

Report to Municipal Council



Meeting Date: September 26, 2024	Report Date: September 24, 2024
Reason Before Council: Policy Direction / Approval	Priority: Normal
Department: Planning & Development	Type of Meeting: Special Meeting

Report Title: Strategic Plan - Reference Checks

Recommended Resolution:

That Council review the comments made by references and decide on the preferred proponent to prepare the Strategic Plan.

Analysis & Background:

I emailed all the references that were listed in the eight (8) proposals except a few that had only phone numbers. On average they included three (3) references. Please note that some references were out of office and did not reply in time for this report. There is at least one (1) reference per proponent.

To make the process fair, I sent out a list of questions to all and only followed up when requested.

A. Compass Point:

1. Town of St. Marys

Good morning, Denis,

I am providing a reference for the work that Dr. Bill Irwin completed for the Town of St. Marys in 2015-2017. At that time, Dr. Irwin (mentioned as a consultant on your project). Completed a strategic plan review and update for our newly seated Council.

- How well did the consultant understand and address your organization needs?



- The Towns project began with a review of the 2010 Strategic Plan as the first step in the project. In 2010, the Town had completed a comprehensive public engagement to identified key strategic issues facing the community. The 2015 effort began with the consultants walking Council through a process to review and determine if these issues remained relevant.
- Dr. Irwin was successful at this task, and was able to help Council identify what was and was no longer relevant issue facing a small town.
- His approach was different than many consultants. In many cases, a consultant will simply document what Council says and believes. Dr. Irwin was able to respectfully challenge the councillors to make them critically think about the issues facing the community.
- How would you rate the quality of the consultant's work?
 - We were very satisfied with the end product. Rather than having a strategic plan that was nebulous and written at the 50,000 ft level, ours was a nice blend of both. It set clear goals for the Town to work towards in the future, complimented by actionable strategies that were clear and easy for staff and Council to understand and implement.
- Were the deliverables clear, actionable, and aligned with your strategic goals?
 - Yes per the above.
- Did the consultant demonstrate a strong understanding of municipalities and specific challenges?
 - Yes. Dr. Irwin has a unique blend of skills that makes offers him an advantage. He is a former municipal employee, former professor in a local government program, and is now a municipal councillor.
 - For St. Marys, Dr. Irwin was able to listen to Council's conversations, and clearly summarize them into key issue statements that were relevant to the community at that time.
- How effective were they in providing innovative solutions?
 - Very. The consultant was able to look at our community, flag issues that we all said "we have to live with that" and challenge us with the simple question of "why"? They were able to push us to openly talk about these strategic issues and develop creative solutions



- Would you hire this consultant again for future projects?
 - Yes
- Is there anything you wish the consultant had done differently?
 - No we were very pleased with the work.

Brent Kittmer, P.Eng., MPA
Chief Administrative Officer
Town of St. Marys

2. Municipality of Grey Highlands

Good afternoon, Denis. I hope this email finds you well.

I am very pleased to be a reference for Compass Point Consulting. On behalf of my Councils and Communities while in the role of CAO, I was able to utilize the firm on planning projects and in a consultative manner.

Compass was able to support the development of an initial strategic plan and cultural plan and assist in establishing a strategic framework for decision-making in one of my municipalities. In another, Compass supported me in the establishment of a revised mission/vision/values along with a strategic decision-making framework.

If selected, they would do a great job for St Charles.

Please see my responses down below in red.

Take care,
Dan
W. Daniel Best
Exeter, ON

B. EYG

1. Manitoulin-Sudbury District Services Board

Thank you for reaching out. We hired EYG for a project with the Manitoulin Sudbury Network for Children and Families, so I am not able to fully assess EYG's understanding of the specific needs and challenges of municipalities like St. Charles.



That said, EYG was enthusiastic and engaged in understanding the Network's needs. However, their approach was somewhat broad, and they faced challenges in addressing the specific, nuanced needs related to supporting children and families across the district. Additionally, we found that their written work could have been more thorough. While the deliverables aligned with our strategic goals, the written materials could have been stronger. Nonetheless, the consultation process did result in clear and actionable recommendations.

I hope this helps, and I wish you the best in finding the right consultant for your strategic planning process.

Thank-you,

Amy Ingram, B.A., RECE
Integrated Human Services Manager
Manitoulin-Sudbury District Services Board

2. I did get a phone call from an OGRA staff that indicated that they had a great experience with EYG, and that the principal of EYG had helped them develop policy, some of which related to Northern Ontario towns. He had a very recommendation for EYG.

C. VS Solution

1. Kinmount District Health Services Foundation

- How well did the consultant understand and address your organization needs?
 - Very well. Information was collected through questionnaires and group discussions.
- How would you rate the quality of the consultant's work?
 - Good. The Board of Directors is very pleased with the Strategic Plan. It is clear and concise.
- Were the deliverables clear, actionable, and aligned with your strategic goals?
 - Yes.
- Did the consultant demonstrate a strong understanding of municipalities and specific challenges?
 - Yes.



- How effective were they in providing innovative solutions?
 - We are not at that point yet in our strategic planning, and this was not an expectation.
- Would you hire this consultant again for future projects?
 - Yes.
- Is there anything you wish the consultant had done differently?
 - Had time allowed, it would have been helpful to have a brief explanation of each item in the SWOT analysis. Time constraints also didn't allow for data collection in order to measure progress toward achievement of goals.

Sincerely,
Susan Forrester
Chair, Kinmount District Health Services Foundation

D. Overlap

1. Guelph Public Library

- How well did the consultant understand and address your organization needs?
 - Overlap demonstrated an exceptional understanding of our organization's unique needs from the very start. They took the time to deeply engage with our team, actively listening to our goals and challenges. Their tailored approach addressed both our immediate concerns and long-term objectives, offering insightful strategies that were both practical and innovative. Their expertise in the field was evident, and their solutions aligned perfectly with our mission and values. We were truly impressed by how effectively they adapted to our specific context, delivering meaningful results that will benefit us for years to come.
- How would you rate the quality of the consultant's work?
 - The quality of the Overlap's work was outstanding. Their attention to detail, thorough research, and thoughtful analysis were truly impressive. Every deliverable was well-organized, clear, and actionable, reflecting their deep expertise and commitment to excellence. They went above and beyond in every aspect, ensuring that their recommendations were not only high-quality but also practical and tailored to our needs. Their professionalism and dedication resulted in a final product that exceeded our



expectations, and we feel confident moving forward with the strategies they provided.

- Were the deliverables clear, actionable, and aligned with your strategic goals?
 - The deliverables were incredibly clear, actionable, and perfectly aligned with our strategic goals. Overlap took great care in ensuring that each recommendation was easy to understand and directly tied to our overarching objectives. The action steps provided were practical, realistic, and tailored to our organization's needs, giving us a clear path forward. Their work demonstrated a deep understanding of our vision, and we're confident that implementing their suggestions will help us achieve meaningful progress. We couldn't be more satisfied with how well the deliverables supported our strategic direction
- Did the consultant demonstrate a strong understanding of municipalities and specific challenges?
 - Overlap demonstrated an exceptional understanding of Public Libraries and the unique challenges they face. Their deep knowledge of municipal structures, processes, and regulations was evident throughout the entire engagement. They were able to anticipate potential hurdles and offer practical, well-informed solutions that took into account both the complexities of local government/boards and the specific needs of our community. Their expertise in navigating municipal challenges, from budget constraints to stakeholder engagement, was invaluable and greatly enhanced the quality of their work
- How effective were they in providing innovative solutions?
 - Overlap was highly effective in providing innovative solutions. They consistently brought fresh ideas and creative approaches to the table, helping us see new possibilities we hadn't considered before. Their ability to think outside the box while remaining grounded in practical, achievable outcomes was impressive. Each solution was thoughtfully designed to meet our specific needs, and they balanced innovation with real-world applicability. Their forward-thinking mindset has given us a clear advantage as we move forward, and we're excited to implement the strategies they proposed
- Would you hire this consultant again for future projects?
 - Yes - this is our third time working with Overlap.



- Is there anything you wish the consultant had done differently?
 - No

Dan Atkins, BA (Hons); MIST; GCert APLL; GCert PLL (He/Him)
Acting CEO, Guelph Public Library

2. Woolwich Township

- How well did the consultant understand and address your organization needs?
 - The consultant was very in tuned to our organizations needs, they took all of our engagement data which included a large portion of staff/council engagement and were able to truly understand our needs and path forward.
- How would you rate the quality of the consultant's work?
 - They were fantastic and did exceptional work.
- Were the deliverables clear, actionable, and aligned with your strategic goals?
 - Yes, they were! They were great with creating a timeline that working within our parameters and were fantastic with providing us with deliverables, even when we changed the scope slightly.
- Did the consultant demonstrate a strong understanding of municipalities and specific challenges?
 - Yes, they did
- How effective were they in providing innovative solutions?
 - They we extremely effective, one of the best interactions we had was during our Council/Senior Staff retreat. This full day exercise allows both Council and Staff opportunities to discuss and strategize. Overlap provided us with an extremely fun and in depth exercise that allowed us to build the foundation four our community strategic plan.
- Would you hire this consultant again for future projects?
 - 100%, they were fantastic to work with.
- Is there anything you wish the consultant had done differently?
 - No, working with Overlap was one of the best experiences. This was my first time going through a Strategic Plan Process and it is



because of Overlap that I truly love the whole process. They made it fun!

Rae Ann Bauman
Executive Officer
CAO's Office/Corporate Services
Corporate Communications/Media Relations

E. Nordicity

1. City of Campbell River

Good morning Denis,

I am out of office attending Union of B.C. Municipality this week so my response will be brief.

We engaged Nordicity several years ago to create a five year strategic plan to help us grow the tech sector on Vancouver Island. (<https://www.viceda.com/>)

Nordicity delivered, on time, the deliverables identified in our RFP. I can also add that Nordicity created a plan that all stakeholders bought into which resulted in a plan that was implementable. We were able to work through implementing the plan over several years.

I would consider hiring Nordicity again for future projects.

Cheers,

Rose Klukas
Director of Economic Development and Indigenous Relations
City of Campbell River

F. Capital Park

1. Township of Billings

- How well did the consultant understand and address your organization needs?
 - We are a very small, rural municipality – smaller than St. Charles (population-wise) – but Capital Park did seem to have a pretty-



good understanding of our needs. Just as importantly, they seemed receptive, and willing to listen/learn about our specific needs. Our previous plan was okay, but for various reasons we had not been able to renew/update our strategic plan. Capital Park was receptive/sensitive to what had gone before, what had been accomplished, or not, evolution, etc.

- How would you rate the quality of the consultant's work?
 - Their work, both their research and reporting, was very good – solid. Not perfect – which I would not expect – but, yes, very good. Steve, who was the lead, was very receptive to feedback and constructive criticism, which to me, is more important than perfection.
- Were the deliverables clear, actionable, and aligned with your strategic goals?
 - Yes, I think so. We all worked very hard on this – including Steve and Tim (Tim attended our in-person workshop session with Council). So, if the deliverables fail in any way in-terms of actionability or tangibility, that rests as much with staff and Council as with the consultants. I think they are pretty good, though, and they do align well with strategic goals.
- Did the consultant demonstrate a strong understanding of municipalities and specific challenges?
 - Yes, Capital Park demonstrated very good knowledge of municipal mandates, operations, and challenges/limitations, including those at our level (small rural)
- How effective were they in providing innovative solutions?
 - I don't know that they necessarily provided a lot of innovation, or that we really asked for any. They did seem to have a lot of different tools or approaches at their disposal and were open to applying and "tweaking" different things to our needs. For example, Steve was very flexible in creating a citizen/rate-payer survey that met our needs – and in the end, we got exceedingly good response to that, as one important form of stakeholder input.
- Would you hire this consultant again for future projects?
 - Yes, we would definitely consider Capital Park again for strategic planning and similar work.
- Is there anything you wish the consultant had done differently?



- Nothing really stands out . . . perhaps pushed us a little harder in the early stages of our process to stick to our timelines – they were almost too flexible/accommodating. It all worked out fine, but it meant we all had to “knuckle down” that much harder in the final stages. I don’t think that is uncommon, though.

Todd M. Gordon, M.Sc.
Deputy CAO/Municipal Project Manager

2. Municipality of Sioux Lookout

- How well did the consultant understand and address your organization needs?
 - Very well – Capital Park is well-versed in providing this type of support to Municipalities.
- How would you rate the quality of the consultant’s work?
 - Very high quality work. We had no complaints.
- Were the deliverables clear, actionable, and aligned with your strategic goals?
 - Capital Park adhered to all the RFP requirements and delivered a product that both staff and Council were pleased with.
- Did the consultant demonstrate a strong understanding of municipalities and specific challenges?
 - Yes; their previous work with municipalities informed their approach and understanding of some of the unique needs and challenges of the municipal sector.
- How effective were they in providing innovative solutions?
 - We specified what we were looking for (i.e., the development of a strategic plan) – we did not seek solutions – we were very clear on what we were seeking.
- Would you hire this consultant again for future projects?
 - Yes.
- Is there anything you wish the consultant had done differently?
 - No.



Brian P. MacKinnon
Chief Administrative Officer
& Municipal Clerk
The Corporation of the Municipality of Sioux Lookout

3. Municipality of French River

Sorry Denis on my list of things to do. ... I have no problems with Capital one and their work and actually enjoyed their interaction with Council, Staff and the public throughout the process.

Marc Gagnon
Chief Administrative Officer / Directeur général
Municipality of French River

G. Karen Jones Consulting

1. Almaguin Community Economic Development

- How well did the consultant understand and address your municipalities needs?
 - KJCO was very thorough in understanding our needs both in their written proposal and at the project kick-off. We have worked with KJCO on several projects and have always had this experience.
- How would you rate the quality of the consultant's work?
 - I would rate Karen and her team's work very highly.
- Were the deliverables clear, actionable, and aligned with your strategic goals?
 - Yes, generally speaking, unless there were required changes or variances on my end, all deliverables were provided as initially scheduled. All action items were pursuant to the project goals set out in the RFP.
- Did the consultant demonstrate a strong understanding of municipalities and specific challenges?
 - As mentioned, Karen and team have worked with our region on several projects, through which, she has developed a keen understanding of the region and its communities.
- How effective were they in providing innovative solutions?



- KJCO has always provided a good mix of best practice and innovative solutions that emphasize compatibility with our unique geographic/economic situation.
- Would you hire this consultant again for future projects?
 - Yes.
- Is there anything you wish the consultant had done differently?
 - No.

Dave Gray, Ec.D.
Director of Economic Development
Almaguin Community Economic Development

2. Town of Parry Sound

- How well did the consultant understand and address your municipalities needs?
 - No issues, they understand small towns.
- How would you rate the quality of the consultant's work?
 - Very professional, met with those individuals we identified, and they were open to discuss various approaches.
- Were the deliverables clear, actionable, and aligned with your strategic goals?
 - Yes and senior staff had opportunities to meet and discuss prior to finalizing.
- Did the consultant demonstrate a strong understanding of municipalities and specific challenges?
 - The consultants have done a lot of work in the municipal sector. They also do a lot of economic development work in the municipal sector which gives them different insights into the community.
- How effective were they in providing innovative solutions?
 - They generated ideas and provided different perspectives throw out the process.



- Would you hire this consultant again for future projects?
 - Yes.

- Is there anything you wish the consultant had done differently?
 - Not that I can think of, we are happy with the end report.

Clayton Harris
Chief Administrative Officer
Town of Parry Sound

H. Capstone:

Both references were not in office / unable to provide reference by Sept 24 in time for report.

Attachments:

- Nil.

Prepared by: Denis Turcot, CAO