OAKVILLE

Final Report

Streamline Development Approval Fund (SDAF) Program Summary

October 19, 2023

Author: Strategic Business Services

Table of Contents

1. SDAF Program Overview

In January 2022, Premier Doug Ford announced the Streamline Development Approval Fund (hereafter SDAF) which is a $49 million investment from the Province of Ontario to help unlock housing supply by streamlining, digitizing, and modernizing current municipal approaches to managing and approving applications for residential developments.

In addition to implementing municipal efficiencies to accelerate housing development, the approved funds were also utilized to hire temporary staff to eliminate existing backlogs related to development approvals in the planning and development engineering departments. The Town of Oakville's funding approval was $1,000,000 with the expectation that all SDAF projects will be completed by October 31, 2023, and can meet one or more of the criteria below.

1.1 SDAF Criteria

- Procuring consulting or fee-for-service resources to do one or more of the following:
  - Identify and implement more efficient processes for the development approvals.
  - Prepare draft changes to zoning by-laws and explore opportunities to accommodate new housing development as-of-right.
  - Implement or enhance implementation of a Community Planning Permits system with a housing component.
  - Review council decision-making processes related to development approvals.
  - Develop draft Community Improvement Plans that include housing incentives.
  - Undertake studies to support new housing types.

- Implementing e-permitting systems or online "Manage My Application" systems.
- Implementing systems that enable the use of online application forms/submission of supporting documents.
- Developing online application guides
- Implementing online booking and web meetings systems for pre-consultation and planning meetings
- Purchasing data/application management/workflow software, digital drawing software, or 3D tools
- Purchasing software or hardware to improve the handling of payments related to development approvals.
- Standardizing terminology, application processes, and data requirements as well as developing terms of reference
- Hiring temporary staff to deal with backlogs related to development approvals.
- Implement diversity internship programs.

- Temporary staffing to implement SDAF projects.
- Other initiatives to streamline development approval processes, previously agreed to with the Ministry.

1.2 Town Approach

To make the most of the funding in a brief period of time, the town decided to utilize the funds to 1) enhance and advance online services and 2) clear the backlog of existing applications that resulted during the pandemic. The funding of $1,000,000 was equally split between advancing online services and clearing the backlog.

The online services projects selected were already in the planning stage and align to the town's overall digital strategy and the property development digital plan which aims to transform the planning and development service to be:

- **Easier and streamlined** - an integrated experience with fewer process steps.
- **Convenient and modern** - reduces physical trips to the Town and includes online solutions to allow for remote and 'off-hour' process step execution.
- **Clearer and transparent** - fostering greater 'real time' application progress tracking and visibility.
- **Predictable and faster** - reliably working within established timelines and resulting in an expedited process outcome for applicants.
- **Collaborative and coordinated** - strengthen the way we work with applicants resulting in less process friction and tension, includes greater activity collaboration, coordination, and information sharing.

2. SDAF Program Workplan & Status

The table below provides a list of the projects and filled positions as part of the SDAF Program and their status as of October 16, 2023, organized by criteria.

#	Project Name	Status
	Improvements to Online Services	
1	Development engineering permits & inspections online	Completed
2	Sign and Noise Permits online	Completed
3	Planning/development applications online (for three types only)	Completed
4	Property Survey Online	Completed
5	Portal improvements for building permits/inspections: • Phase 1: Develop request for proposal and hire vendor (completed) • Phase 2: Design, configure and implement portal changes (to be completed by Q1 2024)	Partially Completed
6	Plan review and circulation tool (ePlan) for building, planning, enforcement: • Phase 1: Acquisition and implementation of ePlan tool (completed) • Phase 2: Customization and configuration (to be completed by Q1 2024)	Partially Completed
	Standardization of terminology, application process, data requirements	
7	Development Engineering Standards & Guidelines Update	Completed
8	Bill 23 Compliance Changes*	Completed
	Data/application management/workflow, digital drawing software, or 3D tools	
9	BIM Pilot Study for building permits	Completed
10	Implementation for ArcGIS Urban for Uptown Core	Completed
11	Municipal Reporting on Planning Matters Compliance*	Completed
12	**Temporary Staffing to Clear Backlog**	
	1. Inspector in Forestry	N/A
	2. Planner in Planning Services	N/A
	3. Development Engineering Technologist in Development Services	N/A
	4. Inspector in Development Services	N/A
	5. Inspector in Permits & Inspections section	N/A
	6. Admin in Road Corridor section	N/A
	7. Inspector in Permits & Inspections section	N/A
	8. Admin in Transportation and Engineering	N/A
	9. Business Analyst Co-op Student to support projects 8 and 11 above*	N/A

2.1 Projects' Descriptions, Outcomes and Benefits

The SDAF funding enabled the town to implement a total of **four** new online services and reduce its development applications engineering review and inspections backlog. The table below provides detailed information on each project, its outcomes, and where appropriate a reference link to the online service.

Project Name & Description	Project Outcomes
1. Development Engineering Permits & Inspections Online Applications were only accepted by email and there were many manual processes required for intake, review, approval, and inspections. It continued to become more problematic during COVID resulting in additional workload for staff, lack of consistency across other permit processes, and customer dissatisfaction. By moving the application process to an online solution, we empowered customers to submit, pay, view status, book inspections and engage with town staff for Development Engineering Permits. Furthermore, we enhanced web content to improve functionality and integrated the ServiceOakville call center for superior tier one customer support. Reference: Construction and Renovations (site.com)	• Higher quality, complete application submissions with reduced errors. • Reduction in effort to administer and issue permits. • Ability for ServiceOakville to manage tier 1 & 2 customer interactions concerning applications. • 24/7, easy to use and convenient. digital service. • Improved customer satisfaction, transparency, and communication. • Approximately 1816 permits applied online since launch in 2022. • Approximately 2366 inspections booked online since launch in 2022.
2. Sign and Noise Permits Online The process for administering sign and noise permits was manual: applicants must either apply in person, via email, or mail a package of documentation. Each permit was documented manually in the online tracking system (AMANDA); fee receipts and permit cards are printed and provided to the applicant; and the original application package is both scanned to the AMANDA folder and stored on-site in paper form. With a high volume of applications received (over 300 permits issued per year), the town decided to move to an online solution that facilities a more transparent and easier to use process for applying and paying for sign and noise permits. In October 2023, the town received the 2023 Digital Government Award for Operational Excellence by Granicus for this project. Reference: https://oakvillecrm.my.site.com/ServiceOakville/s/	• Higher quality applications, with reduced # of incomplete applications. • Reduction in effort to administer and issue permits because of auto approve feature for some permit types. • Ability to apply for multiple permits at once. • Faster application review and time to render decision for permits. • 24/7, easy to use and convenient. digital service. • Improved customer satisfaction, transparency, and communication. • Approximately 1262 permits applied online since launch in 2022.
3. Planning/development applications online Applications were only accepted through email and involved a manual process for staff to input all the application information into the tracking system (AMANDA). This project aimed to enhance the customer experience for three types of planning applications (Part Lot Control, Fence Variance and Zoning Removal of Hold Provision) by providing	• Higher quality, complete application submissions with reduced errors. • Reduction in effort to administer and approve applications. • Provide a digital service that is easy to use and convenient.

Project Name & Description	Project Outcomes
customers with an online application solution that would provide a more cohesive and accessible process. It would provide the ability to track the status, interact with staff and view any applicable comments, as they are available. Internally it would create a more streamlined process, by automating the creation of folders in AMANDA, populating required fields, verifying all required documents and drawings have been attached. Reference: Construction and Renovations (site.com)	• Improved customer satisfaction, transparency, and communication. • A total of 23 applications were submitted since the launch in 2022.
4. Property Survey Online Homeowners can purchase property surveys from the Building Services department (within the last 15 years). The Building Services Department received approximately 300 to 400 walk-in requests for property surveys annually. These Building Services' records are considered "routine disclosure." The purpose of this project was to create capacity for front line Building staff and improving customer experience by creating an online self-serve channel for access to these records. Reference: Property Permits and Taxes (site.com)	• Reduction in cost/effort to administer and respond to requests. • Easy to use and convenient digital service. • Improved customer satisfaction and communication. • Reduction in customer time spent obtaining documents (e.g., travel time to town hall) • Total of 1699 requests submitted online since launch in 2022.
5. Portal improvements for building permits/inspections The building permit and inspection processes were the first services to go online at the onset of COVID without through review of its back-end system. Since its initial implementation in 2021, the town has been monitoring the efficiency and effectiveness of the online service. As a result, several improvements have been identified all geared towards further simplifying the process and making the online experience easier while minimizing manual work for staff. This is a major undertaking which is why the project was divided into two phases. • Phase 1: Develop request for proposal and hire vendor (completed) • Phase 2: Design, configure and implement portal changes (to be completed by Q1 2024)	• Higher rate of complete applications submitted with reduced errors. • Reduction in manual effort to administer and approve applications. • Easy to use and convenient digital service. • Improved customer satisfaction, transparency, and communication.
6. Plan review and circulation tool (building, planning, enforcement) The purpose of this project is to procure and implement off the shelf solution for electronical plan review and circulation (ePlan). Through a competitive process, the town selected ProjectDox by Avolve, which is currently being implemented for building permits, municipal enforcement permits and development applications. ProjectDox will help the town gain efficiencies for project approval, while enhancing teamwork, portability, auditability, operational transparency, and accuracy.	• Faster application review and decision for applications. • Higher quality and accuracy resulting in higher # of complete application submissions with reduced errors. • Improved customer satisfaction, transparency, and communication. • Savings in terms of time and paper for customers and staff.

Project Name & Description	Project Outcomes
This is a major undertaking which is why the project was divided into two phases. • Phase 1: Acquisition and implementation of ePlan tool (completed) • Phase 2: Customization and configuration (to be completed by 2024)	
7. Development Engineering Standards & Guidelines Update This project was to update the Town of Oakville's Development Engineering Procedures and Guidelines Manual. The scope of the work included: a review of background data, reports, other GTA municipalities engineering manuals and guidance documents from outside agencies involved with the engineering approval process; internal stakeholder interviews to gather input; an updated manual and associated standard drawings. Additionally, the consultant created standard design checklists for common stormwater management measures for residential single lots, including, for example, soak away pits, dry wells, cisterns, and storage tanks. This task includes checklists for four stormwater management measures based on existing guidance from CVC/TRCA/STEP/best practices. **Reference:** Development Application Guidelines (oakville.ca)	• Improve the efficiency and completeness of permit applications. • Improve the customer experience as the applicants will have higher quality submissions which leads to a decrease in resubmissions and timelines for approval. • Decrease staff time reviewing and commenting on drawings that do not meet current standards and best practices.
8. Bill 23 Compliance Changes In November of 2022, the Government of Ontario (the province) passed Bill 23, More Homes Built Faster Act, which is part of Ontario's Housing Supply Action Plan and aims to support the province's goal to add 1.5 million new homes in Ontario by 2031. To comply with the legislation, the town had to make significant changes to process and technology for various type of applications. A total of 27 technology changes alone were implemented in 2023. Reference: Grading and Servicing Plan Guide for Residential Infill Developments (oakville.ca)	• Multiple process changes within Building Services, Transportation and Engineering, and Planning Services. • 27 technology changes to account for legislative changes (financial, reporting and process related) • Over 10 templates for staff and applicant usage were created. • Developed grading and servicing plan guide for applicants.
9. BIM Pilot Study for Building Permits Pilot the use of Building Information Modeling (BIM) to see if it can be used to aid building code officials during the plan review process. Research today found that BIM has the potential of helping code officials visualize the project, extract information from objects, and allow them to have a better understanding of unique building features relationship to other building elements. A full implementation of BIM will be considered as part of the long-term property development digital plan.	• Improved quality of submissions • Allow for a more collaborative submission review by all stakeholders. • Access to both BIM and GIS provides opportunities to conduct analysis and simulations. • Enable the planner and examiners to review a three-dimensional model of the building before construction commences.

Project Name & Description	Project Outcomes
10. Implementation for ArcGIS Urban for Uptown Core The town implemented ArcGIS Urban, a web-based solution that applies GIS technology to urban planning to streamline plan creation, analyze the impact of plans, visualize current projects, and can also facilitate public engagement for the Uptown Core of Oakville. The tool allowed the town to utilize a 3D environment for the review and approval process of development applications. The town will continue to expand the use of ArcGIS Urban and provide training to staff to increase their knowledge and skills of the tool. Reference: Oakville in 3D (arcgis.com)	• Better visualization of development heights and setbacks and the effects of an application in the built environment. • Ability to create data driven land use scenarios based on different factors in 3D. • Enable the ability to conduct citizen engagement online in improve that process more in the future.
11. Municipal Reporting on Planning Matters Compliance To help implement a solution in place that would allow the town to collect and report on planning data in an efficient and automated way. Part of the solution includes an online dashboard that would display planning data in a curated and easy to understand manner. The reported information will be used to: • Measure progress towards the Housing Supply Action Plan commitments. • Assess and monitor trends over time, with respect to planning application timelines; and • Provide the provincial government with data necessary to inform evidence-based decision on housing and planning policy. Reference: Planning Applications & Forms (oakville.ca)	• Meet legislative requirements. • Reduce burden from data requests and reporting requirements. • Empower evidence-based decision making. • Improve collaboration and communication. • Enhance planning data transparency.
Temporary Staff to clear Backlog The following positions were hired to help clear the backlog that was created during the pandemic. • Inspector in Forestry • Planner • Development Engineering Technologist • Three Inspectors in Transportation and Engineering In addition, two Administrative Support Staff in Transportation and Engineering were hired to digitize engineering records.	• 675 private tree removal inspections conducted. • 475 private tree removal permits processed. • 64 development applications related to trees processed. • Over 30 planning applications reviewed and processed. • Over 70 engineering reviews completed for permits and development applications. • Over 4,700 engineering permit application files digitized. • Over 8,000 condominium, contract, and subdivision records (images, PDFs, and drawings) digitized and organized for future reference.

The overall benefits of implementing all the online services' projects above and pursuing further digital transformation to improve and streamline the development approval process can be summarized as follows:

- **Accessibility, Collaboration and Public Engagement**: Everything is easily accessible online, reducing the need for physical copies and making information readily available to stakeholders. This accessibility enhances the efficiency of decision-making processes. Virtual town hall meetings, surveys, and interactive platforms encourage community involvement in the planning process.

- **Data Management & Analytics:** Integrating vast amounts of data from various sources can facilitate comprehensive analyses and informed decision-making based on a more accurate understanding of the urban landscape.

- **Visualization:** Visualization tools enable planners to create 3D models, simulations, and interactive maps. This aids in conveying complex ideas to a broad audience and enhances public understanding of proposed developments.

- **Efficiency in Planning and Approval Processes:** Digital planning and permitting technologies can streamline planning processes, reducing paperwork and administrative overhead. This efficiency accelerates decision-making and approval processes.

- **Environmental Sustainability:** Using digital technologies allow for better environmental impact assessments and help minimizing our impact on the environment by using less paper and making few trips to town hall.

- **Savings**: By reducing the need for physical documentation, storage, and administrative tasks, online services can result in cost savings over time as well increase staff capacity to do more value-add work.

- **Minimize Risk:** We can understand or anticipate problems better and plan for them. Planners can analyze various scenarios and implement risk mitigation strategies more effectively.

- **Leverage New Technology**: Leverage modern technologies, such as artificial intelligence to provide better customer service and uncover insights into urban trends and help plan for future advancements.

2.1 SDAF Funds Status

As of the October 16, 2023, the town has made use of the entire allocated funding.

Comprehensive financial details will be submitted to the province as per their designated reporting procedure on November 1, 2023.

3. Conclusion

3.1 Acknowledgement

The SDAF funding has played a pivotal role in propelling the town's online services forward and effectively addressing development applications backlog. The town expresses its deep appreciation for the financial support generously offered by the province, as well as their flexibility in granting an extension for the utilization of these funds.

3.2 Success Factors

The town's advantageous position to leverage this funding opportunity can be attributed to the groundwork laid by the prior Plan-it Oakville Program. This initiative had already established a robust strategy for the implementation of online services for planning, development applications, permits, and inspections.

Furthermore, the presence of a dedicated team, responsible for orchestrating these efforts and managing the funding through a centralized department with the help of Finance, ensured the effective utilization of funds within established timelines while upholding consistency throughout the process.