

Proposal

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

RFP

September 4, 2024

Prepared for:

The Corporation of the Municipality of St.-Charles

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Submission by:

Overlap

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Overlap_

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Introduction

The Municipality of St.-Charles is embarking on a transformative Community Strategic Planning process to develop a visionary new Strategic Plan. This plan will set a compelling vision, define organizational priorities, and guide day-to-day decision-making, positioning the organization for sustained success over the next 10 years.

The Municipality is seeking to develop a comprehensive Community Strategic Plan to guide its growth and development over the next decade. This plan will establish a shared vision and set priorities for the community, ensuring that future development aligns with the aspirations and needs of residents, businesses, and stakeholders. The strategic plan will not only focus on immediate goals but will also lay the groundwork for long-term objectives that extend beyond the current term of Council, creating a clear path for the community's future.

This strategic planning process offers an opportunity for the MSC to develop a new strategic plan that is responsive and resilient to future change and complexity, while addressing current and immediate organizational challenges and opportunities.

The process begins with a comprehensive Project Kick Off, where we align expectations, set up communication channels, and establish clear project goals. This phase is crucial for organizing initial meetings with key stakeholders, discussing objectives, addressing challenges, and presenting our strategic methodology. Following this, an Engagement phase is conducted to gather vital internal and external data. Through internal analyses, external research, and stakeholder engagement, we collect insights that inform our strategic direction.

Next, we facilitate a Strategy Retreat to align the leadership team on strategic priorities. This involves reviewing the environmental scan, engaging in visioning discussions that form the foundation of a 5 year vision. From there, we work closely with your leadership to develop actionable Objectives and Key Results (OKRs). These OKRs are then translated into a detailed, multi-year plan, ensuring that strategic priorities are effectively operationalized at both organizational and departmental levels. Through this structured and collaborative approach, we pave the way for sustainable growth and long-term success.

The final Strategic Plan will eloquently convey the powerful story of the Strategic Vision and act as a pivotal guiding document, uniting and inspiring action across your organization.

Overlap is well-positioned to draw from our many collaborations with government agencies, municipalities, healthcare, housing, not-for-profit and membership-based organizations on their strategy initiatives to seamlessly support your Strategic Plan. **Strategic planning is incredibly rewarding work and we would be thrilled to work with you in a leadership capacity to support the creation of this new Strategic Plan.**

Company Profile

Overlap is a team of strategists, facilitators, and coaches. We help organizations identify and accelerate their most important work.

Overlap provides thoughtful engagement expertise alongside strong facilitation, system thinking, and strategic planning services in not-for-profit, public and private sectors. We work with teams to draw out insights, generate relevant ideas, and arrive at practical, actionable solutions—enabling organizations to make headway on their most complex initiatives.

Since 2011, Overlap has led strategic initiatives with over 100 clients, some of which include:

- **Township of Woolwich** | Community Engagement, Strategic Planning (2024)
- **City of Stratford** | Council & Community Engagement, Strategic Planning (2023-2024)
- **The Grove** | Youth Engagement, Brand Development & Implementation (2021)
- **City of Guelph** | Innovation Framework & Implementation Plan (2022)

At Overlap, we don't just consult; we design for good. Our Strategy by Design approach is deeply rooted in human-centered design, a philosophy that is empathy-fueled, iterative, and collaborative. We place stakeholders and their shared goals at the heart of our process, fostering an inclusive and accessible environment for strategic thought and action.

Collectively, our team has many years of proven experience designing and leading engagement to understand people and their needs; guiding groups to generate richer and more diverse ideas; helping teams communicate, prioritize, and make consensus-based decisions together and guide organizations through transformative change.

Overlap is a longstanding pre-qualified Government of Ontario Vendor of Record (VOR) in Management Consulting Services (Tender #17892) in the roles of Strategic Public Engagement Specialist and Organizational Transformation.

Based in the heart of Waterloo Region's Innovation District, our dedicated, dispersed team is accessible to you for both in-person and virtual engagements. We have a second office based in Leeds (UK) at Nexus, the Innovation Centre at the University of Leeds, and operate in Nova Scotia based out of the Annapolis Valley.

Overlap is proudly certified as a [Women-Owned business](#) with WEConnect International.

Our Experience

Our multi-sector experience is a benefit because we don't approach planning with a narrow view.

We leverage the knowledge, insights and experience we've gained from working with Executive Leadership teams, staff, elected officials, community members, professionally designated individuals, and Boards across our project deliveries—giving us a head start in understanding how to surface and solve for the challenges and opportunities organizations face.

City of Stratford | Council & Community Engagement, Strategic Planning



Throughout 2023-24, Overlap completed work on the City of Stratford's newest Strategic Plan. The aim of the strategic planning process was to bring the perspectives of its diverse residents into its municipal planning process and develop resident-informed Strategic Priorities. Overlap led community engagement activities—including a Public Open House and survey to seek feedback from diverse groups, including the local business sector, non-profit health and social sectors, City staff and council, and the general public.

Engagement insights were brought into strategic planning workshops, designed and facilitated by Overlap, with City staff, Council, and the Mayor to develop a draft set of Strategic Priorities. Residents' feedback helped to revise and refine the priorities developed by Council, resulting in community-informed strategic directions. From there, Overlap worked with the City to develop relevant, meaningful and easy-to-measure performance indicators through facilitated conversations that City staff could implement.

Reference: Emily Robson, Corporate Initiatives Lead

E: erobson@stratford.ca

T: 519-271-0250

Township of Woolwich | Engagement, Strategic Planning

The Township of Woolwich engaged Overlap Associates to lead community engagement and create their 2025-2034 Strategic Plan. The client wanted to focus on long-term planning that reflect changing demographics within the township. The aim was to involve the entire community in the strategic development process to ensure the plan could be easily articulated and embraced by all stakeholders. To support the client with this goal, Overlap conducted and facilitated focus groups and an online survey with various interest-holders, with an emphasis on engaging with youth and interest-holders from special interest groups.

The result of the engagement innovative and inclusive engagement methods and strategic workshops was a Strategic Plan that captured diverse perspectives and fostered a sense of collective ownership.

Reference: Rae Ann Bauman, Executive Officer

E: rbauman@woolwich.ca T: 519-669-6021

Guelph Public Library | Various Projects

Since 2017, Overlap has worked with the Guelph Public Library on community engagement and strategic initiatives. Throughout the collaboration Overlap has engaged over 1,700 stakeholders through various engagement methods including, Street Teams, Surveys, and Stakeholder Labs. Insights from these activities were used during a strategic retreat to address challenges in creating an inclusive space at the Library. This led to new mission and vision statements, which guided the 2018-2022 Strategic Plan. In 2021, Overlap helped to refresh the plan, focusing on pandemic impacts and future priorities, and conducted a Governance workshop to support the Board's upcoming transition. Currently, Overlap has been working with the Guelph Public Library to create an innovative 2025-2029 Strategic Plan.

Reference: Dan Atkins, Acting CEO

E: datkins@guelphpl.ca

Our Team

Our team is dedicated to meaningful engagement, co-design, and organizational transformation.

We are a team of strategists who share a singular, unwavering focus to deliver exceptional value for our clients. Overlap has always approached our project work with a view toward collaboration.

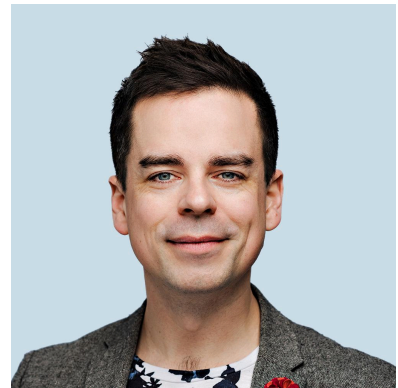
We have assembled an enthusiastic team with the experience, depth and knowledge needed to successfully deliver this project. Our team offers you leadership in the fields of design, engagement, facilitation, communications, and experience delivering successful strategic plans.

We will add our team's experiences to yours and build on the foundation that has already been laid to inspire confidence in trying new approaches and testing new methods. We innovate at every step through our process and we will be your trusted partner throughout this initiative.

Executive Strategy Lead Facilitator—Brock Hart, Chief Design Officer

Brock will lead the Strategic Planning facilitations and act in an advisory capacity for the MSC and Overlap teams at periodic touch points throughout the project.

As Overlap's co-founder and Chief Design Officer, Brock is a passionate advocate for human-centered design's transformative power. A trusted advisor across diverse sectors, including municipalities and townships, housing, not-for-profit, mental health & addictions, healthcare, and education, Brock excels in facilitating visionary thinking and driving true transformation.

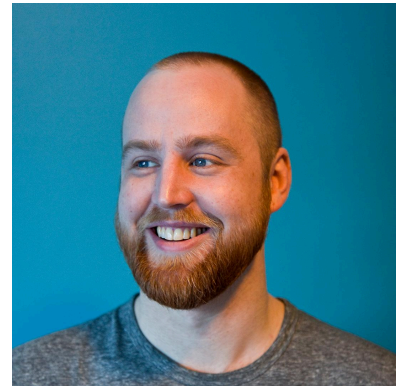


An engaging and natural facilitator, Brock has developed and refined Overlap's award-winning facilitation methodologies over the last 15 years. He has led dozens of strategic planning initiatives spanning sectors—including most recently with the **City of Stratford, Township of Woolwich, Doctors without Borders, and the Toronto Foundation**, demonstrating a proven ability to guide organizations through comprehensive planning processes, ensuring alignment with overarching goals and objectives.

Project Manager & Project Lead—Lee Cookson, Senior Consultant

Lee will be the Project Manager and your primary point of contact. He will lead the project, including overseeing research and engagement and support strategic planning conversations and the development of the final Strategic Plan.

Lee is an arts and culture leader with expertise in strategy, engagement, and service design. He holds a BFA in Theatre and Creative Writing from the University of Victoria, and is a graduate of the Arts and Cultural Management program at Grant MacEwan University. With 15+ years of experience in the arts and culture sector as an administrator, facilitator, artist, and producer, Lee values the role art plays in creating thriving communities and empowering individuals to engage with them.



Lee's passion for arts and culture has led him to work with artists, arts organizations, and arts funding bodies on strategic planning and engagement initiatives including with: **Banff Centre for Arts and Creativity, Vancouver East Cultural Centre, Calgary Arts Development Authority, Exposure Photography Festival,** and the **Capital Regional District Arts & Culture Support Service.**

Project Analyst—Amy Laughlin, Consultant

Amy will support across the arc of the project, supporting engagement, facilitations and the development of the final Strategic Plan document.

Amy holds a Bachelor of Knowledge Integration and a Computing Minor from the University of Waterloo. In leveraging her 4 years of experience in interdisciplinary studies, Amy actively engages with human-centered design and effectively collaborates across disciplines. She seamlessly adapts to different environments and supports the successful execution of various projects.



Proposed Work Plan

The following work plan follows Overlap's Strategy by Design framework to achieve objectives across what will be a fast-paced and highly collaborative initiative throughout engagement and strategy planning.

We have broken down the project into phases so our teams can progress through the process in an intentional manner and calibrate project milestones and deliverables as they emerge. Our Strategy Plans create alignment and gain momentum during implementation because they're informed and co-created by the people that are accountable for successful execution.

Phase 1: Project Planning

Project Planning Meeting: We will schedule a one-hour virtual planning meeting between each of our project leads and other key project team members to review our proposed approach and discuss a range of details connected to getting started with the project. This project planning meeting is aimed to establish alignment between our teams and solidify our approach to the work.

Ongoing Check-in Meetings: We will also schedule a cadence of regular, project check-in meetings to cover the following four points: *victories* (what we achieved to-date), *issues* (any obstacles that have emerged), *priorities* (what is getting done next), and *metrics* (how is the project progressing). In between meetings, we'll also ensure consistent and appropriate communication regarding project progress via email.

Background Materials Research/Review: We believe that gaining organizational context is critical ahead of engagement and strategy development. We note that there are a range of highly relevant materials that have been completed in the last few years, including previous interestholder engagements. We will review the set of materials and glean helpful information that will shape our engagement plan and inform strategic planning.

Kick Off & Engagement Planning Workshop: For this two-hour virtual workshop, we typically meet with the core team who will be directly involved in the process. Overlap will facilitate this workshop to discuss your high-level vision for the work, get a better sense of timing for this initiative and mutually agreed-upon timelines, and establish clear communication channels, roles and responsibilities across our teams. We will also take time to discuss relevant stakeholders that you would like to engage with in this process and the best engagement method for participation with each audience. This meeting is aimed at aligning our collective teams to the strategic planning process and gaining a shared understanding of what success looks like.

Phase 2: Engagement & Insights

Engagement, grounded in human-centred design, is a dynamic process that goes beyond data collection to understand the lived experience and varied needs of individuals that may significantly influence an organization's strategy. Numbers justify change, but qualitative insights derived from your interest holders will be the fuel for designing change.

Our engagement design approach allows us to tailor-design engagement activities that are highly participatory, prompt new ideas, solutions and ensure their voices are heard and included as part of the strategic planning process.

As a starting point, we have scoped for a mix of activities that we feel best suit MSC's needs and RFP requirements.

The following mix of activities will be further tailored collaboratively with you as we dig into the project together and can be further tuned to your budget if needed.

Below are our recommended engagement activities:

- **Engagement/Consultation Sessions:** structured and engaging facilitation for 8–25 people that mine for specific insights and information from identified interest holder groups. Through a highly participatory and facilitated discussion, we'll seek to understand the gaps and priorities interestholders have, as an input to the strategic plan and focus for the next few years.

We are proposing **four (4)** in-person Engagement/Consultations to engage with staff, community, and other relevant stakeholders over a two or three day period. The intended participants for each lab will be determined with you during the planning phase.

- **Engagement Survey:** A thoughtfully crafted online survey enables us to engage a large number of interestholders across the MSC ecosystem. This method allows for analysis of trends, preferences, and opinions within the populations you serve, offering a more comprehensive understanding of prevailing sentiments.

Leveraging MSC's online network, social media accounts, mailing lists, website and engagement platforms to promote the survey, our surveys always include a mix of both close-ended and open-ended approaches to gathering feedback.

We are proposing **one (1)** online survey to engage across MSCs intended interestholders.

- **Information Interviews:** One-on-one interviews with key people provide deeper qualitative insights into perceptions, concerns and expectations regarding the MSC's new strategic plan. Interviews are conducted remotely via phone/Zoom.

We are proposing **five (5)** Information Interviews with Council members, staff, and/or community members to allow for a range of perspectives.

Generating Insights: Following our engagement, our focus shifts to translating data into actionable insights that directly inform your strategic decision-making. We analyze the gathered information, considering both immediate and future implications for the MSC's goals. Our goal is to distill meaningful insights that not only reflect the current environmental landscape but also provide foresight into potential shifts.

This process equips your team with a strategic lens, enabling you to make informed decisions aligned with both short-term adaptations and long-term organizational aspirations. Through this tailored analysis, we empower you with the strategic foresight needed to navigate a dynamic and ever-evolving environment.

Phase 3: Facilitated Strategy Retreat

Overlap's Strategy by Design approach integrates co-creation, facilitation, and human-centered design for visionary planning that seamlessly transitions into actionable implementation.

Our approach to facilitation will lead to new ideas founded in the knowledge and experiences of your leadership participants—and working this way will get the people involved reinvested in the most pressing issues and excited about working collaboratively toward a shared vision of the future.

Full-Day, Facilitated 'Strategy by Design' Retreat: Over the course of this full-day, in-person Retreat, the group will be expertly led by Overlap's Chief Strategy Officer, Brock Hart, through a series of intentional discussions. Beginning with a review of the insights, participants will start with big-picture thinking and then converging around a Vision and supporting set of Key Enablers. The shared understanding coming out of this 'strategic thinking' time together will form the foundation that supports future Strategic Planning discussions and development of the plan itself.

We will work with you to clearly identify the best mix of participants (Steering committee, Executives, Members, etc.) who are in a position to make directional and meaningful contributions to this strategy development.

We will tailor the details of the agenda together. For the purposes of this proposal, this is an outline of our Strategy by Design approach:

- **Future Vision & Strategic Objectives:** Setting aspirational and strategic goals for the coming years; we will review engagement insights and Overlap's facilitators will guide participants through a process to imagine and plan what CFNEO might achieve in the next few years. Our consensus-building facilitation will bring together individual ideas and goals to create a flexible and robust set of updated strategic objectives;

- **Obstacle Framework:** Having established a Vision, it's important for the team to understand what may prevent the vision from being realized. By spending time intentionally considering what stands in the way of achieving the priorities, we can proactively address these issues and avoid becoming stuck during implementation. Obstacles frameworks encourage shared ownership of what is standing in the way of achieving success and generate a joined-up sense of empowerment among the entire team to tackle challenges with a positive frame of mind.
- **Key Enablers to Overcome Obstacles:** Together, we will develop key actionable strategies that provide a structured way of overcoming previously identified obstacles—setting direction and guiding action. Creating strategies that overcome obstacles is a highly effective way of achieving a goal.

The shared understanding of coming out of this 'strategic thinking' time together will guide your team toward success as we move into strategic planning development.

Phase 4: Strategic Planning Co-Development

At this point in the process, we typically work with a smaller group of senior leaders and staff.

Through a series of regular check-ins, collaborative meetings, and some 'internal team homework' in between, Overlap will coach you through the process to refine the Plan Vision and set Objectives & Key Results (OKRs), as well as Key Performance Indicators (KPIs).

These meetings are done virtually and are supported by a digital workspace where your Plan starts to take shape. Discussions typically include:

- **Refine Plan Vision - Goal Setting & Alignment:** With your Strategic Retreat as the backdrop, we will discuss and select the strategic objective that best captures the primary goal for this strategic plan cycle. This overarching goal becomes "the story of the plan" that ensures alignment and commitment to a shared outcome.
- **Refine Objectives & Key Results (OKRs):** The next step in this process is to develop a set of objectives that will help you achieve your identified primary goal. Working with your senior team, Overlap will provide guidance as your team refines and aligns the other objectives to the primary goal and identifies Key Results (OKRs). This process may happen over a few meetings/conversations with some homework in-between.
- **Validation & Feedback:** With your OKRs developed, we encourage leaders to engage interestholders in feedback to provide an opportunity for further engagement and sensemaking of the Plan. We find this collaborative process helps build buy-in for those closest to activating the Plan. This feedback will be reviewed by the senior team and incorporated into the Plan.

- **Key Performance Indicators (KPIs) & Monitoring / Scorecard:** Informed by your OKRs, we will identify Key Performance Indicators (KPIs) together and customize a Scorecard tracking tool that will provide a set of measurable targets (key metrics) that CFNEO will use to monitor and assess progress on the organization’s performance overall.

We will coach your team on how to best monitor progress on your goals. As an example—a potential output from this work may be a draft set of Key Performance Indicators (KPIs) that will provide a set of measurable targets (key metrics) that you will use to monitor and evaluate progress on the organization’s performance overall.

Plan Writing, Feedback and Refinement: Throughout these conversations, Overlap will produce an initial draft Internal Strategic Plan document that articulates CFNEO’s Vision, reflects the overarching Strategic Objectives & Key Results (OKRs) and outlines next steps in the implementation and tracking process.

We will deliver the Plan for review and further refine the Strategic Plan based on your feedback.

OPTIONAL ADD-ON

Additional Engagement Activities: The MSC may wish to consider the following engagement activity as an addition to phase 4:

- **Community Feedback Sessions:** In these sessions, we will share draft elements and facilitate a conversation to gather feedback on the draft priorities. These sessions will be used to revise and finalize the content of the Strategic Priorities, and center the voices of the community in the plan.

FINAL DELIVERABLE: Strategic Plan

What distinguishes Overlap is our unique approach to bringing content to life for our clients. We will articulate the vision and aspiration of the Plan with a strong, inspiring narrative.

We find that tying strategy to hope and optimism is an important aspect of fostering a movement around the Strategic Plan. Emphasizing the influence of storytelling and visual design, we firmly believe that our commitment to design excellence sets Overlap apart from traditional consulting practices.

Upon approval of the draft, Overlap will produce a final, lightly visually designed Strategic Plan, which can be used to support your annual plan development and communications.

The Strategic Plan will outline your goals and provide a clear roadmap for achieving them—leaving your team with a sense of ownership and clarity, ready to activate your new Strategic Plan.

Proposed Timeline

This is our recommended timeline based on our understanding of your goals. We are always happy to refine this scope and timeline to meet your needs.

As we plan our work together, we will use the following timeline and project outline as a starting point. We will work alongside you during our initial planning to refine a final approach and project timeline.

Week	Activities
September	Contract Award & Initial Project Planning Meeting Deliverable: Confirmed Project Workplan Background Materials Research/Review
October	Kick Off & Engagement Planning Workshop Engagement Design & Planning Deliverable: Engagement Plan Engagement Survey Launch
November	Engagement Survey On-Going Engagement/Consultation Sessions Information Interviews
December	Synthesis & Analysis of Engagement Data Retreat Planning Deliverable: Retreat Event Brief <i>Note: The Overlap offices will be closed Dec 21 - 29</i>
January 2025	Retreat Planning Strategic Planning One-Day Retreat Strategic Planning Co-Development Strategic Plan Writing
February	Strategic Planning Co-Development Strategic Plan Writing Deliverable: Strategic Plan Draft
March	Strategic Plan Feedback and Refinement Deliverable: Final Strategic Plan

Pricing

Phase 1: Project Planning

Project set-up
Initial Planning, Kick Off Meetings
Engagement Planning
Background Materials Research/Review
Ongoing Project Management

Phase Total \$5,995.00

Phase 2: Engagement & Insights

Engagement Design
Survey (1)
Engagement Labs (4)
Information Interviews (5)
Synthesis & Analysis
Insights Summary

Phase Total \$17,200.00

Phase 3: Facilitated Strategy Retreat

Strategy Session Design
Strategic Planning Retreat

Phase Total \$15,950.00

Phase 4: Strategic Planning Co-Development

Strategic Plan Development, Writing & Refinement
Final Deliverable: Final Strategic Plan

Phase Total \$8,620.00

Project Sub-total..... \$47,765.00 + HST

Travel Estimate..... \$5,000.00

Project Total \$52,765.00 +HST

Notes on budget

Considerations: If our budget does not align with your vision of the fees and the scope of work, we would be happy to discuss further tailoring the scope and approach to best meet your needs.

Scope Changes: The above budget is inclusive of the services and deliverables outlined in our technical submission. Should the scope of the work change during project execution, we reserve the right to quantify the cost of project changes to the client team. No additional costs will be charged without prior client approval.

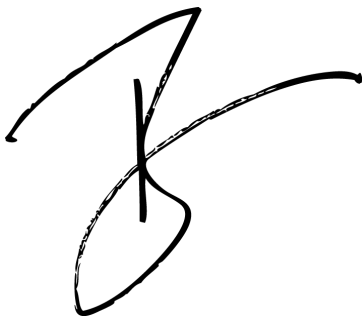
Expenses and Travel Costs: We have budgeted for two in-person visits, one for engagement and the other for the strategic retreat. Once we have a confirmed workplan Overlap travel expenses (including transportation, accommodation, and per diems) will be approved by the client ahead of the event and billed upon completion of the work.

Thank You

We would like to thank you for considering Overlap and giving us the opportunity to present this proposal.

We are truly honoured by the work we get to do and we hope that we can bring the best of what we do to support this most important initiative.

Please let us know if you have any questions.

A handwritten signature in black ink, appearing to be 'Brock Hart', written in a cursive style.

Brock Hart
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