



Staff Report

Strategic Initiatives

Report To: Council Meeting
Meeting Date: May 12, 2025
Report Number: SI.25.021
Title: Corporate Strategic Plan Project Introduction
Prepared by: Tim Hendry, Director of Strategic Initiatives

A. Recommendations

THAT Council receive Staff Report SI.25.021, entitled “Corporate Strategic Plan Project Introduction” for information;

AND THAT Council approves a \$20,000 contingency budget to support the Corporate Strategic Plan project related to any additional expenses that may arise including but not limited to additional public engagement activities, workshops, studies and/or strategy development items as needed;

AND THAT Council acknowledges that a staff report regarding options for the Corporate Performance Dashboard will be brought forward as the Corporate Strategic Plan project progresses;

AND THAT Council acknowledges that staff will provide a monthly verbal project update and a written bi-monthly project update through a staff report to monitor the status of the Corporate Strategic Plan.

B. Overview

This report provides Council with an update regarding the Corporate Strategy Plan project and introduces the project consultant.

C. Background

In February 2025, Council endorsed staff report [SI.25.008](#) titled “Proposed Workplan and Approach for the Corporate Strategic Plan Update”. The report outlined the research efforts and Request-for-Proposal preparation work completed by the Strategic Plan Task Force. The Task Force included staff representation and strategic support from Councillor Gail Ardiel, Councillor June Porter and Mayor Andrea Matrosovs.

As part of the report, Council directed staff to initiate the request-for-proposal (RFP) process to hire a municipal-focused consultant to lead the development of the plan.

The Corporate Strategic Plan RFP (2025-20-P-SI) was issued on February 19, 2025 and closed on March 13, 2025. In total, twelve submissions were received and evaluated by the Senior Management Team using the scoring criteria outlined in the RFP. The process included an independent evaluation of each proposal submission and formal interviews with the three shortlisted proponents.

Through the evaluation process, StrategyCorp received the highest overall weighted score. Their submitted bid was \$99,849.00, which was within the approved \$100,000.00 project budget. As a result, the project was awarded to StrategyCorp. Further details regarding the project budget, including the contingency budget and provisional item, are included in the Financial Impact section of the report.

D. Analysis

StrategyCorp is a leading strategic management consultant for Canadian municipalities. As detailed on their website, StrategyCorp specializes in providing strategic advisory services, including government relations, strategic communications, and management consulting, to organizations operating in complex, highly regulated, and scrutinized environments. Since 1995, StrategyCorp has been involved in some of Canada's most critical business issues and charged public policy matters.

The Town's Corporate Strategic Plan project will be supported by a five-person project team led by Sabine Matheson and Stacy Hushion.

Ms. Matheson is the Principal and Head of StrategyCorp's Municipal Services Practice. Sabine has worked with hundreds of municipalities and broader public sector organizations, including hospitals, library and police services boards, and conservation authorities, on a variety of projects relating to strategic planning, service delivery and organizational reviews, intergovernmental affairs, and governance. Sabine recently led the project to update the Town of Collingwood's Community-Based Strategic Plan and is currently working with the Municipality of Port Hope and the Grand River Conservation Authority on strategic planning processes. Sabine is also an advisor to many associations including the Association of Municipalities of Ontario (AMO), Ontario's Big City Mayors (OBCM), Association of Municipal Managers, Clerks and Treasurers of Ontario (AMCTO), the Canadian Association of Municipal Administrators (CAMA), and the Ontario Municipal Administrators' Association (OMAA).

Ms. Hushion, is a Vice President in StrategyCorp's Municipal Services Practice and has worked in or with municipalities for nearly a decade. Stacy has assisted dozens of municipalities across Ontario with strategic planning, organizational and operational reviews, long-term financial planning, Council orientation and training and intergovernmental affairs. Stacy has significant experience in supporting municipalities and municipal associations with identifying their strategic priorities and developing implementation plans and performance metrics. Since 2022, she has led successful strategic planning engagements for the Town of Collingwood, Oxford County, Dufferin County, City of Guelph, Town of Huntsville, Town of Gravenhurst, Town of Georgina,

City of Vaughan, City of Richmond Hill and the Association of Municipal Managers,
Clerks and Treasures of Ontario (AMCTO).

Project Work Plan Overview

The work plan submitted by StrategyCorp provides a strategic four-step process to guide the development of the plan. An overview of each phase is included below:

- Phase 1 – Project Initiation
- Phase 2 – Current State Assessment
- Phase 3 – Strategy Development
- Phase 4 – Strategy Finalization

Phase 1 – Project Initiation

The first phase is focused on project initiation, with the primary objective being aligned on the goals, scope, work plan, and timelines to support project success. The process includes an in-depth project kick-off meeting to confirm objectives and success criteria, as well as developing/confirming a Public and Stakeholder Engagement Plan, including mapping target audiences like under-represented groups such as youth and young families. A public-facing brand will also be developed to make the project approachable and relatable to the average resident. Comparator municipalities will also be identified for aspirational benchmarking.

Phase 2 - Current State Assessment

The second phase includes a comprehensive current state assessment to review the Town's internal and external landscape, identifying key issues and trends for the strategic planning process. This involves thoroughly reviewing existing documents and data such as strategic plans and budgets, culminating in a SWOT and PESTEL analysis. The process will also include extensive internal consultations through interviews and surveys with Council members and Town staff.

Phase 3 – Strategy Development & Public Engagement

The third phase focuses on strategy development, creating core components of the Corporate Strategic Plan in consultation with Council and leadership and validating these with community members. Key actions include confirming vision and mission statements and conducting workshops with Council and senior management. Significant focus will be placed on broad public engagement, engaging residents and stakeholders through public surveys, pop-up events, and focus groups, reinforcing the strategic plan's alignment with community priorities. A detailed public engagement plan will be shared with Council at a future meeting.

Phase 4 – Finalization

The last phase involves finalizing the Corporate Strategic Plan and supporting materials for implementation. The draft plan will be presented to Committee of the Whole and Council for adoption. A new business plan template will be developed for staff to align actions with the strategic plan, focusing on roles, responsibilities, and expected outcomes through clear key performance indicators and means of measurement.

The summarized project work plan, including key deliverables, is included as Attachment 1 to this report.

E. Strategic Priorities

1. Communication and Engagement

We will enhance communications and engagement between Town Staff, Town residents and stakeholders

2. Organizational Excellence

We will continually seek out ways to improve the internal organization of Town Staff and the management of Town assets.

3. Community

We will protect and enhance the community feel and the character of the Town, while ensuring the responsible use of resources and restoration of nature.

4. Quality of Life

We will foster a high quality of life for full-time and part-time residents of all ages and stages, while welcoming visitors.

F. Environmental Impacts

No environmental impacts are anticipated as a result of this report.

G. Financial Impacts

In 2024, Council preapproved \$100,000 to support the Corporate Strategic Plan project. The bid from Strategy Corp was submitted at \$99,849.00. As the bid was within the approved project budget, and as Strategy Corp received the highest overall weighted score, the project was awarded. The awarded bid includes the full scope of work as outlined in the RFP, less the provisional item noted below.

The motion of the staff reports includes a recommendation for Council to consider a \$20,000 project contingency budget. If approved, the contingency budget would allow for greater flexibility and agility within the project to address evolving needs, such as additional public engagement sessions or facilitated Council workshops. Although it's not anticipated that the contingency budget will be needed, having it pre-approved by Council will allow staff to act accordingly without facing administrative and purchasing related delays. If the contingency budget is utilized, staff will provide written notice to Council by email and will follow up with a formal report to detail the expense. If approved, the contingency budget will be funded through an appropriate budget determined by Finance Staff, such as Working Capital.

The RFP also asked proponents to submit pricing for a provisional item related to launching a Corporate Performance Dashboard. Strategy Corp provided a provisional price with the caveat that different approaches and software solutions could be considered. Although a formal Performance Dashboard through specialized software is the preferred solution, staff support exploring alternative options. As a result, staff are not recommending that the Corporate Performance Dashboard be approved at this time. Staff will work with Strategy Corp to further confirm and discuss the project scope, roles and responsibilities, and expected level of effort. A further staff report will be brought forward as the project progresses.

H. In Consultation With

Adam Smith, Interim Chief Administrative Officer

I. Public Engagement

The topic of this Staff Report has not been the subject of a Public Meeting and/or a Public Information Centre as neither a Public Meeting nor a Public Information Centre are required. However, any comments regarding this report should be submitted to Tim Hendry, Director of Strategic Initiatives si@thebluemountains.ca.

J. Attached

Attachment 1 – Project Work Plan Overview

Respectfully submitted,

Tim Hendry
Director of Strategic Initiatives

For more information, please contact:
Tim Hendry, Director of Strategic Initiatives
si@thebluemountains.ca
519-599-3131 extension 282

Report Approval Details

Document Title:	SI.25.021 Corporate Strategic Plan Project Introduction.docx
Attachments:	- Attachment 1 - Project Work Plan Summary.pdf
Final Approval Date:	May 2, 2025

This report and all of its attachments were approved and signed as outlined below:

Tim Hendry - May 2, 2025 - 1:32 PM

Schedule of Work

Below is our proposed schedule for this project. Based on our work plan and experience in facilitating municipal strategic planning engagements, our team would be able to expediate the project timelines and deliver a final Corporate Strategic Plan to Council around the middle of November 2025, assuming a project kick-off in May:

