



Southwold Economic Development Committee

Agenda

Thursday, March 26, 2026 at 8:00 am
Township Council Chambers – Municipal Office Fingal

1. Call to Order
2. Approval of the Agenda
3. Disclosure of Pecuniary Interests
4. Approval of the February 5, 2026 Minutes
5. Economic Development Plan Submissions
 - a. Submission Summary Report
 - b. 8:15 am – Town Hall Consulting Interview – Online
 - c. 8:45 am – McSweeney Consulting Interview – In Person
 - d. Discussion/Selection of Consultant
6. New and Other Business
 - a. New Member Appointment Recommendation
7. Next meeting date, time and location
8. Adjourn



Southwold Economic Development Committee

Meeting Minutes

**Thursday, February 5, 2026 at 8:00 am
Council Chambers/Webex Meeting**

Present: Deputy Mayor Justin Pennings
Councillor John Adzija
Steve Bushell

Staff/Resource: Aaron VanOorspronk, Director of Infrastructure and Development
Jeff Carswell, CAO/Clerk
Carolyn Krahn, Manager of Economic Development
& Strategic Initiatives

Guests: Tanya Buttinger
Stuart Lackey

Regrets: Barry Harrison
Tanya Wilson, Elgin Business Resource Centre
Scott Young

1. Call to Order

Deputy Mayor Pennings called the meeting to order at 8:05 am.

2. Approval of Agenda

The Committee approved the agenda for the February 5, 2026 meeting.

3. Disclosure of Pecuniary Interest

None

4. Approval of the November 6, 2025 Minutes

The Committee approved the minutes as drafted from the November 6, 2025 meeting.

5. Economic Development Plan Update

The Committee reviewed information related to development of an updated Economic Development Plan with funding from the ROD Program. A draft timeline illustrating the various steps required to complete the updated plan was reviewed. Steps included drafting an RFP for consulting services, selection of a consultant, project kick-off, community consultation, development of the plan and action items, and final approval by Council.

In order to move the project forward in an efficient manner, the Committee discussed acting as the Project Steering Committee and seeking approval from Council to decide on matters such as selection of the consultant, development of the work plan with the consultant and recommendations to Council on key decisions and approvals. The following recommendation will be made to Council:

“That the Southwold Economic Development Committee be authorized to oversee and direct all aspects of the Economic Development Plan update project, including issuing an RFP for consulting services, engaging a consultant to develop the plan, acting as the project steering committee, keeping Council apprised of the project activity and recommending adoption of an updated plan.”

6. Elgin County Economic Development Update

Anne Kleinsteuber, Business Enterprise Facilitator, provided updates on the following matters:

- The Pitch
- The Ed Co Conference
- 2026 Visitors Guide, which includes a new Itinerary Section
- National Women’s Lifestyle Show
- Recent Trade Shows
- Twas the Night Before Christmas in Elgin County featuring 58 local businesses
- Elgin Holiday Gift Guide
- New Economic Development Website
- New Economic Development and Tourism Plan (copy attached to agenda)

- 2026 Performance Plan (copy attached to agenda)

7. Development and Infrastructure Updates

Director of Infrastructure and Development Services, Aaron VanOorspronk reported on the following matters:

- a. Fingal Reconstruction – Construction is well underway. The County is organizing a meeting with the Elgin Federation of Agriculture to review updates to the road design. The committee encouraged that a date be established as soon as possible.
- b. Shedden/Fingal Sanitary Servicing – The contractor is completing work to remedy any infiltration and complete commissioning of the sewer in Union Road, Shedden. The road will remain as base asphalt over the winter.
- c. WWTP Updates for Shedden & Talbotville – The Shedden WWTP construction has started. Staff are working with the Ministry of Infrastructure to finalize the revised plans for improvements to the Talbotville Wastewater system.
- d. Parks and Trails Master Plan Project – The consultant is finalizing the report for presentation to Council.
- e. Staff and County Planning will be starting the Zoning By-law update project. Items identified by the Economic Development Committee will be included for consideration, as well as being further consulted through the update process.

8. New and Other Business

The Committee requested that appointments of additional members be added to the next agenda.

9. Next Meeting date, time and location

The next meeting was scheduled for March 26, 2026 at 8:00 am.

10. Adjourn

The meeting adjourned at 9:16 am.

Chairperson, Justin Pennings

Staff Resource, Jeff Carswell

Proposal Summary (High-Level)

This summary is intended to help the Committee compare the proposals at a glance and prepare for proponent interviews. It highlights key differences in approach, engagement timing, deliverables, and value-for-money considerations, and includes suggested interview questions to test fit and confirm assumptions.

Decision Prompts for the Committee

- Do we want engagement to **shape** the strategy early, or to **test and refine** a draft direction later?
- How much original analysis do we need (and will use) versus a more facilitation- and implementation-focused plan?
- Which proponent is more likely to produce a plan that is practical for staff capacity and budget realities?
- What deliverables matter most to us (e.g., implementation plan/KPIs, land readiness review, investment readiness), and who covers them best?
- What are the schedule risks (seasonal availability, engagement windows, approvals), and how will each team manage them?

Town Hall Consulting Inc.

- Facilitation-led approach with a clear focus on implementation.
- Strong emphasis on Council-staff alignment, governance, and an approach that reflects organizational capacity.
- Seven-phase work plan, with an optional check-in after the plan is completed.
- Proposed fee: \$26,500 + HST.

McSweeney & Associates Consulting Inc.

- Leans heavily on data and economic analysis to guide the plan.
- Focus areas include labour force trends, employment land readiness, and investment attraction.
- Uses a four-step Discover-Define-Develop-Deliver process.
- Proposed fee: approximately \$39,800 + HST.

When Engagement Happens

Town Hall Consulting

- Community engagement comes later, running into June and July 2026.
- The intent is to validate and fine-tune priorities that come out of Council and senior leadership workshops.
- It's more targeted (confirming direction) than broad, open-ended engagement.

What that means:

Council direction and internal alignment are set first; community engagement is then used to test and refine the draft direction rather than drive it from day one.

McSweeney & Associates

- Engagement starts earlier (primarily April–June 2026).
- It follows the initial economic and land-use analysis, and happens before the draft plan is written.
- Engagement activities include:
 - Stakeholder interviews
 - Surveys
 - Focus groups / town halls
 - Staff priority-setting sessions
 - Findings feed directly into the strategic framework and early drafts.

What that means:

Council and the community weigh in earlier, so priorities can shape the plan before drafting begins.

Service Comparison (At a Glance)

Area	Town Hall Consulting	McSweeney & Associates
Project Management & Governance	Strong	Strong
Economic & Labour Market Analysis	Moderate (high-level)	Extensive (data-driven)
Employment / Industrial Land Review	Limited	Comprehensive

Investment Readiness Assessment	Not explicit	Included
Stakeholder Engagement	Robust, later-stage	Robust, earlier-stage
Strategic Framework	Strong	Strong
Implementation Plan & KPIs	Very strong	Strong
Post-Plan Follow-Up	6-Month Health Check included	Not included
Total Consulting Effort	Moderate	High (~30 consulting days)

Value-for-Money Notes

- Town Hall Consulting is the lower-cost option and puts more weight on governance alignment and follow-through.
- McSweeney & Associates offers deeper analysis and brings the community in earlier, which shows up in the higher price.
- Both proposals meet the Township’s RFP requirements. The main difference is timing—when engagement happens and how it’s used.
- Both teams appear well qualified and provided strong references from similar projects.

Summary

- **McSweeney & Associates** is a stronger fit if the Committee wants earlier, broader engagement and more depth on economic/land analysis to inform the strategic direction before drafting.
- **Town Hall Consulting** is a stronger fit if the Committee wants to align Council and senior leadership first, keep engagement more confirmatory, and put extra weight on governance, implementation planning, and follow-through at a lower cost.

Possible Interview Questions

1. What do you see as Southwold’s top one or two economic development priorities over the next four years, and how does your approach address them?

2. When would community and stakeholder engagement happen in your process, and how will that input change (or confirm) the Plan?
3. What original economic or labour market analysis will you produce for Southwold, and how will you turn it into practical local actions?
4. How will you ensure the Plan is realistic and implementable given Southwold's staffing capacity and financial constraints?
5. How will Council know, one year after adoption, whether this Plan is being successfully implemented?
6. What are the biggest risks to delivering this project on time and on budget, and how would you manage them?
7. What elements of your proposal provide the greatest value to Southwold, and what elements could be adjusted if the Committee wished to change scope or timing?
8. What is one thing the Committee should be aware of about your approach that may not be obvious from your proposal?



STRATEGIC PLANNING PROPOSAL

2026 - 2029 ECONOMIC DEVELOPMENT
STRATEGIC PLANNING PROPOSAL FOR THE
TOWN OF SOUTHWOLD

PREPARED FOR:



TOWNSHIP OF
Southwold

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OUR UNDERSTANDING OF THE TOWNSHIP OF SOUTHWOLD

Southwold is a dynamic and developing municipality characterized by its robust agricultural base and growing rural communities. With its strategic location near Highway 401 and access to regional employment centers, the Township is positioned for significant economic growth and diversified opportunities. As Southwold faces evolving economic factors and infrastructure developments, including the emergence of the Amazon Fulfillment Centre at the former Ford Talbotville site, a comprehensive Economic Development Plan is essential. The new Plan will outline priorities for sustainable growth, business retention, and workforce development, ensuring that Southwold effectively meets the challenges and opportunities of the future while enhancing the quality of life for its residents.

Town Hall Consulting understands that Southwold needs:

- A facilitated process that builds alignment between Council, staff, businesses, stakeholders and the community.
- A strategic economic development plan that is ambitious yet grounded in organizational and financial capacity.
- A plan that is evidence-based and reflects emerging municipal trends.
- A practical Plan, implementation roadmap, and KPI framework to support accountability, performance tracking, and long-term success.

WHY TOWN HALL CONSULTING?



Our People

- Deep municipal expertise with a human, adaptable approach
- Experienced facilitators who ensure results
- Experts at building alignment between Council, staff and stakeholders
- We understand the unique realities of medium, small and rural municipalities



Our Process

- Proven 7-Phase framework refined through dozens of municipal projects
- Flexible approach tailored to your community's needs.
- Robust internal and external engagement, ensuring both organizational alignment and community buy-in.
- Track record of delivering clear, practical, and community-driven plans



Our Commitment

- Tools and support for real execution
- Long-term partner mindset — your success is our measure of success
- Dedicated to plans that drive action, accountability, and results.

OUR PROCESS & PROPOSED TIMELINE

Milestone	Target Timing
1. Project Initiation & Current State Assessment	April 2026
2. Internal Engagement	May 2026
3. Planning & Strategy Development: Workshops	June 2026
4. External Engagement	June 2026
5. Refinement & Finalization	August- September 2026
6. Implementation (Key Performance Indicators)	September 2026
7. Health Check	March 2027

1.0 COMPANY OVERVIEW



Who We Are?

Town Hall Consulting Inc. is a boutique strategy consulting firm, specializing in Economic Development, Strategic Planning, Community Engagement, Leadership Development, and Organizational Training.

Our experienced team combines decades of expertise across the public and private sectors, helping organizations and communities plan with purpose and execute with confidence.

We are known for our **practical, human-centred,** and **capacity-sensitive** approach — helping organizations turn ideas into action.

What We Do?

We specialize in helping small and medium-sized municipalities and public organizations plan with purpose and execute with confidence.

Through customized strategic solutions—**never cookie-cutter**—we tailor every project to your unique needs, context, and capacity.

Grounded in innovation, collaboration, and practical implementation, we help organizations overcome challenges, align stakeholders, and unlock new opportunities for lasting success.

Our Edge

Tailored Approach



We don't do cookie-cutter — every project is customized to your community's size, capacity, and unique context

Collaborative Alignment



Bridging the gap between Council and staff goals, and community vision through collaborative solutions that create alignment, trust, and momentum for action.

Action & Implementation



Our plans don't sit on the shelf — they're designed for implementation, supported by tools, tracking, and a 6 month Health Check to keep progress on course.

Our Services



Strategic Consulting

Strategy design, facilitation, community and stakeholder engagement, and implementation support.

We help organizations and communities develop clear, actionable strategies that drive results and alignment.



Organizational Education

Leadership development, coaching, and high-performance team training for Councils, staff, and public-sector executives.

Our training builds collaboration, communication, and accountability — the human side of strategy.

We blend our expertise in **leadership & teams** into every consulting project, ensuring that all stakeholders are **aligned, engaged,** and **equipped to succeed** together.

HOW WE CAN HELP SOUTHWOLD

Your Needs

- A comprehensive Economic Development Plan for 2026–2029 that aligns with Council priorities, incorporates community feedback, and reflects the unique economic landscape of Southwold.
- A facilitated, results-oriented approach that empowers Council and senior administration to make informed decisions.
- Practical implementation strategies, a detailed Economic Development Plan, and a comprehensive framework for tracking key performance indicators to ensure accountability and progress.

Our Solutions

- **Process:** A structured, results-driven strategic planning approach aligned with the Township's scope of work and timeline.
- **Facilitation Style:** Council-centric, collaborative, and pragmatic, ensuring discussions lead to clear, actionable decisions.
- **Planning Approach:** Future-ready and cognizant of current capacities, grounded in existing local plans and economic realities.
- **Implementation Supports:** A well-defined Plan, a comprehensive implementation roadmap, and a scalable KPI framework to measure success and foster accountability.

Our Experience

- **Town of Erin** - Economic Development Plan
- **Lambton Shores** – Tourism-focused Strategic Plan
- **Township of East Zorra-Tavistock** – Strategic Plan
- **Port of Johnstown** – Business-Focused Strategic Plan

Our Tools & Tech:

Strategy Development:

- Economic sector analysis
- Demographic labour force and workforce trends
- Online surveys
- Interviews
- GDSS software
- Expert facilitation
- Team training for Council–staff alignment

Engagement:

- Digital Engagement Platforms (Social PinPoint, Engagement HQ, etc.)
- Hybrid Engagement Techniques (workshops, open houses, monopoly, idea boards)

Implementation:

- Implementation tracking software
- 6-Month health check

Deliverables

- Preliminary Findings Report and Analysis
- Engagement summary report capturing stakeholder input
- Economic Development Plan document (digital and print-ready formats) and Executive summary for public
- Presentation to Council and staff
- Implementation tracker with performance measures and timelines
- Optional 6-Month Health Check and follow-up review to assess progress and update priorities

—
YOUR PARTNER IN
SUCCESS

Rob Adams HON. BA MPA
 FOUNDER AND CEO, TOWN HALL CONSULTING INC.
 PROJECT LEAD

Rob Adams is a respected municipal leader, executive advisor, and strategic facilitator with more than twenty years of experience guiding local governments through transformation, growth, and organizational renewal. A former Mayor, Warden, and Chief Administrative Officer — and the **2025 Municipal World CAO of the Year** — Rob brings a rare dual perspective that bridges political vision with administrative execution.

As Founder and Principal of Town Hall Consulting Inc., he has led municipalities across Canada in developing community-driven strategic plans, economic development plans, strengthening Council–staff relations, and cultivating high-performance leadership cultures. Rob’s approach is rooted in practical governance, evidence-based decision-making, and a deep respect for the people behind the process.

Recognized for his ability to simplify complex challenges and build alignment among diverse stakeholders, Rob has become a trusted facilitator for elected officials and senior leadership teams navigating strategic change. His sessions are known for creating clarity, collaboration, and renewed confidence in direction.

Whether designing a 10-year corporate plan, facilitating a leadership retreat, or coaching emerging CAOs, Rob’s work helps organizations align purpose, performance, and people—leaving behind strategies that are not only written, but lived.

519.942.7491 | robadams008@gmail.com

Emily Adams HON. BA
 CONSULTANT AND PROJECT MANAGER,
 TOWN HALL CONSULTING INC.

Emily Adams is a strategist, facilitator, and leadership coach who brings a strong background in marketing and communications to the strategic planning process. As a Partner at Town Hall Consulting Inc., she blends strategic insight with creative execution—ensuring each project is both analytically grounded and visually compelling. Emily’s experience in crafting marketing and organizational strategies allows her to translate complex ideas into clear, engaging, and high-quality deliverables. Drawing on her expertise in leadership development and organizational culture, she enhances every stage of the planning process—from engagement design to final presentation—helping municipalities build strategies that not only guide action but inspire alignment and pride.

519.939.9542 |
consultant@townhallconsulting.ca

For resume’s and additional team information please
 see APPENDIX A

2.0 APPROACH & METHODOLOGY



Our 7-Step Process



1. PROJECT INITIATION

Establish the foundation for success. We confirm project scope, governance, roles, timelines, and review key background documents to develop a clear work plan aligned with Council and Administration expectations.



2. RESEARCH & ENVIRONMENTAL SCAN

Review existing plans, conduct an environmental scan, evaluate previous strategic priorities, and gather Council insights to understand current context, priorities, and considerations informing future direction.



3. PLANNING & STRATEGY DEVELOPMENT

Facilitate a structured 2-day Economic Development strategic planning workshop with Council and senior leadership to identify key themes, confirm priorities, and establish a clear framework for the 2026–2029 Strategic Plan.



(Optional)

4. EXTERNAL ENGAGEMENT

Gather public input through digital engagement platforms, focus groups and creative tools to ensure the community voice shapes the strategy.



5. REFINEMENT & FINALIZATION

Synthesize input, validate priorities, and finalize the Economic Development Strategic Plan with clear objectives, actions, and measures of success.



6. IMPLEMENTATION

Support rollout with action tracking tools, implementation frameworks, and communications plans to ensure progress and accountability.



(Optional)

7. HEALTH CHECK

Conduct a 6-month post-launch check-in to assess progress, identify barriers, and adjust as needed to ensure sustained success.



1. PROJECT INITIATION

Purpose: To establish a clear foundation for the project by confirming scope, roles, timelines, and decision-making protocols, and by building a shared understanding of Southwold's existing plans, priorities, and organizational context.

Process:

- **Project Kick-Off & Planning:** Facilitate a project kick-off meeting with Administration to confirm project governance, roles and responsibilities, decision-making protocols, timelines, and key milestones. This meeting will also confirm communication and review processes and finalize expectations for the strategic planning workshop.
- **Background Document Review:** Conduct a focused review of relevant corporate plans, policies, and reports to establish a clear baseline and ensure alignment with existing direction. This includes key economic data, demographic, labour force trends, planning documents, master plans, and strategies identified by the Township.
- **Scope Confirmation & Alignment:** Confirm project scope, deliverables, and assumptions to ensure clarity and alignment prior to advancing into the research and engagement phases, minimizing risk and ensuring an efficient planning process.

Deliverable:

- Confirmed project work plan and schedule
- Summary of background documents reviewed and key baseline considerations

Timeline: Early April 2026



2. RESEARCH & ENVIRONMENTAL SCAN

Purpose: To develop a clear understanding of Southwold's current environment, strategic context, and priorities by examining existing information, evaluating previous economic plans, strategic direction, and incorporating Council insights to inform the planning process.

Process:

- **Review of Existing Plans & Strategies:** Review and synthesize relevant economic plans and data, corporate plans, policies, and studies to understand current commitments, priorities, and interdependencies that must be considered in the 2026–2029 Strategic Plan.
- **Environmental Scan:** Conduct an environmental scan of key external forces that may impact Southwold over the next five to ten years, with consideration for governance, economic, social, environmental, and operational factors relevant to the Township's context.
- **Evaluation of Previous Economic Development Strategic Priorities:** Assess the Town's previous economic development strategic priorities to determine progress, ongoing relevance, and lessons learned to inform future direction, as well as employment land inventory and infrastructure capacity.
- **Council and Economic Development Committee Insights & Election Feedback:** Design and administer a targeted Council survey and/or facilitated discussions to capture key themes from the election period, including opportunities, pressures, and community priorities raised by residents.
- **Synthesis & Validation:** Compile and synthesize findings into key themes and insights, and review them with Administration to confirm accuracy and alignment prior to the economic strategic planning workshop.

Deliverable: Current State Summary outlining key findings from document review, environmental scan (SWOT / PESTEL) evaluation of previous priorities, and Council insights.

Timeline: May 2026



3. PLANNING & STRATEGY DEVELOPMENT

Purpose: To engage Council and senior leadership in a structured, results-driven economic development strategic planning process that builds alignment, confirms priorities, and establishes a clear strategic direction for the 2026–2029 term.

Process:

- **Economic Development Strategic Planning Workshop:** Facilitate a 2-day in-person strategic planning workshop with Council, senior administration and the economic development steering committee participating as appropriate to provide context, subject matter expertise, and insight into organizational capacity and operational realities.
- **Vision, Mission & Values Confirmation:** Work with participants to confirm/refine the Township’s Vision, Mission, and Core Values to ensure alignment with Council’s priorities and community expectations.
- **Strategic Priority Setting:** Introduce a structured decision-making model to support informed discussion and reach agreement on the most important economic development strategic priorities for the 2026–2029 term, balancing aspiration with achievability. Focussed on sustainable economic growth, business retention and expansion, investment attraction and workforce development. We incorporate an innovative Monopoly-style prioritization exercise that helps participants understand trade-offs, resource constraints, and the cumulative impact of strategic choices in a practical and engaging way. Our innovative Monopoly approach gamifies the planning process in a uniquely engaging way.
- **Capacity & Alignment Assessment:** Assess proposed priorities against corporate and financial capacity, ensuring alignment with existing plans, policies, budgets, and day-to-day operations.
- **Advocacy & Out-of-Scope Considerations:** Identify and clearly separate items that fall outside the municipal scope for consideration as potential advocacy priorities.

Deliverable: A clear set of confirmed Vision, Mission, and Core Values, agreed-upon strategic priorities that provide the foundation for the development of the Economic Development Plan, and KPI framework.

Timeline: June 2026



4. EXTERNAL ENGAGEMENT (Optional)

Purpose: To provide the Township with an opportunity to gather targeted community input to complement Council direction.

Process:

- **Engagement Design:** Design an online engagement approach and or focus groups to gather community input on identified themes or priorities emerging from the economic development planning process.
- **Online Community Survey and or focus groups:** Develop and administer a concise, accessible online survey to collect feedback from residents, businesses, and stakeholders, focused on validation rather than broad consultation.
- **Summary & Integration:** Synthesize engagement results and share key insights with Administration and Council for consideration during refinement of the Strategic Plan.

Deliverable: An engagement summary outlining key themes and feedback gathered through the online engagement process, for consideration during the refinement and finalization of the Strategic Plan.

Timeline: June 2026



5. REFINEMENT & FINALIZATION

Purpose: To translate Council and Economic Development Committee direction into a clear, well-structured, and visually engaging Economic Development Strategic Plan and supporting documents that are refined, approved, and ready for implementation.

Process:

- **Draft Strategic Plan Development:** Prepare a draft 2026–2029 Strategic Plan based on Council and Committee direction, workshop outcomes, and supporting analysis, clearly articulating strategic priorities, desired outcomes, and success measures. Review draft with Staff, Committee and Council.
- **Document Refinement & Alignment:** Work collaboratively with Administration to refine the draft Strategic Plan, ensuring alignment with existing plans, policies, budgets, and operational realities, and incorporating feedback as required.
- **Design & Presentation Materials:** Apply a clear, professional design and layout to the Economic Development Strategic Plan and executive summary to ensure readability, accessibility, and effective communication for both Council and the public.
- **Council Presentation & Approval:** Prepare and deliver a presentation to the Economic Steering Committee and Council summarizing the Economic Development Strategic Plan, key priorities, and implementation considerations, and incorporate final feedback leading to Council approval.

Deliverable: A finalized 2026–2029 Strategic Plan, including a public-facing executive summary and supporting presentation materials, approved by Council and ready to guide organizational decision-making.

Timeline: August - September 2026



6. IMPLEMENTATION

Purpose: To translate the Economic Development Strategic Plan into a practical and achievable plan supported by a clear implementation roadmap and performance measurement framework that enables accountability, tracking, and reporting.

Process:

- **Economic Development Plan:** Work with senior administration to develop a Corporate Plan that aligns strategic priorities with organizational responsibilities, timelines, and resource considerations, ensuring implementation is realistic and capacity-aware.
- **Implementation Roadmap:** Develop a clear implementation roadmap that identifies key initiatives, milestones, sequencing, and responsibilities to support coordinated execution across the organization.
- **KPI & Performance Measurement Framework:** Design a tiered performance measurement framework that includes strategic, departmental, and community-level SMART KPIs to track progress, evaluate success, and support informed decision-making by Council and Administration.
- **Tracking & Reporting Tools:** Provide practical, low-barrier tools and templates to support ongoing tracking and reporting of progress, aligned with the Town's existing reporting practices and systems.

Deliverable: An Economic Development Plan supported by a practical implementation roadmap and a tiered KPI framework with SMART performance measures, along with tools and templates to support ongoing tracking, reporting, and accountability.

Timeline: September 2026

7. HEALTH CHECK

Purpose: To provide the Township with an optional opportunity to assess early progress, identify challenges, and make informed adjustments to support the successful implementation of the Economic Development Plan.

Process:

- **Virtual Progress Review:** Facilitate a check-in session with Administration to review progress against the Economic Development Plan, and KPI framework.
- **Implementation Reflection & Adjustment:** Support a structured discussion to identify successes, barriers, and emerging considerations, and to confirm whether priorities, timelines, or approaches require refinement.
- **Practical Recommendations:** Provide targeted, practical recommendations to support continued momentum and alignment with Council direction and organizational capacity.

Deliverable: A 6-month Health Check summary outlining key observations, progress considerations, and recommended adjustments to support continued implementation success.

Timeline: March 2027

OUR APPROACH

Collaborative and Inclusive

- Every plan is co-created with Council, the Economic Development committee and senior administration, ensuring alignment between strategic direction and organizational capacity.
- We bridge perspectives between elected officials, committee members and leadership teams to establish a unified, implementable direction.
- Our facilitation style builds alignment and trust, creating a respectful space where informed discussion leads to clear decisions.

Grounded in Municipal Reality

- We understand the complexities of small and rural municipalities — limited capacity, tight budgets, and competing priorities.
- Our process balances vision and practicality, ensuring goals are ambitious but achievable.

Built for Action, Not the Shelf

- Every plan includes implementation tools, performance measures, and accountability supports.
- We provide ongoing guidance through Health Checks, coaching, and dashboards.
- Our goal: a living plan that drives daily decision-making.

Flexible and Adaptable

- While our framework is proven, we tailor every project to each organization's timeline, capacity, and culture.
- We adjust our methods to meet client needs — ensuring efficiency without sacrificing engagement.

		April				May				June					July				August				Sept				Oct		April		
		6	13	20	27	4	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24	31	7	14	21	28	1	15	8	22
Phase 1	Project Initiation & Current State Assessment																														
	Project Setup and Planning																														
	Project Kick-off meeting with Project Team																														
	Scope review, deliverables & Goal Setting																														
	Set up Project Progress meetings																														
	Review Public & Stakeholder Engagement Plan																														
	Discovery, Research, Current State Assessment, Industry Cluster & SWOT, Market Analysis, BR+E Analysis,																														
Deliverable	Research findings & Analysis report delivered																														
Phase 2	Internal Engagement																														
	Interview / Survey CAO & Senior Staff																														
	Interview / Survey Committee & Council																														
	Conduct Staff & Council survey																														
Phase 3	Planning & Strategy Development																														
	Workshop 1 - Mission, Vision, Values, SWOT																														
	Workshop 2 - Focus Sectors, Strategic Priorities, BHAG																														
	Workshop analysis & key findings reports with Project team																														
Deliverable	Strategic Direction Report: Draft Strategy & Action Plan Outline & Executive summary																														
Phase 4	External Community Engagement																														
	Focus Groups																														
	Online Community Engagement survey (Social PinPoint)																														
	Open House / Monopoly Night																														
Deliverable	Community engagement analysis & reporting																														
Phase 5	Refinement & Finalization of Recommendations																														
	Refine recommendations based on Community engagement feedback																														
Deliverable	Draft Strategy & Action Plan presentation to Project Committee & Council for review & refinement																														
Deliverable	Attend Council Meeting to present Plan for approval: Final Strategic Plan delivered																														
Phase 6	Implementation																														
Deliverable	Develop Implementation Plan: identifying steps, responsibilities, timelines, budget, KPI's																														
	Finalize implementation action plan																														
Deliverable	Staff training on Tracking Tool and KPI's																														
Phase 7	Health Check																														
	Conduct "Health Check" Workshop																														
	Develop Key Findings																														
Deliverable	Produce Health Check Report with next steps & any needed adjustments to the Plan																														
Milestones:	1. Research findings & Analysis report 2. Draft Strategy & Action Plan, 3. Engagement Report 4. Draft Strategic Plan 5. Final Strategic Plan, 6. Tracking Tool, 7. Health Check																														
Resources:	Executive Oversight and Project Lead: Rob Adams, Project Manager: Emily Adams																														

3.0 SAMPLES OF WORK

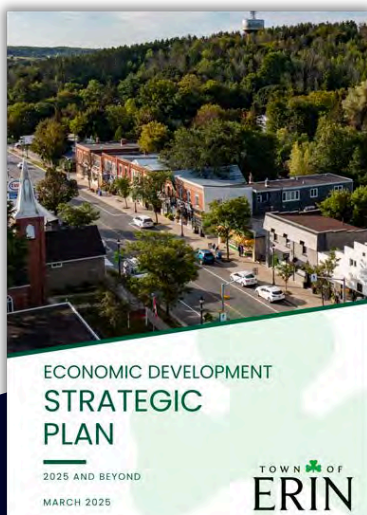


TOWN OF ERIN ECONOMIC DEVELOPMENT AND TOURISM STRATEGIC PLAN

Town Hall Consulting engaged In the facilitation and development of the Town of Erin's Economic Development and Tourism Strategic Plan, guiding the project from analysis to action. Our work included a detailed economic base SWOT, workforce and asset assessment, target industry identification, infrastructure and incentive review, organizational capacity evaluation, and site assessments. Community consultation played a central role in shaping a practical, results-driven plan to support sustainable economic growth.

Project Type: Strategic Planning Facilitation, Stakeholder and Community Engagement, Economic Development and Tourism Strategy, Implementation Tools & Tracking Support

Reference: Marina Mato, Economic Development Officer
519-855-4407 x 241
Marina.Mato@erin.ca



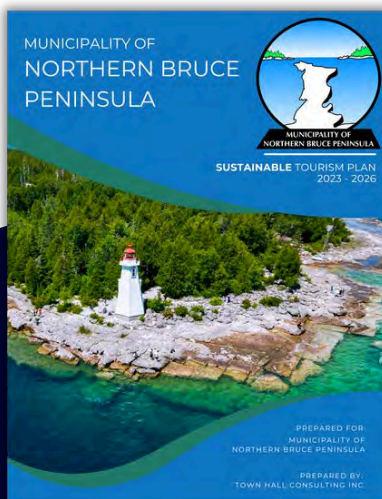
MUNICIPALITY OF NORTH BRUCE PENINSULA, PARKS CANADA AND RTO7 TOURISM STRATEGIC PLAN

Town Hall Consulting was approached by the Municipality of North Bruce Peninsula, Parks Canada and RTO7 under their Sustainable Tourism Advisory Group to build a leading-edge tourism strategic plan. Their strategy need was unique, as the goal was not to attract tourists to the region but rather to manage the tourism demands. Working collaboratively, three levels of government under the guidance of Town Hall Consulting, develop a forward-looking Tourism Strategic Plan that will set the course for the next decade. The plan includes significant changes to how tourism is managed using innovation and UNESCO Sustainable Development Goals.

Organization: STAG (Sustainable Tourism Advisory Group)
Municipality of North Bruce Peninsula

Project Type: Tourism Strategic Plan, Facilitation and Strategic Planning Services, Stakeholder and Community Engagement, Strategic Plan implementation and execution tool and ongoing tracking.

Reference: Peggy Van Mierlo-West, CAO, 519-793-3522
pvmwest@northbruce.ca

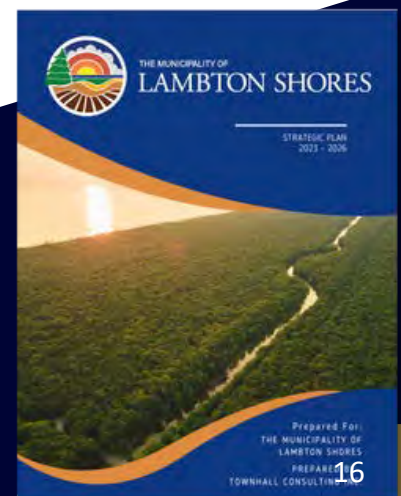


MUNICIPALITY OF LAMBTON SHORES STRATEGIC PLAN ECONOMIC DEVELOPMENT AND TOURISM

The Municipality of Lambton Shores retained Town Hall Consulting to build a dynamic strategic plan for their community of 11,000 residents and thousands of tourists who visit every year. The strategic planning process brought the Council-Staff team together, engaged the community, and identified 6 key priority areas to focus on. Collaboratively, we built a community strategic plan with key initiatives focused on agriculture, economic development and tourism, that will guide the community for this term of council and beyond.

Project Type: Facilitation and Strategic Planning Services, Team building, Stakeholder and Community Engagement, Strategic Plan implementation and execution tool and ongoing tracking.

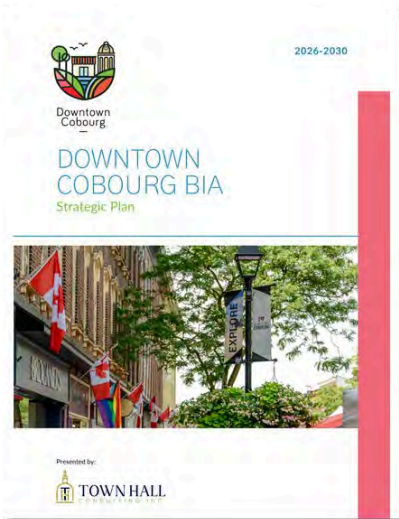
Reference: Steve McAuley, CAO,
519-243-1400
SMcAuley@lambtonshores.ca



DOWNTOWN COBOURG BIA ECONOMIC STRATEGIC PLAN

Town Hall Consulting partnered with the Downtown Cobourg BIA to develop a new economic strategic plan with a strong focus on downtown revitalization, economic vitality, and organizational sustainability. The project built upon the BIA's previous strategic plan, using it as a baseline to assess progress and identify opportunities for refinement and growth. A key component of the work involved establishing clear Key Performance Indicators and measures of success to strengthen accountability and support ongoing decision-making. The resulting strategic plan provides a practical roadmap to guide priorities, track progress, and support continued downtown vibrancy.

Reference: Carleigh Hunter, Administrator
(905) 377-8024
dbia@downtowncobourg.ca

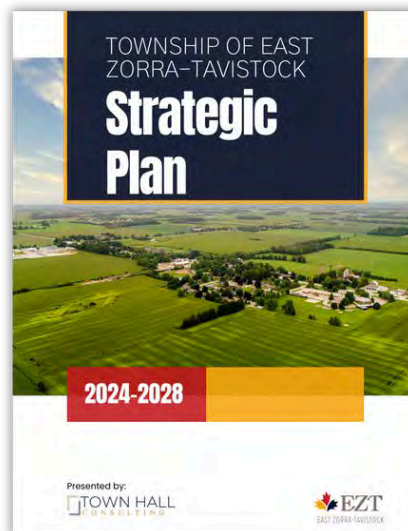


EAST ZORRA-TAVISTOCK STRATEGIC PLAN

Town Hall Consulting partnered with the Township of East Zorra-Tavistock to design and facilitate a highly participatory strategic planning process that brought together staff, Council, and the broader community. The robust project involved extensive engagement with community stakeholders to ensure citizen support and create buy-in. Our unique Strategic Planning 'Monopoly Night' was a huge success with high turnout and rave reviews from residents. Finally, the project involved identifying measures of success/ KPI's to ensure strategy execution and implementation of our tracking tool.

Link: [view here.](#)

Reference: Karen DePrest, CAO,
519-462-2697 #7824
kdeprest@ezt.ca



PORT OF JOHNSTOWN BUSINESS DEVELOPMENT STRATEGIC PLAN

The Port of Johnstown, owned by the Township of Edwardsburgh Cardinal, engaged Town Hall Consulting to develop its first comprehensive Strategic Plan. The project focused on strengthening governance, operational efficiency, and long-term infrastructure planning to enhance the Port's competitiveness and economic impact. Through close collaboration with Port leadership and municipal representatives, Town Hall delivered a clear roadmap to guide sustainable growth and future investment.

Reference: Leslie Drynan, General Manager
613-285-7853
ldrynan@portofjohnstown.com

Testimonial: "provided clear frameworks for decision-making, facilitated productive discussions, and helped the Port identify actionable priorities."

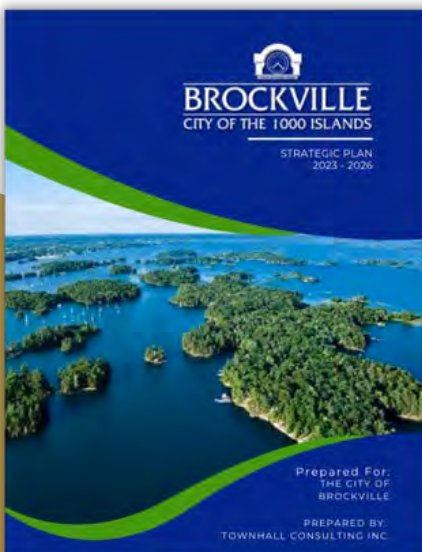


CITY OF BROCKVILLE STRATEGIC PLAN

Town Hall Consulting was recommended to the City of Brockville to facilitate a significant strategic planning project, including extensive employee, community and stakeholder engagement. Council-staff relations and team building were also key requirements. Several strategic planning workshops culminated in a comprehensive strategic plan that will guide the municipality over the next decade. A series of strategic initiatives were identified in 7 priority areas. Key Highlights included Downtown revitalization and redevelopment of the municipal harbour. Town Hall Consulting provided a strategic plan execution tool to track and report ongoing progress.

Link: [view here.](#)

Reference: Sandi McDonald, CAO, 613-342-8872 #4461
smacdonald@brockville.com



TOWNSHIP OF CAVAN MONAGHAN STRATEGIC PLAN

The Township of Cavan Monaghan engaged Town Hall Consulting to lead the development of its 2025-2030 Strategic Plan. The project emphasized collaboration between Council, staff, and the community to define a clear, actionable vision for the next decade. Through a series of facilitated workshops, surveys, and an innovative community engagement campaign, Town Hall guided the Township in identifying priority pillars, measurable objectives, and a framework for long-term implementation. The resulting plan reflects a shared commitment to sustainable growth, community vitality, and service excellence.

Link: [view here.](#)

Reference: Yvette Hurley, CAO, 705-932-9328
yhurley@cavanmonaghan.net



TOWNSHIP OF TYENDINAGA STRATEGIC PLAN

Town Hall Consulting facilitated and built a community strategic plan for the Township of Tyendinaga. Stakeholder engagement was a key element of the project, ensuring citizen support, as well as, key engagement with First Nations of Tyendinaga. The project required a high level of facilitation management and a progressive strategic planning approach unique to the community. Like many growing municipalities balancing local identity with new opportunities, the plan emphasized sustainable development, collaboration, and long-term community well-being. Additionally, Town Hall Consulting provided an implementation tracking tool to ensure plan execution.

Link: [view here.](#)

Reference: Carla Preston, CAO, 613-396-1944
cao@tyendinagatownship.com



TOWNSHIP OF ADJALA-TOSORONTIO STRATEGIC PLAN

The Township of Adjala-Tosorontio retained Town Hall Consulting to facilitate and build a new strategic plan for the community. The project required a high level of engagement management including multiple open houses, a monopoly event, an engagement platform and community surveys. Town Hall facilitated several workshops to collaboratively build a progressive strategic planning unique to the municipality. Town Hall Consulting provided a strategy execution tool to ensure ongoing tracking to deliver results and track KPI's.

Link: [view here.](#)

Reference: Nelson Santos, CAO
249-733-3407
nelsonsantos1970@gmail.com



TOWNSHIP OF EDWARDSBURGH CARDINAL STRATEGIC PLAN

The Township of Edwardsburgh Cardinal engaged Town Hall Consulting to lead the development of a forward-looking Strategic Plan that reflects the needs of residents, businesses, and visitors alike. Drawing on our experience with small municipalities and tourism-based economies, the process united Council and staff around a shared vision while engaging the broader community in shaping local priorities

Link: [view here.](#)

Reference: Sean Nicholson CAO
613-978-0560
snicholson@twpec.ca

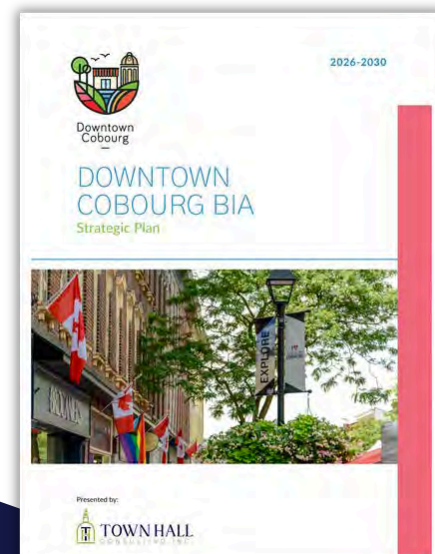
Testimonial: *"Their extensive experience working with small municipalities and dynamic tourism destinations was a significant value-add, as they understood the balance between economic development, tourism, and local priorities...."*



DOWNTOWN COBOURG BIA ECONOMIC DEVELOPMENT STRATEGIC PLAN

Town Hall Consulting partnered with the Downtown Cobourg BIA to develop a new economic strategic plan with a strong focus on downtown revitalization, economic vitality, and organizational sustainability. The project built upon the BIA's previous strategic plan, using it as a baseline to assess progress and identify opportunities for refinement and growth. A key component of the work involved establishing clear Key Performance Indicators and measures of success to strengthen accountability and support ongoing decision-making. The resulting strategic plan provides a practical roadmap to guide priorities, track progress, and support continued downtown vibrancy.

Reference: Carleigh Hunter,
Administrator
(905) 377-8024
dbia@downtowncobourg.ca





APPENDICES



APPENDIX A

Resumes





Rob Adams **HON. BA MPA**

Founder & CEO
Town Hall Consulting

EDUCATION

- HBA Western University MPA
Local Government Western University
- Ivey-AMCTO Executive Municipal Leadership Program
- Pragmatic Marketing Certificate
CRESTCOM Executive CEO Leadership Training

Municipal recognition and professional awards

- Recipient of the E. A. Danby Award for Outstanding Achievement in improving local government performance and Innovation (AMCTO)
- The Peter J. Marshall Innovation Award (AMO) Ontario Municipal Administrators
- Association Achievement Award (OMAA) for mentorship and excellence.
- Award of Excellence issued by Western University Local Government Alumni Society.
- Best Downtown of the Year Award Canada (Orangeville) by Urban Planners Institute

Town Hall Consulting Inc.
robadams008@gmail.com
519-942-7491

PROFILE

Rob is the Founder and Principal Consultant for Town Hall Consulting. Rob is a passionate and innovative leader/facilitator who uses outside-the-box thinking to leverage success.

Rob brings 25 years of direct experience and is unique in the municipal sector having served as a multi-term Mayor and Warden on the political side and as a Chief Administrative Officer where he has led several of Canada's fastest growing communities. His key achievements include:

- Purchased and Operated the Credit Valley Explorer Rail Road to support local industries
- Best Downtown of the Year in Canada: Orangeville
- Huge industrial expansions in Orangeville and Grey Highlands
- Funding and Development of several Hospitals
- CAO of the Year 2026 Municipal World Magazine

Rob is also a proven business executive, as he ran the Operations of Canada's largest digital signage technology software company and achieved the Profit 100 Canada's Fastest Growing Companies rankings 2 years in a row.

Rob has a wealth of experience in economic development strategic planning and has led and facilitated many successful strategic plans using the innovative methodology of OKR's and utilizing performance management software to gather, analyze and manage the data inputs at the strategic planning workshops and beyond. Rob has also facilitated and built private-sector strategic plans using the "Blue Ocean Strategy," Key Performance Indicators, and OKRs (Objectives and Key Results) for two of Canada's largest software companies. He has worked with municipal councils and staff to develop forward-thinking strategic plans that differentiate their communities.

Rob is a terrific mediator/facilitator who has worked with incoming Boards of Directors to address relationship conflicts and build consensus on vision, mission, values, and strategic priorities to guide administrative leadership and drive operations.

Rob recently led and facilitated Council-Staff training workshops at over 60 municipalities in Ontario through AMCTO.

Rob serves on the OMAA Board and chairs the transition committee.

Rob will serve as Project Lead, responsible for ensuring the Municipality receives a comprehensive, actionable session and final product. He will oversee all aspects of project delivery and serve as the key point of contact throughout the project.

Rob Adams

HON. BA MPA

Principle
Town Hall Consulting

AREAS OF PRACTICE

- Economic Development Strategic Planning
- Strategic Planning and Facilitation
- Mediation
- Coaching and mediation of team performance
- Council-Staff relations training
- Service Delivery Reviews
- Tourism and Culture Strategic Planning
- Public Engagement
- CAO Coaching and mentoring
- High-Performance Team training
- Project Management
- Culture-shaping leadership
- Communications and marketing

RELEVANT PROFESSIONAL EXPERIENCE

Mediation and High-Performance team training

- Municipality of Clarington
- Town of Collingwood
- Town of Whitby
- City of Quinte West
- Town of Stratford
- Town of Smith Falls

Strategic Planning

- Town of Erin
- Town of Stouffville
- Town of Orangeville
- City of Brockville
- Town of Arnprior
- Municipality of Lambton Shores
- Tay Valley Township
- Elizabeth Town Kitley
- Municipality of Grey Highlands
- Omnivex Technology Corporation
- Adflow Networks
- Township of East Zorra-Tavistock

Tourism Strategic Planning

- RTO7 Northern Bruce Peninsula
- Municipality of Grey Highlands

Chief Administrative Officer

- Municipality of Grey Highlands
- Town of Stouffville
- Town of Erin

Political Experience

- 3 term Mayor Town of Orangeville
- 4 term Warden of Dufferin County

Private Sector Experience

- President of Direct Internet Systems
- VP Adflow Networks
- VP Omnivex

EMILY ADAMS



With over a decade in marketing & communications strategy, I specialize in helping businesses, organizations, and municipalities develop impactful strategies that drive growth and engagement. As a business strategist and communications consultant, I craft innovative solutions, oversee project management, and provide high-level consulting that enhances brand positioning, stakeholder engagement, and long-term sustainability. My expertise spans business strategy, communications, talent management, and marketing strategy for brands, organizations, and public sector initiatives.

RELATED WORK EXPERIENCE

Consultant Town Hall Consulting Inc | 2023 - Present

- Developed 15+ municipal & departmental strategic plans for long-term economic and community growth.
- Conducted in-depth research, stakeholder engagement, and data analysis to inform policy and planning.
- Advised on public communications strategies, ensuring alignment with municipal goals.
- Created comprehensive business development and operational strategies for clients.

Director of Marketing, Operations & Client Services EIST Marketing & Creative Inc | 2021-2022

- Designed and executed business and marketing strategies for clients across multiple industries.
- Managed and supported teams, ensuring seamless project execution and client satisfaction.
- Developed internal business processes to optimize efficiency and communication.
- Led financial planning and business operations management to drive sustainable growth.

Independent Business & Marketing Consultant Independent | 2018-Present

- Provides strategic consulting for brands and organizations, focusing on business growth, communications, and marketing.
- Develops tailored business strategies, from operational frameworks to brand positioning.
- Leads stakeholder workshops on business development, communications, and digital engagement.

BUSINESS & COMMUNICATIONS STRATEGIST

+1 519.939.9542

consultant@townhallconsulting.ca

EDUCATION

Wilfrid Laurier University Waterloo, ON

Honours Bachelor of Arts in
Communication with a specialization
in Business Management | 2013-2017

CORE SKILLS & EXPERTISE

- Business & Marketing Strategy
- Strategic Communications
- Project & Client Management
- Community & Stakeholder Engagement
- Business Operations
- Data & Performance Analytics
- Proposal Writing
- Graphic Design & Brand Development
- Public Speaking & Workshop Facilitation
- Google Analytics Certified
- Social Media Strategy
- Proficient in Microsoft Office & G-Suit

APPENDIX B

TOOLS AND TECHNOLOGY



Our Tools & Technology Capabilities

Town Hall Consulting uses a range of facilitation tools, engagement platforms, and technology to enhance collaboration, data collection, and decision-making throughout each project.

The selection of tools for each engagement is tailored based on our assessment of your project's scope, objectives, and audience — ensuring the most effective, accessible, and value-driven approach for your community.

Please note that some specialized digital platforms (such as Social PinPoint or Engagement HQ) are licensed software that may require additional purchase or subscription by the Municipality.

If a project would benefit from incorporating these tools, we will discuss the options, pricing, and setup process prior to project launch or the relevant engagement phase.

Internal & Community Engagement:

Modality/Tool	Description	Best Use Case
Online Surveys	Secure, custom-built surveys used to collect input from staff, Council, and the public.	Gathering insights, perceptions, and priorities from diverse audiences.
Stakeholder Interviews	One-on-one or small-group interviews (virtual or in-person) guided by a semi-structured discussion protocol.	Deep-dive understanding of perspectives, challenges, and opportunities from key internal and external stakeholders.
Focus Groups & Workshops	Structured facilitated sessions to explore ideas, test assumptions, and validate priorities.	Building shared understanding and collaboration between teams, departments, or community groups.
GDSS (Group Decision Support Software)	A digital facilitation tool that allows participants to brainstorm, cluster ideas, rank priorities, and reach consensus in real-time.	Prioritizing strategic initiatives with Council or Senior Leadership Teams in facilitated workshops. These tools ensure that all voices are heard, and not just the loudest in the room.
Online Engagement Software (Social PinPoint / Engagement HQ)	Interactive online engagement platforms with tools like idea boards, mapping, and surveys.	Engaging residents, businesses, and stakeholders in a transparent and accessible way.
Monopoly Night / Fund-It Game	A gamified engagement method developed by Town Hall to make complex trade-offs fun and intuitive.	Encouraging meaningful public participation and prioritization during community consultations.

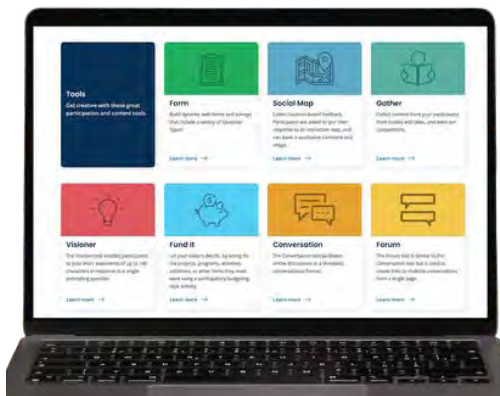
Our Tools & Technology Capabilities

Implementation:

Modality/Tool	Description	Best Use Case
Implementation Tracker	A custom tool developed by Town Hall to monitor progress, assign responsibilities, and measure success over time.	Supporting staff in executing and tracking Strategic Plan actions.
6-Month Health Check	A facilitated follow-up process and survey to assess progress, challenges, and emerging needs.	Measuring impact and re-aligning focus areas post-implementation.

Training & Development:

Modality/Tool	Description	Best Use Case
High-Performance Team Training	A customized team development workshop series integrating leadership, communication, and team dynamics frameworks.	Strengthening Council–staff alignment and improving collaboration.
Values & Culture Assessments	Tools such as the Five Dysfunctions of a Team assessment or customized values surveys.	Enhancing trust, alignment, and cultural clarity within teams.



Google Forms



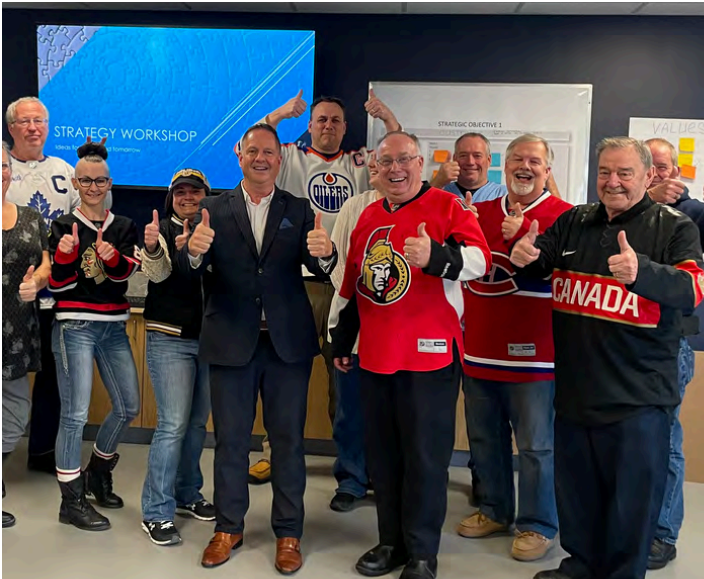
SurveyMonkey

APPENDIX C

Testimonials & Letters of

RECOMMENDATION



MUNICIPALITY OF
ELIZABETHTOWN KITLEY

“Rob Adams is a skilled facilitator whose easy-going manner will put any group at ease. But don't let his calm demeanour fool you – even while you're having fun, you'll get lots of quality work done. Rob and his team helped our Council develop a robust Strategic Plan, which has already started to pay dividends early in our term. For a motivating and memorable experience, consider Rob for your next planning session.”

Mayor Brant Burrows
Municipality of Elizabethtown Kitley



“As a workshop facilitator, Rob Adams is engaging, thought provoking, and most importantly fun; providing a start to finish session that is memorable for those participating. Whether he is presenting virtually or in person, his energy and passion for the topics he presents ensures that people leave with important information, all while having their own ‘aha moments’ along the way. He uses well crafted PowerPoints and games to engage all learning styles. He is able to adapt and meet the needs of his clients – and will work tirelessly to create a well thought out session.”

J. Alexander Gibson, Manager Professional Development, AMCTO, Association of Municipal Clerks and Treasurers





Port of Johnstown

A Division of Edwardsburgh/Cardinal Township

T: 613.925.4228 x104

C: 613.285.7853

E: ldrynan@portofjohnstown.com

3035 County Road 2

Johnstown, ON K0E 1T1

www.portofjohnstown.com

October 20, 2025

Town Hall Consulting Inc.
c/o Rob Adams, Emily Adams

Dear Rob and Emily,

Re: Port of Johnstown Strategic Plan 2025

It is my pleasure to provide this letter of reference for Town Hall Consulting Inc. in recognition of their outstanding support, guidance, and expertise in the development and completion of the Port of Johnstown's Five-Year Strategic Plan.

Throughout the engagement, the Town Hall Consulting Inc. team demonstrated exceptional professionalism, strategic insight, and a deep understanding of both municipal operations and port governance. Their collaborative approach ensured that all stakeholders — from advisory members and staff to municipal representatives and the public — were meaningfully engaged in the planning process.

Town Hall Consulting Inc. provided clear frameworks for decision-making, facilitated productive discussions, and helped the Port identify actionable priorities that balance operational efficiency, economic growth, and long-term sustainability. Their ability to synthesize complex data and stakeholder input into a coherent, forward-looking strategy was instrumental in producing a plan that will guide the Port's continued success over the next five years.

We greatly appreciated their responsiveness, professionalism, and commitment to helping us achieve a plan that truly reflects our vision and values. I would highly recommend Town Hall Consulting Inc. to any organization seeking expert guidance in strategic planning, governance, or stakeholder engagement.

Respectfully

Leslie Drynan
General Manager



To Whom It May Concern,

It is my pleasure to provide this letter of reference for **Town Hall Consulting** and their exceptional work in leading the Municipality of Lambton Shores' Strategic Planning process. As the Chief Administrative Officer, I have had the opportunity to work closely with **Rob Adams, Emily Adams, and their team**, and I can confidently say that their expertise, innovative approach, and commitment to community engagement set them apart in the field of municipal strategic planning.

From the outset, Town Hall Consulting demonstrated a deep understanding of our municipality's unique needs, ensuring that both **Council and staff** were actively engaged in shaping our shared vision. One of the hallmarks of their approach was their ability to foster **true collaboration** between elected officials and staff, bridging gaps and creating a strong, unified direction for our community.

A standout feature of our engagement with Town Hall Consulting was their **unique and innovative public engagement approach**, which was particularly valuable given Lambton Shores' **large seasonal population**. Their strategies ensured that we captured the voices of both full-time and seasonal residents, ensuring broad representation in shaping our Strategic Plan.

Beyond their facilitation skills, **Town Hall Consulting's extensive experience working with small municipalities and dynamic tourism destinations** was a tremendous value-add to our process. They understood the unique challenges and opportunities that come with a municipality like Lambton Shores—where tourism, economic development, and seasonal population fluctuations play a significant role in shaping municipal priorities. Their ability to **balance long-term strategic objectives with the realities of a tourism-driven economy** was a key factor in developing a Strategic Plan that is both visionary and practical.

Thanks to Town Hall Consulting, the Municipality of Lambton Shores now has a **Strategic Plan that is actionable, measurable, and designed for long-term success**. Their ability to drive results, engage the community in meaningful ways, and unite municipal leadership behind a common vision makes them an outstanding partner for any municipality seeking to embark on or refine their strategic planning journey.

I highly recommend **Town Hall Consulting** to any municipality looking for a partner that can deliver a **highly effective, engaging, and results-oriented strategic planning process**. Please do not hesitate to reach out if you require any further insights into our experience working with Rob Adams and his team.

Sincerely,
Steve McAuley, C.Tech.
Chief Administrative Officer
Municipality of Lambton Shores

May 13, 2025

Subject: Letter of Recommendation for Town Hall Consulting

To Whom It May Concern,

This letter of reference is regarding Rob Adams and his company Town Hall Consulting. The Township of Cavan Monaghan recently contracted Town Hall Consulting to create a 5-year Strategic Plan. It was a pleasure working with both Rob Adams and Emily Adams as they guided the Township through the process of developing a comprehensive exploration of our vision, mission, values and key priorities to create a clear path for the future.

I found both Rob and Emily to be very thorough in their pre-planning meetings and their workshops with Council, Staff, and key stakeholders were well planned and engaging. Rob and Emily were able to guide the workshops, keeping everyone on track, which resulted in great discussions and productive sessions.

Town Hall Consulting provided unique and enjoyable ways for the Community to engage with the strategic planning process. They hosted an in-person Monopoly night that was a hands-on way for residents to put their Monopoly money on the priorities they considered most important. They also got the Township up and running with the online engagement tool, Social Pinpoint, where we were able to garner community feedback and engage with residents in a new way.

Feedback from Council, staff and focus groups was positive. I would recommend Town Hall Consulting for any strategic planning needs.

Sincerely,



Yvette Hurley

Chief Administrative Officer/Deputy Clerk/Deputy Treasurer
Township of Cavan Monaghan

988 County Rd 10
Millbrook, Ontario L0A 1G0

www.cavanmonaghan.net

Phone: 705-932-2929
Fax: 705-932-3458



EDWARDSBURGH CARDINAL

Phone: 613-658-3055
Fax: 613-658-3445
Toll Free: 866-848-9099
E-mail: mail@twpec.ca

P.O. Box 129,
18 Centre St.
Spencerville, Ontario
K0E 1X0

To Whom It May Concern,

It is my pleasure to provide this letter of reference for **Town Hall Consulting** and their outstanding work in leading the **Township of Edwardsburgh Cardinal's Strategic Planning process**. As Chief Administrative Officer, I had the opportunity to work closely with **Rob Adams and his team**, and I can confidently say that their expertise, facilitation skills, and commitment to meaningful community engagement set them apart.

From the very beginning, Town Hall Consulting demonstrated a deep understanding of our municipality's **unique needs, challenges, and opportunities**. They ensured that **both Council and staff** were engaged throughout the process, fostering collaboration and building a strong foundation for decision-making. Rob's ability as a **facilitator** was particularly valuable in bringing together the perspectives of elected officials and municipal staff, ensuring alignment and a shared vision for the Township's future.

A key strength of Town Hall Consulting is their **exceptional approach to community engagement**, which was especially important given our **large seasonal resident population**. They employed innovative strategies to ensure that a broad and diverse range of voices were heard, leading to a **Strategic Plan that truly reflects the priorities of our full-time and seasonal residents alike**. Their extensive experience working with **small municipalities and dynamic tourism destinations** was a significant value-add, as they understood the **balance between economic development, tourism, and local priorities**.

Beyond engagement, Town Hall Consulting's ability to translate strategic priorities into **measurable outcomes** was invaluable. **Rob Adams' private sector experience** helped shape a **results-driven framework**, introducing a structured approach to tracking progress through **Key Performance Indicators (KPIs)**. Their **custom tracking tool** provides us with a **clear roadmap for implementation**, while their **Health Check process**, a key differentiator, ensures that our Strategic Plan remains relevant and adaptable over time.

The Township was so pleased with the **process, engagement, and final product** that we have **retained Town Hall Consulting to develop a second Strategic Plan**—this time for the **Township-owned Port of Johnston on the St. Lawrence River**. Their ability to tailor their approach to the unique needs of different municipal assets speaks to the **depth of their expertise and their commitment to delivering strategic plans that drive real impact**.

Thanks to Town Hall Consulting, **Edwardsburgh Cardinal now has a Strategic Plan that is actionable, measurable, and designed for long-term success**. Their ability to



EDWARDSBURGH CARDINAL

Phone: 613-658-3055
Fax: 613-658-3445
Toll Free: 866-848-9099
E-mail: mail@twpec.ca

P.O. Box 129,
18 Centre St.
Spencerville, Ontario
K0E 1X0

unite leadership, engage the public, and create a clear path forward makes them an **outstanding partner for any municipality** undertaking a strategic planning process.

I highly recommend **Town Hall Consulting** to any municipality seeking a **highly effective, engaging, and results-oriented strategic planning process**. Please feel free to reach out if you require further details about our experience working with Rob Adams and his team.

Sincerely,

Sean Nicholson
Chief Administrative Officer
Township of Edwardsburgh Cardinal
Email: snicholson@twpec.ca
Phone: (613) 658-3055 extension 104
Cell: (613) 978-0560

APPENDIX D

Inurance, Certifications, & ACKNOWLEDGEMENTS



Insurance

Town Hall Consulting is insured through:

Crewson Insurance Brokers Limited
110 Adeline Street
Shelburne, Ontario L9V3J8
Broker No. 33654
Nicky Hoogendoorn-deGroot

Our policy is held by:

Intact Insurance
700 University Avenue, Suite 1400,
Toronto, Ontario M5G 0A1

The coverage is:
\$2,000,000 Professional Liability policy
\$5,000,000 Commercial General Liability policy for our business

Town Hall Consulting will arrange prior to commencement for our insurer to provide a certificate naming the municipality within 7 days.

AODA & WSIB COMPLIANCE

AODA

Town Hall Consulting complies with AODA requirements and verifies that all staff are fully AODA compliant.

WSIB

We will provide a valid clearance certificate or a letter from WSIB verifying independent operator status.

CONFLICT OF INTEREST

Town Hall Consulting verifies that we have no conflict of interest regarding the project.

A handwritten signature in black ink, appearing to read 'Rob Adams', with a stylized flourish at the end.

Rob Adams
Town Hall Consulting

4.0 FINANCIAL PROPOSAL



Our Pricing

Phase 1 – Launch and Current Assessment	\$2,500.00
Phase 2 – Internal Engagement	\$2,300.00
Phase 3 – Planning and Strategy Development	\$9,500.00
Phase 4 – External Engagement	\$4,500.00
Phase 5 – Refinement and Finalization	\$3,400.00
Phase 6 – Implementation	\$2,500.00
Phase 7 – Health Check	\$1,800.00
TOTAL PRICE	\$26,500.00

The all-inclusive service cost, as outlined in our proposal, will be \$26,500.00 (HST extra). We understand the importance of working within your budget and are flexible to develop a work plan based on the options above that works for you. Phase 7 is **highly recommended** but is optional, allowing you flexibility to work within your budget.

Town Hall Consulting will provide the municipality with all required meeting materials (digital and print) for engagement, public open houses, and public meetings, as well as a Final Strategic Plan (digital).

Invoices will be submitted after Phase 3 and upon project completion.

Standard hourly rates are:

\$195.00 for on site work, presentations and facilitating workshops.

\$125.00 per hour for research, writing, project management and preparation.

Additional work outside the scope of this proposal and requested in writing will be billed at these rates plus mileage and materials.



McSWEENEY

inspiring economic sustainability®



Economic Development Plan

for the Township of Southwold



TOWNSHIP OF
Southwold



Proprietary Notice

All information and the methodology furnished in this proposal (except the cover, inside cover, and introductory letter) to the Township of Southwold (the Township) shall not be duplicated, used, or disclosed in whole or in part for any purposes other than to evaluate this proposal. Public access to the information contained herein is protected under the *Freedom of Information and Protection of Privacy Act*, as this proposal contains commercial and/or financial information related to consulting services normally provided by McSweeney & Associates and is supplied in confidence. Disclosure of this information would significantly prejudice the competitive position of McSweeney & Associates, and/or be an unreasonable invasion of personal privacy.

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Our Corporate Commitment to You

- We commit to providing you with the most productive, rewarding, and enjoyable experience possible, resulting in the best product that best meets your needs.
- We believe good work breeds good work - and believe our reputation is our best marketing tool.
- We stand by our reputation - one of the most respected consulting firms in Canada. We will work incredibly hard to maintain this reputation.
- We will listen to you, work with you, and empathise with your unique situation.
- We consider our firm's size perfect for our work - not too small to be limited by a lack of diverse skills, but not too large where projects get lost in the search for a strong corporate "bottom line".
- We are a team of industry experts who will provide services designed to serve you best. Our whole team is engaged throughout the entire project until you are happy - not just satisfied, happy! - with the end result.
- We have the knowledge, hands-on experience, and capacity to ensure our clients receive the best service possible. We will always provide you with our full support, which has resulted in award-winning products that get implemented and are always meticulously crafted to meet the rigorous demands of our clients.
- We, as a company will always grow, evolve and change to best meet your unique needs.

Our commitment to you is to be the best firm to meet your needs. This steadfast commitment to our clients is what has propelled us to 25 years of success, undertaking exciting projects just like yours.



“

Working with McSweeney & Associates to develop Grey County's first Economic Development, Tourism & Culture Strategic Plan was an incredible experience. This was our second time working together, and it was their process that drew us instantly back. They run engagement like no one else, and the team's honest, diverse perspectives and voices really pushed us to think deeper and be brave in our decision making. This is the first project in our department to receive unanimous endorsement at every level, from staff, municipal partners, community partners, Committees and Council. Everyone can see themselves in the Plan and are taking great pride and ownership to carry the work forward. We are beaming with pride to know this is our Plan, a Made in Grey Plan that will guide us to collectively care for our people and place - past, present and future.

Savanna Myers

Director of Economic Development, Tourism & Culture

Grey County, 2024

2024 EDCO Award of Excellence Winner - Strategy





March 4, 2026

Jeff Carswell

CAO/Clerk
Township of Southwold
35663 Fingal Line
Fingal, ON N0L 1K0

519.769.2010 ext. 20
cao@southwold.ca

Dear Jeff,

Thank you for the opportunity to submit our proposal to collaborate with the Township of Southwold on the development of its Economic Development Plan.

For this project, we propose an award-winning team of professionals who are experts in economic development with unsurpassed experience in economic analysis, community engagement, facilitation, and strategic planning. As a result of our previous work in the region, our team has extensive knowledge and a clear understanding of issues impacting Ontario communities and specifically those communities in Ontario along the shores of Lake Erie. We will use our knowledge, strategic planning techniques and proven methodologies to identify economic and community issues, gaps and opportunities facing the Township of Southwold. For this project, our team will provide you with:

- Project leadership by one of the most respected Canadian consulting firms, McSweeney & Associates.
- A close knit team of economic development experts (not a one-person shop or a multi-layered corporation where our clients get lost in the corporate hierarchy).
- A unique, open, transparent, and highly effective process that will truly engage Southwold as an economic development community (elected officials, stakeholders, staff, business organizations, volunteers, etc.) and will produce an Economic Development Plan crafted by and for Southwold.
- **An understanding of Southwold through our intimate knowledge of the area. Not only have we completed work in the immediate area, but we have also travelled exclusively through the region over the past many years both for work and pleasure.**
- An in-depth and thorough grasp of how communities function - especially small towns and mid-sized cities across all regions in Ontario.
- A final Plan that is completely AODA compliant.
- Demonstrated expertise and team members with very substantial experience in:



- Local government (Municipal and Regional) - unlike most of our competitors, we have hands on experience as municipal economic development professionals. We understand the stresses and realities of Municipal Economic Development;
 - Strategic planning and implementation;
 - Local and regional community, economic development and investment readiness;
 - Data collection, analysis, and visual communication of complex concepts; and
 - Low-barrier community engagement across a broad cross-section of cultures.
- A process that will build capacity, collaboration, inspiration, and commitment to implementation and success.

“

McSweeney and Associates delivered a solid foundational plan to support our local businesses, and to diversify our economy and move into investment attraction. Working with the McSweeney team has been an absolute pleasure, and we truly appreciate the collaboration and the learning along the way.

Carolyn Krahn

Manager, Economic Development & Strategic Initiatives
Elgin County, 2026

We look forward to working with you on this project and would be pleased to discuss any aspect of our submission with you at your convenience.

Yours truly,



Ian Duff
President

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Proponent Qualifications

McSweeney & Associates is a boutique management consulting firm offering realistic client-specific solutions to local economic and community development challenges and opportunities.

For 25 years, we have been award-winning industry leaders in Community and Economic Development. By collaborating with our clients, we offer realistic and implementable solutions for communities of any size, including Comprehensive Research and Statistical Analysis, Consultation, Engagement, Strategy Development, and Implementation Support.

Our passion is helping our clients to sustain and grow their communities. By working directly with staff, elected officials, and community stakeholders we develop innovative, implementable, solutions unique to each community. We do not overcomplicate our processes or solutions, but instead, make it easy to understand so that all your community stakeholders can be a part of your community's growth.

We're in this together and will only take on projects that complement our skills and abilities. We strive to earn the trust of the communities we work with. Our personal approach has earned us a place as one of Canada's most respected Economic Development consulting firms.

We have worked with hundreds of communities of all sizes across the country on projects that have positively impacted millions of Canadians.

By providing education, expert advice, guidance, and easy-to-use tools, our clients are equipped to create positive community change within their own communities.

Declaration of Human Authorship and Originality

The rapid rise of generative artificial intelligence (AI/GenAI) is fundamentally transforming the landscape of data analytics, writing, design and publishing; and most importantly critical thinking.

McSweeney & Associates firmly believes in the integrity and value of human contribution. We are respected for our years of knowledge, professional expertise, in-house models and tools. We will not use AI as a replacement to these company assets. We do not utilize generative AI technologies (whether fully AI-generated or AI-supported) in our data analyses, conducting of our consultations, writing of our reports, or in any of our graphic design work.



authored by humans
not by AI



“

Working with McSweeney & Associates has been an outstanding experience. From start to finish Ian, Nancy, Kevin and Erikka brought professionalism, energy, and clear guidance to the development of our Economic Development Strategic Plan. We appreciate the positive, collaborative relationship we built with McSweeney.

Their process, from discovery and community consultations to strategic workshops, to developing their proprietary SCOAR® analysis for our region was thoughtful and engaging. They helped us create a plan that is practical, actionable, and rooted in real community needs. The team successfully aligned perspectives across municipalities, businesses, and community stakeholders, and kept the process focused.

Their collaborative approach has left us with a strategic plan that we're excited to put into action – one that will support local growth, attract investment, and strengthen Rural Oxford communities for years to come.

Ronda Stewart

Economic Development Director
Rural Oxford EDC, 2026

Project Team

McSweeney & Associates is the prime firm submitting this proposal. We do not sub-contract out our work, nor do we pursue projects where we do not have the in-house expertise and knowledge to successfully complete the work. This collaborative team model ensures we are not impacted by any issues arising from staff illnesses, absences, or the loss of a team member during the project.

We have no conflicts of interests in delivering all of the services laid out in this proposal.

We aim to exceed your expectations as we have done for many previous clients. Our team is organized as follows:



Ian Duff

President,
Project Director

Nancy Johnston

Project Manager,
Director, Strategic Initiatives

Kevin McPhillips

Director, Research &
Innovation

Erikka Rombough

Graphic Designer,
Report Publisher

The following summarizes each team member's role, experience, and qualifications. Team Resumes can be found in **Appendix A**.



Ian Duff | B.S.Sc., M.U.R.P, EcD
President, McSweeney & Associates
Project Director

Ian is a highly sought-after economic development strategic advisor that takes a very hands-on approach to strategic planning. He has been in the economic development profession for over 30 years while being the project lead and writing or co-writing all the Strategies prepared by McSweeney & Associates for 17 years. Community and Economic Development has become one of Ian’s areas of specialization. All of our strategies rely on successful consultation as a part of the strategic planning development process, and Ian will provide his unparalleled expertise, guidance and advice in strategic planning to the small-town Ontario context.

For this project, Ian will: Work closely with Kevin and review and critique all statistical and data analysis; co-plan the consultations with Nancy; lead the interviews with the elected officials; co-plan the Southwold Economic Development Plan Working Session and be a Co-author (with Nancy) of Southwold’s Economic Development Plan.

Most importantly, Ian will be responsible for the project direction, client satisfaction and project quality assurance.



Nancy Johnston | MAES, EC.D., CECD
Director, Strategic Initiatives
Project Manager

Nancy is an accomplished economic development professional with over 30 years of experience. She has a comprehensive understanding of municipal and regional governments within large and small municipalities and is familiar with the nuances of municipal processes.

As a result of Nancy’s experience working in municipal government as well as direct working relationships with over 65 municipalities, Nancy has garnered extensive knowledge on the foundations of how economies function, the value of economic development in a community’s well-being and the various stakeholders and interests that support community and economic development.

Nancy leads all of our strategic projects that involve public outreach and engagement. Nancy will be: Actively involved in all aspects of the assignment; providing day-to-day project management; leading the public consultations; working closely with Ian to co-plan the Southwold Economic Development Plan Working Session and the Strategic Action Planning Session; and one of the main authors (with Ian) of Southwold Economic Development Plan (and Implementation Plan).



Kevin McPhillips | B.A., MA.
Director, Research and Innovation

Kevin is an expert in sourcing, analyzing, and interpreting data of all types; from macro-level to granular data (community-level data, or neighbourhood data down to specific postal codes). **His expertise comes in the form of summarizing complex data in a succinct, digestible way that allows readers to simply see the value, trends, and characteristics.**

Kevin will be: Responsible for all quantitative research and statistical analysis required for this project (such as the Community Analysis, Situational Analysis, Community and SCOAR®); engaged in the community consultation program; and assisting in the preparation of the Economic Development Plan.



Erikka Rombough
Graphic Designer and Report Publisher

With a background in design, Erikka reviews and edits all documents before they are delivered to our clients and creates innovative graphics for all projects. **She is involved in all aspects of this project from kick-off to the final hand-off of the Plan to Southwold.**

Erikka will be: Collaborating with the Project Manager/Steering Committee to determine the desired look and feel of the final documents, designing the documents, as well as creating all-new graphics, graphs, and infographics.

A portfolio of our design work is available upon request.

Project Understanding

The Township of Southwold is looking to prepare a comprehensive Economic Development Plan that will provide a clear, evidence-based and implementable roadmap to support sustainable economic growth, business retention and expansion, investment attraction, workforce development, and long-term community prosperity. The Plan is intended to be practical, achievable, and aligned with County-level initiatives and broader regional strategies.

Southwold is a municipality within Elgin County characterized by a strong agricultural base, growing rural residential communities, and strategic proximity to Highway 401 and major employment centres including St. Thomas and London. The Township is experiencing a period of significant transition driven by major investment, infrastructure improvements, and anticipated residential growth. Development activity at the former Ford Talbotville lands, including a major fulfillment centre and ongoing industrial land marketing, together with sanitary servicing advancements and planned expansion in the villages of Shedden, Fingal, and Talbotville, is reshaping local economic prospects, workforce dynamics, and service requirements. Southwold's economic future is also influenced by regional initiatives (e.g., the PowerCo battery manufacturing facility in St. Thomas) and this new Economic Development Plan must position Southwold to respond strategically to these regional growth opportunities.

Our approach to the project will include:

1. A kick-off meeting with Township staff and the Southwold Economic Development Committee (Project Steering Committee). This kick-off meeting will confirm scope, roles, responsibilities, timelines, communication protocols, and key milestones.
2. A comprehensive review of relevant background materials and reports.
3. A thorough economic and community analysis to assess Southwold's current conditions, assets, constraints, and competitive position. This will include evaluation of the Township's economic base and sector composition, demographic and labour force trends, business climate and competitiveness, employment land supply, and infrastructure considerations. The analysis will identify strengths, weaknesses, opportunities, and risks, with particular attention to agriculture and agri-business, emerging industrial opportunities, rural innovation potential, and Southwold's role within the regional economy.
4. Community engagement, involving Township Council and staff, the Economic Development Committee, local businesses, landowners, industry representatives, partner organizations, and the broader community through interviews, workshops, surveys, focus groups, or similar methods. Feedback gathered through these activities will directly inform the development of the strategic framework and recommended actions.
5. A draft and final Economic Development Plan, developed in close concert with Township staff.

The final Economic Development Plan will articulate a clear vision and guiding principles for Southwold’s economic future, identify priority sectors and realistic growth opportunities, and establish strategic goals supported by practical initiatives. Recommendations will address business retention and expansion, investment attraction, agriculture and agri-business development, workforce availability, and rural vitality, ensuring alignment with both local conditions and regional economic drivers.

The Plan’s detailed implementation plan will include clearly defined initiatives linked to strategic goals, assigned roles and responsibilities for Council, staff, and partners, phased timelines, performance measures to track progress, and consideration of resourcing, funding tools, partnerships, and organizational capacity. This framework will enable the Township to prioritize actions and allocate resources effectively.

Throughout the project, Plan Deliverables will include:

- A project management plan outlining the timing of all deliverables, engagement sessions, and check-in dates;
- An economic and community analysis;
- A Preliminary Findings Report summarizing research and analysis;
- A Draft Economic Development Plan for review by the Steering Committee and Council;
- Presentations of the draft findings to facilitate discussion and feedback;
- A Final Economic Development Plan incorporating input from the Township;
- A presentation of the Final Plan to Council;
- An executive summary suitable for public communication;
- Supporting tools, templates, and processes to assist with ongoing reporting on implementation progress.



Approach and Methodology

Our approach to this assignment will be tailored specifically to the needs of Southwold. Our goal is to ensure that our clients get the best service possible and to become engaged as partners in a process that will ultimately strengthen and sustain their community's future. **We do not produce one-size-fits-all, cookie-cutter solutions. We will produce a customized Economic Development Plan that truly reflects the needs and values of the Southwold community.**

The strategic planning process will bring together Township staff and elected officials, economic development stakeholders, community development stakeholders, business owners and residents in a collaborative and safe environment to provide unique perspectives and guidance on economic development directions and action plans required to be considered by Southwold.

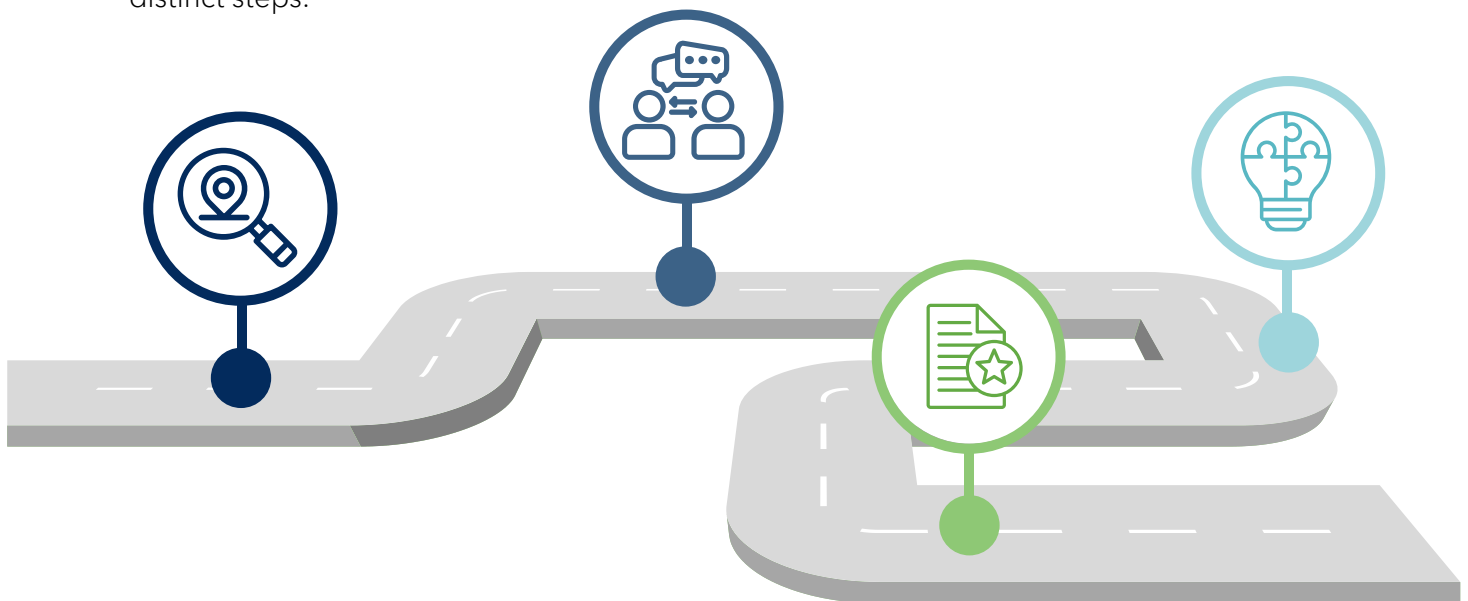
We take these types of projects seriously and are proud to become a partner with the Township. We can confirm that at a minimum our approach will:

- Connect with key stakeholders;
- Use creative and innovative planning and consultation techniques that will prove both effective and efficient;
- Be grounded in both quantitative (stats, data, documentation) and qualitative (consultation) inputs;
- Assist in creating communications material and messaging;
- Provide professional, yet easy-to-approach consultation and decision-making process aimed at creating a shared Southwold's economic future;
- Engage staff, Council and the community through every step of the process both with information and gathering their input and feedback;
- Focus on and be rooted in Southwold's principles, values, and vision for the future;
- Identify emerging trends and opportunities applicable to Southwold;
- Ensure all relevant existing by-laws, strategies, plans, policies, and reports are considered and reviewed for alignment; and
- Create a realistic, actionable, measurable and transferable Plan upon which the Township can continually build upon.

Project Work Plan

Working with and reporting to the Southwold Project Manager and Economic Development Committee while interfacing directly with staff, Council, residents, and the larger Southwold business community, the Economic Development Plan will provide a unique perspective and guidance on economic development directions and actions required for the Township to realistically achieve its desired visions while adhering to its core community values.

The Plan will be developed after an in-depth review of the current situation in Southwold, open and targeted comprehensive consultations, then followed by the development of a vision, strategic directions, and doable strategic actions. We will achieve this through four (4) distinct steps:



Step 1: Discover

- Document Review
- Industrial & Employment Land Review
- Community & Situational Analysis
- Investment Readiness Assessment

Step 2: Define

- Stakeholder Consultations
 - One-on-one Interviews
 - Online Surveys
 - Focus Groups
- Staff Priority Setting Session
- SCOAR® Analysis
- Strategic Working Session

Step 3: Develop

- Strategic Action Planning Session
- Draft Economic Development Plan
- Implementation Plan
- Draft Plan Consultation

Step 4: Deliver

- Final Economic Development Plan
- Presentation to Steering Committee
- Presentation to Council

Following a thorough and deliberate process, the development of the Southwold Economic Development Plan will identify priority economic development actions (short, medium, and long-term) and assist Southwold in moving forward to be more proactive, effective, and efficient in its efforts and its economic development and community development activities.

Project Start-Up

To begin the process, we propose a project orientation and initiation session with the Southwold Project Manager (CAO) and Project Steering Committee. The purpose of the meeting is to:

- Develop a common understanding of the recommended work plan, project goals and objectives, the intended outcomes, and what success looks like at the end of the process;
- Agree on project reporting and progress reports (we anticipate meeting multiple times formally and informally during the progression of the Plan);
- Discuss formal or informal progress reporting (i.e. bi-weekly interim status reports) - what works best for the Southwold Team;
- Present, review and agree on the scope of work, proposed work plan, schedule, and critical path;
- Agree on the project reporting and documentation requirements as noted;
- Review a draft Communications Plan and Engagement Plan;
- Clarify respective expectations and roles; and
- Obtain relevant background documents.




This initial meeting will help to set the stage for a successful project including reporting structure - who reports to who, how both teams will be working (both collaboratively and separately), as well as how decisions are made and who has final and ultimate sign off on the project for McSweeney & Associates and Southwold. It will provide a clear and direct picture of reporting structure and how to best communicate with each other.

M&A will provide an exclusive project management tool at the beginning of the project, outlining the key deliverables. Working with the client to approve mutually agreed-upon timelines, **this customized plan ensures that the client and consultant have a clear understanding of the timelines and responsibilities of both client and consultant.** The plan is flexible and fluid as the process rolls out but establishes a structure to complete the project on time.

Township of Springwater
20 Year Community Based Strategic Plan
PROJECT MANAGEMENT PLAN
June 23, 2022

ACTION	TIMELINES	OBJECTIVE	RESPONSIBILITIES	DATE	NOTES
PHASE 1: UNDERSTANDING SPRINGWATER: BACKGROUND RESEARCH					
Situational analysis	March - July	To have a thorough understanding of the Township of Springwater and its role in the Township.	Completed Situational Analysis	McSweeney Team	John David
PHASE 2: ENGAGING SPRINGWATER: WHERE DO WE WANT TO GO?					
Online survey	July - August	Collect online survey data to identify key issues, trends, and opportunities to improve the regional system. To collect feedback from stakeholders and the community. To identify key issues and opportunities that will be addressed by the Township.	<ul style="list-style-type: none"> 1. Identify key issues and trends in the regional system and provide recommendations for the Township. 2. Provide feedback, input and approval of the survey by email and phone. 3. Provide input on the 4 components and/or the 5 components of the regional system. 4. Complete online survey and provide input to Springwater team. 5. Provide input on the 5 components and/or the 4 components. 	<ul style="list-style-type: none"> McSweeney Team Springwater Team McSweeney Team McSweeney Team McSweeney Team 	<ul style="list-style-type: none"> John David John David John
			Final survey results to be provided to the Township and the Springwater team.	August 2022	

 McSWEENEY

“

I've worked with Ian Duff, Kevin McPhillips and the team at McSweeney & Associates many times across several municipalities. They always bring a professional, forward-looking and (most importantly, for me) data-driven eye to economic development.

Brennan Kenny

Manager of Economic Development
Town of East Gwillimbury, 2026



Step 1 - Discover

Discover

Current Status Review



Document Review

The document review aims to determine alignment between the various plans and to pull out those items that need to be considered during the development of the Plan.

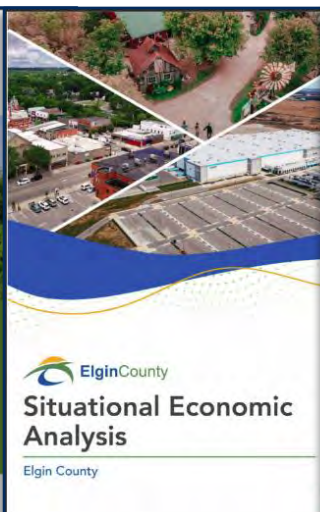
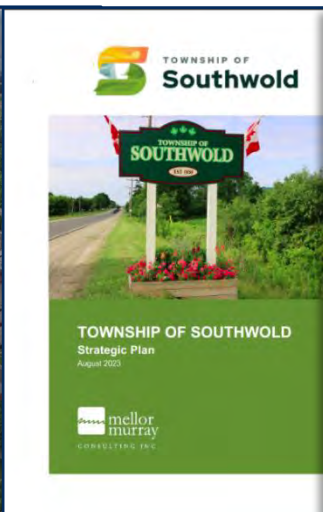
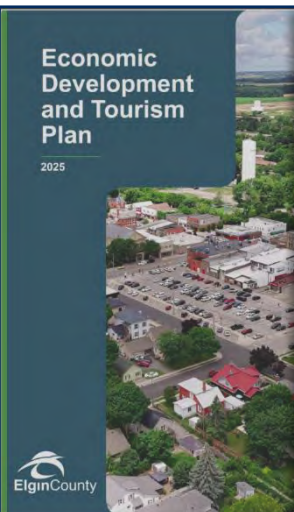
After the Project Initiation meeting, we will work with the Project Manager to attain and review relevant Township documentation and background materials to better understand Southwold's character and economic drivers.

After recently collaborating with the County on the development of its Economic Development and Tourism Plan, we have a base understanding of the regional community in which the Township is located.

To supplement our knowledge, we will conduct an environmental scan and assess alignment across the strategic documents to identify priority actions, emerging trends, and strategic directions that may influence or inform the Township's Economic Development Plan.

Relevant documents will include:

- Southwold's 2023 Strategic Plan
- The Township and County's Official Plans
- Southwold's Zoning Bylaw
- Southwold's most recent BR&E report and any other strategic reports
- The County's 2025 Economic Development and Tourism Plan and Situational Analysis Report
- Any other strategic reports completed by the Township or surrounding region.



Industrial and Employment Land Review

To best assess Southwold’s current available industrial/employment lands and make recommendations on strategies for areas to develop, we suggest the following analysis:

- **Review the Township’s land-use policies**

Our team will begin by reviewing relevant Official Plan policies and Zoning Bylaws impacting the lands, and land use.

- **Understanding the Township’s employment/industrial land development activity**

We will then assess the current level of development and servicing of employment land area, distance from services, and any other observable servicing constraints.

- **Locational desirability**

We will provide feedback on the locational desirability of the lands (i.e., rank-ordering them from the market point of view) based on our findings in the previous steps.

- **Reviewing the Township’s employment land development experience**

Next, we will review the experiences of the Township in employment/industrial land development, servicing, marketing, and sales.

- **Recommendations**

We will then make recommendations on priority areas and use(s) for Southwold’s industrial/employment lands from the above steps. We will also utilize data presented in the Community and Situational Analysis report to assess which industries might be best suited for these lands. Finally, we will also outline the recommended next steps. This will be presented to the Southwold Project Team before being included as background material to help in the development of the Plan.



Community and Situational Analysis

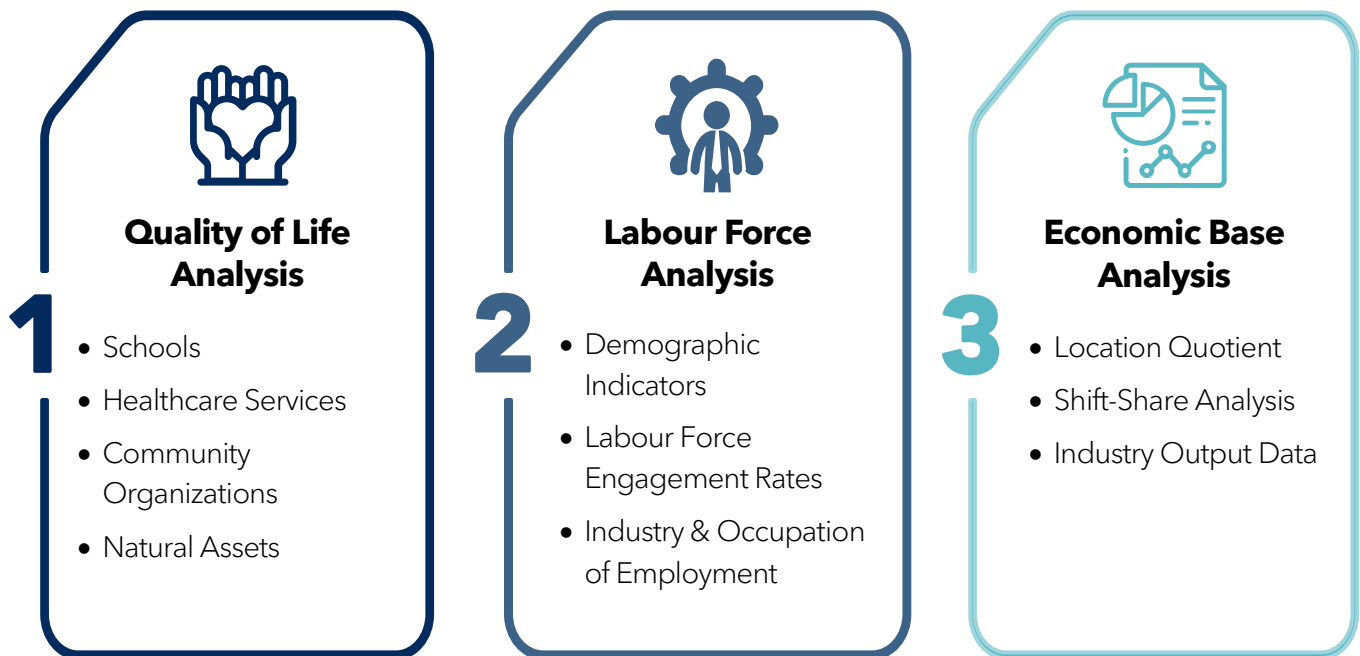
Our firm is known to undertake the most thorough and detailed analyses of communities to ensure that no potential issues or opportunities are left uncovered. We use the most up-to-date available data, including:

- 2006, 2011, 2016, and 2021 Census from Statistics Canada;
- SuperDemographics 2025 from Manifold Data Mining Inc.; and
- Lightcast Analyst Data. 2026.Q1 – employees and self-employed.

More detailed information about our data sources can be found in **Appendix B**.

Our approach to Southwold’s Economic Development Plan will examine each economic sector in the context of attracting and retaining talent, businesses, and investment, building from the community’s existing strengths.

The Community and Situational Analysis report, as outlined below, will be broken into three pieces:



Quality of Life Analysis



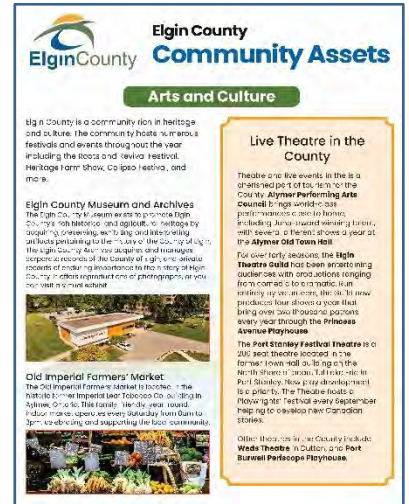
Quality of Life Analysis

1

- Schools
- Healthcare Services
- Community Organizations
- Natural Assets

Our investigation will begin at the Township level and present an assessment of local community assets. This asset profile will help address the economics of “quality of life,” “culture,” and the “social economy” in Southwold.

We will then explore relevant, integrated pieces of socio and demographic information to focus on understanding Southwold’s demographic changes over time.



Labour Force Analysis



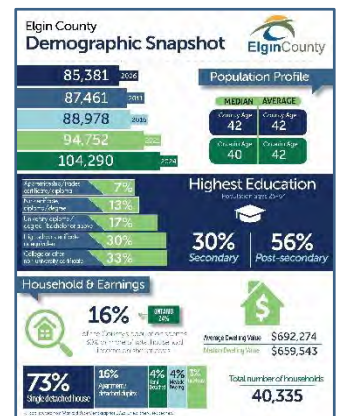
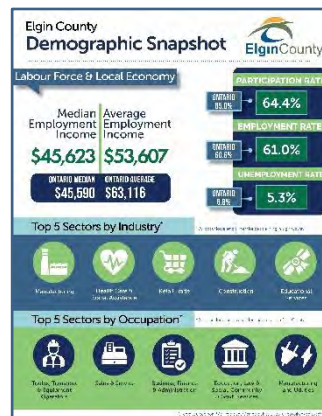
Labour Force Analysis

2

- Demographic Indicators
- Labour Force Engagement Rates
- Industry & Occupation of Employment

We follow up our Quality of Life Analysis with a thorough review of labour force characteristics for Southwold in comparison to Ontario. The result of this will be a complete map of the supply, demand and existing labour gaps and surpluses locally. This will help feed into issues impacting community development as well as opportunities Southwold can address to assist in residential retention and attraction.

Should certain labour force characteristics be a limiting factor in the Township’s economy, recommendations on how to shore up these weaknesses will be made later in our analysis. Skills and/or labour force performance gaps will also be identified through industry-specific focus groups and other methods of consultation within later phases.



Economic Base Analysis



Economic Base Analysis

3

- Location Quotient
- Shift-Share Analysis
- Industry Output Data

An Economic Base Analysis looks at how an economy functions, identifies/understands priority sectors and changes in sector make up over time. For the economic base and target priority sector analyses, we will utilize Lightcast jobs data. This analysis will present a full understanding of the local industry composition, and the economic impact related to each industry (i.e., jobs, exports, total sales).



This is not a definitive list; if specific analysis is desired by the Steering Committee, we are fully open to adaptation.

We will again make use of Lightcast Analyst and Statistics Canada figures. We will also rely on IBISWorld sector reports to provide a “future outlook of the sector”. IBISWorld presents sector reports at a 5-digit NAICS level, allowing for in-depth outlooks on the subsectors most relevant to Southwold. These sector analyses will be used to buttress our localized data to provide a thorough future outlook of Southwold’s sectors of interest.

Investment Readiness Assessment – Free of Charge

As Canada’s recognized leading expert on Investment Readiness Assessment, McSweeney & Associates will undertake an Investment Readiness Review which would determine the investment barriers and identify any disparity between where Southwold envisions itself and its current state of investment readiness. Recommendations would be made in the Plan on how to improve investment readiness.

The Investment Readiness Assessment would assess and examine the adequacy of Southwold’s tools (if available) and indicators such as:

- Web presence;
- Community Profile or Community Asset Inventory;
- Industrial land and building inventories;
- Investment marketing tools;
- Adequacy and readiness of employment lands; and
- How investment inquiries and requests are handled.

Step 2 - Define

Define

Stakeholder Engagement



Immediately after the Project Initiation Meeting, our Team will work with the Southwold Project Manager and the Steering Committee to finalize a detailed internal communication and consultation plan.

The stakeholder consultation activities will be designed to obtain feedback on those priority economic development areas and actions the Township needs to consider in its Plan. In responding to this Request for Proposal, **we will exceed your requirements for interactions/meetings with key stakeholders.**

In addition, we will work closely with the Township to prepare messaging and specific project language and wording to be shared via the Township's social media platform.

While we have outlined a tentative program of public communication and stakeholder engagement (found below), we would appreciate the opportunity to discuss with the Steering Committee at the Project Initiation Meeting - a targeted approach to engaging Southwold's critical partners,

making the best use of feedback received from consultations and resulting refinements to the communication and engagement strategy.

We are proposing a very robust and proven consultation program for Southwold. Below is a synopsis of our approach:



Stakeholder Consultations

- 1
 - Stakeholder Interviews
 - Online Surveys
 - Focus Groups



Staff Priority Setting Session

- 2
 - Issues/Opportunities Template
 - Staff/Senior Management Engagement
 - Understanding Staff Priority Issues



SCOAR® Analysis

- 3
 - Summarize Strengths, Challenges, Opportunities, Aspirations, and Results



Strategic Working Session

- 4
 - Summary of the Situation Workbook
 - Draft Actions Developed by Key Stakeholders



Stakeholder Consultations

- Stakeholder Interviews
- Online Surveys
- Town Halls/Focus Groups
- Public Open House

Stakeholder Consultations

Our multi-faceted approach to stakeholder engagement will ensure that analysis and recommendations arise from a statistically valid sampling of the population. In addition, we will aim to have these engagements low barrier in order to increase options for people to participate. These results will be based on a reliable sampling of residents, businesses, and general community stakeholders.

We do not farm out our consultations to 3rd party call centres or computer-assisted polling companies. The Team members who will also be helping to craft the Economic Development Plan will be directly engaged in the project – conducting interviews, crafting and analyzing online survey results, facilitating focus groups, hosting open houses, and leading the Strategic Working Session and Priority Setting Sessions.

Although we are flexible with our approach and are completely open to trying new and different approaches to engaging your community, we propose the following as the first round of community engagement and input:

- **Stakeholder Interviews – connecting directly with 10 people:** We will interview key Southwold stakeholders (targeting 10 interviews). Stakeholders would include the Mayor, members of Council, Steering Committee, Township staff, targeted economic sectors, community-based groups, business community leaders, economic development stakeholders and relevant government agencies.
- **Surveys (Online) – connecting with an unlimited number of stakeholders:** Online surveys will be prepared and conducted for community input. If desired, we can also prepare separate online surveys for targeted sectors or business groups. Residents and stakeholders can complete a survey via the Township’s social media channels aimed at better understanding the immediate economic development needs of the community or any other items that need to be addressed by the Plan.
- **Town Halls/Focus Groups – connecting with over 75 people in-person:** We will conduct a series of 4-5 engagement sessions with each session having between 10 and 15 participants. Topics of discussion range from economic development to issues impacting the Township’s future success such as housing, labour force, investment readiness, etc. These sessions aim to discuss priority issues impacting the Township as well as opportunities for future growth, investment and development.
- **Email or call us** (toll-free) to provide input and comments directly to McSweeney & Associates.



Who is the Target of Consultation?

- **Township Staff**
(including CAO, Planning and other key departments).
- **Steering Committee**
- **Elected Officials** (Mayor and Council).
- **Economic development partners, agencies and stakeholders**
(i.e., MEDJC&T, OMAFRA, MTCG, Chamber of Commerce, Elgin Middlesex Oxford Workforce Planning Board, etc.).
- **Southwold's Business Community.**
- **Local businesses**
(large employers, Small and Medium-sized Enterprises (SME), start-ups).
- **Major institutions**
(post-secondary, hospital, research facilities).
- **Indigenous communities and organizations.**
- **Sector representatives**
(e.g., manufacturing, cleantech, agri-food, creative industries, tourism).
- **Underrepresented groups**
(youth, newcomers, equity-deserving communities).
- **Neighbouring Communities.**
- **Community Members and Service Groups**
(i.e., seniors, youth).

The outcome of the first round of stakeholder consultations will:

- Outline key values held by economic development stakeholders, business community, residents, elected officials, staff, etc.;
- Outline/reinforce points for a community-specific economic development and community development vision for Southwold;
- Begin a conversation with a wide range of economic development stakeholder groups concerning economic development issues and opportunities;
- Identify associated activities and supports that would complement the Township’s current economic development program;
- Recognize any barriers to economic development, growth, and sustainability;
- Identify any key economic development directions and assets that need improvement or to be added to Southwold to ensure positive economic growth and diversity; and
- Capture any specific economic development issues that need to be addressed in the new Plan.





Staff Priority Setting Session

2

- Issues/Opportunities Template
- Staff/Senior Management Engagement
- Understanding Staff Priority Issues

Staff Priority Setting Session

Often, Township staff are closer to some economic development or community issues than the public or business community. To leverage this insider knowledge, we will conduct a Staff Priority Setting Session.

McSweeney & Associates' unique Priority Setting Session provides excellent team building and support for the Township's economic development team. It builds momentum, engagement and commitment towards understanding the economic development issues that the Township (from a corporate perspective) needs to continue working to address.

Preceding the Staff Priority Setting Session, we work with the Project Manager to craft an economic development Issues/Opportunities template that is used during the interviews to help prompt Southwold's economic development staff as well as Senior Management. We will use this information to help guide the conversation.

This session aims to review:

- Strategic documents (and strategic alignment); stats/data/trends; Community Analysis; Competitive Land Analysis and Investment Readiness Assessment; Economic Situational Analysis; and
- Consultation results to date in an effort to outline perceived Township economic development and/or community development priorities and allow each participant to articulate their priorities, key Township issues and opportunities.
- The outcome/information gathered from the interviews will be:
 - Key economic development issues/opportunities impacting the Township.
 - Key challenges to addressing the issues/opportunities.
 - What are the impacts of not addressing the issues, challenges and/or opportunities?
 - Estimated demands on the Township's resources to address the issues/opportunities.
 - Identifying the key directions and priorities that are supported by the Township's economic development staff.

By the end of this session, attendees will have a solid understanding of the issues/topics/themes that Southwold will need to address and will be discussed further at the Strategic Working Session which will focus on assigning economic development actions to appropriate themes/topics/issues.



**SCOAR®
Analysis**

3

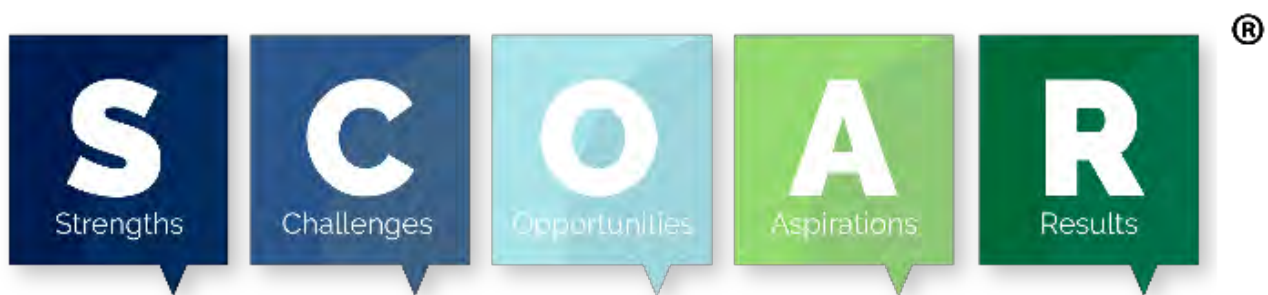
- Summarize Strengths, Challenges, Opportunities, Aspirations, and Results

Summary of the Situation & “What Was Heard” Document – SCOAR® Analysis

The information analyzed from the preceding sections combined with the stakeholder input gathered from the consultations and the Staff Priority Setting Session will be rolled up in a summary of the situation that will include:

- Strategic Documents Review (and strategic alignment);
- Stats/Data/Trends Review, Community Analysis and Economic Situational Analysis;
- Results from the online surveys and one-on-one interviews, and Economic Development Focus Groups;
- Economic Development priorities as outlined in the Staff focused Priority Setting Session;
- **Strategic Working Session Workbook** including a Strengths, Challenges, Opportunities, Aspirations and Results (SCOAR®)¹ analysis;
- Wording around a set of economic development values and vision statement for Southwold; and
- Potential strategic economic development directions to be discussed at the Southwold Economic Development Strategic Working Session.

This Summary will be reviewed by the Project Manager and Project Steering Committee before being made public but will ultimately be presented at the Working Session.



¹ A SWOT analysis has a “50%” focus on “negative” aspects of analysis. While a SOAR analysis emphasizes the positive, it fails to address barriers or challenges to positive community development that every community faces. Our SCOAR® Analysis provides greater balance than either SWOT or SOAR analysis.



Strategic Working Session

4

- Summary of the Situation Workbook
- Draft Actions Developed by Key Stakeholders

Strategic Working Session

The responsibility for the implementation of the new Plan does not fall solely to the Township but may also include other community organizations and stakeholders. Therefore, the buy-in and commitment of the Southwold economic development stakeholders/partners are critical to a successful implementation of actions that fall outside the Township’s areas of service delivery.

We recommend engaging Southwold’s Steering Committee, elected officials, staff and key community and economic development partners in a working session (also referred to as an Economic Development Strategic Working Session). This Working Session aims to review the summary of the situation (stats/data, consultation results to date, outline economic development priorities) and discuss specific actions to make up the Southwold Economic Development Plan (and Implementation Plan).

The following topics are typically covered and presented:

- Identification of Southwold’s economic development assets and competitive advantages for consideration including a SCOAR® Analysis.
- A summary of consultations including the most commonly held views of Southwold’s SCOAR® and economic development values and strategies.
- Review, discuss and gather further input and development of consensus on priority issues and opportunities, strategies, and action plans required for the new Plan.

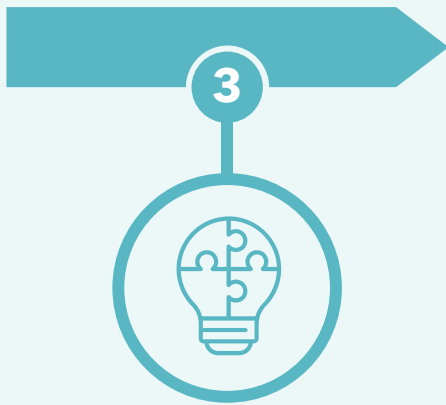
Upon completion of the Strategic Working Session, a draft set of strategic directions and actions will be prepared and provided to the Project Manager and Steering Committee for review.



Step 3 - Develop

Develop

Strategic Development & Implementation Plan



Collaboration is key to achieving success and is the primary driver behind how we develop our plans and strategies.

In this step we will work closely with the Southwold Project Manager and Steering Committee to ensure the economic development guiding principles, themes and strategic actions are the exact fit for Southwold.

To accomplish this, we begin by scheduling a Strategic Action Planning Session with the Steering Committee to determine which goals and actions to prioritize. Upon reaching consensus, we create a first draft of the Plan which is sent to the Steering Committee for review. As always, our process remains collaborative and we welcome feedback at this point for changes to content and design.

The Implementation Plan is also built during this stage using the chosen themes, goals, and actions from the strategic working session. These are used to create a realistic, achievable, timeline for how and when to achieve the chosen goals.



1 Strategic Action Planning Session

- Finalize Strategic Priority Goals and Actions with Staff



2 Draft Plan

- Development of the Draft Economic Development Plan
- Provide Draft to Steering Committee for Review



3 Implementation Plan

- Outline the Approved Short and Long-Term Priority Actions



4 Draft Plan Consultation

- Consultation with the Project Manager on Amendments to the Draft Plan



Strategic Action Planning Session

- Finalize Strategic Priority Goals and Actions with Staff

Strategic Action Planning Session

Our years of experience with hundreds of communities allow us to understand and cater to each community on an individual basis. We do not deal in “cookie-cutter” or “what may work in other communities” - **we deal in what is ‘Best for Your Community’.**

The Strategic Action Planning Session is a collaborative meeting in where we coordinate with staff to ensure the drafted strategies and specific actions are a perfect fit for Southwold.

This session, through a frank and open conversation, would take the form of a video conferencing session or off-sight in-person session - whatever method best meets the Township’s needs.

Through this process, we will finalize the strategic priority goals and actions to be implemented in the draft Plan.



Draft Plan

- Development of the Draft Economic Development Plan
- Provide Draft to Staff for Review

Drafting the Southwold Economic Development Plan

Immediately following the completion of the Strategic Action Planning Session, we will begin the preparation of the new Southwold Economic Development Plan which will be provided to and discussed with the Project Manager and the Steering Committee in advance of any information being made public. This draft will be developed from the preceding analysis and consultation, as well as relevant information from previous strategic documents.

We will identify and document the top community-focused economic development directions and actions for the Township that will be strongly anchored in a data-driven understanding of the community.

The new, fully AODA compliant, Plan will be built through collaboration with Southwold’s stakeholders and will include:

- An executive summary highlighting Southwold’s top economic development priorities.
- Vision and principles to help guide the Township’s future economic development decision-making process.
- The identification of priority areas of focus that will sustainably and successfully move Southwold’s growth and development forward.
- Alignment with other relevant Township and County strategic plans and policies as well as any relevant Provincial priorities.

- Identify actions that focus on people (residential growth, align workforce development efforts, inclusion, diversification, etc.).
- **Immediate, short, and long-term realistic and doable action plans** identifying tactics to best align, innovative strategies, projects, programs, activities, and actions necessary to exploit the Township’s strengths, advantages, and priority opportunities, as well as addressing any challenges.
- Recommended funding tools, partnerships, and delivery models for implementation.





Implementation Plan

3

- Outline the Approved Short and Long-Term Priority Actions

Implementation Plan

Upon drafting of the new Southwold Economic Development Plan, McSweeney & Associates will prepare a detailed Implementation Plan that will outline the short-term (1-3 years) and long-term (3-5 years) prioritized action steps to be achieved. This prioritization will allow the Township the flexibility required to respond to current urgencies and available resources by assigning specific actions for implementation in specific years.

Typically, the Implementation Plan will contain most of the following elements, but we will design a plan that meets the Township's specific needs:

- Name of priority strategic theme, goal, strategic action;
- Name of specific action;
- Priority - are there certain action plans that are a priority over others;
- Timeline - should the action start/be completed in the short, medium, or long term;
- Roles and responsibility matrix;
- Resources and funding; and
- Performance measures.



Draft Plan Consultation

4

- Consultation with the Project Manager on Amendments to the Draft Plan

Consultation on the Draft Plan

After completing the draft Plan, we will confirm with the Project Manager and/or Steering Committee any amendments or refinements required before community and stakeholder consultation on the draft.

At this time, we are prepared to present this draft to the Steering Committee, but we would propose a program of stakeholder consultations on the draft Plan for review and input from the Project Manager. The exact program would be refined based on the success of the techniques employed earlier during the first round of community consultations. These could include virtual tools such as online surveys and open houses, or other opportunities for in-person or virtual consultation.

Step 4 - Deliver

Deliver

Present the Results



Finalized Southwold's Economic Development Plan

With feedback and direction from the Project Manager and Steering Committee, we will finalize the new Plan for Council's approval. It is anticipated that the resulting Plan will:

- Contain a summary of the results to date and Southwold's priority economic development actions;
 - Be based upon best practices while being both strategic and practical, and providing clear guidance on the implementation of action plans;
 - Provide a framework for how objectives will be achieved;
 - Contain strategic recommendations and rationale;
 - Contain realistic and doable actions that will be flexible enough to accommodate future changes;
- Be focused on tactics aimed at assisting the Township in its sustainable community economic development diversification efforts;
 - Be premised on building on Southwold's existing strengths, advantages, and priority opportunities, while addressing any challenges;
 - Provide the Township's economic development partners with strategic guidance and suggestions for interactions in support of the Plan; and
 - Be fully AODA compliant with any guidelines outlined by the Township. If the Township does not have a set of guidelines, we have created our own set of AODA templates and guidelines that meet and exceed what has been set by the Province.

This new Economic Development Plan will provide a proactive approach to economic development well-being. Based on a realistic assessment of the current conditions of the Township, it will identify specific and prioritized opportunities that will enhance the economic viability of the community. Each opportunity/challenge/theme will be addressed by action plans, and the implementation plan will identify leadership, specific partners, funding sources and timelines. It will enable the Township to maximize its available human, financial and natural resources, and existing local assets.

Presentations/Communication of the Final Economic Development Plan

We will prepare and present the final Plan to the Township's Council upon the conclusion of the project.

Once the project is concluded, we will provide all final documents, including the Community and Situational Analysis, all background research and consultation results, the Plan and the Implementation Plan in PDF format. The final materials will be designed with print-ready quality and provided in electronic format.

The final Plan will be the property of the Corporation of the Township of Southwold, and no permission or Copyright release will be required to produce more copies of the Plan.



Schedule

The expected work plan for the Southwold Economic Development Plan will be straightforward and flexible, and will yield practical and achievable results. As illustrated in our proposal, we will use proven principles and analysis techniques to achieve the goals of this assignment. However, we are flexible in our approach to this project and open to making revisions and amendments as needed.

We are prepared to start as soon as the project contract is awarded and anticipate a project end date no later than the end of September 2026. We have based our project timeline on these dates.

For a more detailed schedule please see the following:



Project Tasks	April	May	June	July	August	Sept
Project Start Up	*					
Step 1 - Discover - Background Review & Analysis						
Current Status (Document) Review		*				
Industrial and Employment Land Review		*				
Situational Economic Analysis		*				
Investment Readiness Assessment			*			
Step 2 - Define - Stakeholder Consultation & Progress Summary						
Communications and Stakeholder Engagement Plan	*					
First Round of Stakeholder Engagement/Consultation (one-on-one interviews, online surveys and focus groups)			X			
Staff Priority Setting Session						
Summary of the Situation (Findings) & "What Was Heard" Document			*			
Economic Development Working Session				X		
Step 3 - Develop - Draft Plan						
Strategic Action Planning Session				*		
Drafting the Southwold Economic Development Plan					*	
Implementation Plan						
Draft Plan Consultation						*
Step 4 - Deliver - Final Southwold Economic Development Plan						
Finalized Economic Development Plan						*
Presentation to Council						*

X = In-person meeting with Project Manager/Staff or Project Team
 * = Virtual meeting with Project Manager/Staff or Project Team

Budget

The following table presents our estimated level of effort and upset budget to complete the required work as described in this proposal. The budget we have prepared, and level of effort, are on par with the Strategies and Plans we have prepared for comparably sized communities. We welcome the opportunity to discuss the budget and revise the level of effort/budget if needed.



“

McSweeney & Associates ranked the highest during our evaluation process and achieved the highest score when examining value for money. They had daily rates that were more competitive than other firms and they offered significantly more consulting days compared to the rest. In fact, they had almost twice the number of consulting days compared to the other companies.

Now that we have completed our Strategy with them - they were worth every penny. Not only did we enjoy working with the McSweeney team, they delivered more than what we originally asked for.

Sébastien Dagenais

Directeur des services corporatifs/Trésorier | Director of
Corporate Services/Treasurer
Russell Township, 2025

Project Tasks	Days: ID	Days: NJ	Days: KM	Days: ER	TOTAL
Project Start Up	0.125	0.5	0.125	0.125	0.875
Step 1 - Discover - Background Review & Analysis					
Current Status (Document) Review	0.25	0.25	0.5	0	1
Industrial and Employment Land Review	0.25	1	0.25	0	1.5
Situational Economic Analysis	0.25	0.25	2	1	3.5
Investment Readiness Assessment	0	0	0	0	0
Step 2 - Define - Stakeholder Consultation & Progress Summary					
Communications and Stakeholder Engagement Plan	0	0.25	0	0	0.25
First Round of Stakeholder Engagement/Consultation (one-on-one interviews, online surveys and focus groups)	0.5	2	3	0.5	6
Staff Priority Setting Session	0.25	0.5	0.5	0	1.25
Summary of the Situation (Findings) & "What Was Heard" Document	0.5	1	1	0	2.5
Economic Development Working Session	1	0.5	1	0.5	3
Step 3 - Develop - Draft Plan					
Strategic Action Planning Session	0.5	1	0.5	0	2
Drafting the Southwold Economic Development Plan	1	1.5	0.5	1	4
Implementation Plan	0.5	0.5	0.125	0.25	1.375
Draft Plan Consultation	0.125	1	0.125	0.25	1.5
Step 4 - Deliver - Final Southwold Economic Development Plan					
Finalized Economic Development Plan	0.25	0.5	0.25	1	2
Presentation to Council	0.25	0.5	0.25	0	1
Total Consulting Days	5.75	11.25	10.125	4.625	29.875
Hourly Rate (\$)	\$206.25	\$156.25	\$125.00	\$93.75	
Daily Rate (\$)	\$1,500	\$1,200	\$1,000	\$650	
Total Fees by Consultant	\$8,625	\$13,500	\$10,125	\$3,006	\$35,256
Expenses					
Manifold Data (\$2100 for 2026 Southwold data plus \$450 for a benchmark)					\$2,550
Travel expenses - car rental, motel, meals @ \$500 per trip (4 trips)					\$2,000
Total expenses					\$4,550
Total Fees & Expenses					\$39,806
HST @ 13%					\$5,175

ID = Ian Duff, NJ = Nancy Johnston, KM = Kevin McPhillips, ER = Erikka Rombough

References

Project Example #: 1

Project Title: Elgin County Economic Development and Tourism Plan

Client Name: Elgin County

Contact Info:

Carolyn Krahn
Manager, Economic Development & Strategic Initiatives
Tel: 519-631-1460 ext. 133
Email: krahn@elgin.ca

Award Date: 2025

Completion Date: 2025

Project Example #: 2

Project Title: Rural Oxford Economic Development Strategic Plan 2026-2030

Client Name: Rural Oxford Economic Development Corporation

Contact Info:

Ronda Stewart
Economic Development Director
Tel: 519-619-6895
Email: ronda@ruraloxford.ca

Award Date: 2025

Completion Date: 2025

Project Example #: 3

Project Title: Grey County Economic Development and Cultural Master Plan

Client Name: Grey County

Contact Info:

Savanna Myers
Director of Economic Development, Tourism & Culture
Tel: 519-372-0219 ext. 1261
Email: savanna.myers@grey.ca

Award Date: 2023

Completion Date: 2023

Appendix A - Resumes





Ian Duff

BSSc, MURP, Ec.D., C.EcD

President | McSweeney & Associates

Profile

Ian Duff specializes in economic development, community and corporate strategic planning for communities of all sizes. With over 25 years of experience in leading initiatives in the public and private sectors, Ian brings a highly down-to-earth and hands-on approach; an experienced understanding of how municipal and regional government function; and an unparalleled expertise in people, community and sustainability issues. Ian's exceptional skills at building relationships and forging partnerships across jurisdictions has led to an outstanding record of success and highly sought-after guidance.

Education

- Master of Urban and Rural Planning, Dalhousie University
- Bachelor of Social Science, University of Ottawa
- Masters Certificate in Municipal Leadership, York University, Schulich School of Business



Career Accomplishments

- Led the creation of 100+ successful community and economic strategies for numerous Ontario communities such as Orangeville, Kawartha Lakes, Elgin County, Rural Oxford, Grey County, Huron County, Collingwood, and many more!
- Created the one-of-a-kind process to collaboratively create the Wellington County Corporate Strategic Plan and Grey County Corporate Plan.
- Led and facilitated the award-winning Inspiring Innisfil 2020 project, translating the community vision into a provincially recognized, integrated community, economic development, tourism and culture strategy.
- Oversaw development of ALL of McSweeney & Associates' Target Sector Analyses and Community Profiles.

Professional Experience

- **McSweeney & Associates**
President - Economic Development Consulting
Economic Development Consultant & Project Manager (2008-present)
- **City of Ottawa**
Director, Economic Development & Community Sustainability Branches (2005-2008)
Project Manager, Public-Private Partnership Office (2005-2006)
Business Development Consultant, Economic Development and Growth Management, (1999-2004)
- **Province of Ontario - Ministry of Government Services**
Regional Manager, Service Ontario (2004-2006)
- **City of Kanata**
Economic Development Officer, Planning and Development Services (1998-1999)

Ian loves to travel, and enjoys the outdoors as an avid hiker and water sports enthusiast.



Nancy Johnston

BA, MAES, Ec.D, C.Ec.D

Director, Strategic Initiatives

Profile

Nancy is an accomplished economic development professional with over 30 years of experience. She has a comprehensive understanding of municipal and regional governments within large and small municipalities and is familiar with the nuances of municipal processes. As a result of Nancy's experience working in municipal government, as well as direct working relationships with over 65 municipalities, she has garnered extensive knowledge on the foundations of how economies function, the value of economic development in a community's well-being, and the various stakeholders and interests that support community and economic development.

Education

- Master of Applied Environmental Studies (Local Economic Development), University of Waterloo
- Bachelor of Arts - Geography, York University



Career Accomplishments

- Project manager and lead author for over 50 unique community and economic development strategies including Brant County, Brantford, Orangeville, Kawartha Lakes, Grey County, Gravenhurst, Elgin County, Huron County, Mapleton, Rural Oxford, and the Township of Russell.
- Co-wrote the 2023 EDCO award-winning Economic Development, Tourism & Culture Master Plan for Grey County.
- Development of qualitative research for strategies through the facilitation of stakeholder groups and strategic working sessions, and the evaluations of communities through McSweeney's in-depth SCOAR® Analysis looking at Strengths, Challenges, Opportunities, Aspirations and Results.

Professional Experience

- **McSweeney & Associates**
Director, Strategic Initiatives (2019-present)
Senior Economic Development Consultant & Project Manager (2017-2019)
- **City of Brampton - Economic Development Office**
Manager, Business Development and Marketing (2010-2016)
Business Development Advisor/Coordinator (1999-2010)
- **Brampton Downtown Business Association**
Executive Director
- **Carleton Place Business Improvement Association**
Manager

Nancy enjoys travelling and experiencing different cultures, exploring nature and the outdoors, and supporting the local arts scene.



Kevin McPhillips

BA, MA

Director, Research & Innovation

Profile

An experienced data analyst and economic consultant, Kevin brings a unique ability to take complex data and make it relevant and interesting; summarizing complex data in a succinct, digestible way that allows readers to simply see the value, trends, and characteristics. With experience in both municipal and provincial government, and a wide-ranging set of interests, Kevin approaches each project with a desire to gain a deep understanding of the sectors, people, and area he is working with, as he believes that data only tells part of what makes each community unique.

Education

- Master of Political Science, University of Western Ontario
- Bachelor of Political Science, University of Western Ontario



Career Accomplishments

- Leading all of McSweeney & Associates data and analysis projects including Retail Gap Analyses, Situational Analyses, Profiles, Target Sector Analyses, Labour Market Gaps Analyses, etc.
- Researched and wrote a one-of-its kind report for the City of Toronto that quantifies Toronto's Net Zero Strategy.
- Co-wrote the 2023 EDCO award-winning Economic Development, Tourism & Culture Master Plan for Grey County.
- Led an assessment of the impact on Niagara's economy of post-secondary education shifting to a virtual environment during COVID-19.

Professional Experience

- **McSweeney & Associates**
Director, Research & Innovation (2021-Present)
- **Niagara Workforce Planning Board**
Research Associate (2019-2021)
- **Minister of Northern Development and Mines**
Legislative Assistant (2017-2018)
- **City of Niagara Falls - Mayor and CAO's Office**
Intern (2016-2017)

Certifications

- Accelerated Civic Leadership
- Economic Development Years One and Two
- Gender-Based Analysis+
- Accessibility for Ontarians with Disabilities Act Workplace Wellbeing Training

Kevin gets a thrill at chasing the flavours of local cuisine! He'll be eager to try your favourite lunch spot in your community.



Erikka Rombough

Graphic Designer, Report Publisher

Profile

Erikka is an eclectic artist who brings a keen eye and a flair for visual detail to all of McSweeney & Associates' projects. Her experiences in the arts has allowed her to travel through multiple disciplines, including theatre and live events, music, graphic and web design, writing and publishing, and interior design.

Multi-talented, Erikka is also exceptionally knowledgeable in IT and administration, having over a decade of experience providing customer service, accounting, and senior management to some of Canada's most prestigious individuals across various industries and sectors.

Education

- Interior Decorating, Sheridan College (High Honors)
- Theatre Arts - Technical Production, Sheridan College



Career Accomplishments

- Creator of the layouts and custom graphics for all strategies, community profiles, and research and analysis reports for McSweeney & Associates (approximately 80 per year).
- Designed the 2023 EDCO award-winning Economic Development, Tourism & Culture Master Plan for Grey County.
- Designed and built the McSweeney & Associates website (www.mcsweeney.ca).
- Managed operating budgets of \$30M+ and maintenance budgets of \$10M+ for some of Canada's High and Ultra-High Net-Worth families.
- Featured styling in House & Home Magazine - February 2015 Issue, August 2019 Issue (Sloan Mauran Interior Design)

Professional Experience

- **McSweeney & Associates**
Graphic Designer, Report Publisher, and Office Administrator (2019-present)
- **Wittington Properties Ltd.**
Accounting Administrator (2018-2019)
- **Helix Healthcare Group**
Administrative Assistant/Office Manager (2015-2017)
- **Sloan Mauran Interior Design**
Junior Interior Designer / Office Administrator and Assistant to the Principal (2014-2016)

Erikka is a self-published fiction author, avid baker, and enjoys building a self-sufficient homestead with her wife and three felines.

Appendix B - Data Sources

Manifold Projection Method versus Census Data

We choose to use more accurate Manifold data instead of Census data due to its reliability and accuracy. 2025 data observations are statistical estimates of demographic variables. Estimates are different from data collected by Statistics Canada via the Census every five years, which essentially counts the responses of those who answered the survey. SuperDemographics 2025 is the most up-to-date estimation of population characteristics, based on mathematical models that draw from various data sources. Manifold estimates demographic data annually, including population projections for 5 and 10 years.

Manifold data sources include:

- Statistics Canada
- Real Estate Boards/Companies
- Health Canada
- Canadian Bankers Association
- Regional Health Ministries
- Bank of Canada
- Citizenship and Immigration Canada
- Canada Post Corporation
- Regional School Boards
- Consumer and business directories books
- Flyer Distribution Association
- Publications of hospitals, CMHC, BBM and partners
- Proprietary survey and research

Lightcast (Formerly EMSI) Analyst

Lightcast data brings the various snapshots of the Canadian economy together in a single picture. First, it aligns the geographies of the data from 2001 to the present, which means the Township of Southwold of 2001 is the same as the Township of Southwold of 2026. This results in geographically detailed data (down to the Census Subdivision level) that apply to today's economy.

The data is remarkably detailed, giving you information on 305 industry classifications using the NAICS system and 522 occupations from Statistics Canada's NOCs classification system in over 4,300 integrated geographical areas. The data is updated twice yearly so users have the most current information possible.

Lightcast data sources include:

- Canadian Business Patterns (CBP)
- 2001, 2006, and 2011 Census data
- Survey of Employment, Payroll and Hours (SEPH)
- Labour Force Surveys (LFS)
- Canadian Occupational Projection System (COPS)
- CANSIM Demographics
- Postsecondary Student Information System (PSIS) Education Data

Appendix C - Tools for Successful Engagement

Our relationship with the Township of Southwold's Project Manager and Steering Committee will be built on a common vision of the intended outcome, and on trust, respect, and collaboration to drive the successful completion of this engagement. We have several different tools we use to ensure we will be continually engaged with the Southwold Team.

Project Orientation and Initiation Session

To begin the process, we propose a project orientation and initiation session with the Project Manager and steering committee. The purpose of the meeting is to:

- Develop a common understanding of the recommended work plan, project goals and objectives, the intended outcomes, and what success looks like at the end of the process;
- Agree on project reporting and progress reports (we are anticipating meeting multiple times formally and informally during the progression of the Plan);
- Discuss formal or informal progress reporting - what works best for Southwold;
- Present, review and agree on the scope of work, proposed work plan, schedule, and critical path;
- Agree on the project reporting and documentation requirements as noted;
- Review draft Communications Plan and Stakeholder Engagement Plan;
- Clarify respective expectations and roles; and
- Obtain relevant background documents.

This initial meeting will help to set the stage for a successful project including reporting structure - who reports to who, how both teams will be working (both collaboratively and separately), as well as how decisions are made and who has final and ultimate sign off on the project for McSweeney & Associates and the Township. It will provide a clear and direct picture of reporting structure and how to best communicate with each other.

Issues Resolution Strategy

Outside of the Project Start-up meeting, we are always in constant communication with our clients. We value collaboration, address every issue as they arise, and we will work closely with the Southwold Project Manager to ensure the Project Manager knows exactly what we are

doing and where we are in terms of project progress. In the end, we are only a phone call away and because of our tight internal working relationship, all members of our team will be able to provide support and guidance at any time.

Schedule Control

As our straightforward approach to this project will demonstrate, we will work closely with Township staff as we use a range of creative techniques aimed at ensuring we get the project done right and we get it done on time. The project schedule we are recommending is sound and very doable; however, it is also flexible. If we need to add a few weeks to a specific task, it also means, if necessary, we adjust in other areas. We can move quickly, but we also do not want to move too quickly. We will ensure we take the time to walk through the project steps and conclusions we are arriving at together.

In addition, we have deliberately set up a process that is built upon incremental decision-making so that we (both McSweeney & Associates and the Township) are making project decisions together at every step in the process.

What we propose for this project, and what we find works very well for both our clients and our team is the following:

- For us to produce a draft of each section of the Plan and send it to you for review.
- After time for review, hold a virtual meeting to allow us to present our findings and conclusions, and to have an interactive discussion with the client Steering Committee, whereby we gather directions and issues.
- We finalize the section based on the feedback received, addressing any issues, concerns or gaps identified.

We will also know exactly where we are in the project at all times, and we can adjust the speed at which we roll out the project according to how quickly Township staff can move along with us.

Finally, and in terms of project scheduling, we have deliberately set ourselves up as consulting firm made up of professionals with each team member bringing certain skills and aptitudes to the team. We only pursue projects where we can use our skills and expert knowledge and as such **do not farm out work to other consultants**. Taking this approach, we not only have total control over how often and how easily we communicate with each other, but we also have total control over the time we spend on the project and the speed at which we can complete tasks and project deliverables. This is intentional so we do not become or are not subject to external influences from other consultants in terms of the timing of project deliverables and/or budget.

Cost Control and Risk Management

We are committed to delivering excellent service to the Township of Southwold Zero defect is the only acceptable standard of performance – quality comes first. Quality service to us means consulting services that are technically accurate, that exceed our client’s expectations and have high value-added content.

Quality service means that we will continue to work until all tasks and deliverables have been completed on time and within budget in accordance with this proposal to the complete satisfaction of the client. We invite you to check our unparalleled “on time” and “on budget” performance against that of our competition. **We do not bid on projects that we cannot complete within the project budget and timeframe.** Ian Duff and Nancy Johnston, both experienced project managers, will ensure the successful completion of this project using accepted project management practices:

- Ensuring the project is clearly defined;
- Planning the project, and executing the project work plan;
- Monitoring and reporting on the project status against the project plan;
- Corrections to any deviations that may arise, and actively managing any risks to project deliverables;
- Regular communication and reporting to the Project Manager and Steering Committee; and
- Project closeout and reporting.

Project risk management is comprised of processes for identifying, analyzing, and responding to risks. McSweeney & Associates has identified a series of risk factors involved in economic development consulting assignments and utilizes the following risk management principles in its projects.

- Risk identification identifies and documents risks that are likely to affect the outcome of a project and should be reviewed with the client at project initiation. Risk identification should be regularly re-visited during the project. Risks may be internal (within the control of the Steering Committee) or external (beyond the control or influence of the Steering Committee).
- Complete the risk quantification which involves the evaluation of risks and identifies the possible consequences or outcomes should the risk event occur (probability and seriousness of risk event occurrence).
- Prepare risk responses by defining the specific steps required in response to identified risks that are deemed significant:
 1. Avoid the threat of a specific risk by eliminating the cause of the risk.
 2. Develop risk mitigation measures that serve to reduce the probability of the risk event occurring, or the consequence (or impact) should the risk event occur.

3. Develop contingency plans to be triggered in the event the risk event occurs, to lessen the impact or consequence.
4. Accept the risks and consequences, with or without mitigation measures and contingency plans.

Risk response control involves responding to risk events as they occur, as well as responding to changes in risk quantification throughout the project.

Quality Control

We take quality control seriously - our reputation depends on it. We don't do cookie-cutter reports, so all of our work is custom and unique to every one of our client communities. We always ensure extra scrutiny on our end to ensure our products are flawless. In addition, we do not release any of the work we do to the public. It is not our work to share - it is our client's work. As such all of our reports, studies and documents are always vetted through our clients first before any decision is made to release the information or document to the public. We understand we are working for you and your community and in turn, we want to make sure you always get the best report and product possible.

Although we are always on time and within budget, internally nothing leaves our office without 3 sets of eyes reviewing all documents. No draft reports or products are ever sent to the client without the Project Manager and Project Director's final sign-off and approval.

We have deliberately set ourselves up as a consulting firm made up of professionals who each bring certain skills and aptitudes to the team. We only pursue projects where we can use our skills and expert knowledge and as such **do not farm out work to other consultants**. As such, we have total control over the quality of our products. In the end, we are not satisfied unless our client is 100% satisfied that the project not only meets their expectations but ideally exceeds their expectations and delivers the exact product they were looking for.