



# Town of Bracebridge Service Delivery and Modernization Review: Planning and Development

Final Report

—  
January 28, 2022



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# Table of Contents



## Chapter

## Page

1	Disclaimer	2
2	Project Approach	4
3	Stakeholder Consultation Feedback	7
4	Jurisdictional Scan	16
5	Process Mapping Workshops Summary	19
6	Summary of Observations & Recommendations	21
7	Implementation Plan	38
8	Summary	45
9	Appendix A: Jurisdictional Scan Results	47
10	Appendix B: Process Maps	51



# Project Approach



# Project Overview

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

- The Town's development review processes are critical to achieving the Town's vision for building and encouraging a robust local and regional economy. As such, the Town is looking to ensure its processes are modern, efficient, and effective to achieve long-term growth and develop strong, accessible and sustainable communities.
- The Town would like to understand the impact of initiatives underway at the regional and provincial level with respect to the implementation of digitizing application/data for better integration.

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

The Town of Bracebridge (the "Town") engaged KPMG to conduct a Service Delivery and Modernization review of the Planning & Development department ("the Department"). The key objective was to identify optimum paths for developing digitized, streamlined, and integrated building and planning processes.

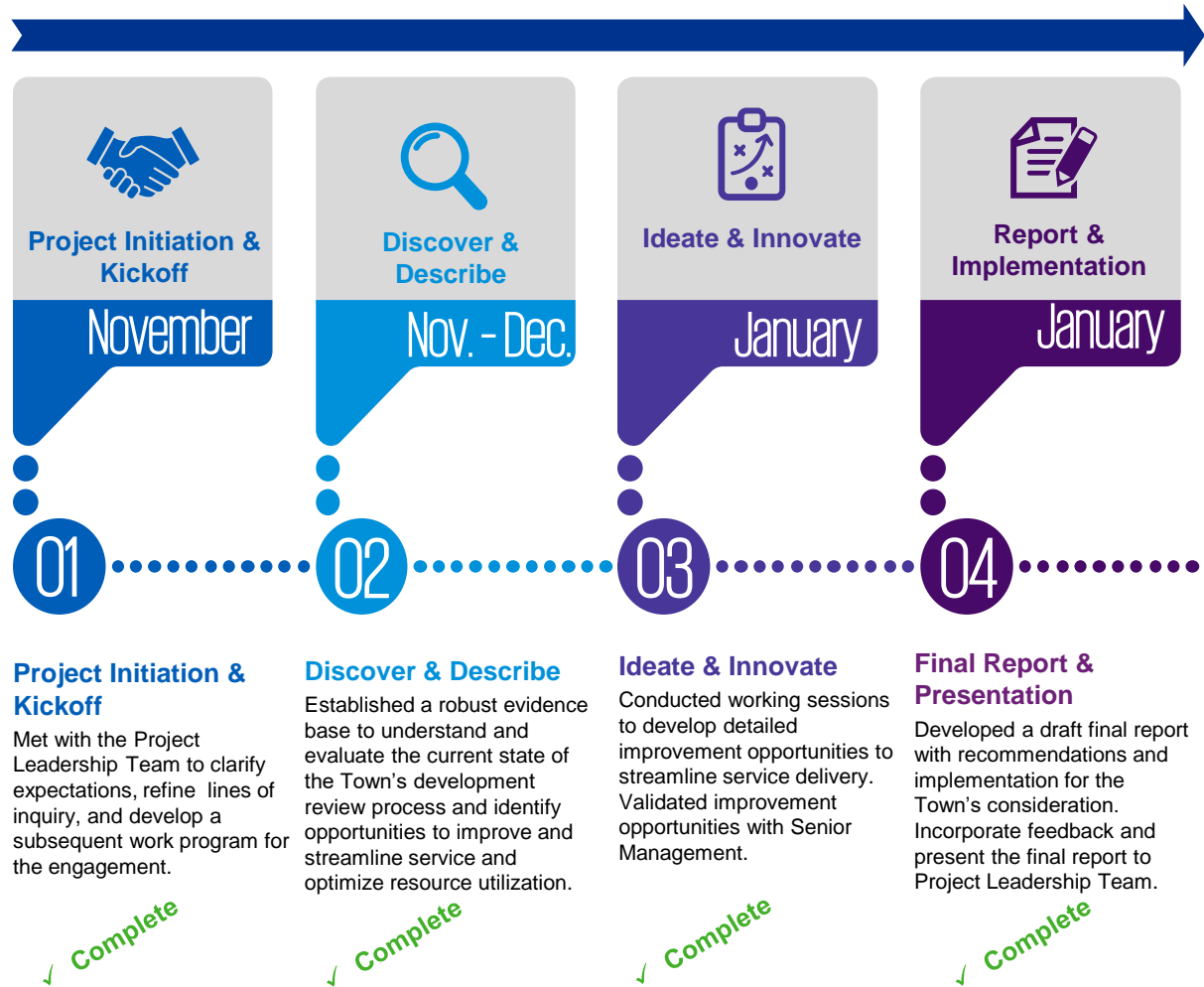
## Project Principles – *What is Important to Us?*

- 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 Service Delivery and Modernization of the Planning and Development review process was conducted in a way that engages the Town's employees.
- The aim was to, wherever possible, transfer knowledge and necessary "tools" to the Planning and Development department 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 identified opportunities to improve the efficiency and effectiveness of how the Town's Planning and Development department provides services to the citizens of Bracebridge.

## Project Timing

The project commenced on November 11, 2021. The project is completed when the Final Report is presented to Project Leadership Team on or before January 31, 2022.

# Project Phases





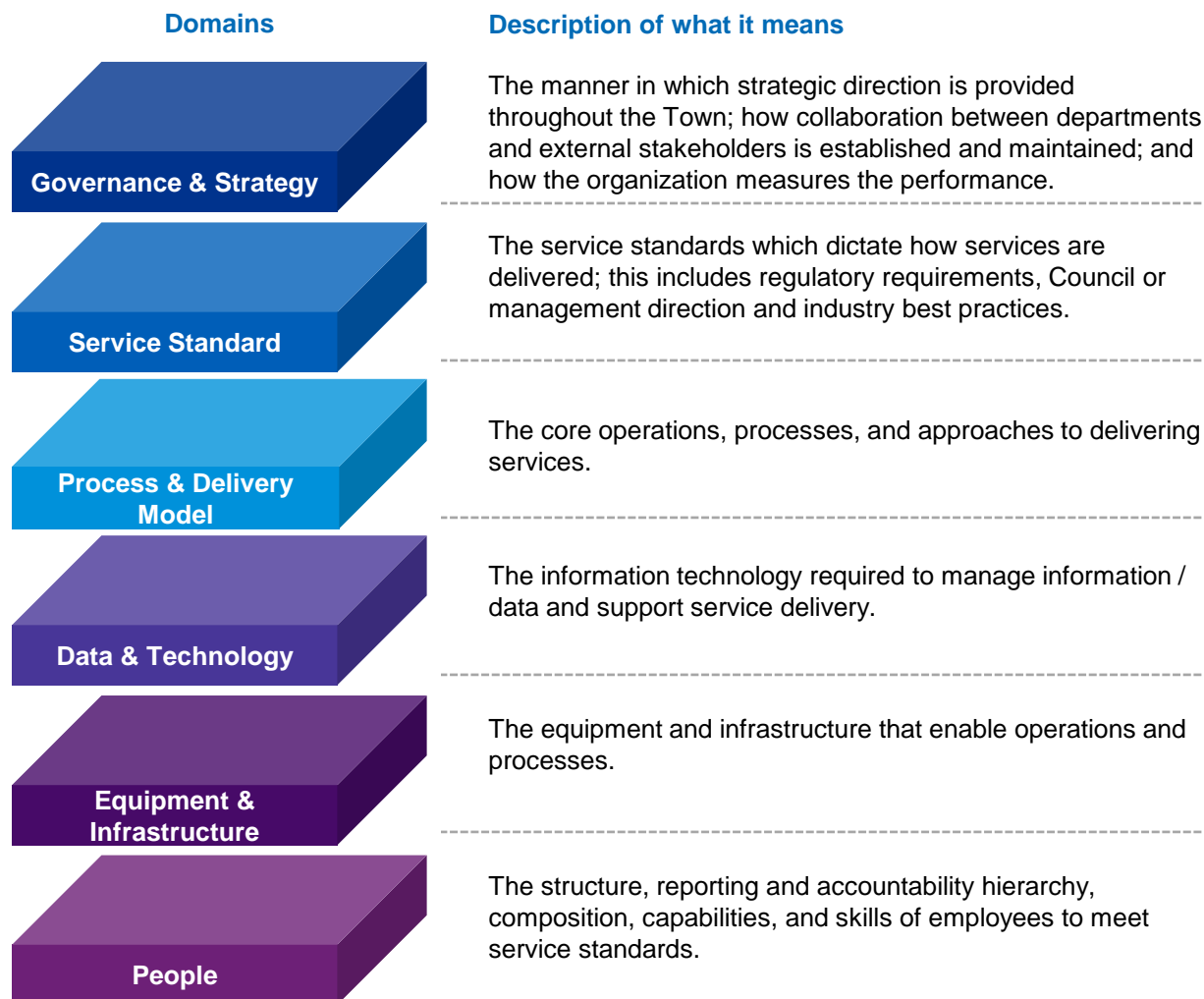
# Stakeholder Consultation Feedback



# Target Operating Model

## Framework to structure the review

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

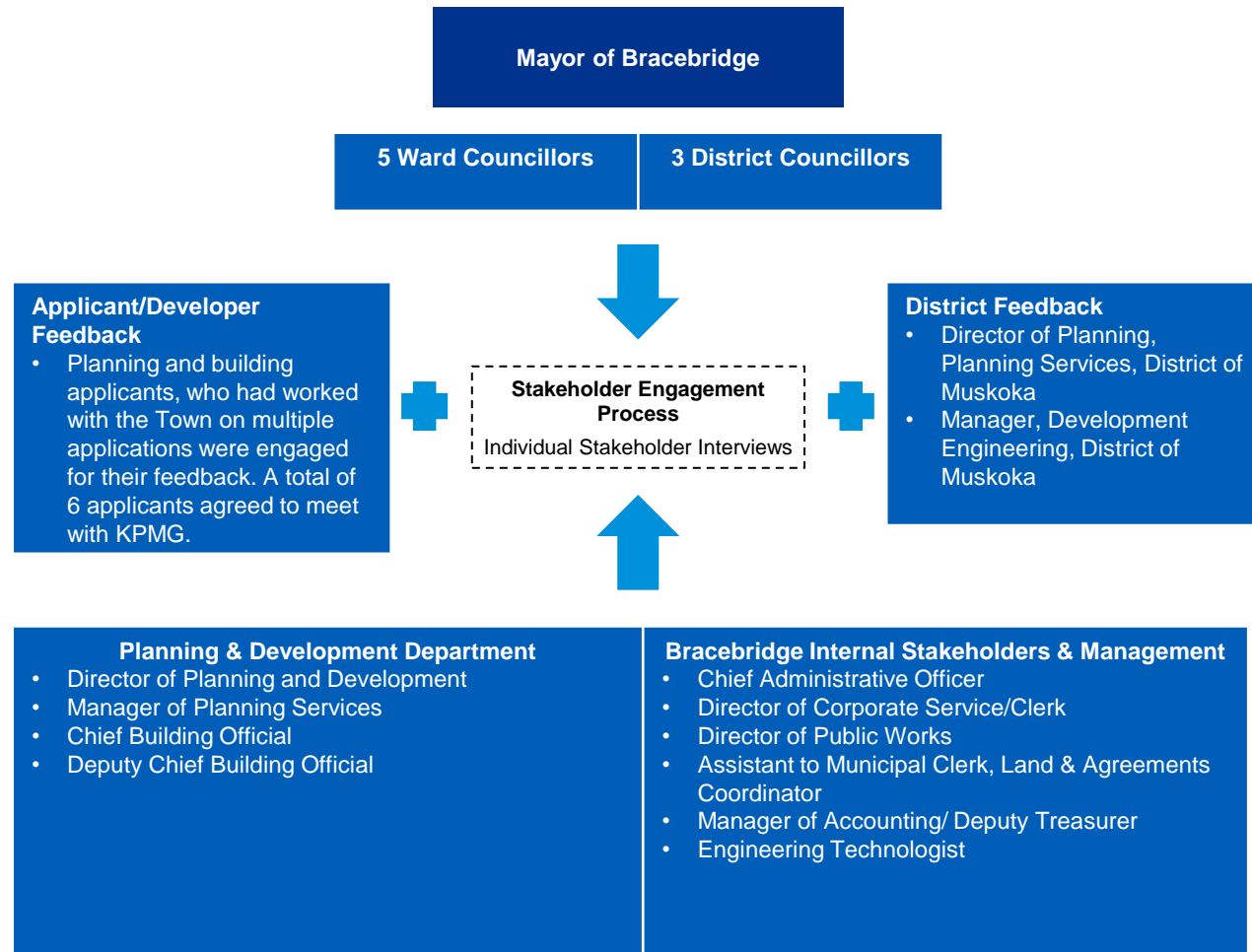
## The Engagement Process

Key themes from the stakeholder interviews are organized into the six TOM domains as a means of analyzing and understanding the current state of the Town's planning and development processes.

The themes are a reflection of stakeholders' understanding of the Town's building and planning services.

### Engagement Process & Details

Key stakeholders were engaged to obtain a holistic understanding of the current state of the Town's planning and development processes.



# Themes from Council Interviews

Council feedback is reflected here. Key themes from the Council interviews are:

- Streamline customer service. Make it simple for the applicant.
- Communicate the processing timelines.
- Clarify the application steps and documentation needed for application review and approval.

## Council Feedback Themes

<b>Governance &amp; Strategy</b>	<ul style="list-style-type: none"> <li>▪ We understand through the consultations that Council is supportive of the current performance of the Department. It was noted that Council recognizes the challenge of delivering services with resource limitations while also trying to meet customer expectations.</li> <li>▪ Council has prioritized short-term rental policies and procedures. We understand that recent Planning and Development Committee meetings and Council meetings have discussed this concern. The Town is working on a strategic approach to governing short term rental properties.</li> <li>▪ Council raised concern about affordable housing. Delays in application approval further effects the availability of affordable of housing. The Town will also need to strategically plan infrastructure to service new housing.</li> </ul>
<b>Service Standard</b>	<ul style="list-style-type: none"> <li>▪ We understand that Council believes better public education is needed regarding the Town's service levels (e.g. timelines to respond to an inquiry, timelines to process a specific type of application).</li> <li>▪ Some Councillors would like to re-evaluate the user fee structure the Town charges for its planning and development services. We understand that Council has recently approved new user fees.</li> </ul>
<b>Process &amp; Delivery Model</b>	<ul style="list-style-type: none"> <li>▪ Interviewed Councillors noted that the various application review processes may be challenging for private citizens to understand. Applicants who work in the development industry, such as developers, planners, architects, etc., have a better understanding of the Town's land use planning and development processes.</li> <li>▪ Some Councillors noted the municipal website could be further improved to communicate what is considered a complete application and timelines to process an application. Some applicants may not be aware that they have to complete certain documentation under the Planning Act and the Town's Official Plan/Zoning By-law.</li> <li>▪ Councillors emphasized that the Planning and Development staff provide good customer service; however, they also noted that front counter services are important as part of customer service. The front counter appears to lack space for more confidential discussion on development matters.</li> </ul>

# Themes from Council Interviews

Council feedback is reflected here. Key themes from the Council interviews are:

- Balance the use of technology versus accessibility, especially for residents living in rural areas with poor internet connection.
- Office setting lacks room for more private discussions.
- The Town has a strong Planning and Development team and Council is supportive of recruiting additional staff.

## Council Feedback Themes

<b>Data &amp; Technology</b>	<ul style="list-style-type: none"> <li>▪ Councillors noted that there should be a balance between online versus in-person customer services, specifically for residents that do not have internet access.</li> <li>▪ We heard the Councillors are supportive of staff streamlining processes through improvements in technology and data management to create staff capacity (e.g. transition away from paper processes) and process applications more efficiently. The Town will need to work with the District or other lower tiers to enhance IT capabilities.</li> </ul>
<b>Equipment &amp; Infrastructure</b>	<ul style="list-style-type: none"> <li>▪ KPMG noted from Council consultation, that the Department's office setting is a concern. The Department needs more space (e.g. consultation rooms and staff work space) and be more accessible for the public.</li> </ul>
<b>People</b>	<ul style="list-style-type: none"> <li>▪ Councillors communicated to KPMG that the Town has a strong Planning and Development team handling building and development matters. Councillors also recognized the staffing shortages, increased volume of applications and work load, and are supportive of recruiting additional staff.</li> <li>▪ Councillors indicated that reports are well-written to inform Council of specific development matters for decision-making.</li> <li>▪ There were suggestions that staff maintain a log of topics discussed with Council that may be considered for Official Plan updates.</li> </ul>

# Themes from Management, Staff & District Consultations

Key themes from stakeholder interviews:

- Processes need improvement either via better records management / information sharing or through use of technology.
- The Town needs to approach IT solutions more strategically.
- Improve public communication to reduce customer inquiries or submission of incomplete applications.
- Service timelines are unclear from a public perspective.

## Stakeholder Feedback Themes

<b>Governance &amp; Strategy</b>	<ul style="list-style-type: none"> <li>▪ Interviewed stakeholders consistently noted that that the Department has performed strongly to keep up with development demand.</li> <li>▪ Re-engineering processes, either with existing systems and tools or through a new solution, in a strategic manner could help create staff capacity. The Town needs to strategically work with the District on improving its current IT infrastructure. For example, the District is looking into new development review software (“Esri”), while SharePoint is being deployed as a records management tool at the Town.</li> <li>▪ Respondents believe the current organizational structure is set appropriately for cross-discipline collaboration.</li> </ul>
<b>Service Standard</b>	<ul style="list-style-type: none"> <li>▪ The Department strives to meet the Planning Act and Building Code Act timelines; however, with increases in development pressures, keeping up with service demand has been a challenge given current resource levels.</li> <li>▪ Applicants expect a fast turnaround time; however, with growing application volume, the Department has not had time to review and set response timelines, specifically for planning applications.</li> </ul>
<b>Process &amp; Delivery Model</b>	<ul style="list-style-type: none"> <li>▪ Application review processes need to be finetuned, specifically, the balance between digital and paper process steps. Respondents raised several observations:               <ul style="list-style-type: none"> <li>▪ The application intake and tracking process could be further streamlined. For example, improve public communication of what constitutes a complete application and clarify the key steps needed for application review.</li> <li>▪ Improving the Town’s website and educating the public of building and planning information may also assist in reducing the volume of customer inquiries.</li> <li>▪ Consider setting or allocating work priority based on the complexity of case versus a first-come-first-serve basis.</li> <li>▪ Reduce the amount of emails, data entry, printing and scanning steps. Respondents believe this will improve with the use of SharePoint.</li> <li>▪ Consider delegating more administrative and approval authorities (e.g. shore road allowance) from the Department’s leadership level to middle management to expedite processing timelines.</li> <li>▪ Improve application forms to be more user-friendly (e.g. fillable PDFs).</li> <li>▪ Public notices may be difficult for the public to understand and need to be written in a more easy-to-understand format.</li> </ul> </li> <li>▪ Due to the COVID-19 pandemic, it was a corporate decision to close the Planning counter. Consider re-opening the Planning counter to allow customers more time and space to discuss application matters.</li> </ul>

# Themes from Management, Staff & District Consultations

Key themes from stakeholder interviews:

- The Town is deploying the use of SharePoint. The intention is to utilize SharePoint for application review and file management.
- Allow online payment options.
- The Town needs to work with the District to upgrade existing systems and processes.

## Stakeholder Feedback Themes

### Data & Technology

- The Department relies heavily on paper to review applications. For example, the Town does not have a software to review drawings. Review comments and approvals are provided back to applicants in paper form.
- Email is the primary form of communication used by the Town between staff, commenting agencies, and with applicants. A notification system of application status would be helpful in managing workflow and application cases.
- The Town is in the process of deploying SharePoint, which will assist in managing and retaining application files. There is an opportunity to further streamline application review processes between the use of manual and digital files. For example, commenting departments can review files and provide comments via SharePoint and reduce email volume.
- The Town uses a system called Marmak to manage the issuance of building permits and applications. The Town has used Marmak for more than 20 years and previously used excel spreadsheets to track building permit applications. However, the software is not used for planning application reviews. The software is contracted via the District and the Town has experienced challenges working with the software vendor to address specific operational needs.
- Allowing online payment options will help make the planning and development application process more efficient.

### Equipment & Infrastructure

- There is limited office space available to accommodate additional staff. The Town is currently performing a work space study. As part of the study, all options for office space will be considered including a review of the Town's Remote Work Policy and electronic files for certain planning and building applications as an opportunity to rationalize space needs.
- With the implementation of SharePoint, staff believe there is opportunity to re-fresh its record management practices and potentially free up more space.
- The Town's IT infrastructure is outsourced to the District. Respondents noted that the Town will need to work with the District to improve its current systems and infrastructure. They also noted that IT solutions are often determined in a siloed manner, for example software solutions should be evaluated based on their ability to "speak to" other programs in use in the municipality and/or reporting structures such as MPAC. Such efforts would streamline the submission of data or processes to multiple sources.

# Themes from Management, Staff & District Consultations

Key themes from stakeholder interviews:

- Additional staffing is needed to keep up with application volume.

## Stakeholder Feedback Themes

### People

- Respondents commented that staff produce high quality work and demonstrate an in-depth understanding of the issues presented in application cases. Each application case is reviewed in detail to ensure it aligns with regulation and the Town's policies.
- Staff capacity was identified as a major concern by stakeholders. There has been limited growth in the Town's staff complement of development related positions (e.g. planners, building inspectors, etc.); however, application volume has increased significantly. Staff have limited capacity to implement process improvements.
- Respondents highlighted challenges in recruiting and retaining talent. Several factors contribute to the recruitment challenges, such as offering competitive pay, affordable housing, trailing spouse, etc.

# Themes from Applicant Feedback

Applicant feedback is reflected here. Key themes from applicant interviews are:

- Planning Committee Meetings and Public Meetings could be run more efficiently.
- Application processing timelines and application status are not clear.
- Pre-consultation meetings are valuable to determine application material needed for review.
- Once an application is submitted, minimize revisions or the need to provide supplemental material.

## Applicant Feedback Themes

<b>Governance &amp; Strategy</b>	<ul style="list-style-type: none"> <li>▪ Customers interviewed consistently mentioned that the way the Town conducts the Planning Committee Meetings and Public Meetings could be modified. Several observations were raised:               <ul style="list-style-type: none"> <li>▪ Agenda sequence and time allocated to discuss application matters could be more efficient.</li> <li>▪ Allow applicants to present their proposal, if they prefer, instead of having staff present the case.</li> <li>▪ Staff reports are at times too detailed. There were suggestions for a more condensed report format.</li> <li>▪ Often times, there is not enough time allocated to all agenda items for fulsome discussions resulting in deferrals or requests to applicants to provide more information, which in turn, delays the application approval timeline.</li> </ul> </li> </ul>
<b>Service Standards</b>	<ul style="list-style-type: none"> <li>▪ Respondents noted that they do not have a clear understanding of the Town's processing timelines. Application reviews appear to take longer than expected; the only system to inquire the status of an application is to contact the Department to inquire the status their application.</li> <li>▪ "Time is money" - All respondents noted that application review and approval delays have a broader impact to the local economy (e.g. employment, housing, cashflow management/banking arrangements, etc.).</li> <li>▪ Applicants can benefit from having clear upfront checklists of documents that need to be prepared for application review. It was suggested that the Town could minimize re-submissions/revisions or the need to provide supplemental material stemming from commenting agencies.</li> </ul>
<b>Process and Delivery Model</b>	<ul style="list-style-type: none"> <li>▪ Pre-consultation meetings are valuable for establishing a mutual understanding of the feasibility of a development proposal and determining the application material needed.</li> <li>▪ Respondents noted that the current application submission process is working as intended. The primary submission method is via email, mail, or physical submissions.</li> <li>▪ Some respondents believe the Town should work more closely with the Town's outside legal counsel to complete the review of legal agreements more timely.</li> <li>▪ Certain commenting agencies' review comments may not align with the application process or may not be completely relevant to the case; however, Town staff expects applicants to address them.</li> <li>▪ The Town's resourcing model is too lean that results in review backlogs.</li> </ul>

# Themes from Applicant Feedback

Applicant feedback is reflected here. Key themes from applicant interviews are:

- Online payment options would save time and effort.
- Some applicants raised concerns over the available office space for the Department
- Leadership could delegate more decision-making to staff
- Additional staff is required to meet the Town's operational requirements.
- All applicants speak highly of the Town's Planning and Development department staff

## Applicant Feedback Themes

<b>Data &amp; Technology</b>	<ul style="list-style-type: none"> <li>▪ All customers interviewed expressed the need for electronic payment options.</li> <li>▪ The Town's acceptance of electronic signatures have provided some efficiencies.</li> <li>▪ Respondents are neutral in terms of the data and technology used by the Town. If the Town moves towards online submissions, the technology needs to be user friendly. Specific items to consider:               <ul style="list-style-type: none"> <li>▪ Electronic fillable forms should be flexible and easy to use.</li> <li>▪ Provide receipt confirmation of date, time, and files that were submitted or re-submitted.</li> <li>▪ Online status reporting of individual applications.</li> <li>▪ The Town will need strong file management practices.</li> </ul> </li> </ul>
<b>Equipment &amp; Infrastructure</b>	<ul style="list-style-type: none"> <li>▪ Overall, respondents were neutral in terms of the equipment and infrastructure used by the Town.</li> <li>▪ Some applicants noted that the office setting used for meetings could be more private.</li> </ul>
<b>People</b>	<ul style="list-style-type: none"> <li>▪ All applicants speak highly of the Town's Planning and Development department staff:               <ul style="list-style-type: none"> <li>▪ Staff are responsive to inquiries.</li> <li>▪ Staff are professional and willing to work with applicants to find solutions.</li> </ul> </li> <li>▪ Respondents also provided their observations for improvement, such as:               <ul style="list-style-type: none"> <li>▪ Leadership could delegate more decision-making responsibilities to staff</li> <li>▪ When interpreting legislation, be less stringent and more open to creative ideas.</li> </ul> </li> <li>▪ Respondents noted that the Town could use additional human resources to meet the required service levels.</li> </ul>





# Jurisdictional Scan



# Jurisdictional Scan



Based on the jurisdictional scan completed for the Town of Oakville, respondents noted that AMANDA is the most commonly used software within Building Services, Municipal By-Law, Planning Services, Enforcement Services, Engineering and Licensing. This slide reflects the key findings from the scan.

The Town of Bracebridge had considered the AMANDA software; however selected Marmak due to cost considerations. The cost for implementing and maintaining AMANDA is significantly higher (approximately \$100K - \$150K annually).

## Town of Oakville

### Town of Oakville – Jurisdictional Scan Results (Refer Appendix A)

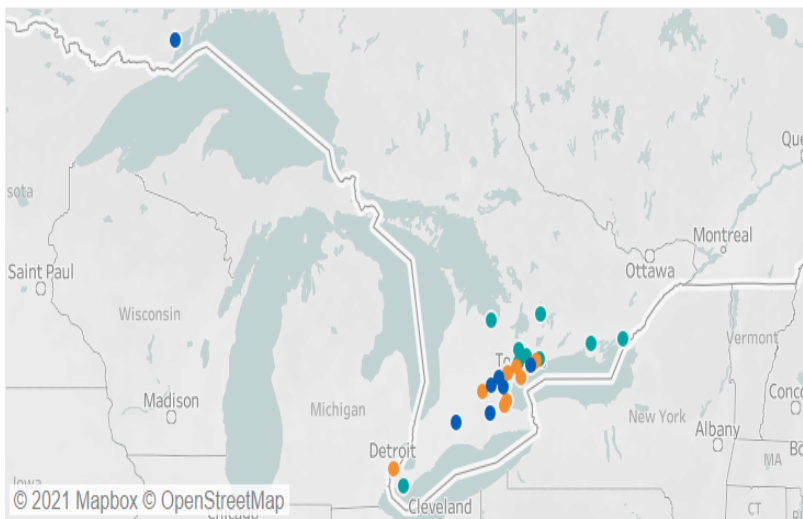
Number of Respondents: 25

Total AMANDA Users: 16

Other Software Users: 9

It was noted that the larger municipalities generally adopted AMANDA and used it across multiple departments. Smaller municipalities used other software to support their Planning and Development function.

### Respondent location



■ AMANDA                      ■ AMANDA and other software                      ■ Other software

## Software Used by Smaller Municipalities

Municipalities that are not using AMANDA have deployed the following software for processing permits and planning applications:

- ProjectDox** Provides configurable workflows, file and markup versioning, digital signature verification, review comments, drawing change compare verification and applicant communications.
- Cityworks** Allows municipalities to share information, streamlining the application review process and customer service.
- EnerGov** Automates land use planning, permitting enforcement case management and inspections.
- Accela** Automates planning applicants submission, status updates, and process payments.
- CityView** Facilitates paperless process that shortens permit and case turnaround time.

## Common Supporting Software Solutions

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

# Jurisdictional Scan



This slide provides information about other key initiatives around the building, planning and development process across the Province.

## Association of Municipalities Ontario (AMO) and Cloudpermit

In January 2022, AMO announced it is partnering with Cloudpermit to offer a digital platform for municipalities to process building permits. The intention is allow municipalities to process building permits more efficiently, streamline processes, improve customer service, and capture new assessments in a more timely manner. According to their website, Cloudpermit has capability to provide a suite of planning and building solutions.

Key features planned include permitting application and review, communications with applicants, payment processing, data management, and coordination with MPAC. AMO is looking for municipalities to participate in its pilot program. A formal Expression of Interest (EOI) to participate in the pilot is expected to be distributed to Ontario municipalities for consideration in the coming days.



## One Ontario

One Ontario is an innovative research and development project that engages municipal and provincial governments, architecture, engineering and construction stakeholders, software providers and academics. They aim to streamline the development approval process by establishing data exchange guidelines. One Ontario is focused on four main objectives, which will establish the infrastructure needed to future-proof the development approval process.

- Identify data exchange requirements
- Design an e-permitting roadmap
- Create the framework for a BIM standard
- Establish a Digital Infrastructure Research Centre

There are multiple organizations and municipalities that have joined the One Ontario coalition including City of Toronto, City of Windsor, Town of Oakville to name a few.

While the organization has issued multiple articles on thought leadership, there is limited information publicly available on the progress against deliverables.



## Municipal Trends

- In recent years, more and more municipalities are reviewing its planning and development services.
- The common trend has been streamlining processes with the assistance of software solutions for more efficiency and better customer service.
- Common challenges are:
  - Procurement of siloed solutions with data integration problems.
  - Upskilling and training the workforce to use technology.
  - Vendor support challenges to customize specific software functions.
  - Implementing workflows without rationalizing existing processes (e.g. workflows are too cumbersome; trying to fit manual processes into electronic workflows).
  - Building has generally been more proactive in digitizing services while Planning is often still using manual processes.



# Process Maps Workshop Summary



# Process Mapping

KPMG conducted 3 process mapping sessions with the Town of Bracebridge to understand the current processes and identify process improvement opportunities. The following are the 3 processes discussed:

- Rezoning
- Site Plan
- Building Permit

*Detailed process maps are included in Appendix B.*

Key themes include:

- High reliance on email correspondence
- Electronic file management has presented challenges (for example version control)
- Manual file management and tracking of key application documentation

## Key Themes

Key themes from each process are highlighted here:

### Rezoning

- There is a high reliance on email to monitor developer inquiries and communicate with the applicant and with commenting agencies.
- Duplication of effort in terms of file management, specifically for application intake. When the Town receives a hard copy application, the Planning Administrator scans the application and stores the application in both electronic and manual forms. In addition, when an electronic application is received, the application is printed and stored in both formats. Version control has presented some challenges, especially when there are revisions.
- The Planning and Development department has to specifically enter application information into Marmak for tracking purposes (owing to the new Development Charges regime whereby rates can be frozen based on the zoning approval date). A manual list of zoning changes is also separately maintained.

### Site Plan

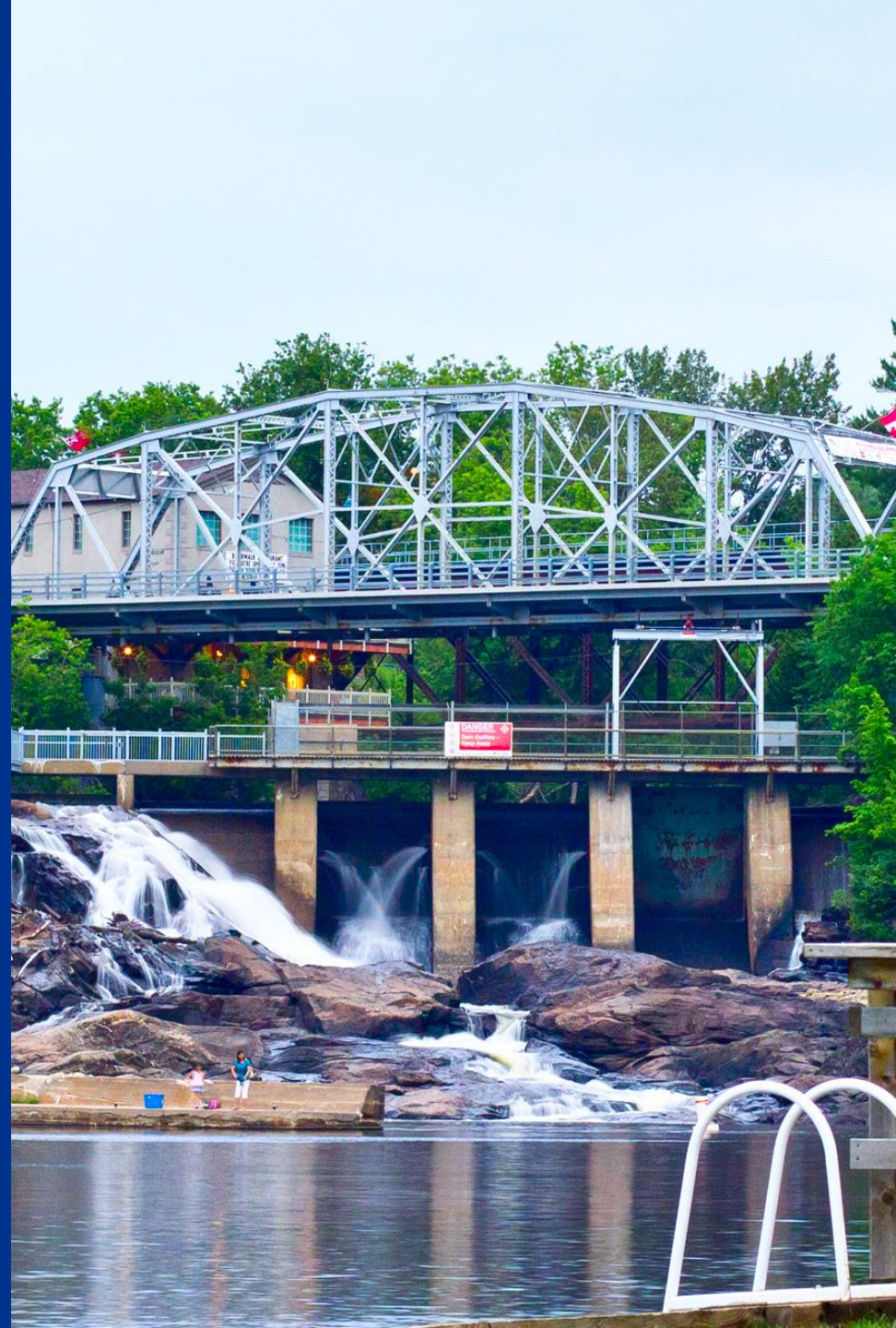
- Tracking progress of site work construction is manual. Most notably:
  - The Town relies on the developer to notify for site visits and to close site work.
  - Annual inspections of completed site work are tracked manually (e.g. via Outlook) based on Site Plan Agreements.
  - Informal tracking may result in communication disconnects with Building Services and/or Engineering Services
- Other themes are similar to the Rezoning process.

### Building Permit

- File management involves duplication of effort similar to the Rezoning process.
- Several data entry steps are needed to update Marmak of building permit application information. Marmak is only used for tracking and reporting purposes.
- There is an additional step of Town staff calculating user fees and contacting applicants for payment after an application is submitted.
- Building inspectors primarily review hard copy documents due to lack of electronic design review tools. Applicants are required to physically pick up approval documents at the Town Office.



# Summary of Observations & Recommendations



# Summary of Observations

During consultations with key stakeholders, over 20 pain points were identified across key areas:


- Pre-Consultation
- Application Intake
- Physical Location
- Technology Ecosystem
- Rezoning Process
- Site Plan Process
- Building Permit Process

These pain points were then summarized further using key processes stated below. In total, 12 observations were identified within the Planning and Development department.

Layer	Number of Findings
Governance	2
Service Standard	1
Process and Delivery Model	1
Data and Technology	5
Equipment and Infrastructure	1
People	2

# Governance and Strategy - Observations & Recommendations

Obs. #	Observations
1	Planning and Development Committee meetings and public meetings could be run more efficiently to minimize deferrals or the need to provide supplemental information.



**Recommendation #1**

Planning and Development Committee meetings and public meetings could be run more efficiently by re-assessing the sequence and time allocated for each agenda item. The approach to presenting report information could be adjusted to facilitate discussion of key items.

**Prioritization**

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



Our process mapping workshops and stakeholder engagements indicated that considerable time is required to write and review reports (owing to the level of the detail required to manage legislative requirements and Ontario Land Tribunal appeal risks). Stakeholders appreciate that the reports are detailed and well-written; however, the Department could consider refreshing its approach to presenting report information to the Planning and Development Committee and during public meetings; focusing on key facts Council and the public needs to be informed about.

The Department will need to work with Corporate Services, Administration Branch (Clerk's division) to implement agenda management changes. Key areas that applicant stakeholders would like modifications include:

- Better allocation of time and agenda sequence to discuss each scheduled application matter.
- Consider a new presentation format to be more condensed and neutral. Sometimes, the same information is being presented twice by the applicant and by staff. There is a perception that not all applications are presented in an unbiased manner.
- Minimize, as much as possible, the use of deferrals or requests to applicants to provide more information that may further delay application decision-making.

Establishing an agenda that is concise and a sequence that avoids duplication/delays will result in time and cost savings for the applicants as well as the Town.



# Governance and Strategy - Observations & Recommendations

Obs. #	Observations
2	The Town's current approach to performance measurement is underdeveloped and inconsistent. Many critical elements related to the development review process are not tracked (e.g. circulation times and review times by commenting partner).



**Recommendation #2**

Establish a performance measurement framework to improve the management and evaluation of the development review process.

Prioritization	
<b>Effort</b>	<b>3</b>
<b>Impact</b>	<b>5</b>



The use and regular review of performance measures are critical to the success of any organization or complex process. Our analysis indicates that performance measure maturity varies across the different teams within the Planning and Development department. The core challenges currently impacting effective performance measurement are set out below:

Challenge	Impact
Non-integrated manual systems	Significant effort required to extract and analyze performance data.
Lack of time tracking across the department	Inability to accurately measure time spent (versus total elapsed time) on individual applications across commenting partners.
Insufficient effectiveness measures	Overall impact of staff or development review process on applications not measured.

To overcome these challenges, KPMG recommends a refreshed approach to development review performance measurement based on leading practice and realistic processing timelines. Measures should also be developed to monitor other core recommendations included in this report.

# Governance and Strategy - Observations & Recommendations

Obs. #	Observations
2	The Town's current approach to performance measurement is underdeveloped and inconsistent. Many critical elements related to the development review process are not tracked (e.g. circulation times and review times by commenting partner).

(2 Cont'd)

The Department could establish the measurement of key performance indicators (KPIs) to improve the management and evaluation of the development review process. KPIs can be developed based on a sample review of past performance. Key considerations for performance measurements include:


- Identification of meaningful KPIs that can measure key strategic and department-specific operations. Recommend the use of two to three KPIs for the Department as a whole.
- Data collection to monitor performance. The Department can sample review a mixture of different application types during a set period of time or leverage Marmak and other planning related tracking tools to monitor performance. There are different sampling approaches, such as random sampling of application file numbers or control-type sampling based on frequency and volume of each application type.
- KPI reporting procedures (e.g. a high-level monthly or quarterly dashboard report) and a process for reviewing the effectiveness of KPIs.

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

Category	KPI
Efficiency	— Total elapsed time from complete application to approval.
	— Total elapsed time for each circulation.
	— Total elapsed time for each commenting partner for each circulation.
	— Total elapsed time with the applicant from complete application to approval.
	— Total elapsed time with the applicant for each circulation.
Effectiveness	— Total public engagement hours by application type and circulation.
	— Extent to which Official Plan objectives are achieved on an annual basis.
	— Applicant satisfaction surveys.
	— Public satisfaction surveys.
	— Number of new comments by circulation.
	— Number of comments unaddressed by applicants.
	— Number of escalations to Management and Elected Officials
	— Number of pre-application consultation meetings

# Service Standard - Observations & Recommendations

Obs. #	Observations
3	Applicants do not have a clear understanding of service level standards (e.g. application review timelines and what is considered a completed application). This also stems from the challenge that applications require timely input from staff in other departments or external agencies. Often times, the lack of clarity on application requirements amongst applicants have resulted in submission of incomplete applications, multiple rounds of application material submissions, increased review times, and applicant frustration.



**Recommendation #3**

Improve communication of service standard timelines for application review, including collection of commenting agency review comments. Refresh the Town's website for better user experience.

Prioritization	
Effort	3
Impact	5




Majority of Council and applicant stakeholders expressed the need to improve communication of application material needed for review, status and review timelines once applications are submitted. Staff indicated that timelines are often impacted by staff capacity, application volume, and commenting agencies' availability. The lack of a common understanding of application material, status and timelines increases customer frustration. We recommend the Town to focus on three specific areas to improve processing application packages.

- 1) The Town could implement standard review times by application type. For example, review times could be implemented for 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).  
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. 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.
- 2) Consider mandatory pre-consultation meetings for more complex planning and development applications to establish mutual understanding of application material needed for review.
- 3) We understand that the Department has developed robust application review guidelines that are published on the Town's website. From a user perspective, we recommend the Town to refresh its website design using UX Design Principles to improve user experience on finding application information. For example, minimize the number of clicks to find building permit application information (fees, forms, process guide, other application specifications, etc.). Refreshing the website design will assist in improving communication of the Town's application process.

# Process & Delivery Model - Observations & Recommendations

Obs. #	Observations
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. Current industry feedback is collected anecdotally.

	<p><b>Recommendation #4</b></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>	<b>Prioritization</b>	
		<b>Effort</b>	<b>1</b>
		<b>Impact</b>	<b>4</b>



Formally and consistently soliciting feedback from applicants will enable the Town to gain insight into the effectiveness of planning and development services 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 included in recommendation #2.

# Data & Technology Analytics - Observations & Recommendations

Obs. #	Observations
5	Data is stored inconsistently using a number of different systems, networks, and manual folders.

	<b>Recommendation #5</b>	<b>Prioritization</b>	
	Consider locating all development application documents under one platform (SharePoint).	<b>Effort</b>	<b>2</b>
		<b>Impact</b>	<b>5</b>




It was noted that physical copies of the documentation were stored in a systematic fashion; however, during the process mapping exercise, inconsistencies were noted in how the data was stored electronically. We understand that Sharepoint has been recently implemented (October/November 2021); and the Town has moved all planning and development files to Sharepoint. The Town should continue to use Sharepoint as the single source for file management.

As the Town implements planning and building application systems, it should determine in advance the data storage requirements and how best to integrate storage within the Town's records management policies. This would ensure that all data collected throughout the process is centralized in one place resulting in easy to locate, accurate and reliable information.

# Data & Technology Analytics - Observations & Recommendations

Obs. #	Observations
6	With the implementation of SharePoint, employees need training on how to use the software effectively and avoid inconsistent use of the technology.

	<p align="center"><b>Recommendation #6</b></p> <p>Provide SharePoint user training to employees, including the expected user protocols to file management.</p>	<b>Prioritization</b>	
		<b>Effort</b>	<b>2</b>
		<b>Impact</b>	<b>5</b>




With SharePoint rollout, the Town should provide training to all users to ensure the appropriate skill sets are developed to fully utilize the tool, which is also part of change management effort. The objective is to train staff on the new software’s functionality features, workflows, and the Department’s expected standards for using the technology. In addition to training of SharePoint’s functions and workflows, other training topics include:

- Filing structure of application files, and within each application file, what key application material needs to be retained.
- Documentation of approvals, review comments, and other pertinent communication
- File naming convention and version control mechanism
- Data security measures

In addition, some staff may benefit from project management training. The objective is to approach each building and planning application as unique projects where project management principles are applied to manage applications, address issues, monitor review timelines and improve the documentation of key comments/decisions. SharePoint can be used as a tool to help manage each “project”.

# Data & Technology Analytics - Observations & Recommendations

Obs. #	Observations
7	The Department would like to extend SharePoint's usage to external parties to facilitate external collaboration (e.g. with the District). The current commenting agency review is done via email.



**Recommendation #7**

Establish user access, data security and file sharing polices for SharePoint's file sharing features.

**Prioritization**


<b>Effort</b>	<b>2</b>
<b>Impact</b>	<b>5</b>

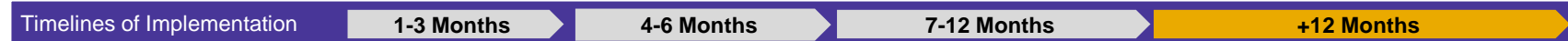


SharePoint has external sharing features where an organization can set the external user's access and the restriction levels. For example, restrictive access to a document or a site. The Department will need to work with the Town and the District on establishing and updating the policies, standard operating procedures, security settings and employee training to allow this function to be used.

# Data & Technology Analytics - Observations & Recommendations

Obs. #	Observations
8	The current process of submitting building permit applications is completed via email or hardcopies; which is a manual and time consuming exercise.

	<b>Recommendation #8</b> Digitize application submission through implementation of an e-permitting system and consider a cloud based platform to review/markup drawings.	<b>Prioritization</b>	
		<b>Effort</b>	5
		<b>Impact</b>	5



KPMG understands that currently the Town relies on a software called Marmak for tracking Building Permits; however this software has limited capability to be used for record keeping. Currently, all building permit documentation are stored on either SharePoint, local/network drives, or hard copy files. Documents are shared via emails and/or hard copy documentation is shared via physical counter drop boxes.

The Province of Ontario has invested significant money for municipalities to investigate how to move services online in a way that create more efficient and effective municipal services. Building permit processes and issuance seems to be one of the top services that Ontario municipalities are adopting through electronic means. The Town can benefit from digitizing the building permit process using a cloud-based permitting system.

The Town should explore investment in an e-permitting system for building permits which often provide the following benefits:

- Low to zero printing costs for submit applications
- Travel time and expense to/from the municipal office to drop off/pick up applications/permits is eliminated
- Ability to track several permits simultaneously
- Inspection scheduling/results electronically
- Allows for quicker application process given that designers can submit plans/drawings directly to their project online

The Town should also consider investment in a drawing review tool. The review tool will allow stakeholders to work from the most recent version of a drawing, with the ability to track whether an issue has been resolved or not. The review tool also allows stakeholders to collaborate in real time so multiple people can review documents simultaneously.



# Data & Technology Analytics - Observations & Recommendations

Obs. #	Observations
8	The current process of submitting building permit applications is completed via email or hardcopies; which is a manual and time consuming exercise.

(8 Cont'd)

Some key factors for the Town to consider:

### Service Delivery Model

- The Town will have to determine if the method for application intake (for example, the Town will have to determine whether they want to continue accepting paper applications, email submissions, or move to 100% digital applications via the e-permitting system).

### Timelines

- One of the neighboring municipalities performed researched independently and requested the District's support for due diligence; that resulted in Council approval of single sourced procurement of an e-permitting and a drawing review tool. The implementation for both tools took approximately 8-10 months.

### Resources and Training

- The District of Muskoka currently has a long list of pending IT projects and needs more information to determine if it can provide the required IT support. For cloud-based tools, the Town can get implementation support directly from the vendor in most cases.
- The Town will require dedicated resources to lead the digital transformation; possibly a business lead who understands the processes that need to be implemented, as well be the main project touch point.
- The Town will need to ensure management and staff are sufficiently trained to use the new technology by working closely with the District and/or vendor.

### Data Integration

- An important consideration would be the data migration between a new e-permitting system and Marmak. Newer e-permitting systems generally provide all functionalities that Marmak provides and more; the Town will have to determine the necessity for maintaining both systems. Based on information gathered from neighboring municipalities, they have been in discussion with Marmak and the new e-permitting system vendor (Cloudpermit) to determine the path forward for data integration.
- Any review tool the Town considers should have the ability to integrate data with the e-permitting system. The District and vendor should be engaged upfront to determine technical feasibility and integration of both systems.

### Planning and Development

- Based on user experience of using an e-permitting software for building permits, the Town should assess the need for using the e-permitting system for planning and development applications.

### Cost

- The cost of e-permitting systems range from \$25,000-\$30,000 annual fees (based on comparator information) along with implementation cost. The cost of review tools range from \$350-\$1,000 annual license fee per user along with implementation cost.

# Data & Technology Analytics - Observations & Recommendations

Obs. #	Observations
9	The current process of electronic application submissions is completed via email which is a manual and time consuming process and does not allow for electronic payment of fees.



**Recommendation #9**

Explore the opportunity of implementing an online application submission system and electronic payment solution to facilitate the application intake and review process to improve process effectiveness and efficiency.

Prioritization	
<b>Effort</b>	1
<b>Impact</b>	5



The Town was proactive in accepting building and development applications online (via email) during the COVID-19 period (March 2020 onwards). However, the applicant is still required to make payments in-person or via mail which defies the purpose of an online submission. Based on stakeholder feedback, it was noted that the online payment initiative is already underway but got side-tracked due to conflicting priorities. Within the Town, as a pilot initiative, the Cemeteries Branch has been successfully accepting online payments and plans are to make online payment options available by Q2, 2022 to the Department. Once executed, this effort will save significant time for the Town and the applicants.

# Equipment and Infrastructure - Observations & Recommendations

Obs. #	Observations
10	The office physical layout of the Planning and Development department is inadequate to meet the operational demands of the Department.



**Recommendation #10**

Execute findings from the Town's work space study once the study is completed. In the interim, re-assess the Department's working space, filing storage and meeting room needs for office work.

Prioritization	
Effort	4
Impact	5




Multiple stakeholders indicated that the current office space is inadequate to meet the Department's operational requirements, and KPMG understands the Town is currently performing a work space study to address this concern. As part of the study, all options for office space will be considered including a review of the Town's Remote Work Policy and electronic files for certain planning and building applications as an opportunity to rationalize space needs. The Department should also re-assess its current office space allocation to maximize usage of square footage such as considering the use of off-site storage to archive manual records.

The COVID-19 pandemic has altered the way people work. There is an opportunity for the Department to pilot a hybrid workplace model where employees are able to either work remotely or physically in the office. This also allows the Department to manage a more flexible working space arrangement where two employees share a physical work space. The Town has a remote working policy that may need to be revised/updated to give employees clear direction about hybrid working while simultaneously safeguarding health and safety.

# People - Observations & Recommendations

Obs. #	Observations
11	Stakeholder feedback indicated that the Department is not equipped with the human resources required to meet service levels.

	<p align="center"><b>Recommendation #11</b> Review current staffing model to ensure alignment with Department’s service level requirements.</p>	<b>Prioritization</b>	
		<b>Effort</b>	<b>5</b>
		<b>Impact</b>	<b>5</b>




With the increase in development pressures, it is essential that the Department is adequately resourced to meet the required service levels. During stakeholder consultations, additional staffing requirements were highlighted. With the expected growth in development applications, the Town should consider adding the necessary roles to streamline the development review process. This is specifically important if the Department wants to digitally transform its current processes.

Once recommendations raised in this report are implemented (for example use of an e-permitting system, drawing tools, using SharePoint), considerable amount of administrative time is expected to be saved in the longer term allowing staff to utilize their time more productively/effectively and provide even better customer service. Towards project completion, the key performance indicators and metrics should be used to determine if further staffing changes are required.

Also refer to observation #12 - consideration should be given to staff roles so they are aligned to support the additional measured delegation and job descriptions should be updated as required.

# People - Observations & Recommendations

Obs. #	Observations
12	Senior Management's review and approval of applications consume valuable time and causes delays as applications go through the chain of command.

	<p align="center"><b>Recommendation #12</b></p> <p>Consider updating delegation of authority such that staff can make decisions on approvals of small/frequent/less complex applications.</p>	<b>Prioritization</b>	
		<b>Effort</b>	2
		<b>Impact</b>	5

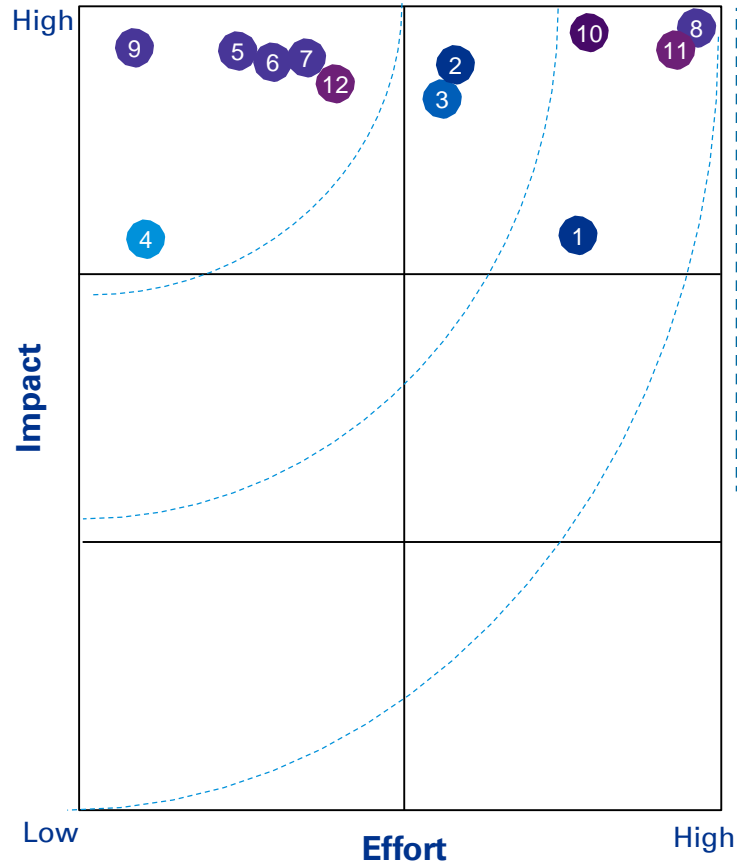


Stakeholders have suggested the Town to Consider delegating more administrative and approval authorities (e.g. shore road allowance) from the Department's leadership level to middle management to expedite processing timelines. This allows leadership to allocate more focus on strategic items and priorities.

Keeping in view with Ministry expectations and guidelines, management could consider delegating responsibility and approval authorities to other staff, where possible. Consideration should be given to staff roles so they are aligned to support the additional delegated responsibilities; job descriptions should be updated as required.

# 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 Improve agenda management of Planning and Development Committee meetings and public meetings
- 2 Establish a performance measurement framework
- 3 Improve communication of service standard timelines for application review, including collection of commenting agency review comments. Refresh the Town's website for better user experience.
- 4 Measure the customer experience with the development review process
- 5 Consider retaining all development application documents under one platform (SharePoint)
- 6 Provide SharePoint training to employees, including the expected user protocols for file management
- 7 Establish user access, data security and file sharing policies for SharePoint's file sharing features
- 8 Implement an e-permitting system to facilitate the building permits
- 9 Implement an electronic payment solution
- 10 Execute findings from the Town's work space study once completed; interim re-assess the Department's square footage usage.
- 11 Review current staffing model to ensure alignment with Department's service level requirements.
- 12 Consider updating delegation of authority

**Legend**

<span style="display: inline-block; width: 15px; height: 15px; background-color: #0056b3; margin-right: 5px;"></span> Governance & Strategy	<span style="display: inline-block; width: 15px; height: 15px; background-color: #0070c0; margin-right: 5px;"></span> Service Standard	<span style="display: inline-block; width: 15px; height: 15px; background-color: #0080c0; margin-right: 5px;"></span> Process & Delivery	<span style="display: inline-block; width: 15px; height: 15px; background-color: #4169e1; margin-right: 5px;"></span> Data & Technology	<span style="display: inline-block; width: 15px; height: 15px; background-color: #6a3d9a; margin-right: 5px;"></span> Equipment & Infrastructure	<span style="display: inline-block; width: 15px; height: 15px; background-color: #800080; margin-right: 5px;"></span> People
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# Implementation Plan



# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development

## Implementation Plan

This section includes the plan to implement the previously identified recommendations. The overall implementation plan includes considerations noted below which are based on KPMG leading practice:





# Implementation Plan

## 1. Implementation Structure

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

Based on the scope of the identified recommendations, we recommend Management to appoint a stakeholder within the team to lead, monitor and report on the implementation of the report's recommendations. Based on the roadmap included in Section 2 below, we anticipate staff will be required for approximately 12 months, with the bulk of activity occurring during the first six months.

## 2. Implementation Roadmap

Here we present an implementation roadmap. It reflects the estimated time required for the completion of each recommendation keeping in mind the effort and time required for implementation. We have included a 12 month timeline, which assumes the appropriate resources and implementation structure described earlier. In some cases, noted in our roadmap, full implementation may stretch beyond 12 months.

#	Recommendation	1-3 Months	4-6 months	7-12 months
<b>Governance</b>				
1	Planning and Development Committee meetings and public meetings could be run more efficiently			
2	Establish a performance measurement framework			
<b>Service Standard</b>				
3	Improve communication of service standard timelines			
<b>Process</b>				
4	Measure the customer experience with the development review process			
<b>Data &amp; Technology</b>				
5	Consider locating all development application documents under one platform (SharePoint).			
6	Provide SharePoint user training to employees, including the expected user protocols to file management			
7	Establish user access, data security and file sharing policies for SharePoint's file sharing features.			
8	Digitize application submission through implementation of an e-permitting system			
9	Explore the opportunity of implementing an online application submission system and electronic payment solution			
<b>Equipment and Infrastructure</b>				
10	Execute findings from the Town's work space study once the study is completed. In the interim, re-assess the Department's working space, filing storage and meeting room needs for office work			
<b>People</b>				
11	Review current staffing model to ensure alignment with Department's service level requirements.			
12	Consider updating delegation of authority			

# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development Implementation Plan

## 3. 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 Town's and the Department's management team and reviewed on a periodic basis.

Success Factor	Does this Exist? (✓/✗)
<b>Implementation Structure</b>	
<ul style="list-style-type: none"> <li>The recommendations and roadmap included in this report have been approved by Town Management</li> </ul>	
<ul style="list-style-type: none"> <li>A clear project governance structure is in place and working well (see Section 1).</li> </ul>	
<ul style="list-style-type: none"> <li>Sufficient staff capacity and resources are dedicated to the work ahead and are working well (see Section 1).</li> </ul>	
<b>Project Management</b>	
<ul style="list-style-type: none"> <li>Work plans exist to support the implementation of all recommendations.</li> </ul>	
<ul style="list-style-type: none"> <li>A holistic communications strategy and the accompanying communications plans are developed for the relevant recommendations.</li> </ul>	
<ul style="list-style-type: none"> <li>Recommendations are implemented according to roadmap timelines; delays are justified and communicated.</li> </ul>	
<ul style="list-style-type: none"> <li>Recommendations that have been implemented are reviewed every six to 12 months for effectiveness.</li> </ul>	
<b>Customer Centricity</b>	
<ul style="list-style-type: none"> <li>Applicants are engaged in the implementation process</li> </ul>	
<ul style="list-style-type: none"> <li>The applicant experience is measured and improving</li> </ul>	

# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development Implementation Plan

## 4. 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 Bracebridge 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 building and planning services to help spread the message. Ensure approval of this report and its roadmap is widely communicated.
- 3. Make it Real:** Clearly define the 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.

# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development

## Implementation Plan

### 5. 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 group.

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 page provides additional detail on each of the five communications principles included in this section.

# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development Implementation Plan

## 5. Communications Strategy (cont'd)

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 building and planning 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>



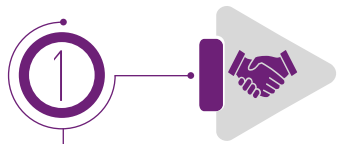
# Summary



# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development

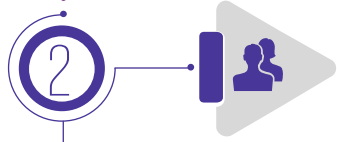
## Summary

Overall, the Town has taken the initial steps to increase the efficiency and effectiveness of development services through digitization and process improvement. The work completed as part of the Development Service Review will serve as a foundation to guide the Department towards a culture of continuous improvement.



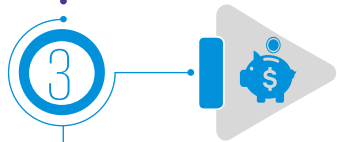
### Is the organization ready?

The Town has taken the initial steps through the Planning and Development Service Delivery Review to increase coordination, accountability, and collaboration within building and planning services. To build on the success of this review, the Town will require an increased focus on streamlining the management of its building and planning service data through technology.



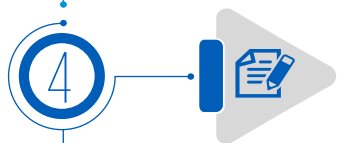
### Who will lead the transformation?

The adoption of new ways to doing things will require governance and oversight. The Town will have to determine the key personnel and stakeholders to be involved in the process and leading the change.



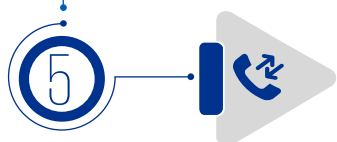
### Is the transformation appropriately funded and resourced?

To achieve the identified recommendations, further funding and staff resources may have to be allocated.



### Does the plan include contingencies?

The Town would like to utilize current technologies to support digital enhancements and is open to exploring the option of an e-permitting system for building permits.



### Is the Department ready for collaboration?

We understand that the building and planning services team is open and ready for change. However, change fatigue must be monitored to ensure changes are implemented effectively. In addition, the strategic alignment and priorities from different Town departments (e.g. the work space study) need to be better communicated to all staff to ensure effective communication and collaboration.



# Appendix A: Jurisdictional Scan Results





# Jurisdictional Scan - Feedback Summary

## Survey Demographics



Number of Respondents | **25**

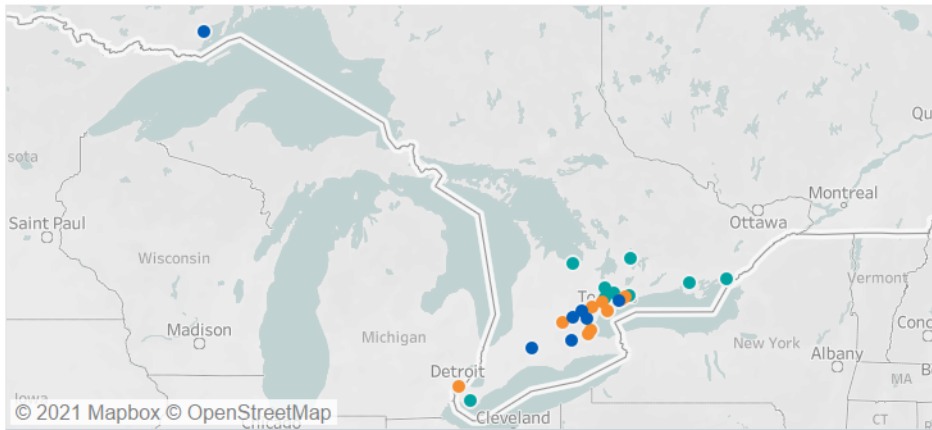


Total AMANDA Users | **16**



Other Software Users | **9**

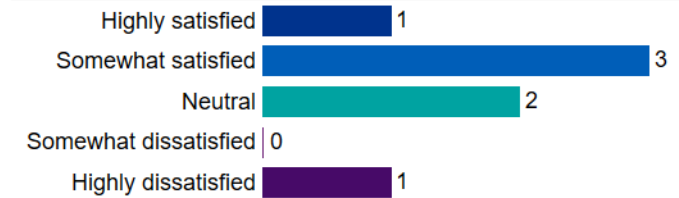
## Respondent location



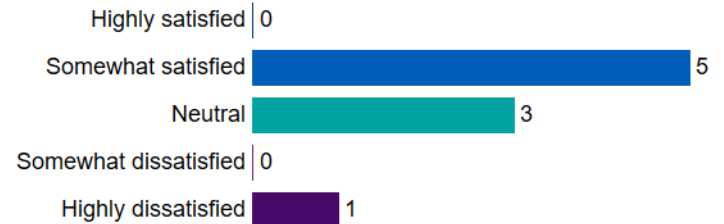
■ AMANDA                      ■ AMANDA and other software                      ■ Other software

## User Satisfaction

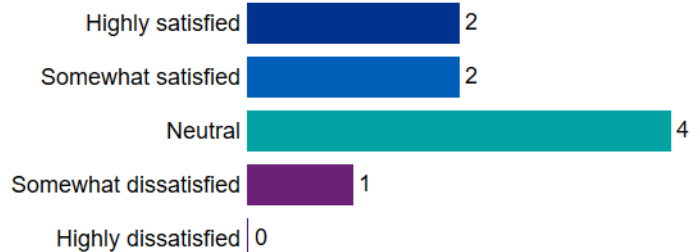
### AMANDA



### AMANDA and Other Software



### Other Software



## AMANDA Satisfaction



**50%** of respondents that utilize AMANDA noted they are either highly satisfied or somewhat satisfied with the system.

## Other Software Solutions

Other software solutions used by municipalities include:

- Cityworks
- EnerGov
- Accela
- CityView
- Cloud Permit
- Blue Beam

# 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 - Other Software Feedback

## Other software used by municipalities

Municipalities that are not using AMANDA have deployed the following software for processing permits, planning applications, licensing and other business processes:

- 01 ProjectDox:** Provides configurable workflows, file and markup versioning, digital signature verification, review comments, drawing change compare verification and applicant communications.
- 02 Cityworks PLL:** Allows municipalities to share information, streamlining the application and review process and improves customer service for contractor and residents.
- 03 EnerGov:** Helps to automate land use planning, permitting enforcement case management and inspections.
- 04 Accela:** Automates planning processes making it easier for applicants to submit proposals, check status updates and pay outstanding fees. Ensures quick turnaround for developers and project owners.
- 05 CityView:** Offers comprehensive software to facilitate paperless process that shortens permit and case turnaround, eliminates redundant work and increases productivity.

## Satisfaction with the software



50% of respondents are highly satisfied or somewhat satisfied with their software.



33% of respondents are not satisfied or dissatisfied with their software



16% of respondents are highly dissatisfied or somewhat dissatisfied with their software.



*CityView is able to adjust their software services to meet our individual needs and requests.*



*Have not been satisfied with Cityworks PLL since its implementation in 2019. Hopeful that Cloudpermit will better fit our needs.*



*CityView has been easy to use and is well integrated with GIS for civic addressing and mapping. Software has good mobile applications and great for reporting and workflow integration.*



*EnerGov technology suite seems outdated and vendor support is less than satisfactory.*



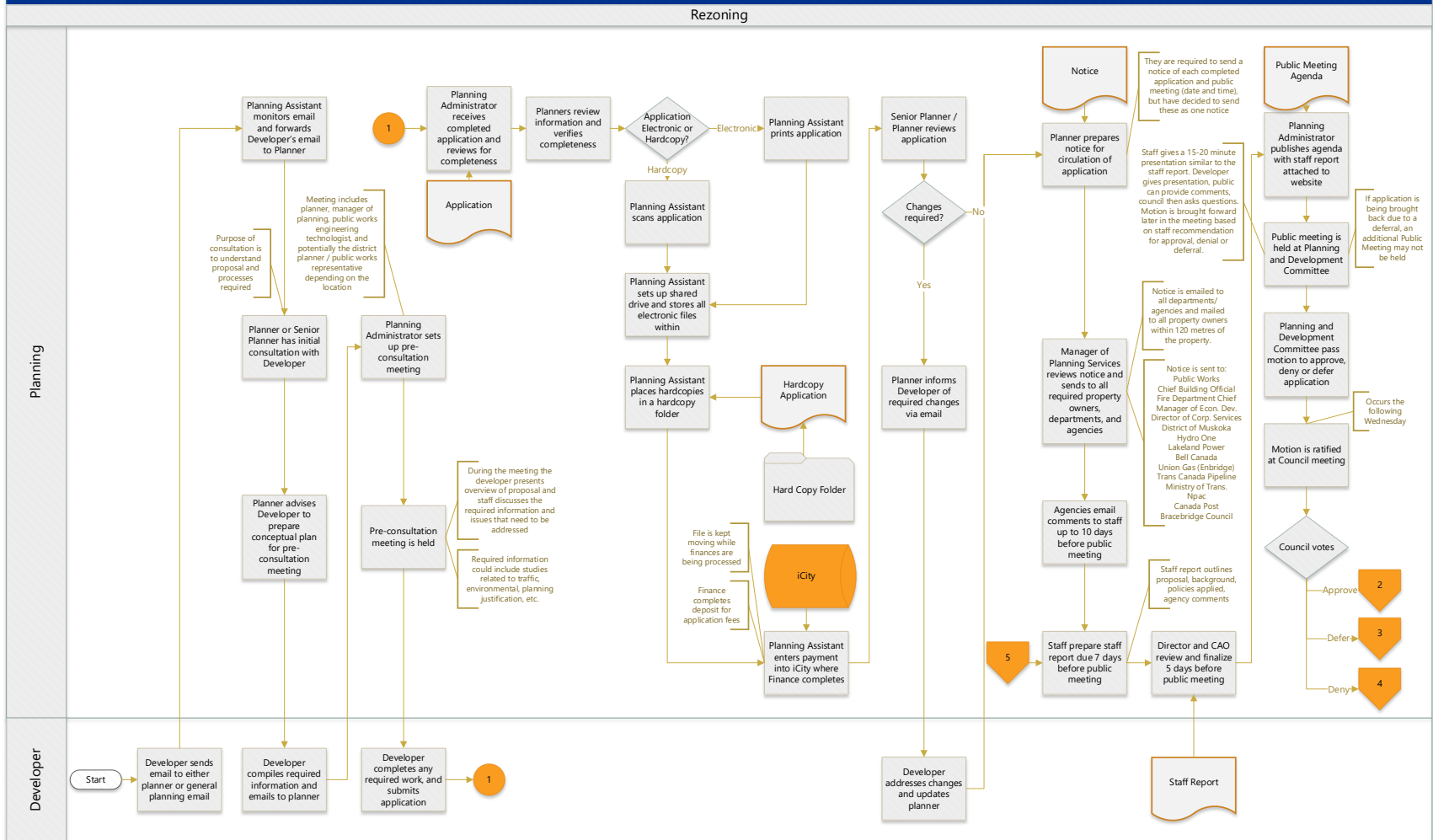


# Appendix B: Detailed Process Maps



# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development Rezoning Process (Part 1)

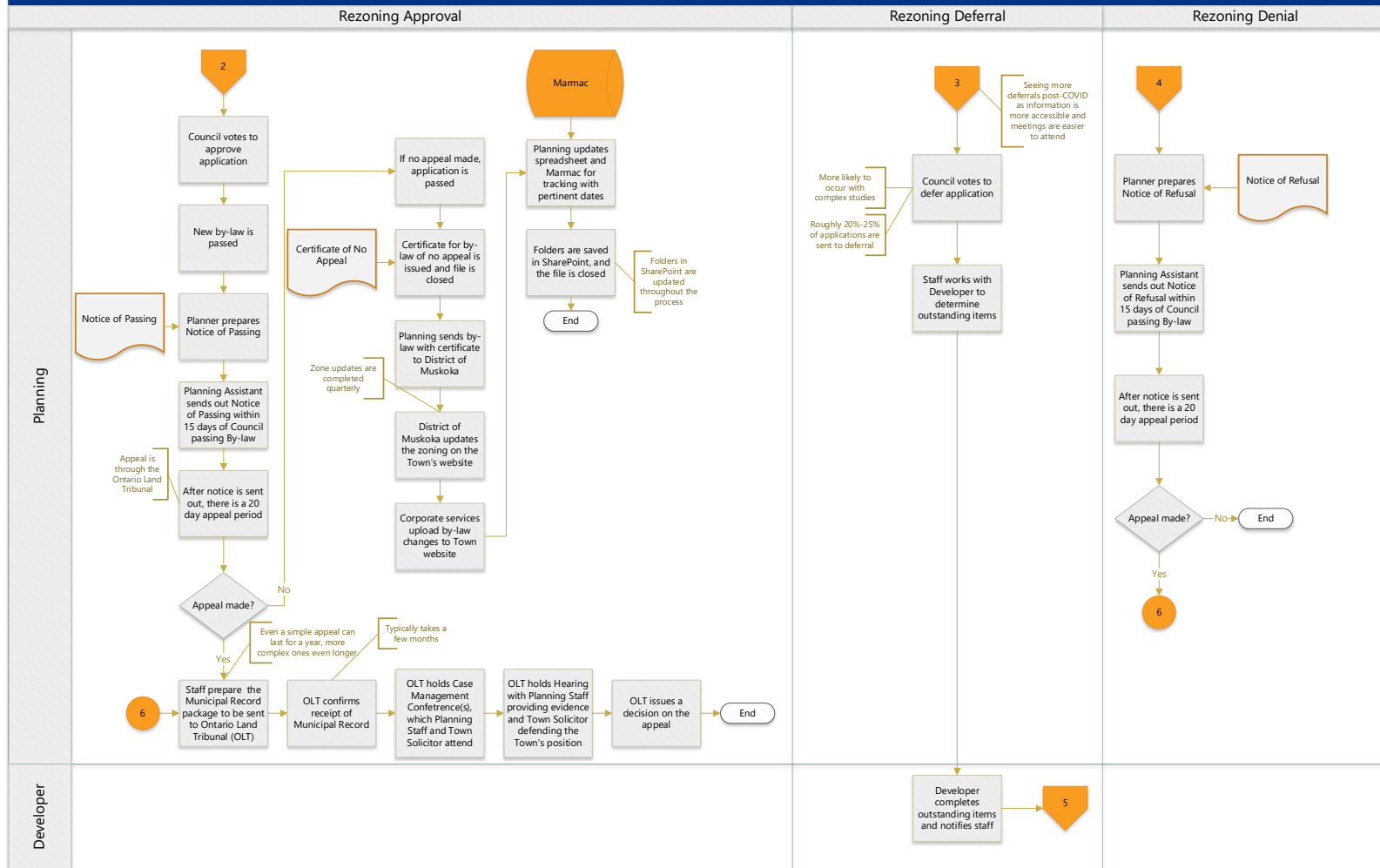
## Rezoning – Town of Bracebridge



# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development

## Rezoning Process (Part 2)

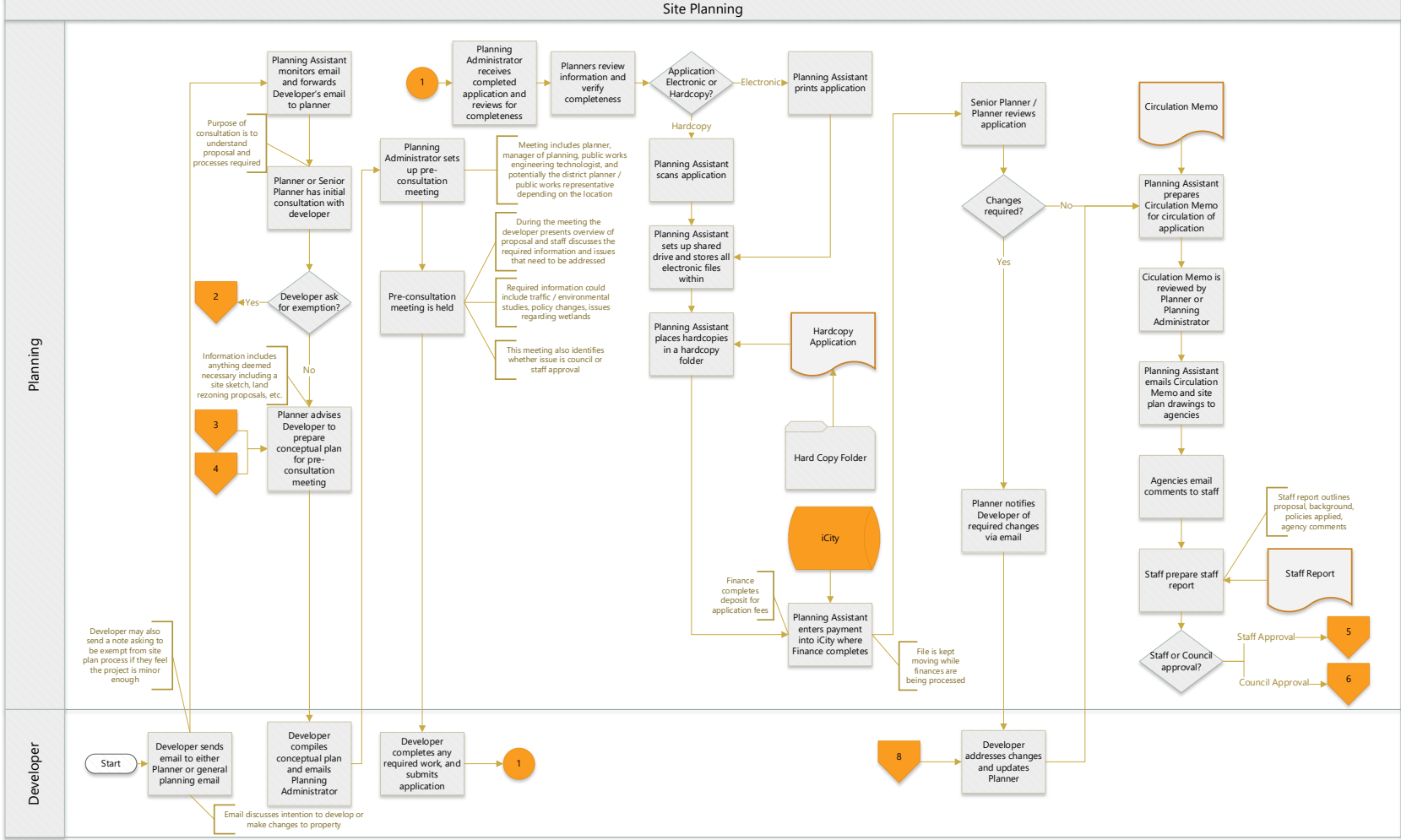
### Rezoning – Town of Bracebridge



# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development

## Site Plan Process (Part 1)

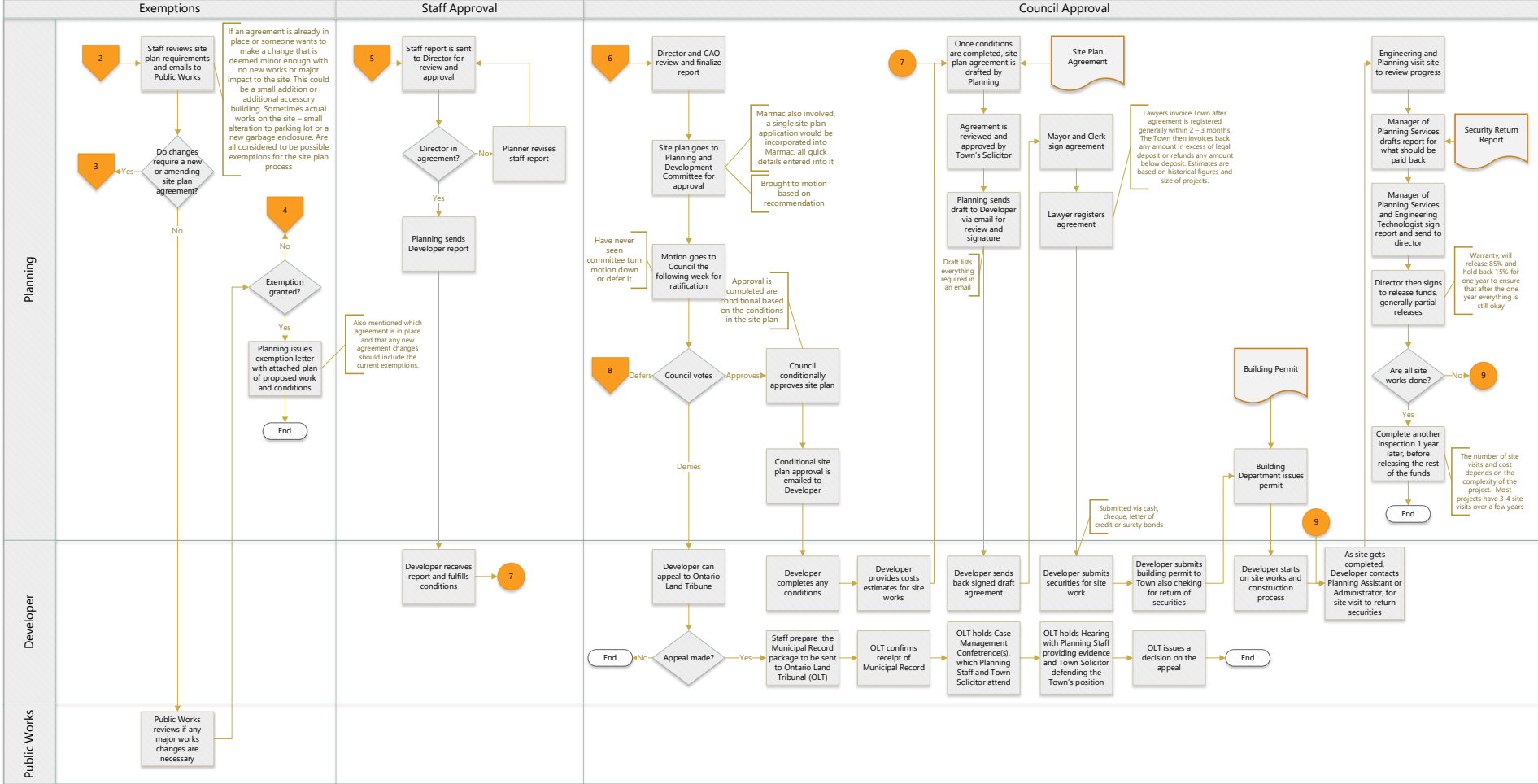
### Site Plan - Town of Bracebridge



# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development

## Site Plan Process (Part 2)

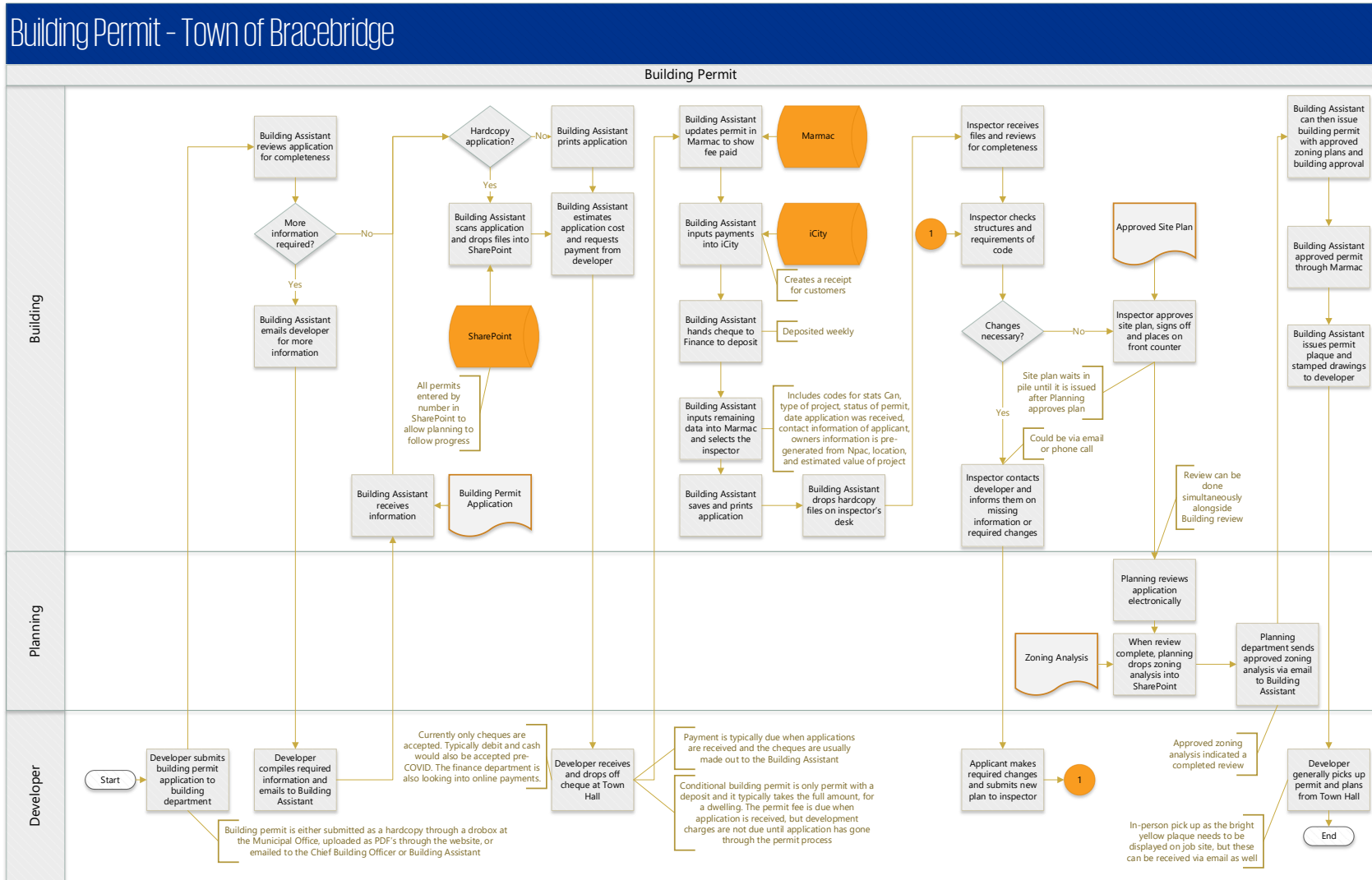
### Site Plan – Town of Bracebridge





# Town of Bracebridge – Service Delivery and Modernization Review: Planning and Development

## Building Permit Process





[kpmg.com/socialmedia](https://kpmg.com/socialmedia)

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