



# QUOTE: STRATEGIC PLANNING

ART GALLERY OF NORTHUMBERLAND

FEBRUARY 17, 2021

PREPARED BY

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February 17, 2021

Dear Olinda:

**Re: Strategic Planning**

I am pleased to submit Laridae's proposal for the Art Gallery of Northumberland as you proceed with your strategic planning process.

At Laridae, we work exclusively with non-profit, association and public-sector organizations. We are a professional services team known for our excellence in facilitation, consulting and training. We support organizations in the areas of planning, governance, communications, change management and more. To date, we've served well over 150 organizations. We have nine employees on staff and a strong commitment to supporting the operational excellence of non-profits. We have the necessary depth and breadth of experience to ensure the success of a collaborative and rigorous strategic planning process on time and within budget.

Additionally, we are a proud, certified B Corporation, which means we meet rigorous, international standards of social and environmental performance, accountability, and transparency.

Planning requires thoughtful process design, disciplined project management, and creative engagement strategies. Our process is designed to ensure the joint development of strategies and solutions that reflect and are owned by you and your team.

Laridae would welcome the opportunity to design and facilitate the strategic planning process for the Art Gallery of Northumberland. Our proposed approach and pricing are detailed in the proposal below. Please let us know if you have any questions. Thank you for the opportunity to submit this proposal.

Sincerely,

Rachel Pott, Consultant  
Laridae

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# 1. ABOUT LARIDAE

We are committed, experienced, and easy to work with. We have extensive non-profit strategic planning, facilitation, and project management experience. We have significant professional experience working with arts and culture organizations. Furthermore, we are a **Vendor of Record for the Ontario Government** in eight management consulting categories, including Strategic Advisor and Strategic Public Engagement Specialist.



At Laridae, we know that non-profit and public-sector organizations are not the same as private companies. Leaders of mission-driven organizations need sound advice from those who share their values and worldview. While we are not a non-profit ourselves, [we are a proud B Corp](#) – certified to uphold the highest standards in corporate social responsibility. With over 150 clients served, our relationships run deep. Nearly 70% of Laridae’s clients come back for additional projects.

We are committed to making our work environment a safe and welcoming place. Furthermore, it important that the work that we do creates a positive social and environmental impact, and that we actively influence positive shifts in anti-racism, anti-oppression, indigenous cultural safety, and LGBTQ+ and gender equality. To that end, we have [made a public commitment on anti-racism](#).

## 1.1. Why Laridae?

Laridae has completed complex and varied projects, as our list of more than **150 clients** demonstrates. We believe that Laridae is right firm to assist the Art Gallery of Northumberland for three primary reasons:

1. **Expertise in strategy development.** Strategic planning is core work for us. To date, we have led over 45 strategic plans – for arts and community development organizations, small municipalities, social service organizations and more. In addition, Laridae staff have worked with multiple art galleries on various projects, including past projects

with the Art Gallery of Northumberland, providing us with unrivalled background expertise and understanding of the complex needs of your organization.

As sought-after thought-leaders in management consulting for non-profit and public sector organizations, we help organizations consider all aspects of strategy development—from risk assessments to success indicators and change management frameworks. We have led countless non-profit boards through facilitated planning and strategy projects.

2. **Expertise in stakeholder engagement.** Laridae has engaged tens of thousands of people through strategic planning, community engagement, rebranding, and research projects, facilitating open – and sometimes tough – conversations. As facilitators, we use a strengths-based approach that recognizes the ideas, passions, and lived experiences of participants. We utilize a range of research and engagement methods – including market research, surveys, focus groups, town halls, and one-on-one interviews – to gather critical information and data, as well as to build relationships and educate. We are adept at customizing activities to suit the audience (size, knowledge, interests).
3. **Completed projects:** At Laridae, our team brings deep experience and leading expertise of mission driven non-profit organizations, some of which include:

- Art Gallery of Peterborough
- Canada Council for the Arts
- Electric City Culture Council (EC3)
- Streams Community Hub
- Association of Canadian Publishers
- Emily Carr University of Art + Design
- Superior North Youth Arts & Culture Strategy
- Reframe Film Festival
- Sound of Music Festival

While this proposal provides the overall project structure, based on our experience and understanding of your needs, *our process will be jointly crafted*. **What differentiates the Laridae approach is that we customize our work** to fit your circumstances, capacity, and needs. The process is necessarily iterative, inclusive, and dynamic. Laridae has proven success

in helping organizations manage change, communicate their purpose, and create innovative, achievable and transformational plans.

Strategic planning requires thoughtful process design, disciplined project management, and creative engagement strategies. We understand that the journey is just as important as the destination. Our process has been designed and refined to maximize the ancillary benefits of the strategic planning process, which include: 1) clarifying and strengthening the organizational culture, 2) building and enhancing relationships with key partners and stakeholders, and 3) grounding the strategic plan in a comprehensive environmental scan, as well as honest and open stakeholder engagement, and considers capacity to put into action.

## 2. PROJECT APPROACH

### 2.1. Methodology

The scope of this project includes planning, research, stakeholder engagement, facilitation, analysis, writing, communications, and project management.

While this proposal provides the overall project structure based on our experience and understanding of your needs, **our process will be jointly crafted**. What differentiates the Laridae approach is that we customize our work to fit your circumstances, capacity, and needs. We will develop the final schedule in consultation with you to meet your needs, schedules and availability, and other priorities.

#### Working Together

Laridae will work with both the staff and Board to champion the process.

Laridae's approach will support the Art Gallery of Northumberland's Board of Directors throughout the journey, as they **champion the planning and provide oversight** of the final strategy. Coordinating these efforts with the Executive Director is, of course, critical, as they are integral to deeply informing and influencing the strategy development, and they are ultimately responsible for implementation in the years to come.

Through the engagement process, we also ensure that the voices of

stakeholders are included, and that they can see themselves in the final strategic plan. We have found that bringing along stakeholders, including all Board members, throughout the project, ensures full 'buy-in' at the end, producing results that can be easily communicated and implemented because investment by participants is there from the beginning.

## 2.2. Meeting During the Pandemic

With the concerning rise in COVID-19 cases across Ontario, Laridae will continue conducting its operations in an all-virtual format through Winter and Spring 2021. Our commitment to ensuring the health and safety of our staff, our clients – large and small, across Ontario and beyond – as well as the communities they serve, is paramount. We will reassess the situation in May 2021 and update our decision accordingly.

To read more on this, [click here](#).

## 2.3. Proposed Strategic Planning Workplan

The project is set to launch in March 2021. Laridae confirms that these timelines are feasible for our team, and we are committed to meeting all project milestones and deadlines.

The work plan below is Laridae's **proposed** plan to guide the process. Three options of varying scope have been provided for your consideration. **We will develop the final scope and schedule in consultation with you** to meet your needs, availability, and other priorities.

Activities	March	April	May
<b>Phase 1: Planning and Research</b>			
<b>Kick-off Call with the Executive Director:</b> To finalize scope, request key documents, and facilitate an understanding of the planning landscape.			
<b>Pre-Reading Package</b> (10 pages max.): An updated overview to prepare the Board for planning, including a brief environmental scan, additional reading material, and a top-line summary of engagement conducted to date, with context for the current landscape.			
<b>Meeting #1 – Pre-Meeting with Board</b> (1.5-2 hours): To gather views and preliminary thoughts and ideas for the strategic plan, surface priority issues, understand the current landscape, enable contributions to the design of the Retreat, etc.			
Develop a stakeholder engagement plan, including communications support.			
<b>Phase 2: Stakeholder Engagement</b>			
<b>Strategic Planning Focus Group (virtual):</b> One staff focus group.			
<b>Key Person Interviews (by phone):</b> Contacts to be determined in consultation with the Art Gallery of Northumberland.			
<b>Phase 3: Developing the Strategic Plan</b>			
<b>Meeting #3: Host Two 3-hour Planning Sessions (virtual):</b> A planning retreat with the Board of Directors, including a discussion of the latest information gathered, a SWOT analysis, and a strategic ‘deep dive’ with facilitated activities, strategic discussion, and development of strategic directions.			
<b>Draft Strategic Plan:</b> Circulate to Board for feedback (one round of edits).			



### 3. PRICING

Based on our best estimate of the time required to plan, research, prepare, and complete the activities identified, Laridae's total fees are **\$8,400 + HST**.

The deliverables, and the fee, will not change unless mutually agreed in writing, and in advance of work beginning. Additional work requested by the client outside the scope of this project will be billed at **\$150/hour plus HST** and will be mutually agreed upon in writing and in advance of such work beginning. The Art Gallery of Northumberland will be responsible for expenses related to meeting room rental, refreshments for participants, and promotion (if circumstances were to permit).