

**To: Warden and Members of County Council**

**From: Chief Administrative Officer**

## 2023 Strategic Planning Project

### RECOMMENDATIONS

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1. That Report No. CAO 2023-02 entitled “2023 Strategic Planning Project” be received;
2. And further, that Council authorizes staff to proceed with engaging StrategyCorp Inc. to facilitate the County’s 2023 strategic plan project as described herein.

### REPORT HIGHLIGHTS

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- This report presents an overview of a strategic plan project as proposed by StrategyCorp Inc. through a competitive purchasing process conducted in accordance with the County’s Purchasing Policy

#### Implementation Points

Upon approval of the recommendations contained in this report, staff will proceed to engage StrategyCorp Inc. and begin the Strategic Planning process.

According to the proposed work plan, a project launch meeting will be scheduled with Council in mid-April with a goal for project completion by June 30, 2023, in time to inform the 2024 Business Plan and Budget process.

#### Financial Impact







StrategyCorp’s proposal for this project is within the provision approved in the 2023 Business Plan and Budget.

#### Communications

Communications will commence upon approval of the recommendations contained in this report and will continue for the duration of the project.

Communications with the public will be necessary throughout the engagement process and will be conducted by the consultants, in collaboration with the County’s internal communications team. In designing the engagement process, StrategyCorp understands the importance of giving the community ample platforms through which to voice concerns, ask questions and learn about changes that will affect them through an effective community engagement strategy.

**Strategic Plan (2020-2022)**

					
<i>WORKS WELL TOGETHER</i>	<i>WELL CONNECTED</i>	<i>SHAPES THE FUTURE</i>	<i>INFORMS &amp; ENGAGES</i>	<i>PERFORMS &amp; DELIVERS</i>	<i>POSITIVE IMPACT</i>
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**DISCUSSION**

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**Background**

The existing version of the County’s Strategic Plan was released in 2013 and was most recently refreshed in 2020. Considering the lapse of time, unprecedented economical and societal changes; and, the recent election of a new term of council that have all occurred since the Plan was approved, it is timely for the County to revisit its strategic goals and directives.

Funding was allocated in the 2023 Business Plan and Budget to engage the services of a consultant to lead the County through a strategic planning process.

**Comments**

The Request for Quotation (RFQ) was created in collaboration with the Oxford County Public Library since they too are seeking a consultant to facilitate a strategic plan project for their services. By coordinating efforts and combining the RFQ process, we can gain efficiencies and ensure the two plans have aligning priorities. A total of six consultants were invited to submit proposals through a competitive RFQ process. Proponents were asked to submit their proposals, considering the following tasks:

- Review of the current Strategic Plan 2020-2022 and familiarize themselves with other strategic documents that will shape the process and the development of an updated strategic plan such as the 100% Renewable Energy Plan, Zero Waste Plan, Zero Poverty Plan and Future Oxford Sustainability Plan.
- Conduct meetings with Council and County staff throughout the strategic planning process.
- Conduct and deliver a public consultation process that engages residents, businesses and other community stakeholders.
- Prepare an analysis of the public consultation results and service area priorities.
- Review of emerging priorities at the County and best practices in municipal strategic planning processes.
- Lead and facilitate with the assistance of Council and County staff, the development of an updated strategic plan, complete with milestones, timelines, objectives and priorities that are realistic, achievable and measurable.

- Identify strategic goals, objectives, actions, indicators, and targets to support the development and monitoring of a new strategic plan as well as the ability to inform departmental business plans in the future that align with the new strategic plan.
- Prepare the draft strategic plan for Council, County staff and stakeholder review.
- Review and amend the draft plan to incorporate Council and stakeholder feedback.
- Prepare the final Strategic Plan document and a presentation on the new Strategic Plan to be presented at a regularly scheduled Council meeting.

In response, staff evaluated two consultants' proposed work plans based on their qualifications, related experience and how their approach to, and understanding of, the project satisfies County goals and objectives. Based on those evaluations, staff recommend the bid received from StrategyCorp Inc., as it represents good value for the work.

StrategyCorp has particular expertise in supporting municipalities with strategic planning. Key highlights of StrategyCorp's philosophy and methodology includes the following:

- Strategic planning is more successful when consultants establish and drive the process, not content.
- The breadth and depth of stakeholder engagement is what differentiates their approach from other firms.
- Successful strategic plans are determined by how well they are implemented; their approach turns conceptual ideas and aspirations into realistic, achievable goals that can be implemented.
- Strategic plan development is iterative, and elements must be considered holistically as the Plan evolves.

StrategyCorp has recommended a four phase process for the County, aspects of which will run concurrently with the Library's process. To summarize, the four phases are as follows:

Phase 1: Project Initiation

- Kick-off meeting
- Issue the data request
- Draft stakeholder engagement plan
- Project launch meeting with Council

Phase 2: Research & Consultation

- Review of data and documents for environment scan and SWOT analysis
- Interviews with the Warden, Council, CAO and SMT
- Develop and issue a staff survey
- Facilitate community consultation activities

Phase 3: Strategy Development

- Conduct workshops #1 and #2 with Council
- Conduct workshop with SMT
- Develop draft Strategic Framework

Phase 4: Finalization

- Review draft framework based on Phase 3 feedback
- Develop public facing document for County's review
- Complete final revisions
- Present final plan to Council for adoption

**Conclusions**

Staff are the opinion that StrategyCorp Inc.'s proposed work plan and approach for the County's 2023 strategic planning process will produce a living document that is specific enough to provide direction that informs operations, planning and budget processes, and is flexible enough to adjust to emerging challenges and opportunities with a view for long term sustainability.

**SIGNATURES**

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**Report Author:**

Original signed by

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**Approved for submission:**

Original signed by

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