Planning & Development Approval's Process Review

Council Presentation

The Corporation of the Township of Oro-Medonte

25th November 2020

Agenda

The Current Situation	Recommendations to Consider	The Road Ahead
Our observations of the current state	Blackline's opinion on the opportunities available to improve services and achieve efficiencies	A suggested timeline of activities to implement the recommendations

The objective is to increase the efficiency and effectiveness of Planning

We use several sources of information to analyze the process and formulate opportunities:

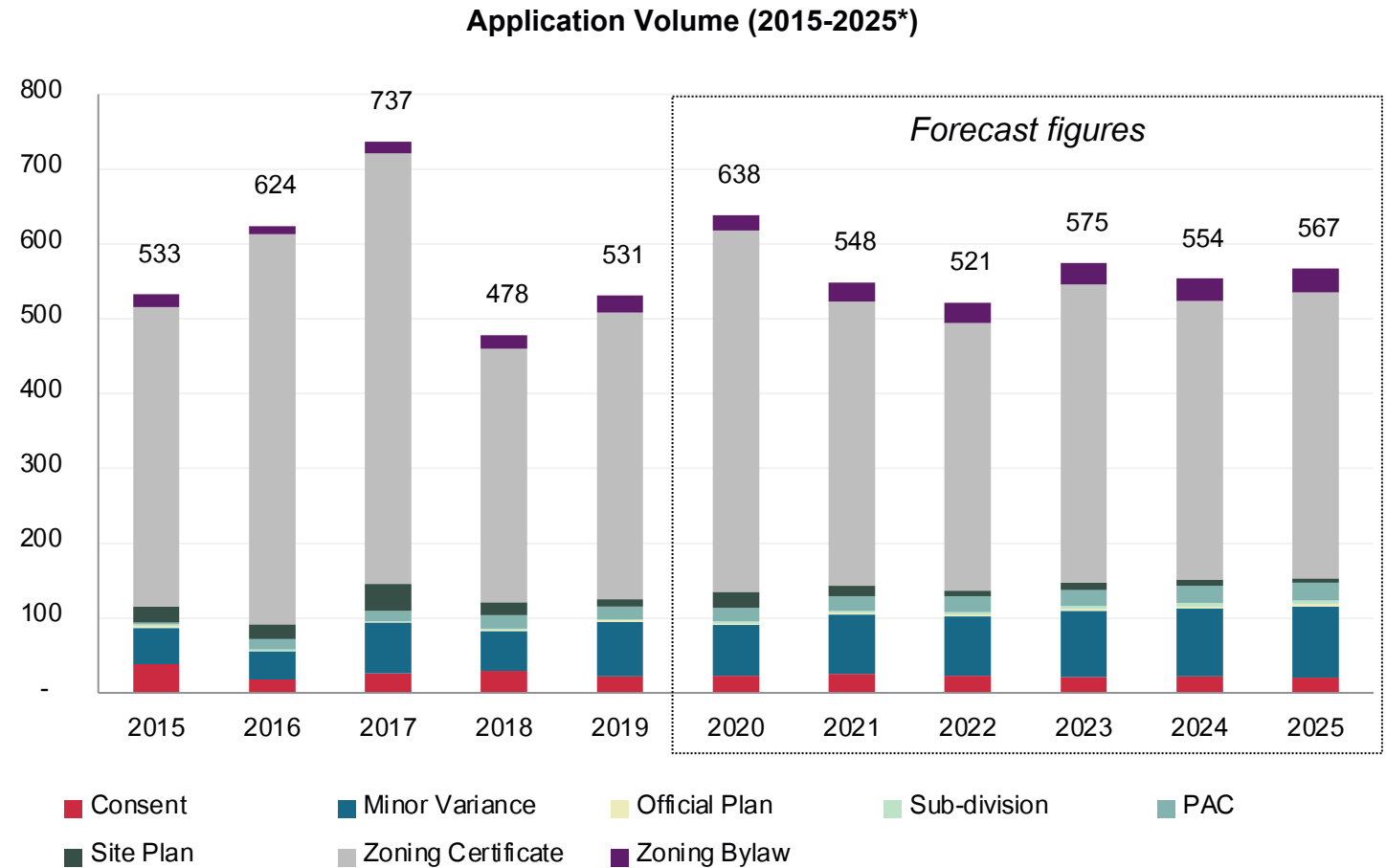| **Job shadowing** | sitting with staff to observe how they conduct their day-to-day activities. |
Stakeholder interviews	consultation with management, staff and developers.
Peer analysis and research	consultation with your peers and researching publicly available information on other P&D practices.
Process analysis	review of existing process, documentation and data.

A linear forecast suggests the volume will be above 2019 levels

► While the number of applications per year fluctuates, the composition is fairly consistent

► Given COVID-19, there is uncertainty about the future (higher or lower) – that said, the Township's development activity has been steady

Application Volume (2015-2025*)

Forecast figures

Legend: Consent, Minor Variance, Official Plan, Sub-division, PAC, Site Plan, Zoning Certificate, Zoning Bylaw

Values labeled above bars: 533 (2015), 624 (2016), 737 (2017), 478 (2018), 531 (2019), 638 (2020), 548 (2021), 521 (2022), 575 (2023), 554 (2024), 567 (2025)

*The rolling five-year linear forecast predicts the volume per application type and therefore it is a different slope than the three percent historic average.

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Our findings narrow down to three key observations
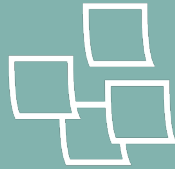
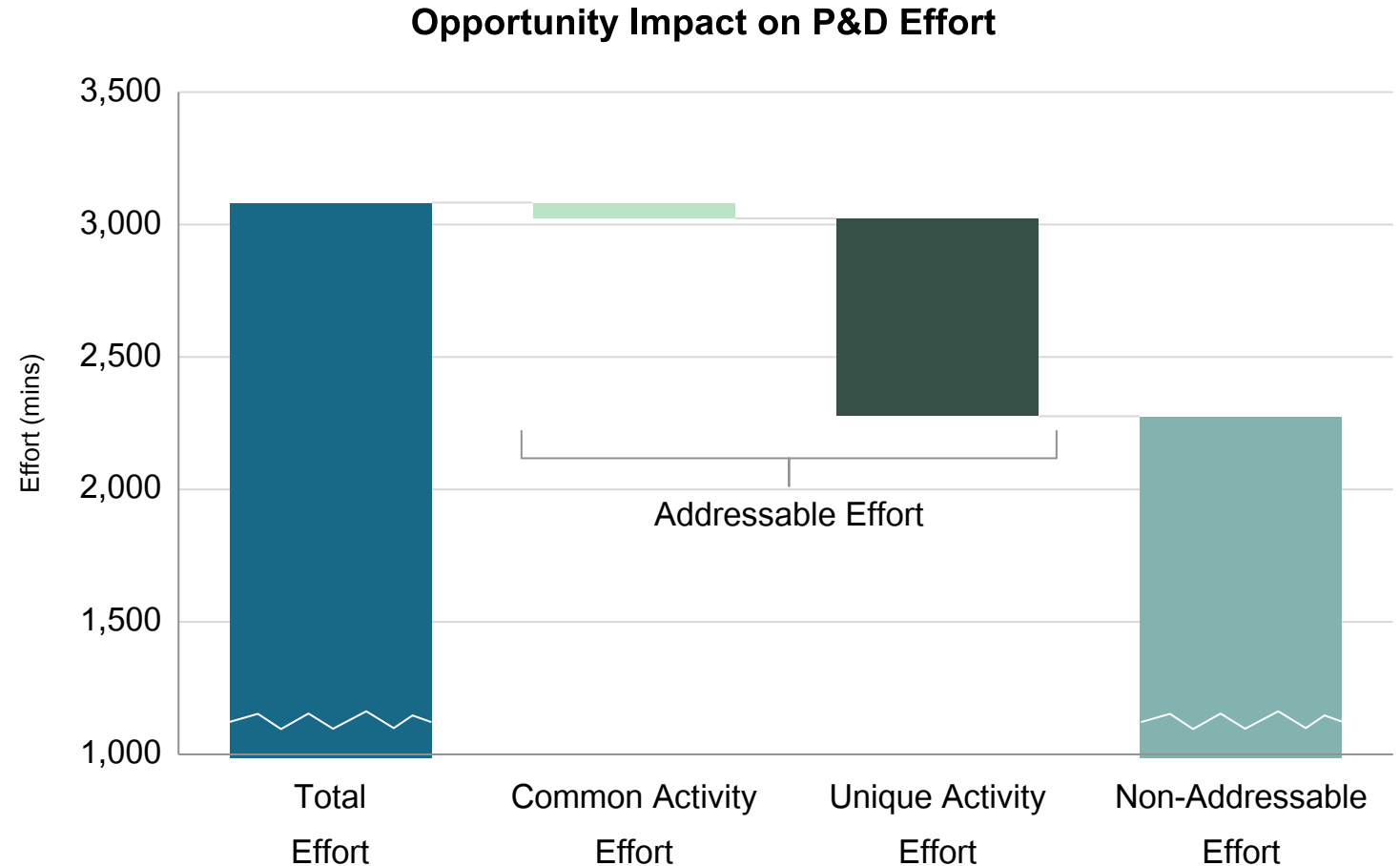| The majority of process activities are manual	There are little self-service capabilities for customers	The Township uses few tools for collaboration
Low reliance on technology, high reliance on individuals – both customers and staff.	The website offers little self-service and information is not easily accessible.	Collaboration between stakeholders is manual with little use of technology.
This requires more staff effort and may cause delays in the process timeline.	This increases work volume (general inquiries) or may discourage prospects.	This causes inefficiencies in sharing documentation or coordinating activities.

We have identified 39 recommendations

	# of opportunities		# of opportunities

39 opportunities across 5 themes

	# of opportunities
Automation	6
Self-service	5
Process Changes	12
Resources	6
Baker Replacement	10

★★☆

Service Improvement

the primary benefit is improving the quality of the service that customers receive.

# of opportunities
11

Efficiency Improvement

the primary benefit is a result in more efficient operations and process activities.

# of opportunities
28

Our recommendations will impact 26%* of P&D effort

► Alternatively, this will impact 60% of P&D's activities

► Some are non-addressable activities, including:

- Conducting internal technical reviews

- Third-party technical reviews (e.g. CA)

- Creating presentations
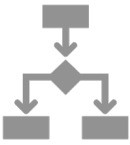
- Writing reports and making recommendations

Opportunity Impact on P&D Effort

Effort (mins) — Total Effort, Common Activity Effort, Unique Activity Effort, Non-Addressable Effort; Addressable Effort

*This equates to 0.86 of a Full Time Equivalent (FTE)

Recommendations: Automation and Self-service

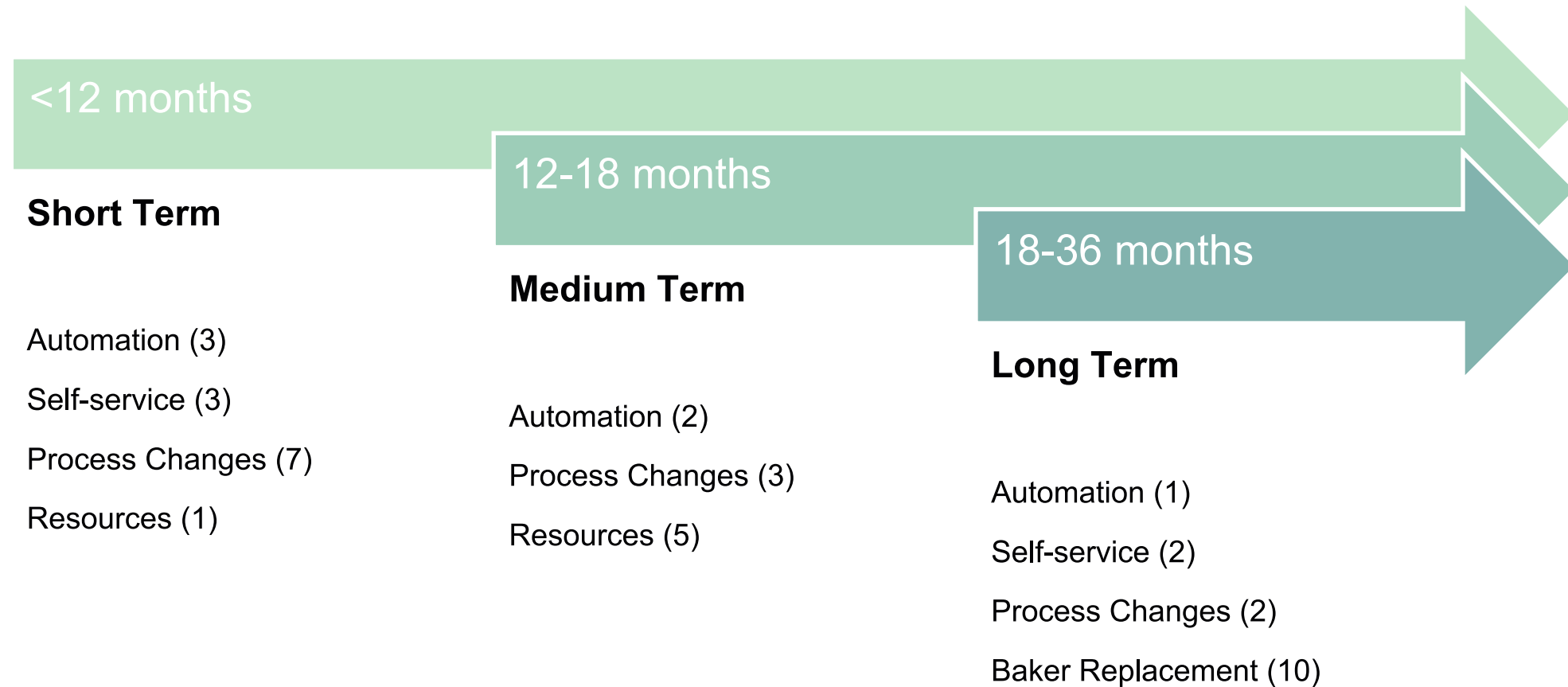| Theme	Opportunity	Efficiency Improvement	Service Improvement
Automation	**Automate manual activities using technology**		
	▶ Implement a web enabled solution to share documents securely	✓	
	▶ Expand the Township's online payment capabilities to accept different options		✓
	▶ Select and implement a digital signature solution (e.g. DocuSign)	✓	
Self-service	**Providing customers with resources to do more**		
	▶ Provide better online information for customers		✓
	▶ Update or replace the Township's existing website forms so that they are fillable	✓	
	▶ Implement an online scheduling tool to streamline booking meetings with customers	✓	

Recommendations: Process and Resources Changes

Theme	Opportunity	Efficiency Improvement	Service Improvement
Process Change	**Streamline processes**		
	▶ Block timeslots on a set frequency for customer appointments	✓	
	▶ Streamline the payments process to be more customer-friendly		✓
	▶ Create a risk-based framework to delegate approval authority for certain applications	✓	
Resource	**Re-assigning activities**		
	▶ Pilot a rotation model, where staff specialize for a certain period	✓	
	▶ Decentralize the initial check for 'application completeness' process to all Planners	✓	

Recommendations: Baker Replacement

Theme	Opportunity	Efficiency Improvement	Service Improvement
Baker Replacement	**Functionality to include when replacing Baker with a new system**		
	▶ A portal for customers to submit/upload applications and supporting documents, check application status, make payments and add/view comments/questions		✓
	▶ Ability to store (or attach) relevant application documents and link it to an application file	✓	
	▶ Ability for workflow capability to track activities and send notifications to internal staff (reminders to complete an activity) or customers regarding application progress	✓	

The Township should consider these along with the Service Level Review

<12 months

12-18 months

18-36 months

Short Term

Automation (3)

Self-service (3)

Process Changes (7)

Resources (1)

Medium Term

Automation (2)

Process Changes (3)

Resources (5)

Long Term

Automation (1)

Self-service (2)

Process Changes (2)

Baker Replacement (10)

Questions

Blackline Consulting