protection Services Canada. This entailed facilitating sessions in English and French with all employees within the Environmental Protection Services (EPS) to obtain input and feedback on current management and human resource practices and writing an output report
- Interviewed all management staff (65) within the Environmental Conservation Services (EPS) to obtain input on the future direction of the Service, the organization structure and human resource issues. Wrote the output report and subsequent 2003 human resource plan.
- Facilitated sessions for the Public Service Commission of Canada with all employees in the Human Resource Directorate regarding the Public Service Survey results
- Analyzed the Public Service Commission's competency profile process and made recommendations to streamline the process and reduce duplication. Responsible for developing all new supporting documentation, conducting a pilot and implementing the new process throughout the PSC
- Wrote the PSC's Human Resource Strategy

Provided HR and Corporate Services for Sanga International Corporation: Worked with this fast-growing start-up as it grew from 10 to 300 employees in less than 3 years. Responsible for all human resource functions, facilities and administrative functions in Ottawa, Boston and Barbados

Conducted research and statistical analysis for public sector clients on behalf of Ernst and Young Consulting in the areas of strategic human resource management, business policy and program evaluation.

DOMINIC SCOZZAFAVA, BSC, MBA, MPH

PROFILE

Dominic is currently working as a Researcher with Capital Park with a focus on projects involving program review and change management. His duties include literature reviews, research, data analysis, and report writing.

Dominic has significant experience in conducting interviews and focus groups, particularly in assessing an organization's preparedness for organizational change.

EDUCATION AND CREDENTIALS

- Master of Business Administration – Master of Public Health (MBA-MPH), Concurrent Degrees, Brock University, 2023
- Bachelor of Science, Honours Life Sciences, McMaster University, 2021

EXPERIENCE RECORD

Research Assistant

Capital Park Consulting, Ottawa, Ontario

September 2023 – Present

- Lead researcher for the development of a new strategic plan for the City of Thorold. Conducted interviews with the mayor, council members and senior managers. Leading external stakeholder engagement activities, including facilitating focus groups and analyzing results of online residents' survey.
- Conducted a scoping review to explore the opinions on Canada's COVID-19 pandemic preparedness and response in academic literature
- Conducted a historical review to investigate lessons and recommendations for improvement identified after infectious disease outbreaks and pandemics in Canada

Master of Public Health Remote Student – Interprofessional Practice

BC Mental Health and Substance Use Services, Vancouver May 2023 – August 2023

- Conducted a literature review to identify the best practices for facilitating organizational culture change
- Led and analyzed interviews with organizational stakeholders to evaluate their readiness for change, as well as gather their opinions on the current organizational culture and their suggestions for creating change
- Created a trauma-informed practice (TIP) organizational culture change framework to guide the organization through the culture change process

- Supported and informed the change management working group in the creation of the trauma-informed practice educational material for organizational leaders

Master of Public Health Student – Reproductive & Child Health

Niagara Region Public Health, Thorold, Ontario

May 2022 – September 2022

- Conducted a literature review to examine and identify public health nurse orientation strategies that are in line with current, evidence-based best practices
- Conducted interviews with public health nurses to gather insight on the current orientation practices
- Completed a Gap analysis to identify disparities between the current and desired states of nurse orientation
- Presented the project findings and recommendations for improving nurse orientation to management

Manufacturing Technician

Norgen Biotek, Thorold, Ontario

April 2020 – August 2020

- Manufactured COVID-19 collection and RT-PCR test kits used by major government organizations
- Conducted quality control to ensure that the testing and collection kits were properly manufactured and that a high-quality product was being produced

9. CONFLICT OF INTEREST DECLARATION

Capital Park Consulting Inc. has carefully examined the conditions attached to this Request for Proposal and is prepared to perform the work as outlined in this document in an expedient, professional and workmanlike manner, promptly and as directed by the Principal Contact.

No person, firm or corporation, other than Capital Park, has any interest in this proposal or in the proposed services for this proposal.

This proposal is made without any connection, comparison of figures, or arrangements with, or knowledge of any other corporation, firm or person making a proposal for the same Service and is in all respect fair and without collusion or fraud.

No member of the Staff or Council of the Municipality of St.-Charles has or will become interested directly or indirectly; as a contracting party, partner, shareholder, surety or otherwise; or in the performance of the Service; or in the supplies, service or business to which it relates; or in any portion of the profits thereof; or in any of the monies to be derived there from.

The content and requirements of this RFP have been read and understood. All prices are quoted in Canadian funds.

DATED AT OTTAWA THIS 9TH DAY OF SEPTEMBER 2024.



Tim Hore
President
Capital Park Consulting Inc.