

### Recommendation:

That the Treasurer-2023-18 report, dated August 1, 2023 regarding the Award of RFP ADM-2023-01 – Strategic Plan be received and that Quarry Consulting be awarded the contract to complete the 2023-2027 Corporate Strategic Plan in the amount of \$19,920 plus HST.

### Overview:

RFP ADM-2023-01 for the Development of a 2023-2027 Corporate Strategic Plan was issued on June 27<sup>th</sup> and was the first RFP process using the newly implemented Bids and Tenders system. The RFP closed on July 20<sup>th</sup> and the Township received 7 bids.

An evaluation team reviewed each proposal based on the following breakdown of scores:

Item	Point Allocation
1. Company Overview and Project Team	10
2. Qualifications and Experience	25
3. Workplan and Timelines	35
4. Proposed Fee	30
<b>Total</b>	<b>100</b>

These were the results of the evaluations:

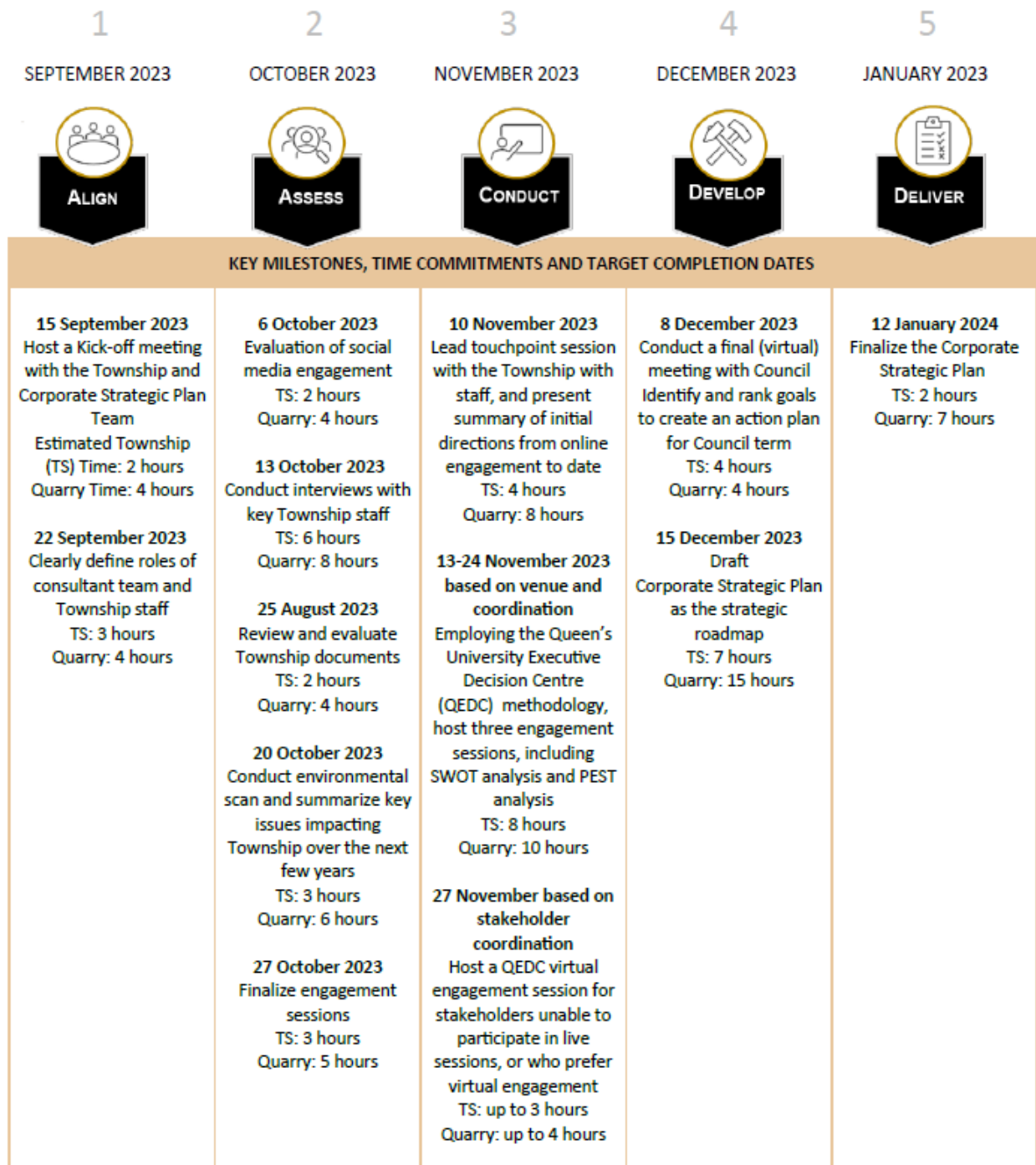
Rank	Vendor	Proposed Fee (excl. HST)	Company Overview and Project Team	Qualifications and Experience	Workplan and Timelines	Fee Score	Total
1	Quarry Consulting	\$22,509.60	7.33	19.17	23.33	27.79	77.60
2	Wilton Consulting	\$21,755.89	6.67	15.00	24.50	28.75	74.90
3	Arising Collective	\$20,848.50	5.33	12.50	22.17	30.00	70.00
4	Ember Experience	\$22,600.00	5.33	11.67	24.50	27.68	69.20
5	Praxis Consulting	\$34,962.20	7.33	18.33	22.17	17.89	65.70
6	Optimus SBR Inc	\$22,292.08	5.33	14.17	15.17	28.06	62.70
7	ICA Associates Inc	\$21,804.48	4.67	10.00	16.33	28.68	59.70

**Conclusion:**

Quarry Consulting is an independent, 100% Canadian-owned and operated company with its headquarters in Ottawa, Ontario. The firm has approximately 95 employees and provides consulting services on a wide range of subjects. The Client Executive of the project will be Lynn Van Der Linde who leads the Advisory Services practice. The Facilitator for the development of the Strategic Plan will be Erik Lockhart who is the Associate Director of the Queen's Executive Decision Center and the Founder of Lockhart Facilitation Inc.

Mr. Lockhart has worked in the Kawarthas/Peterborough/Northumberland County area quite extensively facilitating strategy and planning sessions with Trent University, Fleming College, Peterborough CFDC, Peterborough Economic Development, Kawarthas Food Action Plan, Town of Campbellford, Northumberland County Council, Cavan-Monaghan, Otonabee South Monaghan, Ontario East, and the Eastern Ontario Leadership Council. He has also worked with public schools and hearing and sight impaired groups. Mr. Lockhart facilitates in the Queen's Executive and Public Executive Programmes.

The proposed project outline is as follows:

**Financial Impact:**

Quarry Consulting bid \$19,920+HST which results in an expense to the Township of \$20,270.59 which is only \$270.59 over the \$20,000 budget.

**Strategic Plan Applicability:** To ensure and enable an effective and efficient municipal administration.

**Report Approval Details**

Document Title:	Award of RFP ADM-2023-01 Strategic Plan.docx
Attachments:	
Final Approval Date:	Jul 26, 2023

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

Martina Chait-Hartwig

Elana Arthurs