



Tool Kit - Module 2

PHASE
1

**ACTION
ITEM 2**

Community Identifies a Facilitator to Carry-Out Sustainability Visioning Activity

Key Task 1: *Define the Role and Responsibilities of the Facilitator*

Key Task 2: *Determine Whether an Experienced Facilitator Exists in the Community or Whether an External Contractor is Needed*

Key Task 3: *Undertake Steps Necessary to Retain a Facilitator*

Key Task 4: *Secure the Services of a Facilitator*

1 KEY TASK

Define the Role & Responsibilities of the Facilitator

Objective » *To clearly articulate the needs and requirements of a well-qualified and well-experience individual / firm to effectively and efficiently carry-out all activities related to the Community Sustainability Visioning exercise within the predefined timeline and budget.*

Overall Responsibility » **Visioning “Champion” / Community Leadership**

Activities

- » With the knowledge of the requirements of the sustainability visioning exercise, develop a list of key requirements of the Facilitator. These could include:
 - Experience with sustainability visioning and / or in the development of community sustainability-based plans;
 - Clear demonstration of an understanding of the community, the work requested, the timeline associated with the activity, the level of effort;
 - Previous experience undertaking similar initiatives;
 - Proven project management skills;
 - Proven time and budget management skills; and
 - Proven success.
- » Define the Facilitator’s role and responsibilities and indicate the level of effort associated with this undertaking.
- » Submit list of requirements along with the role and responsibilities to the Community’s Leadership for review and input.
- » Address all input and finalize the list of requirements, role, and responsibilities.

Defining The Role of The Community Sustainability Visioning Facilitator

- Project & Budget Management;
- Organize, Facilitate, & Attend Meetings with the Community’s Leadership and NWMO (as needed);
- Develop a Detailed Work Plan & Schedule to Guide Visioning Exercise;
- Conduct Detailed Community-Based Research, Literature & Document Reviews;
- Develop a Community Profile;
- Develop a Communication / Engagement Plan for the Community with Supportive Materials;
- Logistical Arrangements for the Engagement Activities;
- Design a Facilitator’s Guide for the Engagement Activities;
- Provide Facilitation Services at Engagement Activities; and
- Develop Draft & Final Community Sustainability Visions.

2 KEY TASK

Determine Whether an Experienced Facilitator Exists in the-House Community or Whether an External Contractor is Needed

Objective



Consider whether there is an experienced in-house facilitator available and whether it is best to work with that individual or whether an external facilitator should be hired to support the Community Sustainability Vision.

Overall Responsibility



Visioning “Champion” / Community Leadership

Activities

- » With the knowledge of the needs of the sustainability visioning exercise and the skill set requirements of the Facilitator, conduct an inventory of existing Community staff to determine whether skill sets already exist.
- » If research shows that such a person exists within the community’s staff, obtain their resume and submit to the Community’s Leadership for their review and input.
- » Develop a list of potential challenges and benefits associated with securing internal and external services to undertake the Community Sustainability Visioning exercise. Submit the list of challenges and opportunities to the Community’s Leadership.
- » Schedule a meeting with the Community’s Leadership and determine whether they wish the Community Sustainability Visioning exercise to be an internal or external (i.e. with the assistance of Consultant) undertaking.

3 KEY TASK

Undertake Steps Necessary to Retain a Facilitator

Objective » *To develop an approach to identify a potential “Facilitator”.*

Overall Responsibility » **Visioning “Champion” / Community Leadership**

Activities

- » Armed with the knowledge of the Community’s Leadership decision on whether to pursue the services of a Facilitator internal and / or external to the community AND using the description of the roles and responsibilities defined in Action Item 2: Key Task 1, craft a “Terms of Reference ” / Request for Proposals.
- » Identify the mechanism through which the Facilitator position will be “advertised” (e.g. posted using existing channels such as “internal web postings”, advertised externally using the Community’s website, Merx, or through email distribution to specifically identified individuals).
- » Through discussions with the Community’s Leadership, identify the method through which an individual can “apply” for the position (e.g. resume, proposal) and confirm the timeline for applying to the position.
- » Determine the mechanism through which interested parties can apply (e.g. an email account “visioningfacilitator@communityX.com”) and identify an individual to receive all applications.
- » Develop an overview of the project and the scope of work:
 - Introduce the community, the Community Sustainability Visioning exercise, the history of activity to date, the objective of the undertaking, and the proposed outcome;
 - Define the timeline of the undertaking;
 - Outline the resources available to assist with the undertaking; and
 - Provide an overview of the timeline for the recipient to apply to the position and specific details on how (e.g. resume, proposal) they can express their interest in the position.
- » “Advertise” the position.

Example of a Request for Proposals (RFP) for Community Sustainability Visioning Facilitator

- Cover Page
 - The cover page lists the name of the community, the title of the project (e.g. “*Community Name’s Sustainability Visioning Exercise*”), and a project number (e.g. RFP-0001). It may also list a key contact person within the Community, and the date and time when the proposal is due to the Community.
- Background and Context:
 - This sets out the history behind the pursuit of the Community Sustainability Vision. It should speak to things like NWMO, the Adaptive Phased Management (APM), the Deep Geological Repository (DGR), and the NWMO’s site selection process.
 - This section should also provide some background on the Community, its history, its size and population, any key environmental features, administrative structure, any previous activities which may help to inform this process (e.g. an existing vision, Integrated Community Sustainability Plan, Environmental Scan, Environmental Plan, Land Use Plan).
 - An overview of reporting structure for this assignment should be included and the identification of resources (staff and materials) that will be made available to the successful candidate.
 - The Background and Context piece can also list all activities related to the Community Sustainability Visioning exercise which has been undertaken to date (e.g. the identification of a Community Sustainability Visioning “Champion” and background research to identify existing documents, reports, plans, materials to help inform an understanding of the community).
- Schedule
 - The date the exercise will start and when it should be completed by.
- Scope of Work:
 - This will focus on the scope of work required related to;
 - Planning for Community Sustainability Visioning;
 - Developing the Community Sustainability Vision; and
 - Finalizing the Community Sustainability Vision.
- Deliverables:
 - There will be two key deliverables:

Communication/Engagement Plan

The plan should include the development of a communication strategy that outlines effective methods for providing the community with information and notice of the visioning process. Engagement activities may include a range of techniques; however, the plan should allow community members the opportunity to “just sit and talk”. Strategies should reflect those best suited to community members, allowing them to feel comfortable providing insight to inform the community’s vision. Techniques may include workshops or community meetings (supported by a series of posters and print material and workbooks, checklists, etc.); booths at local venues such as libraries, grocery stores, coffee shops; use of social media; or ‘kitchen table meetings’ etc. Approaches for involving a range of specific audiences such as the general public, youth, elders/seniors, seasonal residents, and community organizations should be noted.

Community Sustainability Vision Report

The second key deliverable from the assignment will be a Community Sustainability Vision report, documented in an easy to understand format, with supporting background material. The report would/could include:

- The Community Sustainability Vision;
- Description of themes or pillars that support the Vision, including existing conditions/profile, Strengths Weaknesses Opportunities and Threats (SWOT) analysis, goals/objectives, related actions;
- A description of the communication/engagement process and methodology; and
- Appendices of related material as applicable (e.g., bibliography, community profile, asset mapping).

- Proposal Requirements

It is recommended that the submitted proposal include the following elements:

1. Qualifications and Experience - The consultant should outline their relevant experience, including experience of the Project Lead/Facilitator (and support staff, if any) and corporate experience with:

- a. Community development /sustainability or strategic planning projects, including the development of Community Sustainability Visions – particularly in small northern /rural communities;
- b. Planning, implementing and documenting community engagement activities;
- c. Community development/sustainability or strategic planning and engagement projects with Aboriginal communities and organizations (First Nations and Métis) (*if appropriate for community*);
- d. Preparing materials for communication with a range of audiences;
- e. Provision of services in [specify language(s)];
- f. Identification of Project Staff – including at a minimum the Project Lead, and support staff (if any) – including CVs addressing the relevant areas of experience outlined above; and
- g. Summaries of corporate experience and illustrative projects and experience relevant to this assignment.

2. Suggested Approach - The consultant should outline their relevant experience, including experience of the Project Lead/Facilitator (and support staff, if any).

3. Work Plan, Schedule and Budget by Phase – Based on the approach outlined above, a work plan, schedule and budget should be provided, illustrating the level of effort for staff, and allocation of costs. The budget should be inclusive of all consultant fees/disbursements, and clearly identify costs for specific tasks, including engagement activities (including travel as applicable). The maximum funding available for the assignment (including GST/HST as applicable) could be identified.

4. References - (name, position/organizations, phone, e-mail) for two illustrative projects relevant to this assignment.

- Selection Criteria

- Consideration should be given to predefining selection criteria and associated weighting/point scheme. For example:

Selection Criteria	Weighting (Points)
Clear demonstration of an understanding of the community and the proposed Sustainability Visioning exercise	10
Well documented experience developing Community Sustainability Visions, designing and executing community-based engagement sessions and Facilitator Guides, background providing facilitation and consultation services, history of providing strategic advice and guidance, extensive research and analysis experience, proven experience developing Communication / Engagement plans and associated materials	15
References <ul style="list-style-type: none"> - Name and duration of project; - Client; - Size and scope of work undertaken; - Key contact person (name, title, position) with Contact Details (postal address, telephone number, email, and fax number). 	15
Well articulated approach to developing Community Sustainability Visions	15
Proposed Team	10
Sample of Communication / Engagement Plans and Materials designed to support visioning engagement sessions (e.g. workbooks)	10
Detailed work program which outlines all steps / tasks associated with developing the Community Sustainability Vision	10
Schedule and Timeline	5
Budget for undertaking work	10

- Proposal Delivery Requirements

- This section provides very clear and detailed instructions on how the proposal is to be delivered, to whom it should be delivered and by what time, and the number of copies required

- Questions Related to the RFP

- This section should clearly identify an individual to whom bidders can direct their questions, the contact details, and the date and time of when question submission closes.

4 KEY TASK

Secure the Services of a Facilitator

Objective » *To identify a qualified and experienced individual to assume the role of Community Sustainability Visioning Facilitator.*

Overall Responsibility » **Visioning “Champion” / Community Leadership**

Activities

- » Gather all resumes / proposals received at the close of the posting period and submit to the Community’s Leadership for their review.
- » Schedule a meeting with the Community’s Leadership to review proposals for Facilitator position.
- » Using the list of key requirements developed in Action Item 2: Key Task 3, meet with the Community’s Leadership and review all applicants.
- » Obtain consensus on the preferred applicant and undertake the steps necessary to notify that individual.
- » Once the Sustainability Visioning Facilitator has accepted the position, undertake logistical activities and arrange a meeting with the Community’s Leadership to officially initiate the process.
- » Meet with the Community’s Leadership and ensure that the Facilitator fully understands their role and responsibility, is provided with the support necessary to undertake their responsibility, and address contractual / administrative requirements as necessary.

Key Questions to ask when Identifying the Community's Sustainability Visioning Facilitator

- Does this person / firm have previous experience developing Community Sustainability Visions?
- Does this person / firm come with an understanding of sustainability and municipal / community politics?
- Does this person / firm have the skills and experience needed to engage with the members of our community?
- Does this person / firm have the necessary experiential background to provide the guidance needed for this undertaking?
- Is the team proposed well qualified to undertake this process?
- Does the work program / approach proposed show an understanding of what is required?
- Were there any unique and interesting ideas proposed that would help to improve the effectiveness and efficiency of the process proposed to develop the vision?
- Does the proposed timeline show an understanding of the level of effort associated with this undertaking?
- Is the price "affordable" and appropriate given the level of work / effort proposed?