

STAFF REPORT

Department: Administration

Date: December 5, 2022

Item: Recommendation for New Strategic Plan RFP

Recommendation: Be It Resolved That: Council award the RFP for Consulting Services - Strategic Plan 2023-2027 to David King and Bill Winegard.

Background: The Town of Espanola completed its last strategic plan in 2013 and the Plan has been in use since then. In late 2019, early 2020 work on a new strategic plan was started. In March 2020 the pandemic hit and work was put on hold. The new CAO started in July 2021 and with only fifteen months left in the term of Council it was decided to hold off on starting a new strategic plan until the new term of Council.

A Strategic Plan is to serve as a community's roadmap for the goals it has and is used to prioritize initiatives, resources, department operations and projects. The strategic plan is designed to be a big-picture document that directs efforts and resources toward a clearly defined vision for the community. A successful strategic plan not only provides a vision for the future, it also lays out the steps necessary to achieve the goals required to meet that vision. The document points the way forward for municipal business and it lays out Town goals and explains why they are important.

These are challenging times and the strategic plan helps the municipality capitalise on opportunities. It is a tool that helps the Town to harness its potential and develop a coordinated, institutional framework to make the most of opportunities. When completed, the strategic plan aligns everyone around a shared purpose. It proactively sets objectives to help the Town achieve its goals. It defines long-term goals, and then sets shorter-term goals to support achieving the long-term goals. Strategic planning can directly benefit the organization by enabling the Council who create policies and make key decisions to work more effectively and focus on their key goals and objectives.

In September staff posted an RFP for services related to the development of a new strategic plan, we were looking for a company to help coordinate and facilitate a consultation process that includes input from Council, staff, residents and key stakeholders. The plan needs to include businesses and community stakeholders. The consultation program may incorporate various approaches but will include



meetings with businesses and community stakeholders, public open house(s), consultation sessions with the Town Council and senior staff. A draft Strategic Plan will be presented to Council and senior staff and upon completion, a final strategic plan will be presented.

The RFP closed on October 31st.

Analysis: We received eight responses to the RFP. The responses were independently evaluated by the CAO, the Clerk, the Deputy Clerk, the Deputy Treasurer, the Economic Development Officer and the Assistant Librarian. The four areas of the RFP that were scored were:

1. Understanding of Major Issues and Objectives of the RFP
2. Experience, Qualifications and Availability of team members
3. Approach and Methodology of work required for the RFP
4. Financial Proposal

Each area was worth a quarter of the overall score.

Two of the eight responses were eliminated in our first round of evaluations. One did not demonstrate a good enough understanding of the major issues and objectives of the project and the other did not fall within what was determined to be a reasonable financial proposal.

After further evaluation the consensus of the committee was that there were three submissions that could meet the requirements of the RFP.

After further discussion and evaluation, our conclusion was that with the experience that David King and Bill Winegard bring to this project, they were the best fit to successfully complete the new Strategic plan for the Town of Espanola.

Their references included the Municipality of Middlesex Centre, the Township of Southgate and the Municipality of Brocton. In the last two years they've completed similar reviews to what the Town is asking for. They also demonstrate the experience and skill sets necessary for this type of project.

Their maximum cost of \$27,020 + HST was competitive when compared to the other seven RFP's under consideration.

The funding for this project is coming from the reserve funds for modernization that was previously received from the province. When this project is complete the reserve will still have a healthy balance of over \$400,000 to be used for other projects.

The expected start date to begin work is the first half of January and the Strategic Plan is expected to be completed by the end of June.



Once the Strategic Plan is completed, a final presentation will be presented to Council along with a staff report that will outline the next steps and timeline moving forward.

Existing Policy: Previous Strategic Plan

Strategic Goal: Excellence in Government

Financial Commitment: \$27,020.00 + HST

Budgeted: **Yes** ☐ **No** ☒

Implementation: To start January 2023

Prepared By: Allan Hewitt

Department Manager:

CAO/Treasurer:

Approval of Recommendation: **Yes** ☐ **No** ☐

Comments: