



# Town of Oakville

## Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

# Final Report

September 30, 2021



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Pursuant to the terms of our engagement, it is understood and agreed that all decisions in connection with the implementation of advice and recommendations as provided by KPMG during the course of this engagement shall be the responsibility of, and made by, the Town of Oakville. KPMG has not and will not perform management functions or make management decisions for the Town of Oakville.

This report may include or make reference to future oriented financial information. Readers are cautioned that since these financial projections are based on assumptions regarding future events, actual results will vary from the information presented even if the hypotheses occur, and the variations may be material.

Comments in this report are not intended, nor should they be interpreted, to be legal advice or opinion.

KPMG has no present or contemplated interest in the Town of Oakville nor are we an insider or associate of the Town of Oakville. Accordingly, we believe we are independent of the Town of Oakville and are acting objectively.

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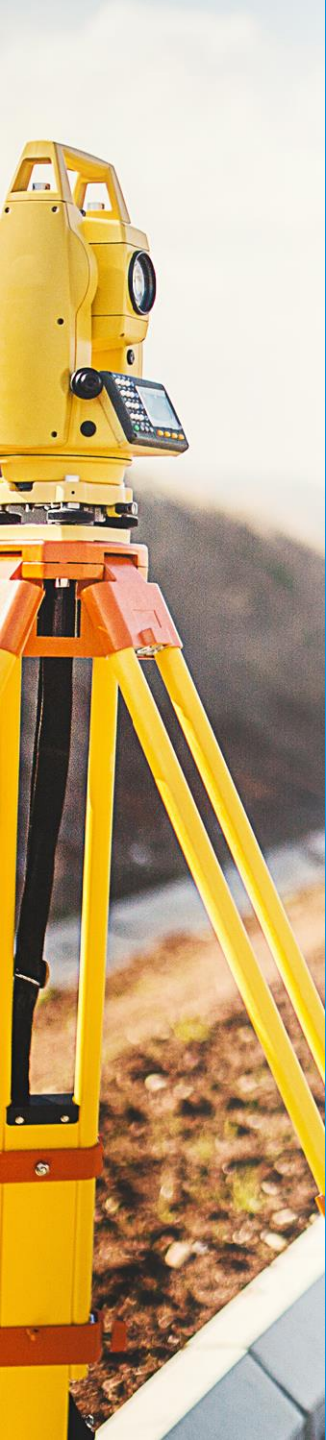
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# Project Overview

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# Project Overview

## Project Drivers – *What problem are we trying to solve?*

- In alignment with the Plan-it Oakville initiative, the Town is looking to modernize the property/land development service and transition the service from a siloed approach to an integrated, digital, customer-focused, and project-based service.
- The Town is seeking recommendations to develop a improvements roadmap focused on improving online service capabilities and creating a more effective digital service delivery model.

## Project Objectives – *How do we define success?*

The Town of Oakville engaged KPMG to conduct a review of the Town's property/land development approval process and identify modernization opportunities, including an evaluation of the Town's digital capabilities and functions.

Original project objectives included:

- Identify opportunities to improve the property/land development service through specific software or technology.
- Identify opportunities for processes to be digitized or modernized to improve responsiveness and efficiency.
- Realize quick wins from existing tools and capabilities.
- Develop recommendations around the property/land development service to streamline and improve the overall responsiveness and customer experience for service users in the development community.
- Develop options for how to proceed with either modifying the existing system or migrate to a new solution.
- Developed a high-level implementation plan to support all recommendations.

The following objectives were removed during the course of the project by the Town:

- Conduct process flow workshops utilizing lean six sigma methodology.
- Conduct a SWOT and financial analysis to support new technology tool options.

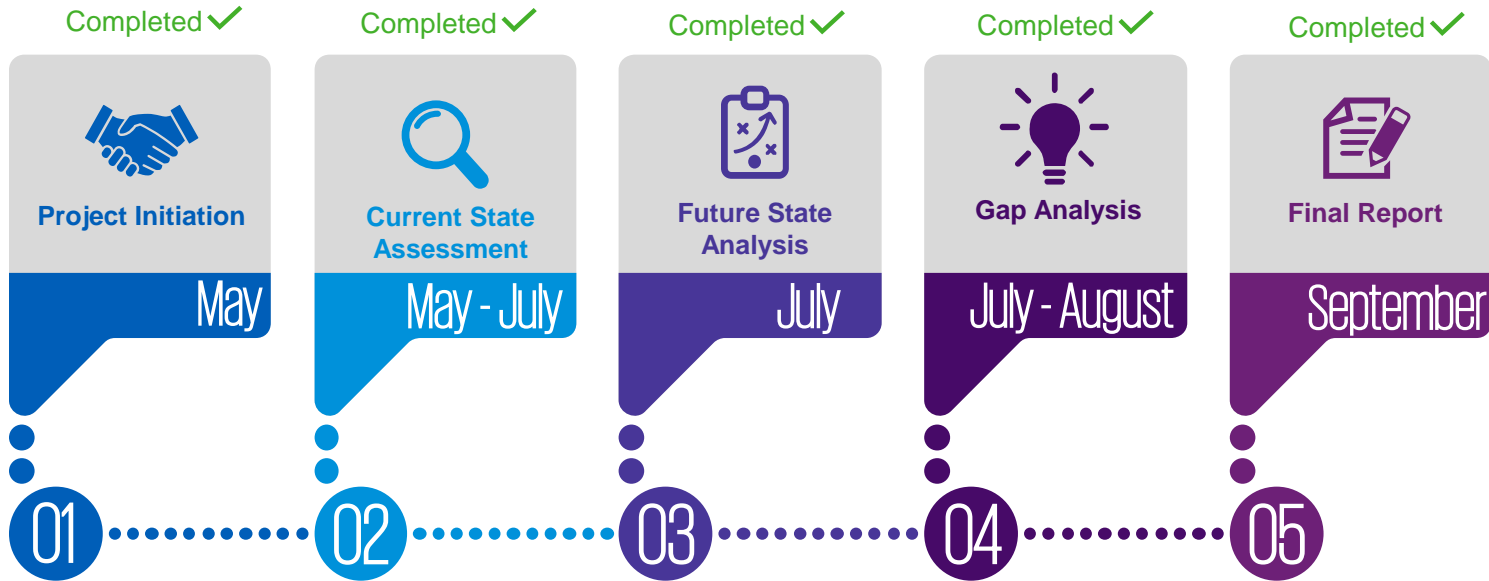
## Project Principles – *What is Important to Us?*

- The knowledge and expertise of Town staff was fully engaged and built upon, to arrive at recommended actions through a transparent, participative and inclusive process facilitated by KPMG.
- The modernization of the property/land development service review was conducted in a way that engages Town employees.
- The aim was to, wherever possible, transfer knowledge and necessary "tools" to Town staff to enable them to better develop their own solutions to operational and process issues and challenges over time.
- The framework and approach was based on leading practices from other municipalities, or other levels of government experience and/or private sector.
- Lastly, this was not an audit nor a deeper-dive operational review. This was a review to build on successes and identify opportunities to improve the efficiency and effectiveness of how the Town delivers services to the citizens of Oakville.

# Introduction and Context

## Project Timeline

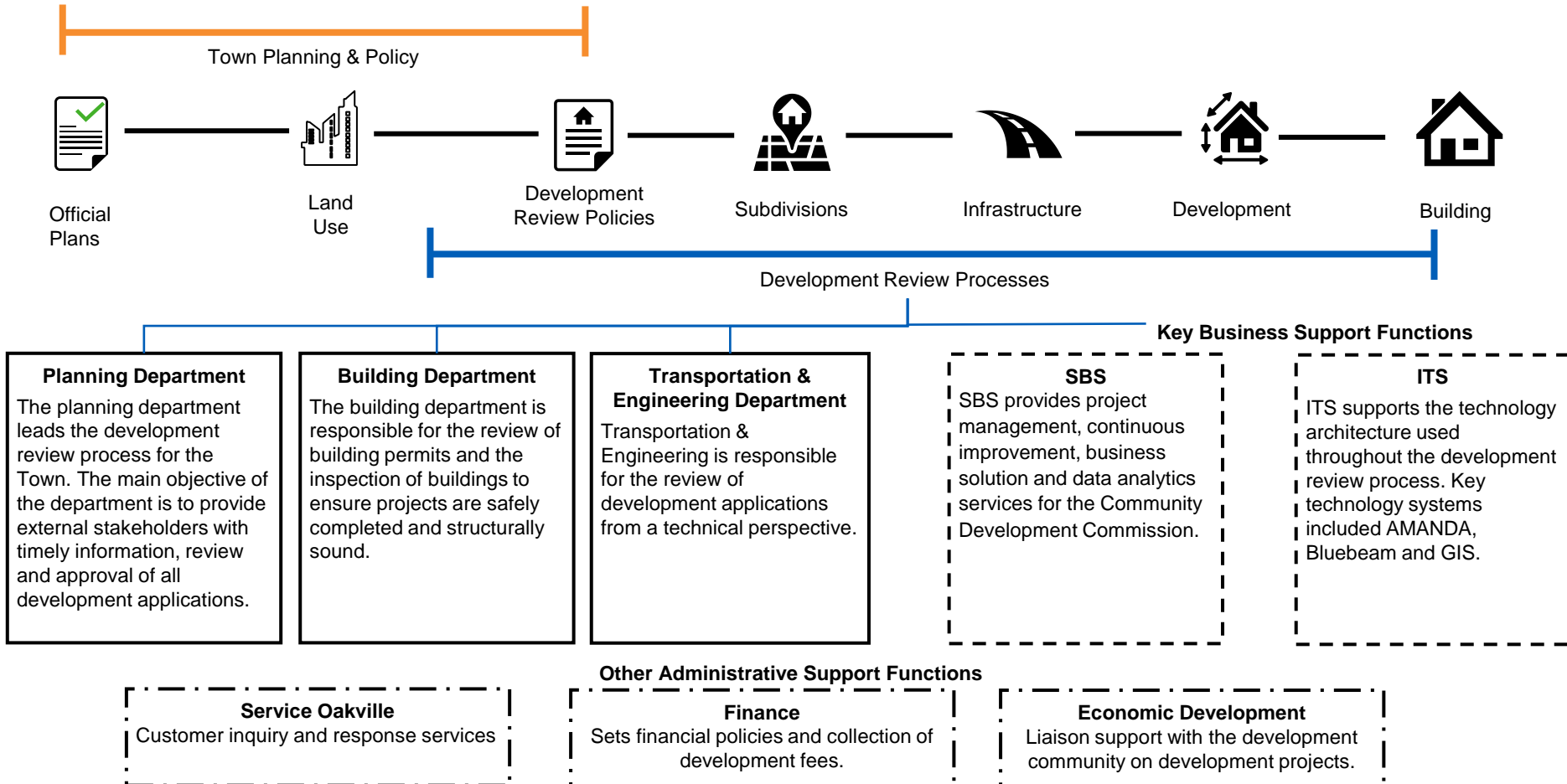
This engagement commenced on May 27, 2021, and was completed when the draft final report was submitted to the Town on September 30, 2021.



# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Development Review Process

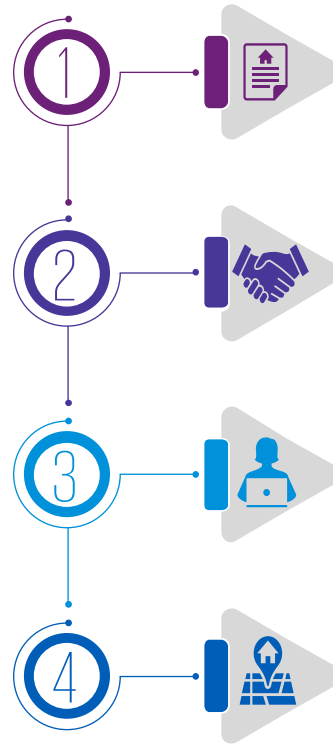
In accordance with the Planning Act, the Town is required to prepare and update an Official Plan. The Official Plan is a legal document that contains goals, objectives and policies to manage the direct physical and land use changes and their effects on the cultural, social, economic and natural environment within the Town. The development review process requires the Town to work with external stakeholders to obtain approvals (e.g., zoning amendments, site plan) for developing property in alignment with provincial legislation, the Town's Official Plan and other relevant municipal policies. The process heavily involves the Town's Planning, Building, and Transportation & Engineering departments and requires additional support from other Town departments (e.g., SBS and ITS).



# Development Review Process

## Enabling Technology

- Various technology tools are used to process the overall development review processes outlined on the previous page.



### **AMANDA**

AMANDA is the Town's current enterprise software solution used in the planning, building permitting and other business processes. The software stores data including permit drawings, payment data, and property data. The Town recently upgraded to AMANDA version 7.

### **Online Portals**

The Town currently uses the AMANDA Citizens Portal. The online portal provides external stakeholders with the ability to submit and review the status of applications online.

### **Bluebeam**

Bluebeam is a newly implemented solution that allows teams to collaboratively review development review drawings and documents.

### **ESRI (GIS)**

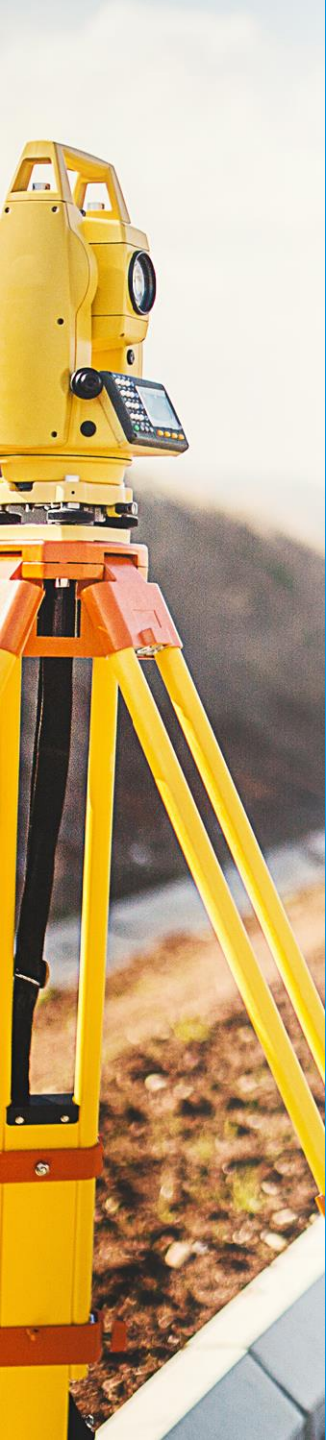
ESRI GIS is the Town's GIS system software used to capture and analyze spatial and geographical data.





# Employee Survey

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# Employee Survey - Feedback Summary

## Survey Demographics



Number of Respondents **120**



Average Years of Experience using AMANDA

**0 to 5 years of experience**



Most Common Frequency of AMANDA Use

**Daily**

## AMANDA Satisfaction



**45%** of respondents noted they are highly satisfied or somewhat satisfied with AMANDA.



**32%** of respondents noted they are neither satisfied or dissatisfied with AMANDA.



**23%** of respondents noted they are highly dissatisfied or somewhat dissatisfied with AMANDA.

## Other software/enterprise solutions to consider?

Respondents identified the following software/enterprise solutions for the Town to consider as replacements or additions to AMANDA:

- Questica
- OneDrive
- Salesforce (Public Sector Licenses & Permit Module)
- Camino
- Cityworks
- Accela
- Stratawise
- Cloud Permit
- Evolta
- POSSE Enterprise Platform

## Most common processes within AMANDA

Most respondents (66%) stated they utilize AMANDA for Planning/Development Applications and Building Permit processes. However, some respondents (10%) noted they use AMANDA to simply view information.

## Is the Town using AMANDA to its full potential?

While the majority of responses were neutral (48%), 37% of respondents noted the Town is not utilizing AMANDA to its full potential. Respondents noted there is a lack of knowledge on the full capabilities of the system.

## Key factors why AMANDA is not fully utilized

48% of respondents identified insufficient training and/or knowledge of AMANDA features as a barrier to fully utilizing the system. Other respondents noted they do not understand the value of the data entered into the system, or how it supports process outcomes.

## Most common AMANDA sentiments

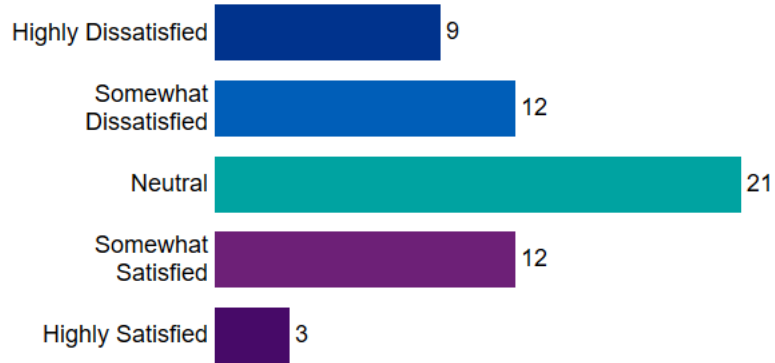
Most respondents noted that AMANDA is used inconsistently across the Town's departments which causes more work from manual workarounds. Respondents also identified the lack of AMANDA system integrations as a challenge.



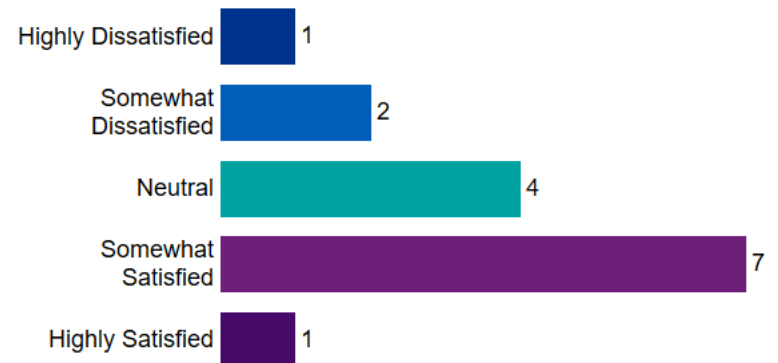
Overall, respondents noted they require more information before determining whether or not the Town should replace AMANDA with another enterprise solution. Respondents suggested that a new system would be welcomed provided it could increase efficiency and effectiveness of processes. Respondents noted that current process inefficiencies may not be the result of the AMANDA system, but rather the highly customized processes built within the system.

# Employee Survey - Feedback Summary

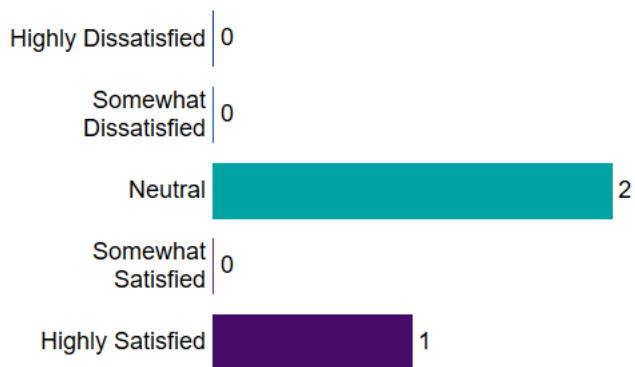
## Community Development AMANDA Satisfaction



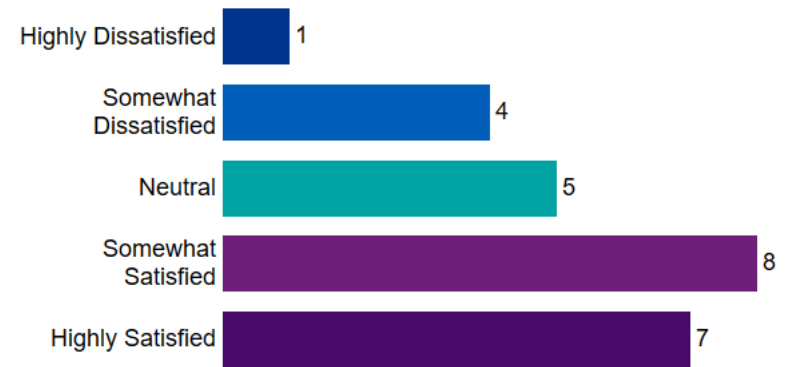
## Community Services AMANDA Satisfaction



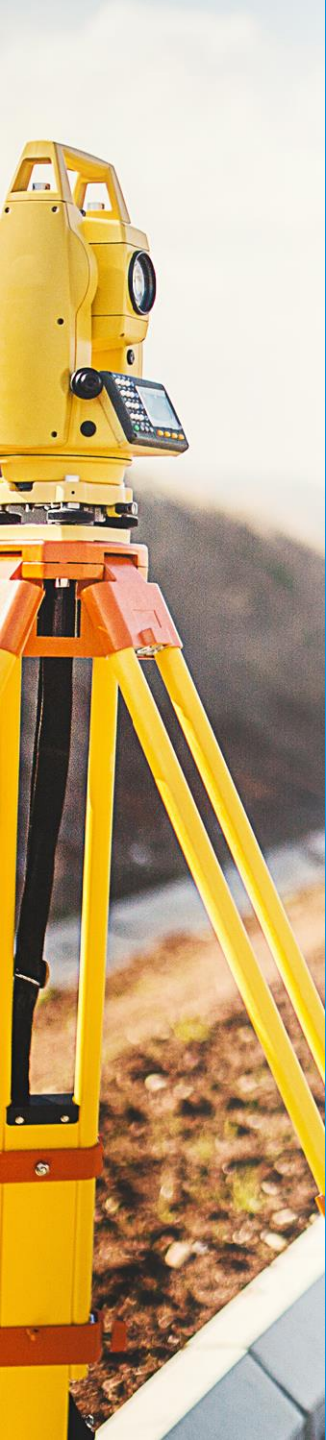
## Community Infrastructure AMANDA Satisfaction



## Corporate Services AMANDA Satisfaction



When analyzing overall AMANDA satisfaction within the Town’s program areas, **72% of dissatisfied AMANDA users** are from the **Community Development** area. These stakeholders are heavily involved in property/land development review process and are daily users of AMANDA.



# Jurisdictional Scan

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# Jurisdictional Scan - AMANDA Feedback

## Most common processes within AMANDA

Similar to the Town of Oakville, respondents noted AMANDA is most commonly used within Building Services, Municipal By-Law, Planning Services, Enforcement Services, Engineering and Licensing.

## Common AMANDA challenges

Over 50% of respondents identified insufficient training/knowledge of AMANDA features and insufficient time and resources to explore AMANDA features as major barriers to fully utilizing the software.

## Supporting software/applications

Respondents were asked to identify other software systems/applications that are used to support AMANDA. Below is a summary of the most common responses:

- 01 Drawing / Mark-up Software:** Bluebeam, AMANDA's EMMA Module, ProjectDox
- 02 Citizen Portal:** CloudPermit, AMANDA Public Portal, Alphinat Smart Guide, Stratawise CRM Cloud Portal
- 03 Document Management:** CloudPermit, AMANDA, Network Drives
- 04 Digital Signatures:** Bluebeam, Adobe, DocuSign, ConsignO
- 05 Digital Payments:** CloudPermit, Moneris, Bambora



Respondents with insight into the cost to maintain their current version of AMANDA indicated their annual cost is approximately **\$100,000-\$150,000\***. In addition, 66% of all respondents that utilize AMANDA indicated their municipality will be utilizing AMANDA for the foreseeable future.

\*Approximately 80% of respondents were unaware of the annual cost to maintain AMANDA.



*There are a lot of features available in AMANDA 7 that we are not using yet.*



*AMANDA works relatively well, however upgrades have impacted workflows as additional steps are now required. Technical support for the system is often difficult to access.*









*Not fully aware of all AMANDA's capabilities, workflows can be overly complex to accomplish basic tasks.*



*AMANDA works well, however add-on integrations into newer systems (e.g., Bluebeam) can be costly or unsupported.*



# Jurisdictional Scan - Detailed Municipal Review

	City of Burlington	City of Hamilton	City of Vaughan
 Service Delivery Model	<ul style="list-style-type: none"> <li>Some data effectively flows between development review departments, however there can be internal disconnect.</li> <li>Processes deliver outcomes without improving efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>Hybrid development application intake process used to accept both digital and paper-based applications.</li> </ul>	<ul style="list-style-type: none"> <li>Building permit application intake available online only via City portal.</li> </ul>
 Process	<ul style="list-style-type: none"> <li>Can be difficult to determine who owns an application file.</li> <li>Insufficient communications between departments.</li> </ul>	<ul style="list-style-type: none"> <li>Planning has developed manual workaround to digital processes (e.g., working with document offline out of AMANDA).</li> </ul>	<ul style="list-style-type: none"> <li>Implemented an online pre-application review to ensure quality submissions. Controls are set in the City portal to only accept completed applications (applicants cannot complete payment if application is incomplete).</li> </ul>
 Data and Analytics	<ul style="list-style-type: none"> <li>Early stages of establishing a BI platform for dashboarding and reporting.</li> <li>In the process of determining critical databases to increase process efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>AMANDA is the single source of truth for development review applications.</li> <li>Implementing enterprise-wide Power BI dashboard reporting.</li> </ul>	<ul style="list-style-type: none"> <li>Only IT can create and extract reports from AMANDA.</li> <li>Early stages of developing and implementing dashboard reporting.</li> <li>Developing a single source of truth for development review process reporting.</li> </ul>
 Technology	<ul style="list-style-type: none"> <li>Utilizing AMANDA, Bluebeam.</li> <li>Portal is not servicing the development review process.</li> <li>Integrations between systems remain an issue.</li> </ul>	<ul style="list-style-type: none"> <li>Utilizing a number of technology systems (e.g., AMANDA, Bluebeam, ProjectDocs, Microfiche).</li> <li>Systems are not integrated or used by all departments.</li> </ul>	<ul style="list-style-type: none"> <li>Building Services is the primary department using AMANDA. Planning and Engineering will migrate to AMANDA in 2022.</li> <li>Recently added Bluebeam and a new citizen portal. Integrations between systems remain an issue.</li> </ul>
 People	<ul style="list-style-type: none"> <li>Roles and responsibilities are well defined.</li> <li>Training could be increased on new technology.</li> </ul>	<ul style="list-style-type: none"> <li>Roles and responsibilities are well defined in the building department.</li> <li>City has developed job specific training for AMANDA processes.</li> </ul>	<ul style="list-style-type: none"> <li>In the process of developing continuous improvement training for new technology (e.g., Bluebeam).</li> <li>Developed AMANDA test scripts for training.</li> </ul>
 Governance	<ul style="list-style-type: none"> <li>Do not have standardized processes for applications intake and review.</li> <li>Building more advanced as a result of Bill 124.</li> </ul>	<ul style="list-style-type: none"> <li>Building processes have structured processes within built in accountability.</li> <li>Planning processes are not as mature as building.</li> </ul>	<ul style="list-style-type: none"> <li>Planning processes are manual for now. The City will implement digital processes in 2022 with AMANDA migration.</li> <li>Documents stored in multiple different systems.</li> </ul>



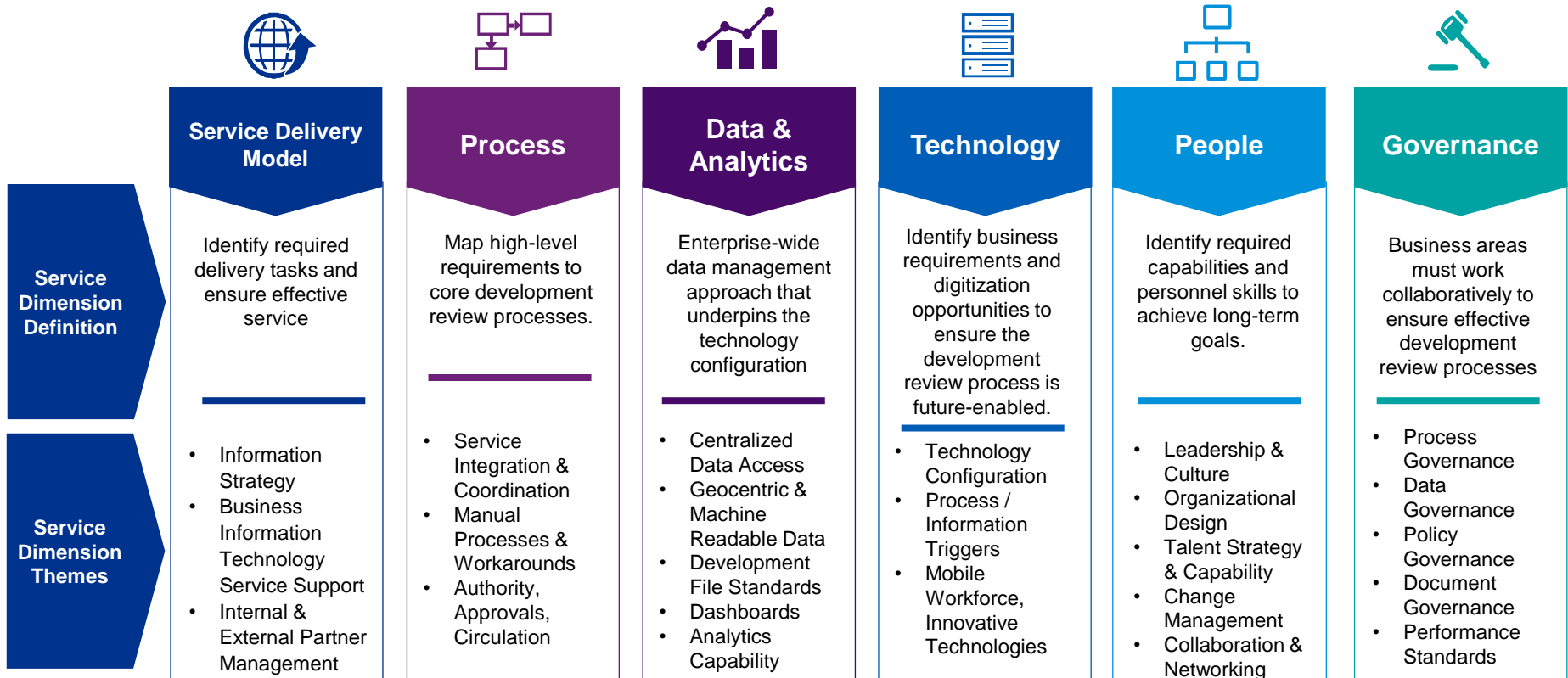
# Current State Assessment

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# Target Operating Model

KPMG’s Target Operating Model (TOM) framework is used to structure the review. The six TOM dimensions provide a consistent means and structure to engage stakeholder feedback, evaluate existing development review processes, validate business goals and objectives, and identify and recommend business improvement opportunities.



# Stakeholder Engagement

## The Engagement Process

- As part of the project, key stakeholders were engaged to produce a holistic current state assessment of the Town's property/land development review and approval process.
- In total, 7 one-on-one interviews with senior management, 8 interviews with management, 5 current state workshops, and 5 current state validation sessions were conducted.

**Management Feedback**  
Management Interviews



**Employee Feedback**  
Current State Workshops

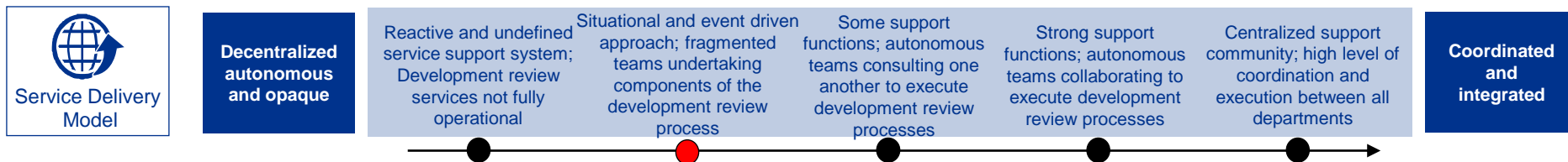
CAO

Commissioner,  
Community Development

Acting Director, Planning	Director, Building	Director, Transportation & Engineering	Director & Executive Sponsor, Plan-it Oakville	Director, ITS
<ul style="list-style-type: none"> <li>• Manager, Planning</li> <li>• Manager, Urban Design</li> </ul>	<ul style="list-style-type: none"> <li>• Manager, Building Inspections</li> <li>• Manager, Mechanical Inspection</li> <li>• Manager, Zoning and Committee of Adjustment</li> <li>• Supervisor, Service Delivery</li> <li>• Manager, Plan and Code Review</li> </ul>	<ul style="list-style-type: none"> <li>• Manager, Inspections and Road Corridor</li> <li>• Manager, Development and Environmental Engineering</li> <li>• Supervisor, Road Corridor and Records</li> <li>• Manager, Transportation Strategy</li> <li>• Water Resource Engineer</li> </ul>	<ul style="list-style-type: none"> <li>• Manager, SBS</li> </ul>	<ul style="list-style-type: none"> <li>• Acting Manager, Application Support</li> </ul>
<p><b>Planning Workshop</b></p> <ul style="list-style-type: none"> <li>• Senior Planner (4)</li> <li>• Planner (2)</li> <li>• Policy Planner</li> <li>• Planning Clerk</li> <li>• Admin, Assistant</li> </ul>	<p><b>Building Workshop</b></p> <ul style="list-style-type: none"> <li>• Building Engineer</li> <li>• Building Inspector</li> <li>• Building Service Representative</li> <li>• Zoning Plans Examiner (2)</li> <li>• Mechanical Inspector</li> <li>• Intermediate Mechanical Plans Examiner</li> <li>• Assist. Secretary Treasurer, Committee of Adjustment</li> </ul>	<p><b>Transportation &amp; Engineering Workshop</b></p> <ul style="list-style-type: none"> <li>• Transportation Engineer</li> <li>• Urban Forester</li> <li>• Development Coordinator</li> <li>• Development Eng. Technologist (2)</li> <li>• Development Engineering Clerk</li> <li>• Senior Business Process Analyst</li> </ul>	<p><b>SBS Workshop</b></p> <ul style="list-style-type: none"> <li>• Supervisor-Business Solutions and Analytics</li> <li>• Business Solutions Analyst</li> <li>• Strategic Business Advisor</li> <li>• Project Manager</li> <li>• Data Science and Visualization Specialist</li> </ul>	<p><b>ITS Workshop</b></p> <ul style="list-style-type: none"> <li>• Application Platform Coordinator</li> <li>• Application Support Analyst</li> <li>• Business Analyst</li> <li>• Business Solutions Analyst</li> </ul>
<p><b>Service Oakville</b></p> <ul style="list-style-type: none"> <li>• Manager, Service Innovation</li> </ul>	<p><b>Finance</b></p> <ul style="list-style-type: none"> <li>• Deputy Treasurer and Director of Finance</li> <li>• Manager, Development Financing</li> </ul>		<p><b>Economic Development</b></p> <ul style="list-style-type: none"> <li>• Director</li> <li>• Sr Economic Development Officer</li> </ul>	

# Current State Assessment: Service Delivery Model

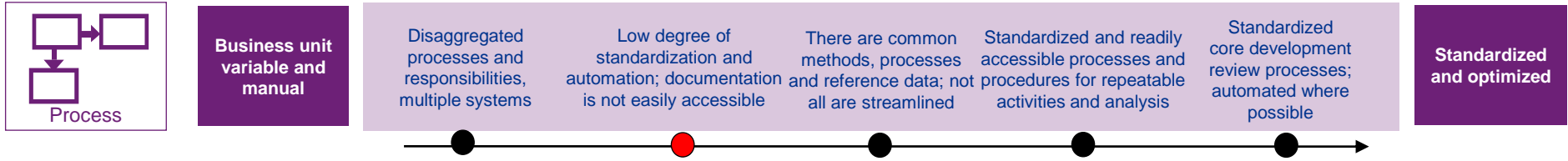
Service Delivery Model defines the means by which development review services are delivered within the Town, including the business areas involved and where the accountability lies. A well-defined service delivery model contributes to a strong internal support system with alignment between support services and users.



Theme	Summary from Stakeholder Consultations
Development Information Strategy	<ul style="list-style-type: none"> <li>There is no corporate-wide development information strategy. Respondents noted the Town's current approach to managing development data is reactive and undefined. The Town does have a plan to formalize a corporate data strategy.</li> <li>There is a lack of clarity with the value of information that is captured and inputted throughout the process. Respondents wonder if the Town is collecting the right type of information it needs to efficiently deliver development review services.</li> </ul>
Business Information Technology Service Support	<ul style="list-style-type: none"> <li>The SBS digital intake process has been beneficial to the organization. Digital change requests that come in to IT through SBS are completed with a defined result.</li> <li>Non-SBS digital change requests are submitted as a concept idea. These requests require additional effort from IT staff to flush out and add value to the business unit.</li> <li>There is a large backlog of digital change requests, additional capacity may be required to effectively manage digital process changes.</li> </ul>
Internal & External Partner Management	<ul style="list-style-type: none"> <li>There is a perception that no action is taken on digital change requests that are brought to ITS / SBS. As a result, staff stop bringing up actions and improvement initiatives.</li> <li>The Town lacks formalized and defined levels of service.</li> <li>Most neighboring municipalities are utilizing AMANDA. Promotes external collaboration and problem solving.</li> </ul>

# Current State Assessment: Process

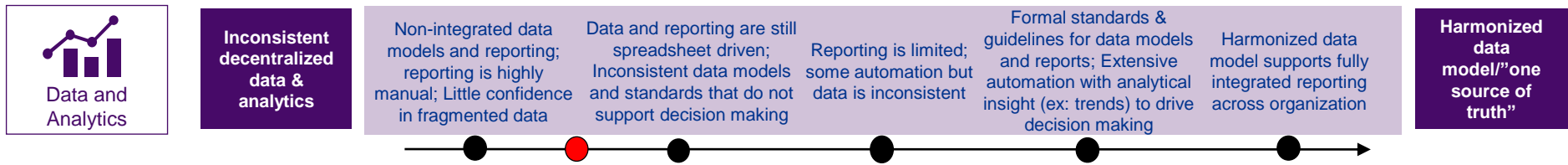
Process outlines how specific steps link to function within an individual business area or between multiple business areas. Processes define the key roles and positions involved in each step, the systems and inputs requires to complete the process and achieve the desired output or outcome.



Theme	Summary from Stakeholder Consultations
Manual Processes & Workarounds	<ul style="list-style-type: none"> <li>• Digital processes are highly customized and designed to meet the specific objectives of individual stakeholders. This has resulted in lengthy, time consuming processes that do not add value to the overall process.</li> </ul>
Service Integration & Coordination	<ul style="list-style-type: none"> <li>• Development review processes are not well documented with a low degree of standardization.</li> <li>• There is a lack of understanding of the end-to-end development review process.</li> <li>• Individual stakeholders / users do not understand how inaccurate data entry in technology solutions impacts other departments or downstream processes.</li> <li>• Lack of accountability and ownership of tools and technology deployed throughout the process.</li> <li>• Ineffective communication between departments. This can lead to duplicate digitization requests, or incomplete solutions.</li> </ul>
Authority, Approvals, Circulation	<ul style="list-style-type: none"> <li>• There is inconsistent use of AMANDA features (e.g., task list).</li> <li>• Development process digital workflow triggers and notifications are not effective.</li> </ul>

# Current State Assessment: Data and Analytics

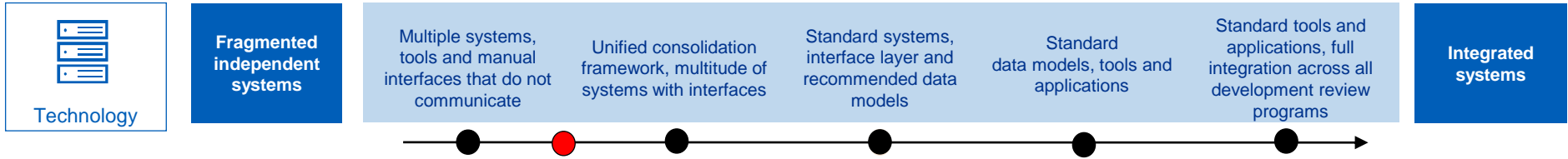
Data & Analytics defines the information, reporting and business analytics required to drive timely and accurate decision making across the organization. It outlines basic operational reporting and management reporting needs, plus differentiated key performance indicators and analytics to drive business insights.



Theme	Summary from Stakeholder Consultations
Centralized Data Access	<ul style="list-style-type: none"> <li>Data is stored inconsistently in a number of different systems, network, and manual folders.</li> <li>With non-standardized data governance requirements, employees do not fully trust system data and performs additional verifications of inputs made by other departments.</li> <li>Some data are more reliable: however, there is a challenge getting this information to business units in a timely manner.</li> </ul>
Development File Standards	<ul style="list-style-type: none"> <li>There is inconsistent data fields and data input requirements.</li> <li>There are inconsistent file standards for documents throughout the development review process.</li> </ul>
Dashboards & Business Intelligence	<ul style="list-style-type: none"> <li>The Town has deployed QlikSense dashboarding software; however, not all development review employees can use the tool due to license limits.</li> </ul>
Analytics Capability	<ul style="list-style-type: none"> <li>Dashboards and data visualization tools are available; however, most departments rely on ITS and SBS to perform data analytics due skill set gaps within the planning, building and transportation &amp; engineering departments.</li> <li>Insufficient capacity and training are barriers to effective use of analytics tools.</li> </ul>

# Current State Assessment: Technology

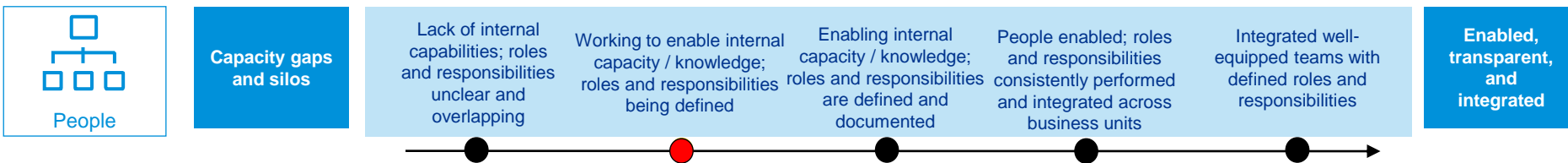
Technology includes the applications that are used to enable the processes policy compliance, internal controls and generation of reports. It outlines what is required to drive service delivery, business processes and information security. Technology is viewed as “the how” in which to better enable the other Target Operating Model (TOM) layers.



Theme	Summary from Stakeholder Consultations
Technology Configuration	<ul style="list-style-type: none"> <li>The Town’s technology configuration consists of highly customized solutions with manual interfaces that do not communicate.</li> <li>Multiple systems are used throughout the process.</li> <li>The Town is currently using two separate online portal products. Transitioning to a single portal could create efficiencies.</li> </ul>
Process / Information Triggers	<ul style="list-style-type: none"> <li>Staff rely on emails and manual information handoffs (e.g., in-person communication) instead of system notifications.</li> <li>There are opportunities to determine how AMANDA can better integrate with other systems (e.g., Sharepoint, Outlook) and create a more efficient workflow.</li> </ul>
Mobile Workforce, Innovative Technologies, Intelligent Automation & Augmentation	<ul style="list-style-type: none"> <li>The Town needs a strategy to implement new innovative technology.</li> <li>The Town needs to ensure new technology is sustainable and usable for everyone.</li> <li>Remote work technology not where it needs to be to promote efficient and effective mobile work.</li> </ul>

# Current State Assessment: People

People outlines the training, skills and culture for the business users supporting the development review process. This includes definition of the roles, responsibilities and support activities necessary to contribute to the on-going change management related to the digitization of development review services.



Theme	Summary from Stakeholder Consultations
Leadership & Culture	<ul style="list-style-type: none"> <li>The vision for the digitization of the property / land development review process is not communicated effectively.</li> <li>There needs to be increased awareness and education for management on new innovative technology. This will help to develop technology master plans and implement systems that add value to the process.</li> <li>Leadership needs to understand the impact of changing systems, if required.</li> </ul>
Organizational Design & Governance	<ul style="list-style-type: none"> <li>There is a bucketed vision by department for the digitization of the property / land development review process.</li> <li>Roles and responsibilities of key stakeholders (e.g., AMANDA process owners) throughout the process may not be unclear.</li> <li>Lack of standardization of development review processes across the departments.</li> </ul>
Talent Strategy & Capability	<ul style="list-style-type: none"> <li>Insufficient training on new technology. No formal AMANDA training / standards for using the technology tool.</li> <li>Inconsistent onboarding process for new staff. New hires are taught multiple ways to complete tasks.</li> <li>Staff do not have the capacity to find process efficiencies through technology. This results in the implementation of tools without a fully digital process.</li> </ul>
Change Management	<ul style="list-style-type: none"> <li>There is a steep learning curve for staff with the implementation of new technology.</li> <li>Changes are not communicated effectively to internal stakeholders.</li> <li>Each digital process update adds steps and additional time to the process. This results in staff creating manual workarounds to the digital process.</li> </ul>
Collaboration & Networking	<ul style="list-style-type: none"> <li>Digital systems have increased service collaboration. Departments are working together to understand the digital processes and build an integrated development review process solution.</li> <li>The process to request digital change requests can be time consuming.</li> <li>The Town may not have the most effective suite of technology tools to enable remote work and collaboration (e.g., Microsoft Teams).</li> </ul>

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Current State Assessment: Governance

Governance outlines the organizational structures, policies and controls that are in place to mitigate operational and technology risks. It identifies the governance that manages the development review process to facilitate timely and effective decision making while ensuring compliance to organizational policy.



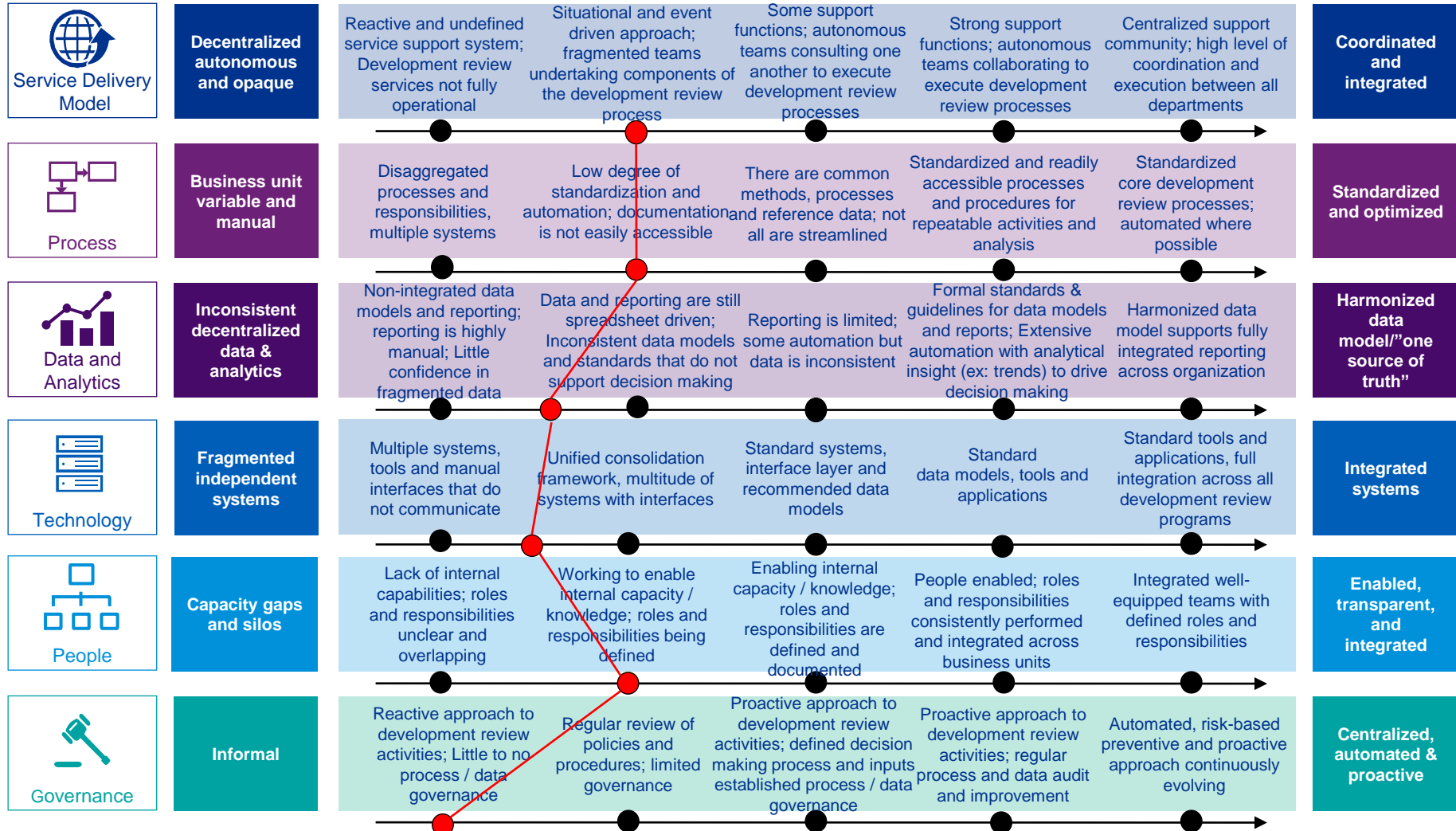
Theme	Summary from Stakeholder Consultations
Process Governance	<ul style="list-style-type: none"> <li>The development review process lacks consistency to enable effective governance.</li> <li>It is unclear who holds overall responsibility for updating and maintaining development review process documents.</li> </ul>
Data Governance	<ul style="list-style-type: none"> <li>There is no clear ownership of development review data.</li> <li>There is inconsistent use of data fields, resulting in unreliable data.</li> </ul>
Policy Governance	<ul style="list-style-type: none"> <li>There is uncertainty regarding who holds overall accountability for the property and land development policies.</li> <li>There is misalignment on expectations versus operations</li> </ul>
Document Governance	<ul style="list-style-type: none"> <li>The Town lacks clear document governance (document management and storage).</li> <li>There is inconsistent document naming conventions and protocols.</li> <li>Development review process documents do not use a standardized template.</li> </ul>
Performance Standards	<ul style="list-style-type: none"> <li>Performance reporting and standards have not been clearly defined.</li> <li>Each business unit is collecting data; however, reporting is ad-hoc and manual.</li> </ul>



# Current State Assessment

● **Current State**

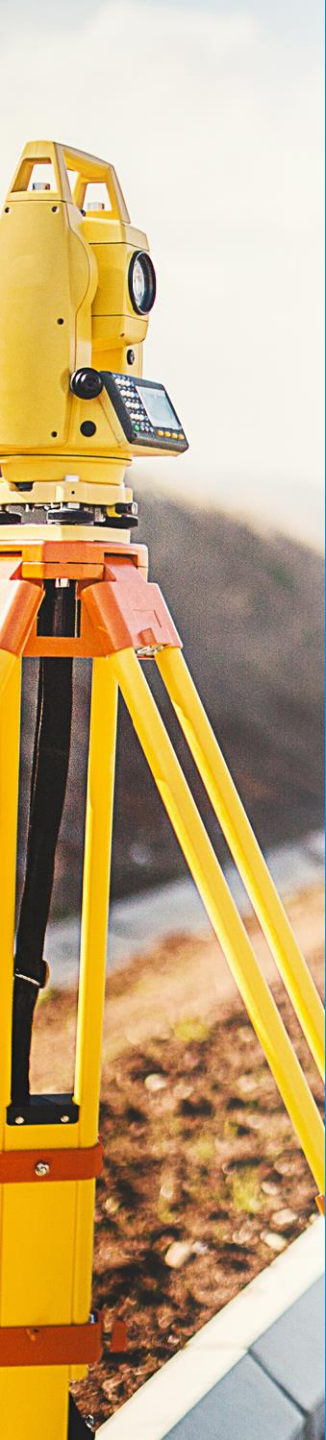
The objective of the Current State Assessment was to understand the challenges and pain points within the Town’s property/land development review processes, and to identify business gaps and improvement opportunities. Based on information gathered during the stakeholder consultations, we assessed the collection, management and use of information within the development review process. As a result, we rated the current state of each Target Operating Dimension to produce an overall Current State Assessment of the Town’s property/land development review process.





# Needs Assessment

Town of Oakville  
Development Process Review  
Final Report



# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Addressing Current State Challenge Cycles

The challenges and pain points identified during the Current State Assessment can be summarized into three main challenge cycles, illustrated below, which contribute to inefficient processes. KPMG facilitated a Needs Assessment workshop where stakeholders identified the Town’s targeted future state and the specific needs to address current state challenges.

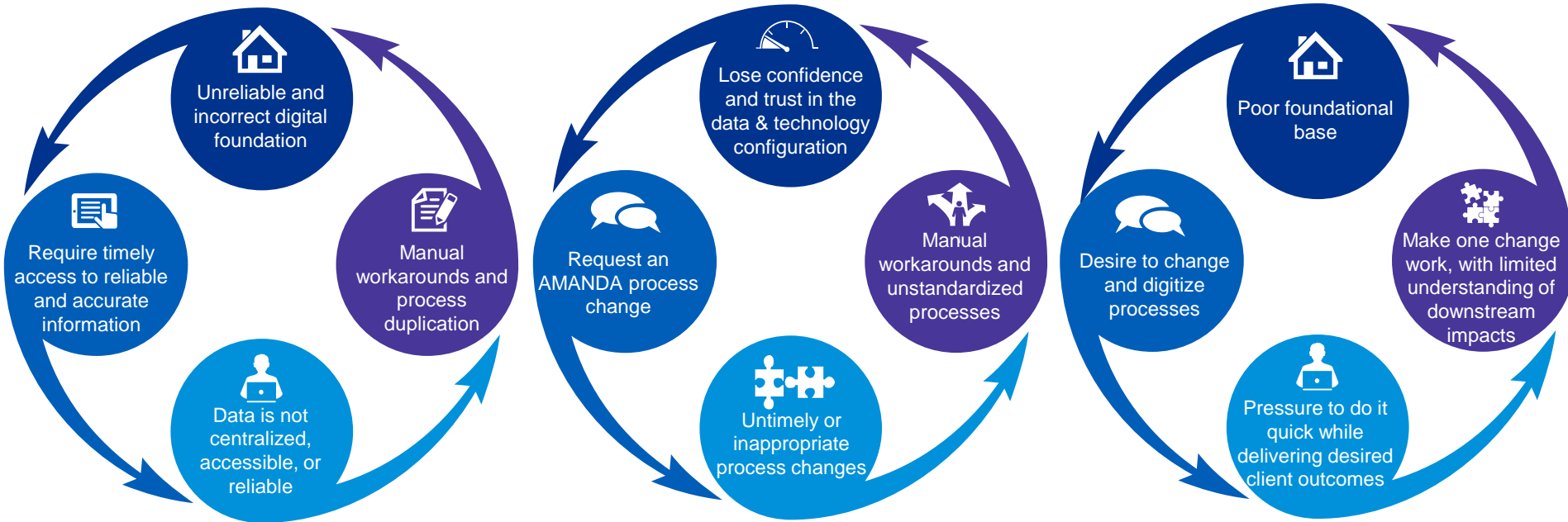


### People impacted by the cycle:

System Users (e.g., AMANDA users)

All Development Review Stakeholders

Supporting Service Administrators



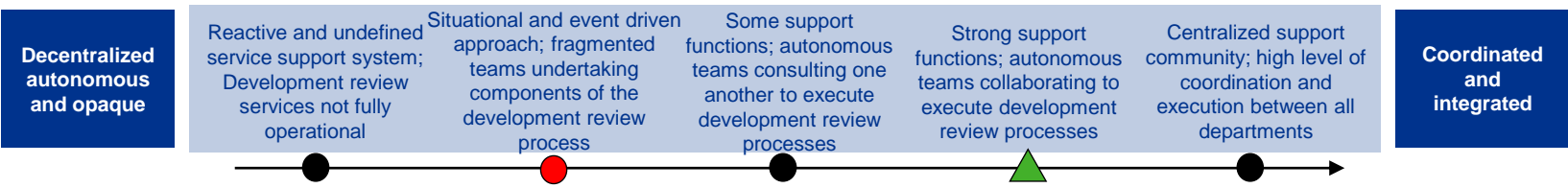
### Challenge Cycles lead to the following issues:

- Changes are implemented in AMANDA to address narrow individualized needs of stakeholders
- Unreliable data/digital base within AMANDA and other technology solutions



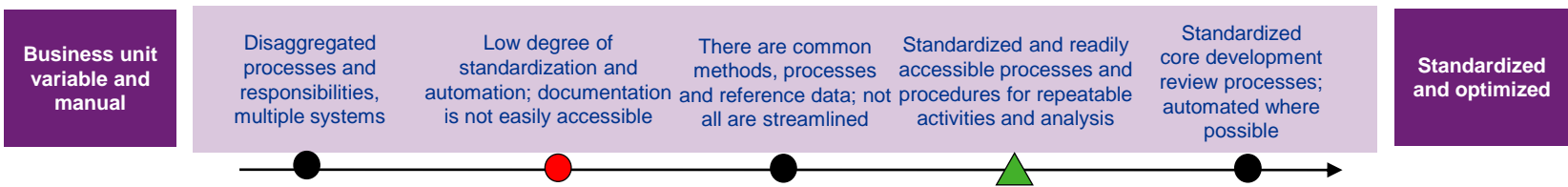
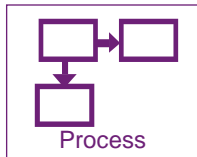
Issues result in a collection of **Technical Debt**:  
The implied cost of additional rework caused by choosing an easy solution now instead of a better approach.

# Needs Assessment: Service Delivery Model



Theme	Summary from Stakeholder Consultations	Stakeholder Identified Needs
Development Information Strategy	<ul style="list-style-type: none"> <li>There is no overarching organizational information strategy. Current approach to managing data within the property/land development review process is reactive and undefined.</li> <li>There is a lack of clarity with the value of information that is captured and inputted throughout the process.</li> <li>The Town does have a plan to formalize a corporate data strategy, however there is no defined timeline for implementation.</li> </ul>	<ul style="list-style-type: none"> <li>There is shared clarity and buy-in from senior leaders on the organization's data information strategy with a clear vision, goals and objectives.</li> </ul>
Business Information Technology Service Support	<ul style="list-style-type: none"> <li>The SBS digital intake process has been beneficial to the organization. Digital change requests that come in to IT through SBS are completed with a defined result.</li> <li>Non-SBS digital change requests are submitted as a concept idea. These requests require additional effort from IT staff to flush out and add value to the business unit.</li> <li>There is a large backlog of digital change requests, additional capacity may be required to effectively manage digital process changes.</li> </ul>	<ul style="list-style-type: none"> <li>There is dedicated digital service delivery team for the property/land development review process (e.g., centre of excellence). Budgets are aligned to support the implementation of a digital service delivery team.</li> <li>The centre of excellence supports property/land development services digitization along with integrated community of practice to ensure aligned and coordinated activity, and collective growth.</li> </ul>
Internal & External Partner Management	<ul style="list-style-type: none"> <li>There is a perception that no action is taken on digital change requests that are brought to ITS / SBS. As a result, staff stop bringing up actions and improvement initiatives.</li> <li>The Town lacks a formalized and defined levels of service.</li> <li>Most neighboring municipalities are utilizing AMANDA. This promotes external collaboration and problem solving, which is beneficial to the organization.</li> </ul>	<ul style="list-style-type: none"> <li>There is clear alignment on overall objectives for each activity within the property/land development review process. There is a clear understanding of information hand-offs and cross departmental support activities.</li> <li>A networking committee is set up to bring areas together and drive the collective vision and objectives for the property/land development review process.</li> </ul>

# Needs Assessment: Process



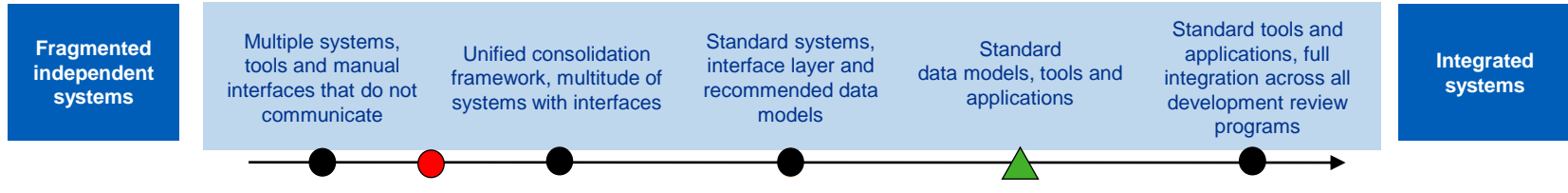
Theme	Summary from Stakeholder Consultations	Stakeholder Identified Needs
Manual Processes & Workarounds	<ul style="list-style-type: none"> <li>Digital processes are highly customized and designed to meet the specific objectives of individual stakeholders. This has resulted in lengthy, time consuming processes that do not add value to the overall process.</li> </ul>	<ul style="list-style-type: none"> <li>Standard operating procedures (SOPs) are documented and formalized to ensure consistent use of technology within the property/land development review processes.</li> <li>SOPs are understood by both internal and external stakeholders, who are not as familiar with development review process.</li> </ul>
Service Integration & Coordination	<ul style="list-style-type: none"> <li>Property/land development review processes are not well documented and there is a low degree of standardization.</li> <li>There is a lack of understanding of how inaccurate data entry in technology solutions impacts other departments or downstream processes.</li> <li>There is a lack of understanding of the end-to-end property/land development review process.</li> <li>There is a lack of accountability and ownership of tools and technology deployed throughout the process.</li> <li>There is ineffective communication between business units. This can lead to duplicate digitization requests, or incomplete solutions.</li> </ul>	<ul style="list-style-type: none"> <li>Continuous process improvement is embedded throughout the process.</li> <li>There are adequate resources to maintain and update data as appropriate.</li> <li>There is governance over the process, including the ability to audit and hold staff accountable.</li> </ul>
Authority, Approvals, Circulation	<ul style="list-style-type: none"> <li>There is inconsistent use of AMANDA features (e.g., task list).</li> <li>Development process digital workflow triggers and notifications are not effective.</li> </ul>	<ul style="list-style-type: none"> <li>The process is repeatable with consistent information hand-off and process triggers.</li> <li>AMANDA capabilities are fully understood and built into processes where applicable.</li> </ul>

# Needs Assessment: Data and Analytics



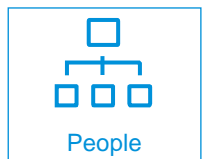
Theme	Summary from Stakeholder Consultations	Stakeholder Identified Needs
Centralized Data Access	<ul style="list-style-type: none"> <li>Data is stored inconsistently and located in a number of different systems / folders.</li> <li>There is a lack of trust with data that requires verification or input from other departments. This is a result of non-standardized data.</li> <li>There is some data that is available and usable; however, there is a challenge getting this information to business units in a timely manner.</li> </ul>	<ul style="list-style-type: none"> <li>Improved processes for data entry into technology systems. Formal standards and guidelines for data entry are established.</li> <li>Understand current data collection requirements. Overarching data information strategy.</li> <li>Dedicated effort to clean up data based on vision, desired outcomes, and data to support workflow delivery and required reporting.</li> </ul>
Development File Standards	<ul style="list-style-type: none"> <li>There is inconsistent data fields and data input requirements within the property/land development review systems (e.g., AMANDA).</li> <li>There are inconsistent file standards for documents throughout the property/land development review process.</li> </ul>	<ul style="list-style-type: none"> <li>Established standards for development file naming to ensure consistency across the departments.</li> </ul>
Dashboards & Business Intelligence	<ul style="list-style-type: none"> <li>The Town has deployed QlikSense dashboarding software; however, there are a limited number of licenses available. This has impacted the ability of staff to operationalize the daily use of dashboards.</li> </ul>	<ul style="list-style-type: none"> <li>Strong senior management support and buy in to address current data challenges.</li> <li>Dynamic information through dashboard is developed and easily located. Dashboards provide the level of details required by users (e.g. capabilities to roll up and drill down data).</li> </ul>
Analytics Capability	<ul style="list-style-type: none"> <li>Dashboards and data visualization tools are available, however staff are not fully equipped with the skill sets to utilize these tools.</li> <li>Insufficient capacity and training are barriers to effective use of analytics tools.</li> </ul>	<ul style="list-style-type: none"> <li>Licenses for analytical tools are available for all staff that require access.</li> <li>Increased data literacy and access for internal stakeholders.</li> </ul>

# Needs Assessment: Technology

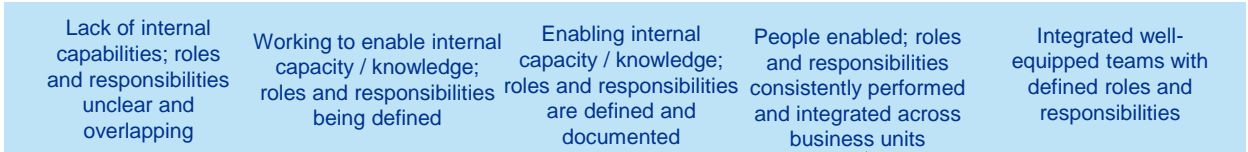


Theme	Summary from Stakeholder Consultations	Stakeholder Identified Needs
Technology Configuration	<ul style="list-style-type: none"> <li>The Town’s technology configuration consists of highly customized solutions with manual interfaces that do not communicate.</li> <li>Multiple systems are used throughout the property/land development review process.</li> </ul>	<ul style="list-style-type: none"> <li>There is a strong property/land development review business process foundation to build and align technology where possible. Consider other technology components that help support the overall development digital delivery process.</li> <li>Departmental property/land development review technology systems are rationalized and aligned to support the organizational development information strategy and consistent and efficiency development review processes.</li> </ul>
Process / Information Triggers	<ul style="list-style-type: none"> <li>Staff rely on emails and manual information handoffs (e.g., in-person communication) instead of automated system notifications.</li> <li>There are opportunities to determine how AMANDA can be better integrated with other systems (e.g., Sharepoint, Outlook) to create a more efficient workflow.</li> </ul>	<ul style="list-style-type: none"> <li>Further investigate, prioritize, and address causes of workarounds.</li> <li>Technology solutions are implemented to support all departments within the property/land development review process.</li> <li>The role of AMANDA is clearly identified in the process and consider other components that could do activities more effectively.</li> </ul>
Mobile Workforce, Innovative Technologies, Intelligent Automation & Augmentation	<ul style="list-style-type: none"> <li>The Town needs a strategy to implement new innovative technology.</li> <li>The Town needs to ensure new technology is sustainable and usable for everyone.</li> <li>Remote work technology is not where it needs to be to promote efficient and effective mobile work. Staff noted the current Microsoft Teams configuration is not effective for all users.</li> </ul>	<ul style="list-style-type: none"> <li>There is a bottom-up approach to implementing new innovative technology. User feedback supports management decision making on technology investments.</li> <li>Additional technology is considered to improve process efficiency and effectiveness. Technology is reviewed to ensure it provides openness to underlying data, and ability to work with other technologies effectively (open platform, open APIs, access to data sources)</li> </ul>

# Needs Assessment: People



**Capacity gaps and silos**

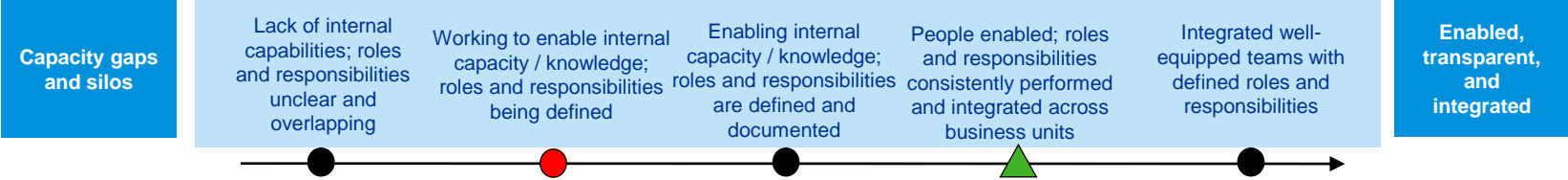
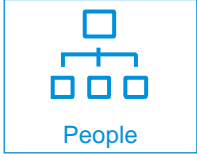


**Enabled, transparent, and integrated**

Theme	Summary from Stakeholder Consultations	Stakeholder Identified Needs
Leadership & Culture	<ul style="list-style-type: none"> <li>The vision for the digitization of the property/land development review process is not communicated effectively.</li> <li>There needs to be increased awareness and education for management of new innovative technology. This will help to develop technology master plans and implement systems that add-value to the process.</li> <li>Leadership needs to understand the impact of changing systems, if required (e.g., replacing AMANDA within another solution).</li> </ul>	<ul style="list-style-type: none"> <li>There is a clearly articulated vision in terms of staff expectations and requirements.</li> <li>Technology master plans are implemented to support the implementation of new innovative technology throughout the process.</li> </ul>
Organizational Design & Governance	<ul style="list-style-type: none"> <li>There is a bucketed vision by department for the digitization of the property/land development review process. Each department is carrying out their own objectives.</li> <li>Roles and responsibilities of key stakeholders (e.g., AMANDA process owners) throughout the process can be unclear.</li> <li>There is a lack of standardization of property/land development review processes across the departments.</li> </ul>	<ul style="list-style-type: none"> <li>Management and staff have well-defined roles and responsibilities related to digital items to enable and support a more efficient and effective process.</li> <li>Appropriate resources are identified when new technology is added, to support use and ongoing sustainment, development and governance.</li> <li>There are well defined and up-to-date job descriptions with clear priorities that reflect identified needs from both development/planning perspective and digital capabilities.</li> </ul>
Talent Strategy & Capability	<ul style="list-style-type: none"> <li>There is insufficient training on new technology. In addition, there is no formal AMANDA training / standards for using technology.</li> <li>The Town lacks standardized onboarding for new staff. Currently, new hires are taught multiple ways to complete property/land development review activities.</li> <li>Staff do not have the capacity to find process efficiencies through technology. This results in the implementation of tools without a fully digital process.</li> </ul>	<ul style="list-style-type: none"> <li>There are dedicated resources for digital enablement.</li> <li>The Town has role-specific training for new technology to 'make it real' to people and ensure consistency and complete use of technology.</li> </ul>

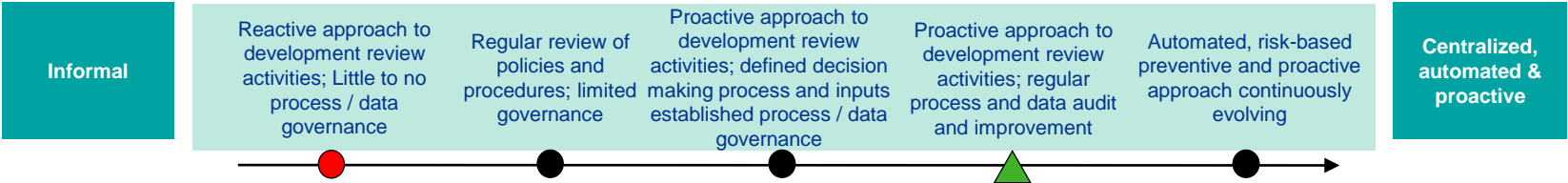


# Needs Assessment: People



Theme	Summary from Stakeholder Consultations	Stakeholder Identified Needs
<p>Change Management</p>	<ul style="list-style-type: none"> <li>• There is a steep learning curve for staff after the implementation of new technology.</li> <li>• Technology and process changes are not communicated effectively to internal stakeholders.</li> <li>• Each digital process update adds additional steps and time to the process. This results in staff creating manual workarounds to the digital process.</li> </ul>	<ul style="list-style-type: none"> <li>• Staff are equipped with the appropriate skill set to effectively complete work (e.g., training on all new technology).</li> <li>• There is adequate and timely communication issued to effected users when software is changed/updated.</li> </ul>
<p>Collaboration &amp; Networking</p>	<ul style="list-style-type: none"> <li>• There is increased service collaboration resulting from digital systems. Departments are working together to understand the digital processes and build an integrated development review process solution.</li> <li>• The process to request digital change requests can be time consuming and overly-complex.</li> <li>• The Town may not have the most effective suite of technology to enable remote work and collaboration (e.g., Microsoft Teams).</li> </ul>	<ul style="list-style-type: none"> <li>• Departments and staff are equipped with required technology to support collaboration.</li> <li>• The right staff with the required skill sets and capabilities are in place to manage and monitor new technology.</li> </ul>

# Needs Assessment: Governance



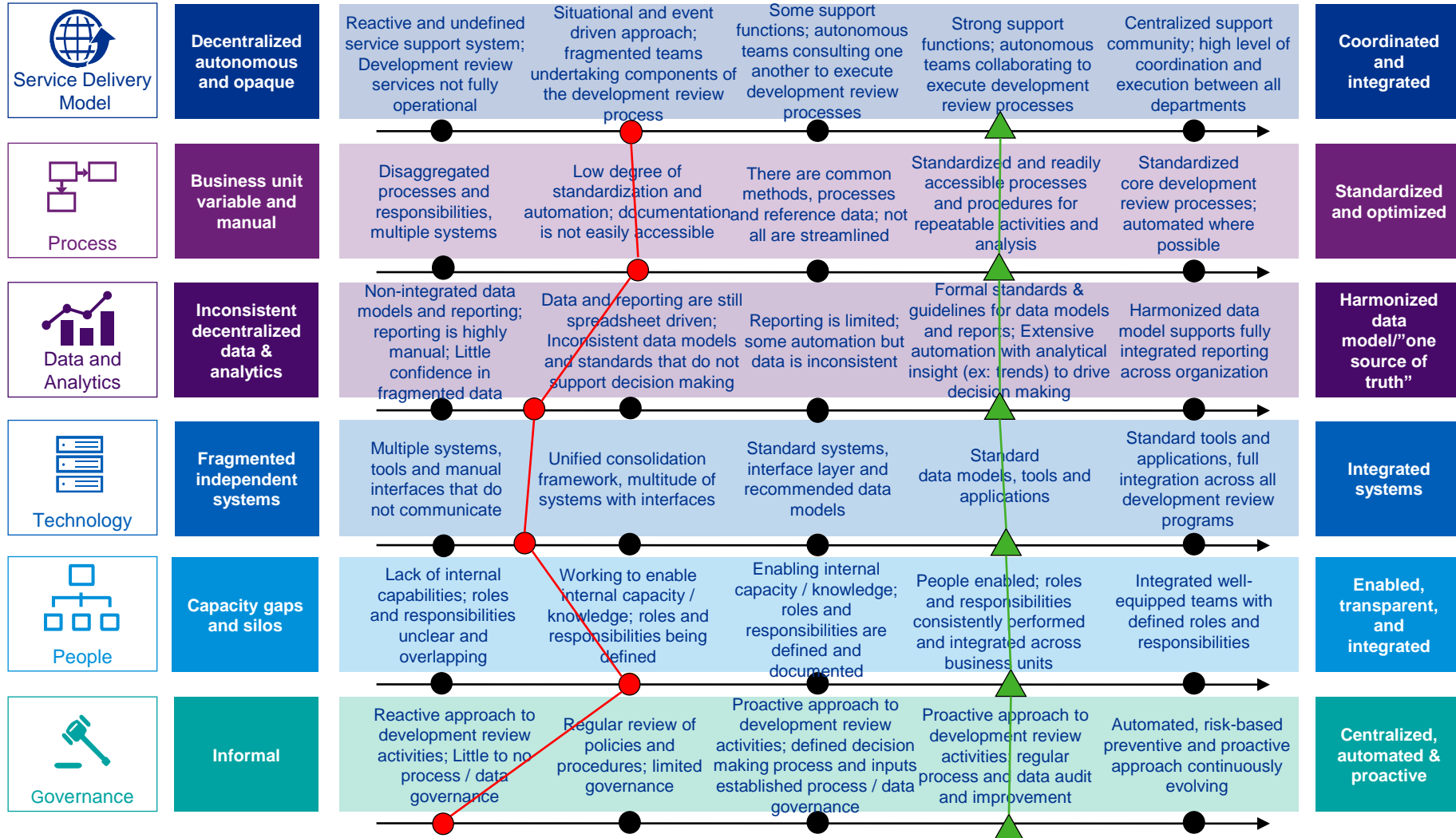
Theme	Summary from Stakeholder Consultations	Stakeholder Identified Needs
Process Governance	<ul style="list-style-type: none"> <li>The property/land development review processes lack consistency to enable effective governance.</li> <li>It is unclear who holds overall responsibility for updating and maintaining property/land development review process documents.</li> </ul>	<ul style="list-style-type: none"> <li>There is regular process review with defined control owners and audit plans.</li> <li>There is a process created for maintaining and updating property/land development review procedures.</li> <li>There is standardization of processes with staff accountability embedded throughout each process.</li> </ul>
Data Governance	<ul style="list-style-type: none"> <li>There is no clear ownership of property/land development review data.</li> <li>There is inconsistent use of data fields within the technology systems, resulting in unreliable data.</li> </ul>	<ul style="list-style-type: none"> <li>Operational/departmental development review information systems are rationalized and aligned to support organizational development review strategy and consistent development review processes.</li> <li>Resources are assigned to enter and maintain property/land development review data within technology systems.</li> </ul>
Policy Governance	<ul style="list-style-type: none"> <li>There is uncertainty regarding who holds overall accountability for the property/land development review policies.</li> <li>There is misalignment on staff expectations versus operational realities (e.g., timelines to complete tasks).</li> </ul>	<ul style="list-style-type: none"> <li>Property/land development review processes are reflective of the Town's overall vision and strategic objectives.</li> <li>An overall process coordinator role is implemented within the Town to support the overall process digitization.</li> </ul>
Document Governance	<ul style="list-style-type: none"> <li>There is a lack of document governance (document management and storage).</li> <li>There is an inconsistent document naming convention / protocol.</li> <li>Property/land development review process documents do not use a standardized template.</li> </ul>	<ul style="list-style-type: none"> <li>There are standardized document templates for development review documents.</li> <li>There are established and standardized processes for document storage.</li> </ul>
Performance Standards	<ul style="list-style-type: none"> <li>Performance reporting and standards have not been identified.</li> <li>Each business unit is collecting data, however reporting is ad-hoc and manual.</li> </ul>	<ul style="list-style-type: none"> <li>There are clearly defined departmental objectives with action plans and performance targets for all levels of staff.</li> </ul>

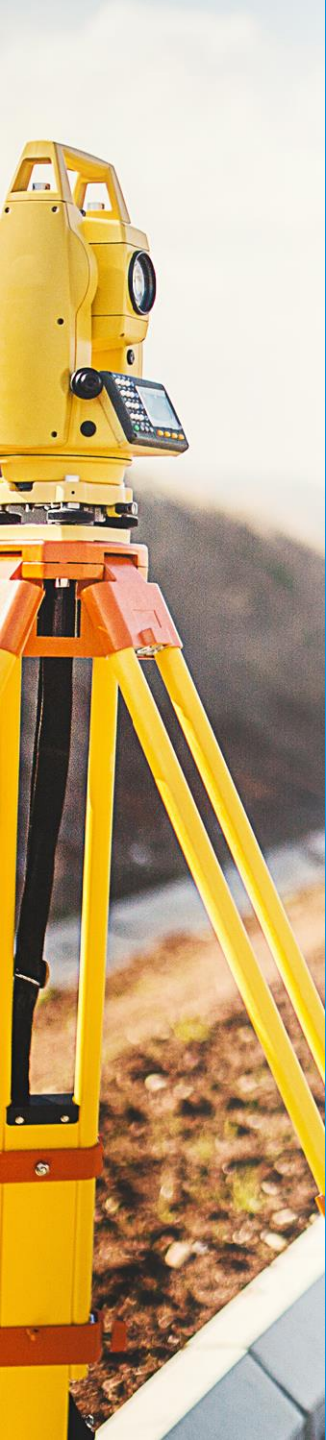
# Targeted Future State

● Current State

▲ Future State

The targeted future state represents key stakeholder’s desired future state for the modernization of the development review process over the next 3 – 5 years.





# Summary of Observations & Recommendations

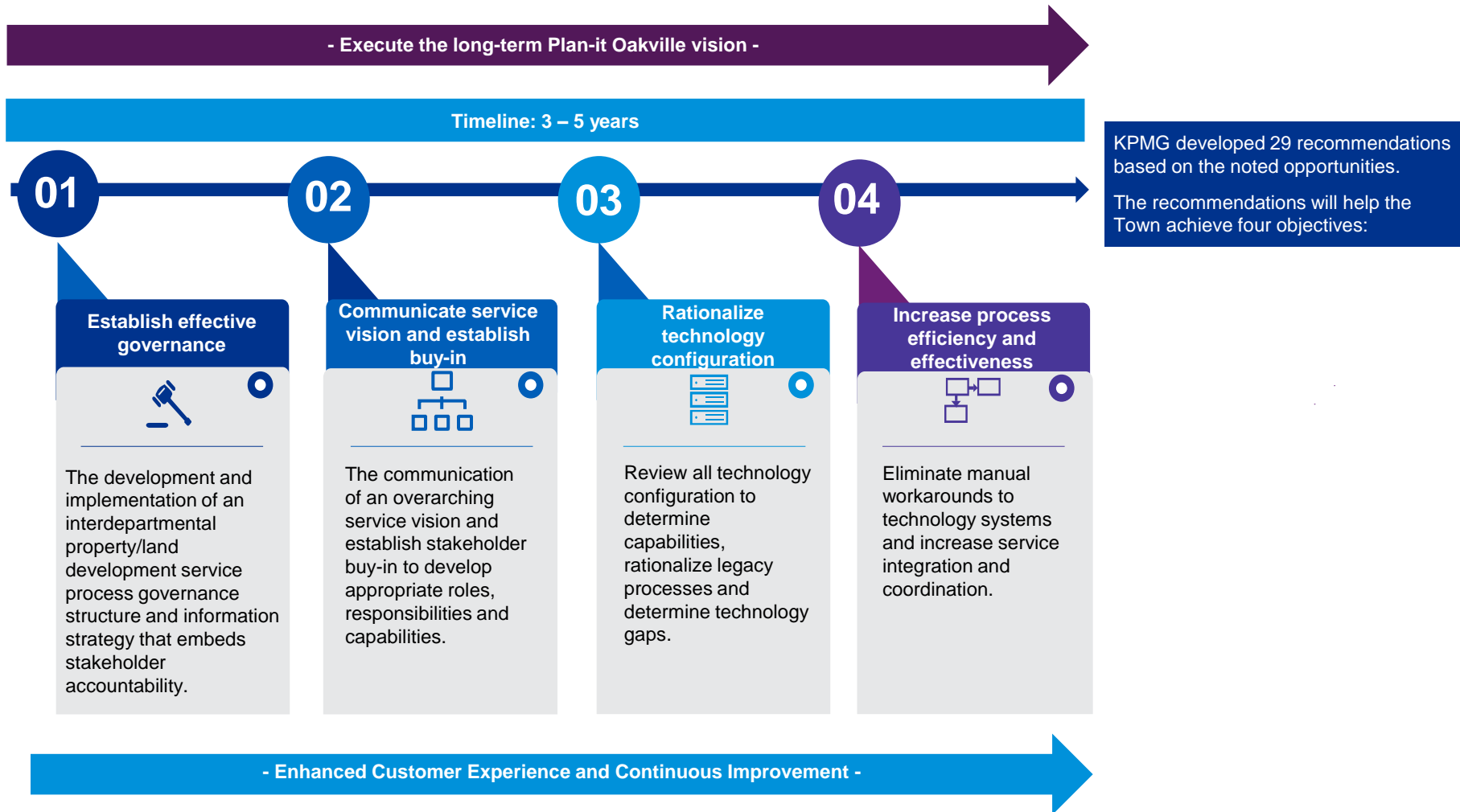
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# Plan-it Oakville - Alignment to the Vision

The Town went through a comprehensive exercise to develop an overarching mission and vision, called “Plan-it Oakville”. The vision statement lays the foundation for what the Town wants to achieve in terms of streamlining and modernizing the development review and approval process. Guiding principles were identified to realize the Plan-it Oakville’s vision. Improvement opportunities were recommended for the Town to consider in order to achieve the Town’s desired future state and to align with the Plan-it Oakville vision and guiding principles.



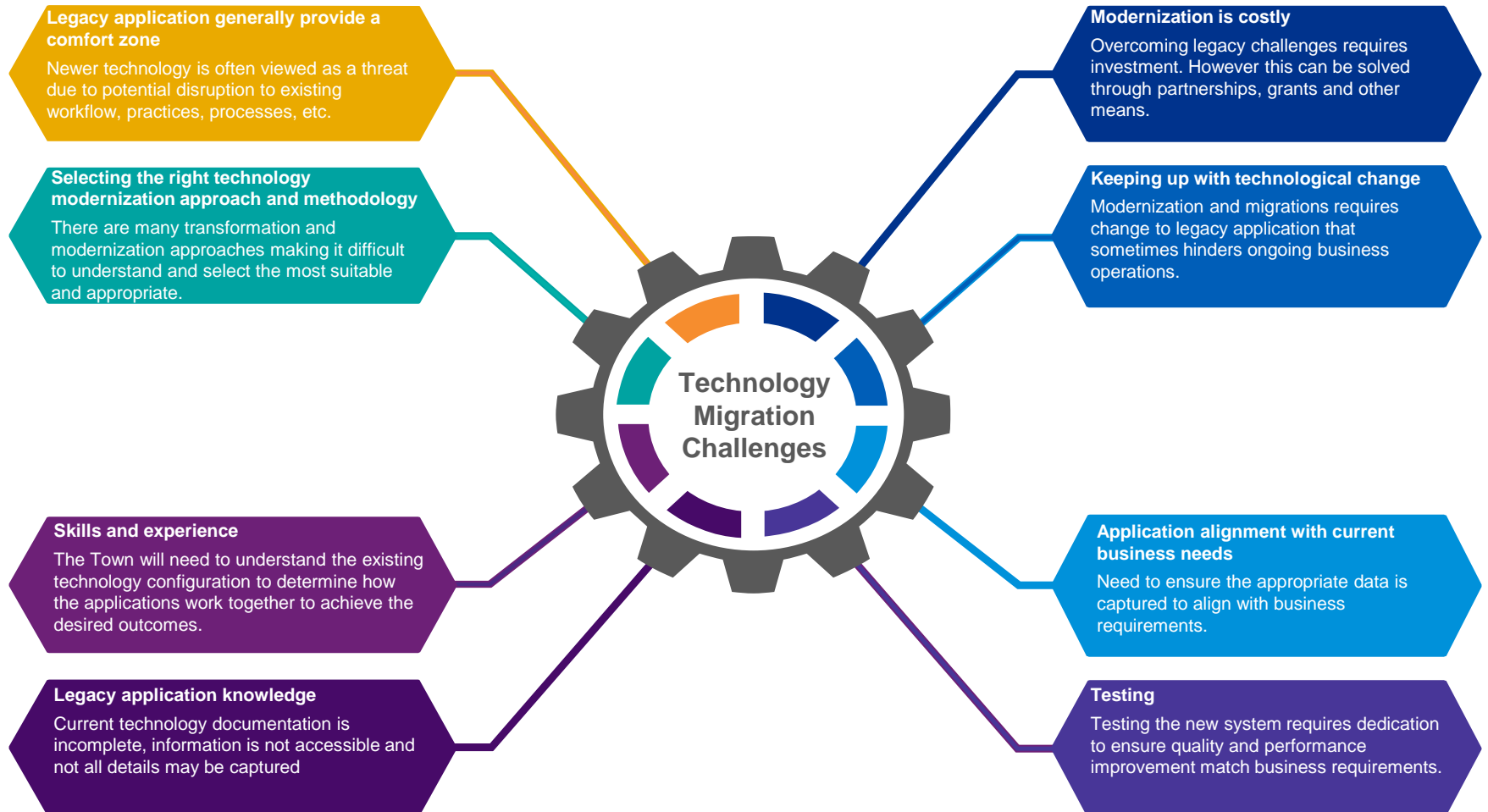
# Property/Land Development: Next Steps



# Looking into the Future: Technology Challenges

Our current state assessment noted that while the AMANDA software has accumulated technical debt, the technology is not the overarching factor contributing to ineffective and inefficient workflows. Processes should be improved and/or reconfigured first before considering migrating to alternative technology tools. For example, automating an inefficient/ineffective process will not resolve most identified challenges

The recommendations are meant to help the Town solve short-term challenges related to the property/land development service in order to achieve the desired target state. Post-implementation, if the Town decides technology migration is required, the following challenges should be acknowledged:



# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Summary of Observations

During consultations with Town staff, a number of pain points were identified as barriers to efficient and effective property/land development service processes. These pain points were summarized further using the 6 layers of the Target Operating Model to identify specific opportunities for improvement. In total, 38 observations were identified within Oakville’s property/land development service process.

Over the next 3-5 years, the implementation of the recommendations to address each observation will help to achieve the Town’s target state goal for each TOM dimension.

TOM Dimension	Themes
<b>Service Delivery Model (4)</b>	There is no corporate-wide development information strategy. As a result, the Town’s current approach to managing development data is reactive and undefined. There is lack of clarity regarding the value of information that is captured and inputted throughout the property/land development process.
<b>Process (7)</b>	Property/land development processes are not well documented with a low degree of standardization. This has resulted in a lack of understanding of the end-to-end process. There is also a large backlog of digital change requests, leading to delays in updating systems (e.g., AMANDA).
<b>Data &amp; Analytics (7)</b>	Data is stored inconsistently using a number of different systems, networks, and manual folders. There are challenges getting reliable and timely information from the Town’s business units.
<b>Technology (5)</b>	The Town’s technology configuration consists of highly customized solutions with manual interfaces that do not communicate. In addition, the utilization of systems amongst the departments involved in the property/land development service is inconsistent which impacts the accuracy and quality of data stored in the system.
<b>People (7)</b>	The vision for the digitization of the property/land development service is not communicated effectively to all staff. There is a disconnect on the priorities and mandates of key stakeholders throughout the process.
<b>Governance (8)</b>	Lack of clarity around overall responsibility and accountability for property/land development service processes. The Town’s current approach to performance measurement is underdeveloped and inconsistent.



# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Service Delivery Model - Observations & Recommendations

Theme	Obs. #	Observations
Development Information Strategy	1.1	There is no corporate-wide development information strategy. As a result, the Town's current approach to managing development data is reactive and undefined. It should be noted the Town does have a plan to formalize a corporate data strategy.
	1.2	There is a lack of clarity regarding the value of information that is captured and inputted throughout the property/land development process. This results in incorrect and inconsistent information collected and inputted by all stakeholders throughout the process leading to process inefficiencies and delays.



### Recommendation #1

Develop a detailed property/land development service information strategy to support the long-term vision and aligned direction of the Town's property/land development service.

### Prioritization

<b>Effort</b>	<b>5</b>
<b>Impact</b>	<b>5</b>

The current state analysis noted the Town's current approach to property/land development service information is situational and event driven. This has resulted in a lack of clarity for the value of information collected and inputted throughout the process and has led to downstream process inefficiencies.

The Town should develop a detailed property/land development service information strategy which clearly describes how information supports the delivery of development services and the technology systems (AMANDA, Bluebeam) and governance processes that are required to ensure accuracy and quality of information. This strategy should be communicated to all key stakeholders to ensure they are aware of the data/information requirements and understand the importance of collecting quality data throughout the property/land development process.


An information strategy would typically include:

- A policy on development information
- The identification of development information needs to support the organization's decision making and operational processes including data quality and accuracy requirements
- Responsibilities and accountabilities for information management
- Processes for continued alignment of these needs as the Town's requirements evolve
- Processes for the improvement of the development information and data quality (continuous improvement)
- Technology requirements necessary to support the property/land development service process and information needs.

Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

# Service Delivery Model - Observations & Recommendations

Theme	Obs. #	Observations
Internal & External Partner Management	1.3	The Town lacks formalized application review time service level standards. Applications can take varying amounts of time which can result in scheduling difficulties for the developer and impacts the developer's confidence and trust in the Town. This also stems from the challenge that applications require timely input from staff in other departments.



**Recommendation #2**

Establish internal review service standard timelines for application submission to ensure comments are given in a timely manner.

Prioritization	
<b>Effort</b>	<b>2</b>
<b>Impact</b>	<b>4</b>

Once applications are submitted, there is no standard review time for developers to expect to receive comments on their application. Often, reviews can be delayed due to the volume of submissions received by the Town. The lack of a committed timeline often results in receiving late stage comments and increases the risk of developer frustration as they await completion of reviews with little communication on anticipated completion.

To address this issue, the Town should implement standard review times based on the application type. For example, the following review times could be implemented for all site plan applications:

- 7 weeks after 1<sup>st</sup> submission
- 5 weeks after 2<sup>nd</sup> submission
- 3 weeks after 3<sup>rd</sup> submission

It would be important to establish accountability by developing these timelines in collaboration with key stakeholders. If the standard review date is nearing and are likely to pass, notice should be provided to the applicant. Timelines impacted by external stakeholders that the Town cannot control (e.g. outside agencies' commentary reviews) should be included in the applicant's status notification.

Establishing clear and realistic review timelines for first and subsequent application submissions will improve developer relationships and accountability with commenting staff. Additionally, such a procedure may contribute to the ongoing monitoring of the property/land development service and potential improvement opportunities. As the Town's data and analytics capabilities expand, there is an opportunity to use historical submission data to establish estimated review times based on seasonal demands and peak application periods.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Service Delivery Model - Observations & Recommendations

Theme	Obs. #	Observations
Internal & External Partner Management	1.4	There is no formal and consistent method for soliciting feedback from applicants throughout the application process and for overall feedback once an application is completed.



### Recommendation #3

Measure the customer experience with the development review process (e.g., annual surveys to track performance and continuously improve the customer experience with the Town's property/land development service).

### Prioritization

Effort	1
Impact	3

Formally and consistently soliciting feedback from applicants will enable the Town to gain insight into the effectiveness of the property/land development service and staff involved in the process.

The Town should develop applicant satisfaction surveys to better track and continually improve the customer experience. The Town should consider two types of user feedback surveys:

- An annual survey distributed on an industry-wide basis to understand system-level experience and trends; and,
- Randomly selected, pulse-style surveys following application completion milestones to gather real-time insights into immediate challenges and opportunities that require action.

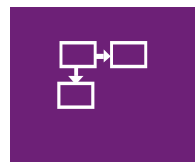
Effective customer experience surveys are short, easy-to-complete and generally involve one to five questions. The Town should consider measuring customer experience with the following aspects of the development review process:

- Timelines;
- Customer service;
- Clarity and transparency; and,
- Cost.

The results of the surveys should be published internally and externally (at appropriate levels of detail), and can form part of the performance measurement framework and continuous improvement system included in recommendation #27.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service Process - Observations & Recommendations

Theme	Obs. #	Observations
Manual Processes & Workarounds	2.1	Digital processes are highly customized and designed to meet the specific objectives of individual stakeholders. This has resulted in lengthy, time consuming processes that do not add value to the overall process.
	2.2	Property/land development processes are not well documented with a low degree of standardization. This has resulted in a lack of understanding of the end-to-end process.



**Recommendation #4**

Establish, document and communicate standardized property/land development service processes that clearly define key activities and tools used to complete steps of common or high risk processes. This will ensure each process has consistent and repeatable steps and eliminate customized time-consuming and inefficient processes.

Prioritization	
Effort	3
Impact	3


Our current state analysis noted that the property/land development service digital processes are highly customized and designed to meet the specific objectives of individual stakeholders. This is a result of technical debt from **challenge cycles** noted earlier in our current state assessment. In addition, the processes are not well documented and have a low degree of standardization. This has resulted in multiple lengthy processes that are not consistent or repeatable. The non-standardized processes also impact onboarding for new hires as each stakeholder has developed their own digital and manual workaround processes to complete property/land development activities.

To increase the standardization of the property/land development service processes, the Town should establish, document and communicate standardized property/land development process (e.g. SOPs) that clearly define key activities, data, and systems that support the process. The Town can consider utilizing the Service Oakville approach of sharing operational and process knowledge.

In addition, the Town should conduct an exercise to identify and prioritize areas that require increased understanding and processes mapping due to the high level of customization.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service Process - Observations & Recommendations

Theme	Obs. #	Observations
Service Integration & Coordination	2.3	The property/land development service intake and review process is non-standardized, resulting in a number of application re-submissions and delays throughout the process.



**Recommendation #5**

Establish standard procedures and accountability for performing property/land development service activities (e.g., application intake, review).

Prioritization	
<b>Effort</b>	<b>4</b>
<b>Impact</b>	<b>5</b>


During our stakeholder consultations and jurisdictional interviews, property/land development service application intake was identified as a major pain point and bottleneck to the service. Currently, the Town does not have a mechanism in place to review the quality of development applications permits prior to initiating the review. This results in a number of re-submissions by the applicant and delays to the process.

The Town should standardize the approach to performing property/land development service application and permit intake as well as procedures for application and permit review. This can be accomplished by implementing application and permit standards via intake stage gates. Stage gates would mandate specific documents and level of quality that applications and permits must meet prior to entering the review phase. During the review phase, each application and permit should go through a standard review based on the type of application or permit. This will help to increase the quality of applications and reduce the number of re-submissions to the Town.

In addition, the Town should consider the future model for the intake process. While there is increased focus on fully digitizing application intake, a hybrid model could be implemented to provide developers with the option of digital or in-person application intake. In-person intake would provide inexperienced developers with onsite planning expertise and application review to ensure requirements are fully understood in order to avoid numerous re-submissions.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service Process – Observations & Recommendations

Theme	Obs. #	Observations
Service Integration & Coordination	2.4	There is ineffective communication between departments when requesting digital changes to property/land development technology solutions. This is the result of a siloed approach to digital change requests and can lead to duplicate digitization requests, or incomplete solutions.
Business Information Technology Service Support	2.5	Digital change requests that are not vetted through SBS generally come to IT as a concept idea with no real business case. As a result, these requests require additional effort from IT staff to flush out and in order to understand purpose and add-value to the business unit.
	2.6	There is a large backlog of digital change requests, leading to delays in updating systems (e.g., AMANDA). This has resulted in a perception that no action is taken on change requests brought to ITS/SBS and results in stakeholders to not request additional changes and revert back to manual processes. Additional capacity may be required to effectively manage digital process changes.


	<b>Recommendation #6</b>	<b>Prioritization</b>	
	Establish SBS as the digital change lead to facilitate all property/land development digital service change requests.	<b>Effort</b>	<b>1</b>
		<b>Impact</b>	<b>5</b>

Currently, the Town’s SBS department intakes AMANDA digital change requests from departments involved in the property/land development service. Departments outside the property/land development service submit digital change requests directly to ITS. Stakeholders noted change requests that are not vetted through SBS often come to ITS as concept ideas without an adequate business case for the change. This results in additional time spent by ITS to develop requests and engage other departments that may be affected by the request.

The Town should consider allowing SBS to provide digital change request intake for all AMANDA requests that affect the property/land development service (outside of their current Commission). As an initial vetting step, change requests could be reviewed and approved by the departments as part of the intake process. The mandate and resources for SBS would need to be reviewed to support this additional role.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service Process - Observations & Recommendations

Theme	Obs. #	Observations
Service Integration & Coordination	2.7	Stakeholders do not have a portfolio-wide view of the application pipeline that identifies application volumes and bottlenecks. In addition, existing reporting on the application portfolio is inconsistent and ad-hoc.

	<p><b>Recommendation #7</b></p> <p>Enhance application tracking procedures through improved use of tools (e.g., AMANDA) to improve application tracking and identification of bottlenecks.</p>	<b>Prioritization</b>	
		<b>Effort</b>	<b>4</b>
		<b>Impact</b>	<b>5</b>

Senior staff do not have a portfolio-wide view of the application pipeline that identifies application volumes and bottlenecks. In addition, the Town has implemented an integration between QlikSense dashboarding and AMANDA, however the AMANDA dashboards are not fully utilized due to data quality.

To address the gap, the Town needs to identify the key data points that must be entered into the AMANDA database, during the application intake process, to ensure AMANDA data is consistent and accurate. These key data points should be utilized to create a portfolio wide report that can track key KPIs related to the application portfolio. This dashboard should be used to ensure the Town has adequate resources to review application in order to meet established timeframes. The tool should be consistently used and updated with information as it becomes available.

Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

# Data & Analytics – Observations & Recommendations

Theme	Obs. #	Observations
Centralized Data Access	3.1	Data is stored inconsistently using a number of different systems, networks, and manual folders.
	3.2	There are challenges getting reliable and timely information from the Town's business units.



**Recommendation #8**  
Review current data storage solutions to determine the single source of truth.

Prioritization	
Effort	5
Impact	5

Currently, data that is collected throughout the property/land development service process and stored in a number of different systems, networks and local storage folders. This results in challenges locating documents due to the various storage locations, file structures. Once a document is located, stakeholders noted that it can be time consuming to work with the data due to file inconsistencies (pdf, excel, etc.).

To ensure property/land development service data is centralized and consistent, the Town should review the current storage solutions (AMANDA, Bluebeam, Sharepoint) and determine the optimal solution to be the single source of truth for all property/land development service data. This would ensure that all data collected throughout the process is centralized in one place resulting in easy to locate, accurate and reliable information.

If the current solutions do not produce the expected outcomes for data storage, the Town should consider the implementation of a new solution.



# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Data & Analytics – Observations & Recommendations

Theme	Obs. #	Observations
Development File Standards	3.3	There are inconsistent data fields and data input requirements. This leads to inconsistent data throughout the property/land development review process.
	3.4	There are inconsistent file standards for documents throughout the property/land development process.



### Recommendation #9

- Develop and implement standardized property/land development templates to streamline workflow processes and timelines of reviews.

### Recommendation #10

- Develop a data dictionary to assist key stakeholder with data entry into technology systems

### Prioritization

Effort	3
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Impact	3
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Currently, there is significant inconsistency in how property/land development service information is collected, inputted and stored within the Town's property/land development service technology. While some stakeholders use a consistent file format the practice is not widespread. This results in inconsistent development service data and can lead to an increase in processing timelines. To increase the maturity of the Town's development file standards, the following recommendations should be considered:

1. The Town should conduct a system review of all AMANDA data fields to determine mandatory and non-mandatory. In addition, the Town should ensure these data fields are clearly understood by internal and external stakeholders.
2. Develop a data dictionary to catalog and communicate the structure of the required data found in property/land development service templates. The data dictionary should provide a description for each data field in the template to ensure data requirement/type is understood by all stakeholders (example can be found below).

### Data Dictionary Example

Field Name	Type	Data Format	Description
Start Date	Date/time	DD/MM/YYYY	Start date of the application

# Data & Analytics - Observations & Recommendations

Theme	Obs. #	Observations
Dashboards & Business Intelligence	3.5	The Town has deployed QlikSense dashboarding software; however, not all property/land development service employees can use the tool due to license limits. This results in a lack of buy-in and ineffective use of the tool.
Analytics Capability	3.6	Dashboards and data visualization tools are available, however, most departments rely on ITS and SBS to perform data analytics due skill set gaps within the planning, building and transportation & engineering departments.
	3.7	Insufficient capacity and training were identified as barriers to effective use of analytics tools.



- Recommendation #11**
- Determine Town employees that should have access to QlikSense dashboarding software and ensure licenses are available for the user group. In addition, training should be provided to employees who are given access to QlikSense dashboarding.
- Recommendation #12**
- Equip property/land development employees with analytics tools and training.
- Recommendation #13**
- Update property/land development service job descriptions to include analytics components

Prioritization	
Effort	1
Impact	3

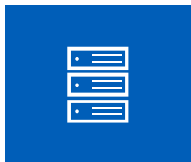
**Licensing**  
 Stakeholders noted the Town has recently deployed QlikSense, a data visualization software, throughout the organization. The software allows users to create visualizations, charts and interactive dashboards to analyze data in order to make data-driven decisions. However, there has been limited adoption of the tool as limited licenses are available. As such, property/land development service departments and stakeholders rely on ITS and SBS to perform data analytics activities.  
 As such, the Town should conduct an analysis to determine property/land development service employees that should have access to QlikSense and ensure the appropriate number of licenses are available. To increase staff buy-in, the Town should identify opportunities to share dashboarding tools with front-line staff to operationalize the benefits of real-time decision-making and reporting. In addition, the Town should provide training to all users to ensure the appropriate skill sets are developed to fully utilize the tool.

**Training**  
 Stakeholders noted the Town has recently deployed QlikSense, a data visualization software, throughout the organization. However, the technology rollout was not accompanied with training to develop analytics skill sets. To ensure key stakeholders are developing analytics capabilities, the Town should rollout training modules that can provide end users with basic to advanced QlikSense skill sets. Training modules are available through QlikSense’s QlickQ Learning platform. The platform provides self-paced learning, classroom training, programs and assessments to help employees build their analytics capabilities.  
 In addition, the Town should consider a review of property/land development service job descriptions to include basic analytic and reporting activities. This would ensure that employees develop their analytic capabilities to be able to perform key activities required for their position.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Technology – Observations & Recommendations

Theme	Obs. #	Observations
Technology Configuration	4.1	The Town's technology configuration consists of highly customized solutions with manual interfaces that do not communicate. In addition, the utilization of systems amongst the departments involved in the property/land development service is inconsistent which impacts the accuracy and quality of data stored in the system.
	4.2	Lack of integrations between systems tools currently used by departments involved in the property/land development service has resulted in duplication of effort, and ineffective workflows.



### Recommendation #14

Modernize the existing property/land development service technology configuration.

### Prioritization

Effort	5
Impact	5

The Town should accelerate the modernization of its property/land development service technology configuration. Currently, the Town's property/land development service utilizes AMANDA 7 which is highly customized to complete specific development service processes. In addition, other systems (e.g., Bluebeam, ESRI, online portals) are used throughout the property/land development service process, however these systems are not integrated together.

In order to achieve the Town's target state for property/land development service technology configuration the Town will have to rationalize current technology systems and align technology to support key property/land development service business processes.

Based on our leading practice research the Town should ensure its development service technology configuration can support the following features:

- **Enterprise-wide, interdivisional capabilities:** All commenting parties involved in the property/land development service should be able to use the same, modernized system. Similarly, the system should provide a common online platform for circulating comments across commenting partners and integrate with existing Town databases (e.g., listed and designated heritage properties);
- **Automated:** Routine business processes and data entry should be automated to reduce the administrative burden on staff. Similarly, the system should provide automated time-based flags and alerts for tasks and key application-related deadlines;
- **Project management capabilities:** The system should support advanced project management tools and techniques, including application-based time entry and start-stop comment tracking for all commenting partners;
- **Data-enabled:** The system should be capable of capturing high quality data to support enhanced portfolio and performance management. The system should also allow staff time-tracking across individual applications.


In addition, the Town should identify the modules of AMANDA that the Town can leverage to improve process consistency. For example, the Town should determine if AMANDA can be used for:

- Standardized comment templates to streamline workflow processes, comment consolidation, and timeliness of reviews
- Enhanced application tracking procedures to improve application tracking and identification of bottlenecks
- Calculating application fees
- Integrations with other software (e.g., Bluebeam, ESRI, Sharepoint)

To address the features above, the Town should consider utilizing a systematic approach to modernizing and refining the current AMANDA system. This could possibly be done by reallocating time of the SBS and ITS teams in the short term, to enhance the system and train the staff on usage.

# Technology - Observations & Recommendations

Theme	Obs. #	Observations
Technology Configuration	4.3	The Town is currently using two separate online portals for property/land development service application submission.



**Recommendation #15**

Review the capabilities of the existing online portals and determine if they can be integrated to create a unified solution.

Prioritization	
<b>Effort</b>	<b>4</b>
<b>Impact</b>	<b>4</b>

The online portal allows applicants to submit property/land development applications and permits online and review application status throughout the review process. Currently, the Town is utilizing two portal products, the Salesforce Online portal (Service Oakville) and the AMANDA online portal. The Service Oakville is the Town’s citizen facing portal solution. This portal connects citizens to all areas of the Town, including property/land development services. To submit a property/land development application, citizens are connected to the AMANDA portal from Service Oakville. Once in the AMANDA portal, citizens can upload their property/land development application and permits for review. However, there is currently no integration between Service Oakville and the AMANDA portal making resulting in external stakeholder to have to log in to multiple portals to review comments from Town staff and their application status. In addition, citizens are only able to submit applications for building permits, zoning occupancy and building inspections online through the portal. All other applications and permits are submitted via email.

To close the gap, Plan-it Oakville has identified several projects in 2022 and 2023 to expand and improve online portal services. Some of these projects include:

- Compliance letter automation
- Develop/implement application wizard functionality for the portal
- Provide ability for customer’s to schedule multiple building inspections
- Develop online application for Authority to Occupy & Partial Permits
- Implement ability for the applicant to assign a delegate through the portal
- Implement portal for FOI
- Implement portal for other permits

In addition to these projects, the Town should review the current portal configuration to ensure the portal software aligns with the Town’s future vision. Our jurisdictional scan identified the following online portal technology deployed by other municipalities:

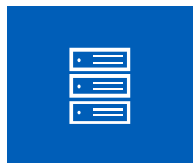
- Alphinats SmartGuide Platform
- Stratwise CRM Cloud-Hosted portal
- Cloudpermit

These online portal solutions should be further examined to determine if they can be better streamlined with Service Oakville to optimize customer portal experience. ITS recently initiated a “customer identity access door” project as part of streamlining customer data for enhanced customer experience.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Technology - Observations & Recommendations

Theme	Obs. #	Observations
Mobile Workforce, Innovative Technologies, Intelligent Automation & Augmentation	4.4	The Town does not have an overarching technology strategy to procure and implement new innovative technology.
	4.5	The current technology suite for mobile work does not promote efficient and effective mobile work.



- Recommendation #16**
- Develop and implement a technology strategy that will provide the guiding principles for procuring new technology related to the property/land development service.
- Recommendation #17**
- Consider a review of mobile workforce technologies to ensure the latest version of the technology and additional innovative technologies are deployed.

Prioritization	
<b>Effort</b>	<b>4</b>
<b>Impact</b>	<b>4</b>

To ensure the Town is effectively deploying technology to further digitize the property/land development review service, the Town should develop an overarching technology strategy. In order to develop an overarching technology strategy, the Town’s senior leadership and management should increase their awareness and education on evolving technology by asking questions such as:

- Is our current property/land development service technology suite working for us?
- Are we able to continue to use our legacy technology while taking advantage of new technology opportunities?
- What are new emerging technologies to consider?

The answers to these questions will form the baseline for the technology strategy and help develop a technology master plan that adds value to the property/land development service. The Town’s technology strategy should include the following details:


- Technology vision for the property/land development service
- Strategic goals, objectives and actions
- IT decision making framework
- Suggested project portfolio and implementation costs
- Identification of enterprise configuration resources to plan and deliver specific actions of the technology strategy

As part of the technology plan, the Town should consider a project to examine the current suite of mobile technology to ensure the latest versions and/or the most effective technology is deployed. This will result in significant efficiencies and time savings across various activities within the property/land development service.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## People - Observations & Recommendations

Theme	Obs. #	Observations
Leadership & Culture	5.1	The vision for the digitization of the property/land development service is not communicated effectively to all staff. This can result in disconnect between senior management and front-line staff.

	<b>Recommendation #18</b>	<b>Prioritization</b>	
	Ensure leadership effectively communicates the vision for the property/land development service to all levels of staff.	<b>Effort</b>	<b>1</b>
		<b>Impact</b>	<b>4</b>


Plan-it Oakville has articulated leadership’s focus on what matters most for the Town’s property/land development services. To carry out the Plan-it Oakville vision, additional emphasis should be given to the following to demonstrate leadership’s commitment:

- Align organizational culture with the Town’s vision and strategy. In other words, shift ingrained mindsets and practices away from resistance of change. Encourage management and staff to move away from comfort zones of legacy applications and processes. Stakeholders indicated that often times people want technology tools to serve legacy processes instead of adapting to changes and disruptions new technology brings.
- The message of transformation should be communicated from leadership top-down by setting expectations through policies and procedures, data and record management requirements (i.e. implementation of technology master plans).
- Form realistic expectations when selecting technology transformation and modernization approaches and tools. The Town will need to balance risk appetites, needs, cost, resource capabilities and the complexity of technology transformation efforts.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## People - Observations & Recommendations

Theme	Obs. #	Observations
Organizational Design & Governance	5.2	There is a bucketed vision by department for the digitization of the property / land development review process. This has resulted in a disconnect on the priorities and mandates of key stakeholders throughout the process.



**Recommendation #19**

Ensure alignment of priorities across departments involved in the property/land development service.

**Prioritization**


<b>Effort</b>	<b>1</b>
<b>Impact</b>	<b>3</b>

Streamline departmental priorities across the Town with Plan-it Oakville's vision. Development service is a collaborative endeavor that requires input and engagement from a broad range of staff. All stakeholders involved in the process should work together towards a cohesive, prioritized, Town-wide position. The departments should update their operational plans to align it with the refreshed priorities that supports the Town's development services in a cohesive manner. Roles and responsibilities should be updated to reflect priorities from both development/planning perspective and digital capabilities. Refer to Observation #5.3 for further details.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## People - Observations & Recommendations

Theme	Obs. #	Observations
Organizational Design & Governance	5.3	Roles and responsibilities of key property/land development services stakeholders (e.g., AMANDA process owners) are not well defined. Lack of clearly defined roles and responsibilities leads to process inefficiencies and bottlenecks in the process.

	<p style="text-align: center;"><b>Recommendation #20</b></p> <p>Define and document property/land development service related roles and responsibilities to align with updated process requirements, refresh recruiting and training strategies, and reduce process inefficiencies.</p>	<b>Prioritization</b>	
		<b>Effort</b>	<b>3</b>
		<b>Impact</b>	<b>3</b>

Clearly defining each stakeholder’s role and mandate in the development review process will enhance transparency and predictability as well as empower staff to fulfill their responsibilities.

The roles and responsibilities of each stakeholder (application review staff, commenting departments, system support and data analysis personnel, customer service, and applicants/the public) should be clearly delineated and made available to the public on the Town’s website. To clarify development review-related roles and responsibilities and reduce process inefficiencies, the Town should define and document a responsibility assignment matrix or RACI (responsible, accountable, consulted, informed) for each development application type. At a minimum, the RACI should document:

- The mandate of each commenting department (i.e., the subject matter for which the commenting partner is responsible);
- Application-related approval authorities and accountabilities;
- The roles and responsibilities of applicants; and,
- The roles and responsibilities of administrative and support functions.

To help ensure the effectiveness of the responsibility assignment matrix, the Town should:

- Reflect the RACI in job descriptions as they are updated;
- Include the RACI in development review-related training, including staff onboarding;
- Review and promote the RACI with applicants.


Once established and promoted, the Town should begin tracking any significant incidents related to ambiguities in roles and responsibilities (e.g., when they result in application delays).



# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## People - Observations & Recommendations

Theme	Obs. #	Observations
Talent Strategy & Capability	5.4	There is insufficient training on new technology. This results in the inconsistent use to technology deployed throughout the property/land development service.
	5.5	There is an inconsistent onboarding process for new staff. This has resulted in new hires taught multiple different processes to complete the same or similar tasks.

	<p><b>Recommendation #21</b></p> <ul style="list-style-type: none"> <li>Establish formal training and learning opportunities for staff to improve efficiency and quality of the property/land development service.</li> </ul>	<p><b>Prioritization</b></p> <table border="1"> <tr> <td><b>Effort</b></td> <td><b>3</b></td> </tr> <tr> <td><b>Impact</b></td> <td><b>3</b></td> </tr> </table>	<b>Effort</b>	<b>3</b>	<b>Impact</b>	<b>3</b>
	<b>Effort</b>		<b>3</b>			
<b>Impact</b>	<b>3</b>					
<p><b>Recommendation #22</b></p> <ul style="list-style-type: none"> <li>Develop a formal onboarding process for new staff joining the property/land development service.</li> </ul>						

The Town should develop a standard suite of learning programs for staff to enhance their knowledge and usage of technology and improve the development review process. Training topics should include:

- Training sessions on Plan-it Oakville vision and development review priorities
- Training sessions on legislative requirements, application review processes and procedures
- AMANDA functions and workflows
- Other system and tool functions that integrate with AMANDA (e.g. GIS, Bluebeam, SharePoint, etc.)
- File management
- Project management


These training material should be made available in an accessible location and adopted into training and onboarding of all development review-related staff. In addition, training should be provided when there are changes to legislative requirements, systems upgrades, and process and workflows changes. It is recommended to identify trainers within departments and/or amongst specific user groups.

The Town should also review job descriptions for property/land development service positions and update to include digital activities. This will ensure that all positions have a digital foundation and understand the skills and competencies required.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## People - Observations & Recommendations

Theme	Obs. #	Observations
Collaboration & Networking	5.6	There is a lack of formalized department collaboration to ensure property/land development application and permit issues are addressed and bottlenecks are identified in a timely manner.

	<p style="text-align: center;"><b>Recommendation #23</b></p> <p>Implement a Project Review meeting as a governance mechanism to resolve difficult application-related issues. Identify project leads to manage the end-to-end development review process.</p>	<b>Prioritization</b>	
		<b>Effort</b>	<b>1</b>
		<b>Impact</b>	<b>4</b>

The Town should apply project management principles to manage development applications, address application issues, monitor review timelines and improve the documentation of key comments/decisions. In other words, approach each development application as unique projects.

The Town can consider implementing Project Review meetings to resolve difficult application-related issues. These meetings can be conducted by a lead Planner or Planning Manager after each application milestone (e.g. submission, review, approval, completion) as a governance mechanism to:

- Proactively monitor the end-to-end development review process
- Coordinate and prioritize work and staff resources across departments
- Identify and resolve conflicts

Suggested actions to formalize the process:

- Develop a pre-determined procedure for planners and other development review staff to add items on the agenda for discussion;
- Identify participants according to the applications included on the meeting agenda; and,
- Develop documentation requirements to document application-related decisions in a consistent manner (i.e. use of SharePoint, AMANDA functions, or simple-to-use templates).


A more standardized approach would provide development review staff with a predictable, easy-to-use mechanism to resolve difficult issues, reduce workarounds and churn associated with ad-hoc resolution of these issues. The meetings can also be used as a tool to:

- Review development review workloads and application volumes across staff and commenting departments.
- Identify issues that need digital change in a holistic and consistent manner for SBS review and ITS execution. Avoids one-off or incoherent digital change requests that unintentionally impacts upstream or downstream workflows (see Observation #2.5).

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## People - Observations & Recommendations

Theme	Obs. #	Observations
Change Management	5.7	Changes are not communicated effectively to internal stakeholders. This results in a lack of stakeholder buy-in and failure to adopt the new process.

	<p><b>Recommendation #24</b></p> <ul style="list-style-type: none"> <li>Establish dedicated resource to lead, monitor and report on the change.</li> </ul>	<p><b>Prioritization</b></p> <table border="1"> <tr> <td><b>Effort</b></td> <td><b>1</b></td> </tr> <tr> <td><b>Impact</b></td> <td><b>4</b></td> </tr> </table>		<b>Effort</b>	<b>1</b>	<b>Impact</b>	<b>4</b>
	<b>Effort</b>			<b>1</b>			
	<b>Impact</b>	<b>4</b>					
<p><b>Recommendation #25</b></p> <ul style="list-style-type: none"> <li>Develop a communications strategy to ensure staff are informed of all changes to the property/land development service.</li> </ul>							

Effective change management aligns personnel around change that is clearly defined, justified and well-communicated. Communication is the critical enabler to implementing change and embracing change. Dedicated resources should be appointed to lead and coordinate change efforts.

Recommended approach to communicate change, obtain stakeholder buy-in and minimize disruption:

- Disseminate leadership’s commitment to change and the case for change.
  - Empower change champions, such as project managers or team leaders, to provide clarity and context for change.
  - Ensure ITS is ready to support technological change.
- Identify stakeholder groups and develop targeted key messages for each group.
- Communicate consistent messages emphasizing anticipated benefits, timelines and key milestones.
- Provide training to adapt to change (i.e. training on new technology; training of AMANDA upgrades and how changes impact processes and workflows).
- Repeat and reinforce key messages and progress. Create channels for staff to reach out for questions and concerns.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Governance - Observations & Recommendations

Theme	Obs. #	Observations
Policy/Process Governance	6.1	It is unclear who holds overall responsibility and accountability for property/land development service processes.
	6.2	The property/land development service lacks consistency to enable effective governance.
Data Governance	6.3	It is unclear who holds overall responsibility and accountability for property/land development service data.
	6.4	There is inconsistent use of data fields within property/land development service technology systems, resulting in unreliable data and multiple sources of truth.
Document Governance	6.5	The Town lacks clear document governance including document management, storage, and naming conventions. Currently, property/land development service documents can vary depending on the responsible stakeholder resulting in inconsistencies throughout the process.



### Recommendation #26

Establish an overarching governance structure to proactively monitor the property/land development service data and process.

### Prioritization

Effort	3
Impact	5

Our current state analysis noted that key stakeholders throughout the property/land development service are unaware of who holds overall responsibility and accountability for data and processes within the service. This has resulted in inaccurate data and inefficient processes. The Town also lacks clear document governance including document management, storage, and naming conventions. Currently, property/land development service documents can vary depending on the responsible stakeholder resulting in inconsistencies throughout the process. Lastly, there is no clear owner of property/land development service data. There is inconsistent use of data fields within property/land development review technology systems, resulting in unreliable data and multiple sources of truth. As such, the Town should establish an interdepartmental governance structure with accountability for overseeing the end-to-end property/land development service data and processes. A defined governance structure will enable the Town to:

- Streamline and coordinate oversight and decision-making.
- Address and prioritize governance and practice-related issues to enhance consistency and resolve challenges.

[Continue to next slide]

# Governance – Observations & Recommendations

The following outlines potential process and data governance models:

## **Process/Policy governance:**

To ensure there is effective governance over the property/land development service processes, the Town should assign overall process governance responsibility and accountability to the Development Service Committee. The Committee should be made up of key stakeholders from Building, Planning, and Engineering and enforce process steps outline in the documented property/land development service procedures (see Recommendation #4). The Committee should also maintain property/land development service process documents. In addition, the Development Service Committee would:

- Develop and formalize a set of property/land development service policies and procedures that govern the process.
- Create standardized audit control mechanisms
- Establish a document governance framework to provide the guiding principles for developing, updating, maintaining and storing documents

## **Data/Document governance:**

To ensure consistent and accurate data is collected and inputted into property/land development service databases (e.g., AMANDA) the Town should assign overall data responsibility and accountability to either SBS or assign champions within each department. Using the guiding principles outlined in the property/land development service information strategy (see Recommendation #1 and #2), SBS/champions would enforce quality data standards and hold all stakeholders accountable for data within the database. Additionally, SBS/champions should standardize data and documentation requirements (i.e. data field input and file management practices) to ensure accuracy of all data collected. SBS and the departments would need to be resourced adequately to be able to provide this oversight

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Governance - Observations & Recommendations

Theme	Obs. #	Observations
Policy/Process Governance	6.6	With Plan-it Oakville planned to conclude in 2023, the continuous improvement component needs to be built in the property/land development service



**Recommendation #27**

Transition Plan-it Oakville project to a formal continuous improvement program once the project concludes in 2023 to maximize the impact of existing process improvements and benefits delivered by the project.

Prioritization	
Effort	3
Impact	5

The Town's Plan-it Oakville project was implemented to create a customer-oriented experience within an integrated development approval process, founded on solid business practices and a digital platform that is respectful of community expectations and legal requirements. The project has four phases which is set to conclude in 2023. In order to continue to build on the successes of the project, the Town should transition the Plan-it Oakville project to a formal continuous improvement program to maximize the impact of existing process improvements and benefits delivered by the project.

The Town needs to formalize the execution of the continuous improvement program, define ownership and allocate the necessary resources for successful execution of the program. This recommendation should be implemented once the current Plan-It Oakville project objectives are achieved.

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Governance - Observations & Recommendations

Theme	Obs. #	Observations
Process Governance	6.7	Applicants frequently contact senior staff and elected officials to inquire about the status of an application and discuss other application-related issues.



### Recommendation #28

Develop a mandatory escalation protocol to reduce the negative impact of stakeholder interventions during the formal development review process.

### Prioritization

Effort	3
Impact	4

Develop escalation protocols to reduce ad hoc interventions. Stakeholders indicated that applicants may contact various Town departments to inquire about the status of an application and to discuss other application-related issues resulting in numerous process inefficiencies, including:

- Time-consuming internal follow-up and reporting requirements;
- The ad hoc re-prioritization of development review applications;
- Extended development review timelines; and,
- Inefficient workload management for development review staff.

The protocol should also be made accessible on the Town's website and included in staff training and onboarding. The following table outlines the escalation criteria and reporting process that should be considered by the Town.


Sample escalation criteria and reporting process.

Category	Escalation Criteria	Reporting Process
Purpose	Identify reasonable criteria to determine when an escalation should warrant a fulsome response.	Reduce the administrative burden created by unplanned stakeholder interventions by standardizing the tasks and tools used to respond to them.
Description	<p>Escalations to senior management and elected officials should be permitted on a "last resort" basis. This means that prior to escalating an application-related issue, applicants should first try to resolve the issue with the lead Planner and relevant Planning manager.</p> <p>Applicants should be able to demonstrate that previous attempts to resolve the issue through these regular process channels have not been successful.</p>	<p>The reporting process should include:</p> <ul style="list-style-type: none"> <li>• A short escalation form completed by applicants to document and submit the details of the escalation)</li> <li>• A short escalation reporting template summarize key application-related information and a staff response to the issues identified by the applicant</li> <li>• A standardized response timeline for follow-up by staff to establish clear expectations for stakeholders and help staff better manage workloads</li> </ul>

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Governance - Observations & Recommendations

Theme	Obs. #	Observations
Service Standards	6.8	The Town's current approach to performance measurement is underdeveloped and inconsistent. Many critical elements related to the property/land development service are not tracked (e.g., circulation times and review times by commenting parties).



**Recommendation #29**

Establish a performance measurement framework to improve the management and evaluation of the property/land development service.

Prioritization	
<b>Effort</b>	<b>3</b>
<b>Impact</b>	<b>3</b>

The use and regular review of performance measures are critical to the success of any organization or complex process. Performance measure maturity varies significantly across the property/land development service. The core challenges currently impacting effective performance measurement are set out below:

Challenge	Impact
Non-integrated, highly manual systems	No end-to-end view of performance. Significant effort required to extract and analyze performance data.
Lack of time tracking across most departments	Inability to accurately measure time spent (versus total elapsed time) on individual applications across all stakeholders.
Tracking and measuring key performance indicators (KPIs) and service standards	KPI's are not being used for decision making

To overcome these challenges, we recommend a refreshed approach to development review performance measurement based on leading practice and realistic processing timelines.

The Town should build upon the performance measurement framework to improve the management and evaluation of the property/land development service.

The framework should be grounded in leading practice and analysis of past performance. It should include:

- The identification of end-to-end and department-specific key performance indicators KPIs, including efficiency and effectiveness measures;
- KPI collection procedures;
- KPI reporting procedures, including the identification of appropriate KPIs for each major stakeholder group and how they will be shared (e.g., a high-level monthly dashboard with strategic KPIs for senior-level staff and a weekly report with operational measures for managers); and,
- A process for reviewing the effectiveness of KPIs.

Example indicators are included on the following page. These KPIs are based on KPMG leading practice. This is an illustrative list and not meant to be exhaustive.



# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

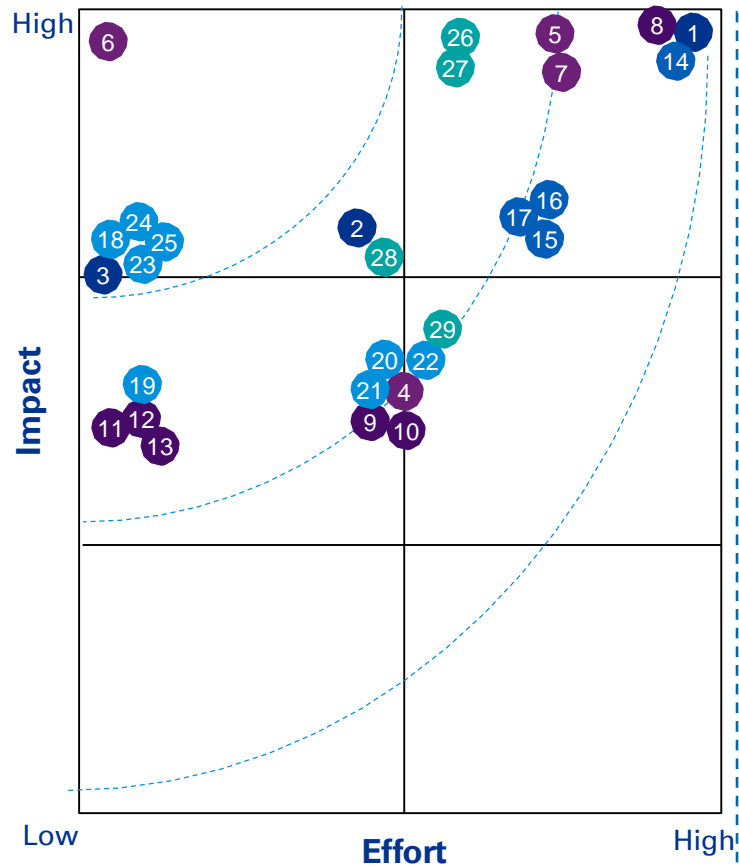
## Governance - Observations & Recommendations

Sample KPIs for performance management.

Category	KPI
Efficiency	<ul style="list-style-type: none"> <li>• Total elapsed time from complete application to approval.</li> <li>• Total elapsed time for each circulation.</li> <li>• Total elapsed time for each commenting partner for each circulation.</li> <li>• Total elapsed time with the applicant from complete application to approval.</li> <li>• Total elapsed time with the applicant for each circulation.</li> <li>• Total number of applications processed each quarter.</li> </ul>
Effectiveness	<ul style="list-style-type: none"> <li>• Total public engagement hours by application type and circulation.</li> <li>• Extent to which Official Plan objectives are achieved on an annual basis.</li> <li>• Applicant satisfaction surveys.</li> <li>• Public satisfaction surveys.</li> <li>• Number of new comments by circulation.</li> <li>• Number of comments unaddressed by applicants.</li> <li>• Number of escalations to Management and Elected Officials.</li> <li>• Number of pre-application consultation meetings.</li> </ul>

# Prioritization of Suggested Recommendations

Suggested recommendations have been mapped for **impact vs effort** to help prioritize activities. The order that recommendations should be implemented would be top left quadrant (low effort, high impact) to bottom left quadrant (low effort, low impact) and top right quadrant (high effort, high impact) down to bottom right quadrant (high effort, low impact). Those in the bottom right quadrant would be considered to be optional as a result of the potential effort required versus the potential benefit derived.



## Suggested Actions

- 1 Develop a detailed property/land development service information strategy
- 2 Establish internal review service standard timelines for application submission
- 3 Measure the customer experience with the development review process
- 4 Establish, document and communicate standardized property/land development service processes
- 5 Establish standard procedures and accountability for performing property/land development service activities
- 6 Establish SBS as the digital change lead to facilitate all property/land development digital service change requests.
- 7 Enhance application tracking procedures through improved use of tools
- 8 Review current data storage solutions to determine the single source of truth.
- 9 Develop and implement standardized property/land development templates
- 10 Develop a data dictionary
- 11 Determine Town employees that should have access to QlikSense dashboarding software
- 12 Equip property/land development employees with analytics tools and training.
- 13 Update property/land development service job descriptions
- 14 Modernize the existing property/land development service technology configuration.
- 15 Review the capabilities of the existing online portals
- 16 Develop and implement a technology strategy
- 17 Consider a review of mobile workforce technologies
- 18 Ensure leadership effectively communicates the vision for the property/land development service
- 19 Ensure alignment of priorities across departments involved in the property/land development service
- 20 Define and document property/land development service related roles and responsibilities
- 21 Establish formal training and learning opportunities for staff
- 22 Develop a formal onboarding process for new staff
- 23 Implement a Project Review meeting as a governance mechanism
- 24 Establish dedicated resource to lead, monitor and report on the change
- 25 Develop a communications strategy to inform staff of Plan-IT initiatives and changes
- 26 Establish an overarching governance structure
- 27 Transition Plan-it Oakville project to a formal continuous improvement program
- 28 Develop a mandatory escalation protocol to reduce the negative impact of stakeholder interventions
- 29 Establish a performance measurement framework

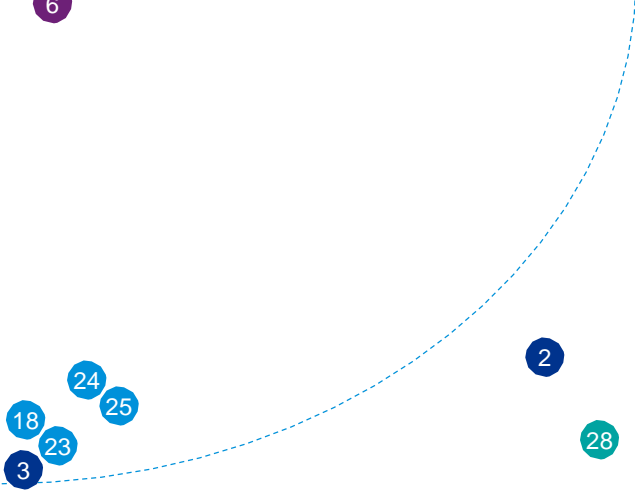
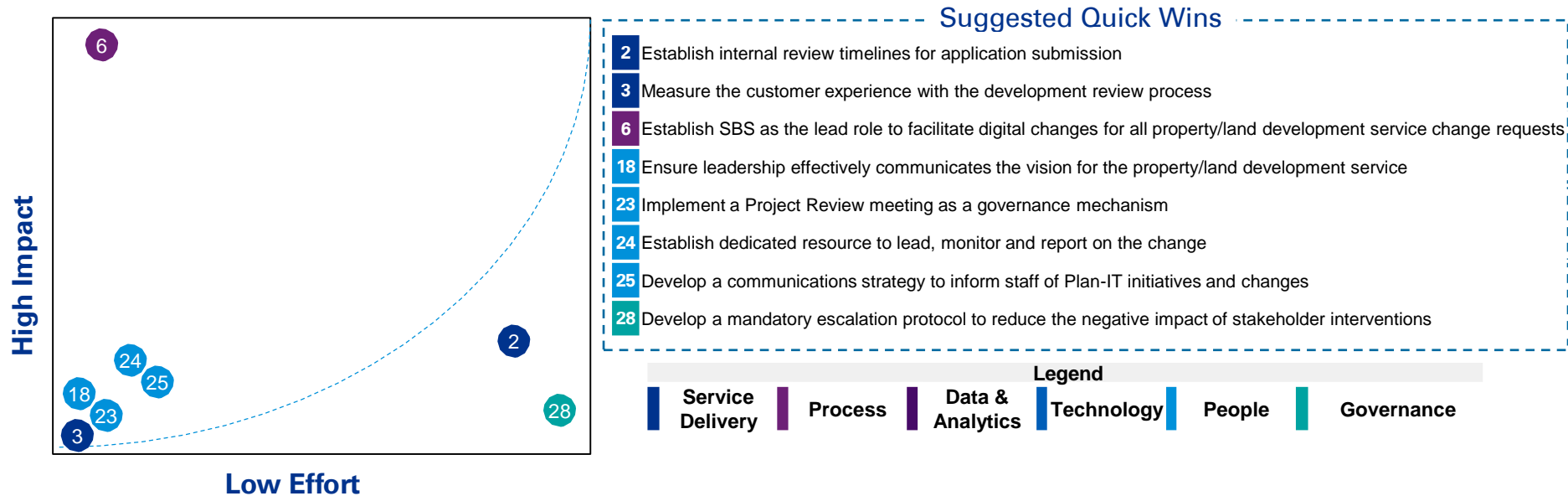
### Legend

- Service Delivery
- Process
- Data & Analytics
- Technology
- People
- Governance

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Summary of Quick Wins

Suggested recommendations that are low effort, high impact are considered quick wins. These quick win recommendations are suggest to be implemented in Q4 of 2021. Recommendation #27 is suggest for implementation in Q2 of 2022.



- 2 Establish internal review timelines for application submission
- 3 Measure the customer experience with the development review process
- 6 Establish SBS as the lead role to facilitate digital changes for all property/land development service change requests
- 18 Ensure leadership effectively communicates the vision for the property/land development service
- 23 Implement a Project Review meeting as a governance mechanism
- 24 Establish dedicated resource to lead, monitor and report on the change
- 25 Develop a communications strategy to inform staff of Plan-IT initiatives and changes
- 28 Develop a mandatory escalation protocol to reduce the negative impact of stakeholder interventions

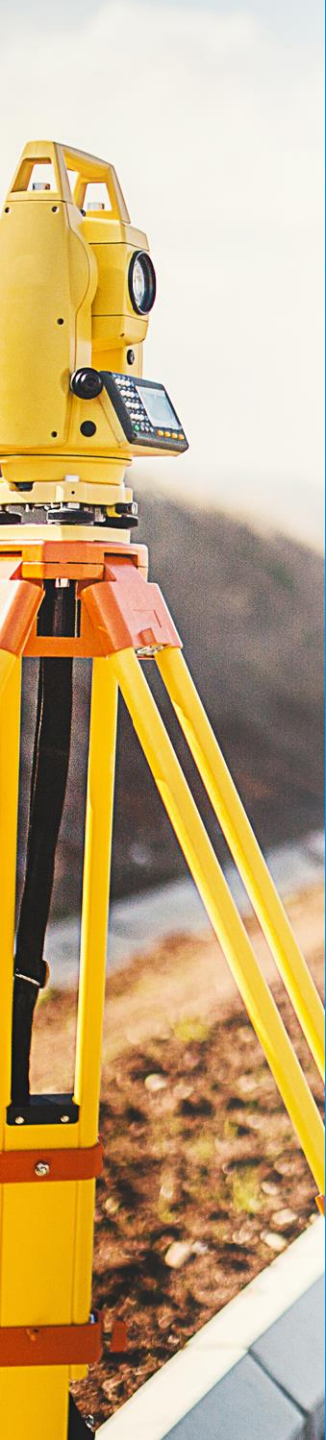
**Legend**

- Service Delivery
- Process
- Data & Analytics
- Technology
- People
- Governance

# Estimated time and cost savings

This slide presents the estimated annual time and cost savings associated with each recommendation. Some of the recommendations may indirectly result in cost savings. For example, implementation of a thorough communication strategy will result in stakeholder buy in, higher productivity and more efficiency; thereby creating time and cost efficiencies. We also anticipate ongoing cost savings with the continuous improvement initiatives.

#	Recommendation	Estimated Time Savings	Estimated Cost Savings
<b>Service delivery Model</b>			
1	Develop a detailed property/land development service information strategy	> 35 Hours	>\$50,000
2	Establish internal review timelines for application submission	25 - 35 Hours	<\$25,000
3	Measure the customer experience with the development review process	15 - 25 Hours	<\$25,000
<b>Process</b>			
4	Establish, document and communicate standardized property/land development service processes	15 - 25 Hours	>\$50,000
5	Establish standard procedures and accountability for performing property/land development service activities	> 35 Hours	\$25,000 - \$50,000
6	Establish SBS as the digital change champion for all property/land development service change requests.	> 35 Hours	\$25,000 - \$50,000
7	Enhance application tracking procedures through improved use of tools	> 35 Hours	<\$25,000
<b>Data &amp; Analytics</b>			
8	Review current data storage solutions to determine the single source of truth	> 35 Hours	>\$50,000
9	Determine Town employees that should have access to QlikSense dashboarding software	15 - 25 Hours	\$25,000 - \$50,000
10	Equip property/land development employees with analytics tools and training.	15 - 25 Hours	\$25,000 - \$50,000
11	Develop and implement standardized property/land development templates	15 - 25 Hours	<\$25,000
12	Develop a data dictionary	15 - 25 Hours	<\$25,000
13	Update property/land development service job descriptions	15 - 25 Hours	<\$25,000
<b>Technology</b>			
14	Develop and implement a technology strategy	> 35 Hours	>\$50,000
15	Modernize the existing property/land development service technology architecture.	25 - 35 Hours	>\$50,000
16	Review the capabilities of the existing online portals	25 - 35 Hours	\$25,000 - \$50,000
17	Consider a review of mobile workforce technologies	25 - 35 Hours	<\$25,000
<b>People</b>			
18	Ensure leadership effectively communicates the vision for the property/land development service	25 - 35 Hours	>\$50,000
19	Ensure alignment of priorities across departments involved in the property/land development service	15 - 25 Hours	>\$50,000
20	Develop a communications strategy	25 - 35 Hours	\$25,000 - \$50,000
21	Establish dedicated resource to lead, monitor and report on the change	25 - 35 Hours	\$25,000 - \$50,000
22	Define and document property/land development service related roles and responsibilities	15 - 25 Hours	<\$25,000
23	Establish formal training and learning opportunities for staff	15 - 25 Hours	<\$25,000
24	Develop a formal onboarding process for new staff	15 - 25 Hours	<\$25,000
25	Implement a Project Review meeting as a governance mechanism	25 - 35 Hours	<\$25,000
<b>Governance</b>			
26	Establish an overarching governance structure	> 35 Hours	>\$50,000
27	Transition Plan-it Oakville project to a formal continuous improvement program	> 35 Hours	>\$50,000
28	Develop a mandatory escalation protocol	25 - 35 Hours	<\$25,000
29	Establish a performance measurement framework	15 - 25 Hours	<\$25,000



# Implementation Plan

Town of Oakville  
Development Process Review  
Final Report

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Implementation Plan

This section summarizes a suggested plan to implement the identified recommendations. The overall implementation plan are based on KPMG leading practice of:

### Implementation Structure

High level resourcing and governance required to successfully implement the recommendations and promote continuous improvement

### Implementation Scorecard

Performance measures to monitor progress and help demonstrate success

### Communications Framework

A framework to structure effective communications



### Implementation Plan

Specific actions and timelines for each of the recommendations outlined in the previous section

### Change Management Framework

A framework to drive effective change management

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Implementation Plan

### 01 Implementation Structure

Successful implementation of the recommendations included in this report will require dedicated resources and effective governance.

It is our understanding that Plan-it Oakville program will spearhead the implementation of recommendations included in this report. Currently, the 2022 Project Plan includes 7 projects, some of which align to the recommendations in this report. Where applicable, we will identify recommendations that should be prioritized within current projects to avoid duplication of effort. Projects identified within the 2022 Project Plan include:

1. Property Development Service & Technology Roadmap
2. Digital file management for property development permits and applications
3. Renew the Bluebeam (plan review tool) contract
4. Online service improvements for property development permits and applications
5. Undertake a review of Building service permit types and associated AMANDA folders
6. Develop transition plan for operationalizing Plan-it
7. Undertake a review of Planning Services application types and associated AMANDA folders

In addition, the Plan-it Oakville program has identified key project resources and vendors that will support each project. In total, approximately \$760K and 8,500 hours will be allocated to Plan-it projects in 2022. The resource team includes:

- Project Manager
- SBS Supervisor
- Business Process Analyst
- Business Solutions Analyst
- Program Manager
- Business Technologist
- Solutions Architect
- Business Analyst
- Application support Analyst
- Other ITS resources
- Senior Purchasing Coordinator
- Web Coordinator, Communication Advisor, SO Supervisor/Manager

# Implementation Plan

## 02 Implementation Plan

This slide presents the implementation plan for each recommendation acknowledging that some recommendations may need to precede other recommendations for successful execution. For example, we are proposing implementation of recommendations under Phase 1 prior to implementation of Phase 2 recommendations. At least 7 of our recommendations in Phases 1 and 2 can be aligned with the Plan-it Oakville's 2022 Project Plan.

#	Recommendation	Quick Wins	Phase 1	Phase 2	Phase 3
<b>Service delivery Model</b>					
1	Develop a detailed property/land development service information strategy				
2	Establish internal review timelines for application submission				
3	Measure the customer experience with the development review process				
<b>Process</b>					
4	Establish, document and communicate standardized property/land development service processes				
5	Establish standard procedures and accountability for performing property/land development service activities				
6	Establish SBS as the digital change champion for all property/land development service change requests.				
7	Enhance application tracking procedures through improved use of tools				
<b>Data &amp; Analytics</b>					
8	Review current data storage solutions to determine the single source of truth				
9	Develop and implement standardized property/land development templates				
10	Develop a data dictionary				
11	Determine Town employees that should have access to QlikSense dashboarding software				
12	Equip property/land development employees with analytics tools and training.				
13	Update property/land development service job descriptions				
<b>Technology</b>					
14	Modernize the existing property/land development service technology architecture.				
15	Review the capabilities of the existing online portals				
16	Develop and implement a technology strategy				
17	Consider a review of mobile workforce technologies				
<b>People</b>					
18	Ensure leadership effectively communicates the vision for the property/land development service				
19	Ensure alignment of priorities across departments involved in the property/land development service				
20	Define and document property/land development service related roles and responsibilities				
21	Establish formal training and learning opportunities for staff				
22	Develop a formal onboarding process for new staff				
23	Implement a Project Review meeting as a governance mechanism				
24	Establish dedicated resource to lead, monitor and report on the change				
25	Develop a communications strategy				
<b>Governance</b>					
26	Establish an overarching governance structure				
27	Transition Plan-it Oakville project to a formal continuous improvement program				
28	Develop a mandatory escalation protocol				
29	Establish a performance measurement framework				



# Implementation Plan

## 02 Implementation Plan

### Service Delivery Model






### Timeline for Implementation

Quick Wins

2022 Project Plan

2023 - 2025

Recommendation	Description of Activities
<p>1</p> <p>Develop a detailed property/land development service information strategy to support the long-term vision and aligned direction of the Town's property/land development service.</p>	 <ul style="list-style-type: none"> <li>Align with the Plan-it 2022 program plan focus area of "Property Development Long-Term Technology Modernization Plan".</li> <li>Incorporate the development service information strategy as part of the long-term service and technology roadmap.</li> </ul>
<p>2</p> <p>Establish internal review service standard timelines for application submission to ensure comments are given in a timely manner.</p>	 <ul style="list-style-type: none"> <li>Establish and clarify who Plan-it Committee members are and associated roles and responsibilities in order to develop appropriate application review timeline commitments.</li> <li>Pilot review timelines for specific applications and monitor performance prior to full roll-out.</li> </ul>
<p>3</p> <p>Measure the customer experience with the development review process (e.g., annual surveys to track performance and continuously improve the customer experience with the Town's property/land development service).</p>	 <ul style="list-style-type: none"> <li>SBS to develop short survey to measure customer experience and report to the Plan-it Committee to facilitate action planning.</li> <li>Use the survey to request customer feedback for applications completed within Q1 of 2022.</li> </ul>

# Implementation Plan

## 02 Implementation Plan

### Process



### Timeline for Implementation



Recommendation		Description of Activities
4	Establish, document and communicate standardized property/land development service processes that clearly define key activities and tools used to complete steps of common or high risk processes. This will ensure each process has consistent and repeatable steps and eliminate customized time consuming and inefficient processes.	
		<ul style="list-style-type: none"> <li>• Incorporate this action into Plan-it's review of building folders and planning folders.</li> <li>• Define standardized planning and building processes to streamline the folder rationalization process.</li> <li>• Establish standard operating procedures (SOPs).</li> </ul>
5	Establish standard procedures and accountability for performing property/land development service activities (e.g., application intake, review).	
		<ul style="list-style-type: none"> <li>• Work with neighboring municipalities and external parties to develop a standard approach to application intake.</li> <li>• Determine intake approach moving towards the future (fully digital or hybrid)</li> </ul>
6	Establish SBS as the digital change lead to facilitate all property/land development digital service change requests.	
		<ul style="list-style-type: none"> <li>• Update SBS mandate to be the lead role for identifying AMANDA change requests and facilitating implementation of such changes.</li> <li>• Issue organizational communications outlining framework for involving SBS in AMANDA digital change requests.</li> </ul>

# Implementation Plan

## 02 Implementation Plan

### Process



### Timeline for Implementation


Quick Wins

2022 Project Plan

2023 - 2025

### Recommendation

### Description of Activities

7	Enhance application tracking procedures through improved use of tools (e.g., AMANDA) to improve application tracking and identification of bottlenecks.	 <ul style="list-style-type: none"> <li>• Develop set of KPIs to monitor and measure application review performance.</li> <li>• Ensure AMANDA is configured to collect data used in KPIs</li> <li>• Develop KPIs dashboards to monitor performance.</li> </ul>

# Implementation Plan

## 02 Implementation Plan

### Data & Analytics



### Timeline for Implementation

Quick Wins

2022 Project Plan

2023 - 2025

Recommendation	Description of Activities
<p>8</p> <p>The Town should review current data storage solutions to determine the single source of truth.</p>	<p>Quick Wins</p> <ul style="list-style-type: none"> <li>Align with the Plan-it 2022 program plan focus area of “Property Development Long-Term Technology Modernization Plan”.</li> <li>Determine the long-term solution for storing data used in dashboards and reporting.</li> </ul>
<p>9, 10</p> <ul style="list-style-type: none"> <li>Develop and implement standardized property/land development templates to streamline workflow processes and timelines of reviews.</li> <li>Develop a data dictionary to assist key stakeholders with data entry into technology systems</li> </ul>	<p>2022 Project Plan</p> <ul style="list-style-type: none"> <li>Create an inventory or property/land development processing templates (e.g. applicant submission forms, in-take templates, commenting review fields).</li> <li>Develop data dictionary to support data requirements within each template.</li> <li>Make the templates publicly available.</li> </ul>

# Implementation Plan

## 02 Implementation Plan

### Data & Analytics



### Timeline for Implementation

Quick Wins

2022 Project Plan

2023 - 2025

Recommendation	Description of Activities
<p>11, 12, 13</p> <ul style="list-style-type: none"> <li>Determine Town employees that should have access to QlikSense dashboarding software and ensure licenses are available for the user group. In addition, training should be provided to employees who are given access to QlikSense dashboarding.</li> <li>Equip property/land development employees with analytics tools and training.</li> <li>Update property/land development service job descriptions to include analytics components</li> </ul>	<p>Align with the Plan-it 2022 program plan focus area of “Property Development Long-Term Technology Modernization Plan”.</p> <ul style="list-style-type: none"> <li>Determine number of employees that should have access to QlikSense.</li> <li>Review QlikSense licenses.</li> <li>Deploy all solutions with training modules.</li> </ul>

# Implementation Plan



## 02 Implementation Plan

### Technology



### Timeline for Implementation



Recommendation		Description of Activities
14	Modernize the existing property/land development service technology configuration.	 <ul style="list-style-type: none"> <li>Align with the Plan-it 2022 program plan focus area of “Property Development Long-Term Technology Modernization Plan”.</li> <li>Conduct detailed evaluation of future state system requirements.</li> <li>Identify the module of AMANDA that the Town can further leverage and determine additional solutions to close gaps (as applicable).</li> </ul>
15	Review the capabilities of the existing online portals and determine if they can be integrated to create a unified solution.	 <ul style="list-style-type: none"> <li>Align with the Plan-it 2022 program plan focus area of “Online Services Capabilities”.</li> <li>Conduct a gap assessment to determine if portal products can support online service enhancements.</li> <li>Conduct preliminary research on the feasibility of adopting a new online portal software.</li> </ul>

# Implementation Plan

## 02 Implementation Plan

### Technology



### Timeline for Implementation

Quick Wins

2022 Project Plan

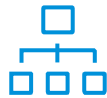
2023 - 2025

Recommendation		Description of Activities
16, 17	<ul style="list-style-type: none"> <li>Develop and implement a technology strategy that will provide the guiding principles for procuring new technology related to the property/land development service.</li> <li>The Town should consider a review of their mobile workforce technologies to ensure the latest version of the technology and additional innovative technologies are deployed.</li> </ul>	<div style="text-align: right; margin-bottom: 10px;"> </div> <ul style="list-style-type: none"> <li>Plan-it to implement existing technology enhancements identified within the 2022 program plan.</li> <li>Work with property/land development service staff to understand and assess future technology needs.</li> <li>Develop plan to continuously enhancement technology tools.</li> <li>Allocated necessary resources to plan and deliver the technology strategy.</li> </ul>

# Implementation Plan

## 02 Implementation Plan

People



### Timeline for Implementation



Recommendation		Description of Activities
18	Ensure leadership effectively communicates the vision for the property/land development service to all levels of staff.	<ul style="list-style-type: none"> <li>• Draft communication to property/land development service staff.</li> <li>• Issue communication with the vision for the property/land development review service.</li> <li>• Ensure employees understand their roles over the next five years.</li> </ul>
19	Ensure alignment of priorities across departments involved in the property/land development service.	<ul style="list-style-type: none"> <li>• Add to 2022 Plan-it program plan.</li> <li>• Define departmental objectives for the year.</li> <li>• Update departmental plans to align with the property/land development service vision.</li> </ul>
20	Define and document property/land development service related roles and responsibilities to align with updated process requirements, refresh recruiting and training strategies, and to reduce process inefficiencies.	<ul style="list-style-type: none"> <li>• Add to 2022 Plan-it program plan.</li> <li>• Plan-it Committee to develop a responsibility assignment matrix in consultation with management</li> <li>• Communicate responsibility matrix to staff and make available in a publicly accessible location</li> <li>• Reflect the RACI in job descriptions as they are updated and include in staff on-boarding</li> </ul>



# Implementation Plan

## 02 Implementation Plan

People



### Timeline for Implementation



Recommendation		Description of Activities
21, 22	<ul style="list-style-type: none"> <li>Establish formal training and learning opportunities for staff to improve efficiency and quality of the property/land development service.</li> <li>Develop a formal onboarding process for new staff joining the property/land development service.</li> </ul>	
		<ul style="list-style-type: none"> <li>Determine medium for training opportunities (e.g., workshops, online).</li> <li>Develop job specific learning plans.</li> </ul>
23	Implement a Project Review meeting as a governance mechanism to resolve difficult application-related issues. Identify project leads to manage the end-to-end development review process.	
		<ul style="list-style-type: none"> <li>Plan-it Committee to develop and approve process documentation for review meetings (e.g. cadence, templates, etc.)</li> <li>Roll out and communicate updated process to staff</li> </ul>
24, 25	<ul style="list-style-type: none"> <li>Establish dedicated resource to lead, monitor and report on the change.</li> <li>Develop a communications strategy to ensure staff are informed of all changes to the property/land development service.</li> </ul>	
		<ul style="list-style-type: none"> <li>Plan-it Committee to appoint change champion for the property/land development service.</li> <li>Develop KPIs to monitor and report on change initiatives.</li> </ul>

# Implementation Plan

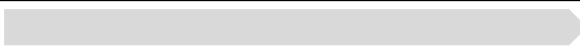


## 02 Implementation Plan

### Governance



### Timeline for Implementation



Recommendation		Description of Activities
26	Establish an overarching governance structure to proactively monitor the property/land development service data and process.	 <ul style="list-style-type: none"> <li>• Add to the Plan-it 2022 program plan.</li> <li>• Document overarching policy, process, data and document governance roles and responsibilities</li> <li>• Assign governance responsibilities to the appropriate stakeholder(s)</li> <li>• Communicate changes to staff.</li> </ul>
27	Transition Plan-it Oakville project to a formal continuous improvement program once the project concludes in 2023 to maximize the impact of existing process improvements and benefits delivered by the project.	 <ul style="list-style-type: none"> <li>• Action is aligned with the Plan-it 2022 program plan focus area of “Transition to Operations”.</li> <li>• Develop plan with roles and responsibilities for managing continuous improvement.</li> </ul>
28	Develop a mandatory escalation protocol to reduce the negative impact of stakeholder interventions during the formal development review process.	 <ul style="list-style-type: none"> <li>• Plan-it Committee, in consultation with staff and stakeholders, to document the escalation protocol</li> <li>• Plan-it Committee to approve the escalation protocol</li> <li>• Implement the protocol, focusing on communications with industry and elected officials.</li> <li>• Begin tracking escalations to support continuous improvement</li> </ul>

# Implementation Plan

## 02 Implementation Plan

### Governance



### Timeline for Implementation

Quick Wins

2022 Project Plan

2023 - 2025

Recommendation		Description of Activities
29	<p>Establish a performance measurement framework to improve the management and evaluation of the property/land development service.</p>	<div style="text-align: right; margin-bottom: 10px;"> </div> <ul style="list-style-type: none"> <li>Plan-it Committee to inventory existing performance measures used across the development review process, including metrics, systems, collection frequency and use</li> <li>Plan-it Committee to develop detailed project plan to develop performance measurement framework</li> <li>Develop the performance measurement framework and submit to Plan-it Committee for approval</li> </ul>

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Implementation Plan

### 03 Implementation Scorecard

This section presents a scorecard to help measure the implementation of the identified recommendations. Demonstrating progress will help build buy-in with internal and external stakeholders, facilitating change.

This scorecard should be reviewed and approved by the Executive Management Team and reviewed on a monthly basis by the SBS team.

Success Factor	Does this Exist? (✓/✗)
<b>Implementation Structure</b>	
• The recommendations and Plan included in this report have been approved by Town Council.	
• A clear project governance structure is in place and working well (see Section 1).	
• Sufficient staff capacity and resources are dedicated to the work ahead and are working well (see Section 1).	
<b>Project Management</b>	
• Work plans exist to support the implementation of all recommendations.	
• A holistic communications strategy and the accompanying communications plans are developed for the relevant recommendations.	
• Recommendations are implemented according to roadmap timelines; delays are justified and communicated.	
• Recommendations that have been implemented are reviewed every six to 12 months for effectiveness.	
<b>Customer Centricity</b>	
• Applicants are engaged in the implementation process	
• The applicant experience is measured and improving (see Recommendation 5.1).	

# Town of Oakville – Review of Service Delivery & Modernization Opportunities for the Property/Land Development Service

## Implementation Plan

### 04 Change Management Framework

Effective change management aligns leaders and staff around change that is clearly defined, justified and well-communicated. The figure below presents KPMG’s change management framework as a starting point for the development of a detailed change management plan to support the implementation of the recommendations included in this report.



To help ensure internal and external stakeholders are ready, willing and able to implement change, the Town of Oakville should:

- 1. Make it Clear:** Ensure senior Town leadership understands and is committed to the importance of visible, aligned and ongoing support for an improved development review process.
- 2. Make it Known:** Develop and implement a detailed communications plan that clearly articulates the overall case for change to each stakeholder group. Consider identifying champions in each development review-related department to help spread the message. Ensure approval of this report and its roadmap is widely communicated.
- 3. Make it Real:** Clearly define the Plan-it Oakville team roles, responsibilities and mandate. Develop detailed change management plans for the recommendations included in in this report.
- 4. Make it Happen:** Begin implementation. Resolve issues and mitigate risks by escalating them through appropriate channels. Focus on high-impact recommendations and continuously monitor the effect of implementation on each stakeholder group.
- 5. Make it Stick:** Use the implementation Scorecard to measure progress and maintain momentum.

## 05 Communications Strategy

Communications is a critical change-enabler. This section presents five strategic principles to support effective communications during a significant, process-driven transformation:

1. **Equip leaders and change agents:** equip leaders and other change agents with easy-to-use key messages and communication tools.
2. **Develop tailored key messages:** identify different stakeholder groups and develop targeted key messages for each group.
3. **Communicate consistent messages:** communicate consistent messages emphasizing the case for change and anticipated benefits.
4. **Reinforce messages:** repeat and reinforce key messages and progress through a variety of tactics and channels with each stakeholder group.
5. **Engage industry:** communicate directly and regularly with this stakeholder groups.

These principles should be used as a starting point for the development of a tactical communications plan to support the implementation of the recommendations identified in the report. A tactical communications plan should define the communications-related activities that accompany each recommendation/change as well as the overall improvement project. An effective tactical communications plan should include:

- The overall case for change;
- The unique key messages that accompany each initiative or recommendation;
- The key audience(s) when communicating each key message;
- The roll-out timelines; and
- The methods and channels that are to be used when communicating.

The figure on the following pages provides additional detail on each of the five communications principles included in this section.

**05 Communications Strategy**

Principle	Outcomes	High Level Tactics
<b>Equip leaders and change agents.</b>	Organizational leadership and change champions have the tools needed to promote the case for change.	<ul style="list-style-type: none"> <li>• During the first 90 days, provides a refresher course in change management and effective communications for leaders and change agents.</li> <li>• Continuously update key messages and communication tools for leadership to ensure they remain relevant and effective.</li> </ul>
<b>Develop tailored key messages.</b>	Different stakeholder groups are targeted with specific key messages, increases the chances of success.	<ul style="list-style-type: none"> <li>• Identify different internal and external stakeholder groups involved in the development review process.</li> <li>• Review how the overall implementation roadmap will impact each group as well as the implementation of specific recommendations.</li> <li>• Develop targeted key messages that speak to how each stakeholder group will be impacted by the change, identifying each group's unique case for change.</li> </ul>
<b>Communicate consistent messages</b>	Key messages are developed and are consistent across initiatives and time, and align with the broader goals of the property/land development service.	<ul style="list-style-type: none"> <li>• Identify near-term milestones and any quick wins/</li> <li>• Develop and leverage key messages consistently through all communications to build consistency, credibility and support.</li> <li>• Create a common look and style for change communications. Use it consistently in materials so that communications are recognizable.</li> </ul>
<b>Reinforce messages</b>	Multiple opportunities are created for key stakeholders to provide input.	<ul style="list-style-type: none"> <li>• Provide regular communications which set specific, clear and relevant expectations and then report back on progress.</li> <li>• Use existing communication channels (email, internal portals, the online planning portal) to regularly share information.</li> <li>• Develop standards and messages for the change writ-large, and cater messaging in tactical communications plans that support individual initiatives.</li> <li>• Encourage two-way dialogue and feedback from stakeholders to continuously improve communication approaches.</li> </ul>
<b>Engage industry</b>	Initiatives underway are consistently communicated to industry stakeholders to maintain their awareness and buy-in.	<ul style="list-style-type: none"> <li>• Provide structured, formal updates to industry groups, leveraging existing mechanisms.</li> <li>• Follow up with all industry stakeholders engaged by KPMG to provide a status update and opportunity to review and validate this report.</li> </ul>



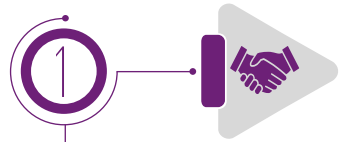
# Conclusion

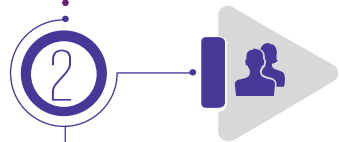
Town of Oakville  
Development Process Review  
Final Report

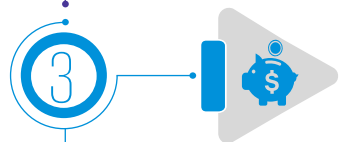


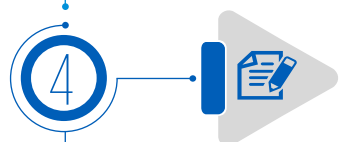
# Conclusion

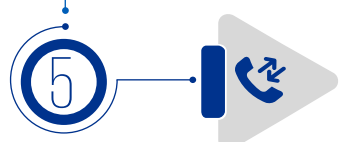
Overall, the Town is well positioned to digitally enhance the property/land development service over the next 5 years. The results of the jurisdictional scan noted the Town is ahead of its peer group in terms of technology configuration, digital process maturity and organizational support. The implementation of the recommendations in this report will increase the Town's property/land development service digital maturity in order to efficiently and effectively achieve the service's vision. In addition, the Town has adequately prepared itself for a successful digital transformation by responding to the following five questions:

- 

**Is the organization ready?**  
The jurisdictional scan revealed the Town is ahead of its peers in terms of property/land development service digital maturity. In addition, the Town has taken necessary steps to improve online service capabilities to create a more effective digital service delivery model.
- 

**Who will lead the transformation?**  
The property/land development service digital transformation is being led by the Plan-it program. The program has developed a program plan with initiatives that support the service's vision. The program plan will be supplemented with recommendations outlined in this report. Management needs to determine if SBS will continue to lead the initiative going forward.
- 

**Is the transformation appropriately funded and resourced?**  
The Plan-it program has been adequately funded to-date. Total budget (including contingency) to carry out the 2022 program plan is set at approximately \$760K. For the Plan-it program, 2 contract Project Managers are funded from the capital budget and 2 SBS resources are working full time from the operational budget. Moving into 2023-2025, the Town will need to determine if SBS will continue to support the Plan-it program as additional resources may be required.
- 

**Does the plan include contingencies?**  
The Plan-it project plan includes a number of initiatives to increase the efficiency and effectiveness of AMANDA workflows. Despite the recommended changes, there still remains the risks associated with AMANDA – that it is not project based, is still highly resource driven and often times insufficiently supported due to the vendor's changing management structure. The Town would need to re-assess the future with AMANDA once the recommendations are implemented.
- 

**Is the project team ready for collaboration?**  
The Plan-it program approach to digital transformation has created efficient and effective collaboration and coordination between property/land development service departments. However, the strategic alignment and priorities across the departments need to be better communicated to all staff.



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