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**Date** January 20, 2022 **Report No.** 2022-74

**To** Chair and Members  
Building Construction Process Review Task Force

**From** Heidi de Vries, General Manager  
People, Legislated Services and Planning

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## 1.0 Type of Report

Consent Item ☐  
Item For Consideration ☒

## 2.0 Topic Development Approvals Process (DAP) Review: Phase 1 Implementation Plan [Financial Impact - NONE]

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## 3.0 Recommendation

- A. THAT Report 2022-74, "Development Approvals Process Review: Phase 1 Implementation Plan", BE RECEIVED; and
- B. THAT the Steering Committee BE DIRECTED to develop a Terms of Reference to hire a consultant to complete a Planning and Development Application and Service Fee Review for Council consideration; and
- C. THAT the Steering Committee BE DIRECTED to undertake a review of the Site Plan, Site Alteration and Security Release processes to implement the "As Should Be" recommendations contained in the final DAP report, and report back to the Task Force and Council with recommendations by the end of Q2 2022; and
- D. THAT the Steering Committee BE DIRECTED to develop a Standard Operating Procedure and Planning Application Manual as part of their work plan for 2022; and
- E. THAT the Steering Committee BE DIRECTED to solicit a proposal from North Lake Design Lab to develop a work plan, schedule and budget to

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- configure all the required Planning functions in AMANDA for consideration by the Task Force and Council; and
- F. THAT Staff BE DIRECTED to report back to the Task Force and Council with an annual implementation update.

## 4.0 Executive Summary

Performance Concepts Inc. was retained by the City to conduct a Phase Two analysis of the Development Approvals Process (DAP) in order to support the implementation of the KPMG Phase One recommendations. The final DAP report builds on the previous work conducted by KPMG in 2020 and outlines detailed recommendations to improve service delivery based on the initial KPMG findings. Performance Concepts presented the final DAP Review and Technology Modernization Report to the Building and Construction Task Force in November, 2021 which report included a total of thirty seven (37) “Do Now”, “Do Soon” and “Do Later” recommendations. The purpose of this report is to present the Task Force with an implementation plan and road map to put into practice the twenty three (23) “Do Now” recommendations outlined in the final DAP report, which have been consolidated to form part of this report as **Appendix A**. Full implementation of all the recommendations contained in the DAP report will require further review and funding to implement; as such, the Steering Committee anticipates that the full implementation of the recommendations contained in the DAP report will require a multi-phased approach. This report also provides a status update with respect to the initial forty-five (45) recommendations contained in the KPMG report which are attached as **Appendix B** to this report for ease of reference. While many of the recommendations require technology improvements (AMANDA Workflow tool/ online application portal) in order to implement and have been the subject of the Performance Concepts work program, staff have been able to implement several of the administrative recommendations to improve service delivery in the interim while the DAP review was underway.

## 5.0 Purpose and Overview

The purpose of this report is to present the Task Force with a prioritized road map to implement the twenty three (23) “Do Now” recommendations outlined in the final DAP report prepared by Performance Concepts Inc.

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## 6.0 Background

On November 9, 2021, Performance Concepts Inc. presented the final DAP Review and Technology Modernization report to the Building and Construction Task Force. The Task Force approved the following recommendations, which were endorsed by Council at their meeting on November 23, 2021:

- A. THAT the report 2021-612 titled Development Application Process Review BE RECEIVED; and
- B. THAT staff BE DIRECTED to report back to the Human Resources Committee with respect to an implementation plan for the staffing recommendations set out in the Development Application Process Review by the end of Q4, 2021; and
- C. THAT staff BE DIRECTED to report back to the Building Construction Process Review Task Force in December, 2021 with an action plan and implementation roadmap.

This Report responds to Recommendation C above: that staff report back to the Task Force with an action plan and implementation road map in December 2021. Also, at the Committee of the Whole – Planning Administration meeting held on November 9, 2021, a status update on the implementation of the KPMG recommendations was requested, which update is attached as Appendix B to this report.

## 7.0 Corporate Policy Context

In 2019, City Council identified through the “2019-2020 Council Priorities” that where there is opportunity to do so, streamlining of City procedures should be a priority of Council (see Section 8.3 of Report 2019-384). This report outlines key implementation strategies to improve service delivery and builds upon the work completed by KPMG and Performance Concepts Inc.

## 8.0 Input From Other Sources

The DAP Steering Committee includes staff from the CAO’s office, Planning, Building, IT Services and Development Engineering.

## 9.0 Analysis

The DAP report includes a total of thirty seven (37) “Do Now”, “Do Soon” and “Do Later” recommendations. For the purposes of this report, staff have consolidated the twenty three (23) “Do Now” recommendations into a summary

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document attached as **Appendix A**, which shall form the basis for an overall implementation strategy to be coordinated by the Steering Committee.

This implementation strategy represents prioritized actions required to lay the ground work to begin to implement all of the recommendations contained in the final DAP report, and have been broken down into the following four (4) categories:

- Accounting and Fees;
- Internal Process Improvements;
- Technology Solutions; and
- Staffing Resources and Governance.

## **9.1 Accounting and Fees**

In 2014, Council mandated a 90% cost recovery target for DAP, which is currently being met based on a basic calculation of the costs associated with processing development applications in the Planning department. However, these costs do not represent a modernized staff complement (based on current and future proposed staffing levels), nor do the costs reflect the full service delivery costs to the Corporation resulting from indirect costs such as finance, legal and human resources. The DAP report recommends that a full fee review be undertaken to determine the true costs to the Corporation to process development applications. This will ensure that appropriate fees for service delivery are established moving forward and cost recovery targets can be set based on actual expenses to the Corporation. Furthermore, changes to our internal accounting practices in Planning are also recommended, such that application revenues are used as a funding source to offset additional staffing/technology improvements needed over time.

In order to implement the recommendations contained in the DAP report, Staff recommends that the Steering Committee, with input from Staff in the Finance department, develop a Terms of Reference and identify a proposed budget to retain a consultant to undertake a full service fee review and report back to the Task Force prior to the end of 2022. Modernizing the fee schedule in the Planning Department, and allocating revenues to fund staffing/operating costs would be consistent with the

accounting structure already in place in the Building Department and will address the “Do Now” recommendations 1-4 in the final DAP report.

Building Department fees currently fund all annual operational costs of the department, including an indirect corporate overhead charge; with any surplus transferred to a reserve in accordance with Finance Policy 002 (FP2) to offset future costs or deficits. Similar to the Building Department, Development Engineering also recovers its direct costs from fees, and transfers any surplus to reserves in accordance with FP2. Development Engineering, however, does not currently receive a corporate overhead charge; and as such their fees will also be reconsidered through this review. The Planning Department does not currently recover all of its costs, nor is there a provision for any surplus to be put in reserves to offset future costs. A key outcome of the review will be to recommend a fee structure across all DAP functions including Planning, Building and Development Engineering that ensures full cost recovery, in addition to consistent accounting treatment.

## **9.2 Internal Process Improvements**

### **9.2.1 Review of Site Plan, Site Alteration, and Security Releases Processes**

The DAP report identifies internal process improvements that can be made without the need for major technological improvements or funding. The Steering Committee acknowledges that the Site Plan, Site Alteration and Security Release processes for Site Plan applications is cumbersome and labour-intensive for both Staff and the development community. The Steering Committee recommends undertaking a deep dive review of these internal processes to implement the “As Should Be” recommendations contained in the DAP report. This review will focus on the process and associated by-laws to consider opportunities to speed up the application process and combine these processes where feasible, while meeting legislated requirements. Staff will also review and present recommendations to modernize the release of securities, identify one central business unit responsible for inspections and look for opportunities to compress the time frame for inspections. Given the amount of time, research and consultation with stakeholders and the development community that will be required, the Steering Committee plans to report back to the Task

Force with the findings of the review and recommendations for an improved process(es) by Q2 2022. Undertaking a deep dive into this process review will address recommendations 1-5 in the final DAP report and addresses several of the key recommendations identified in the KPMG service review.

### **9.2.2 Application Requirements, Development Review Meeting Structure and Technical Review Cycles**

All development applications are required to go through a pre-consultation phase prior to the submission of formal Planning Act applications. The purpose of the pre-consultation meeting is to review a draft development proposal and identify the need for, and scope of, the technical information that will be necessary to facilitate the comprehensive assessment of the application by the City and relevant agencies.

It should be acknowledged, however, that prior to the formal pre-consult meeting, DAP staff often engage in multiple meetings and touch points with applicants prior to the submission of the formal pre-consultation application and again prior to the formal submission of a development application(s). While this is often the case amongst many developers, it is more problematic with some small scale builders/developers who often do not retain professional consulting services with the expertise needed to guide them through the development approvals process. As the application volumes continue to increase, it will become more challenging for staff to manage current DAP files within the legislated timeframes under the Planning Act, and provide the same level of oversight or assistance required to the development community, in the early inquiry stages of a development concept through to a formal application submission.

Recognizing these challenges, the final DAP report identifies several process, technology, and resourcing improvements to maintain this vital customer service role, while reducing the amount of time in which staff is redirected away from processing of DAP applications. To address these concerns the DAP report recommends transitioning to a one-window approach for development inquiries. This would involve integrating several key departments into one centralized Commission to better align and

coordinate DAP functions, improve communications and workflow. Furthermore, the DAP report also recommends establishing a development facilitation Concierge position, to support small builder/developers and free up DAP staff for their core review functions. As noted previously, a separate report addressing the City's corporate structure and additional staff resources will be coming forward under separate cover to the Human Resources Committee and will address recommendations 7 and 8 of the final DAP report.

Recommendations 14 –23, listed in the attached Appendix A, directly relate to improved application processing. To improve processing, a Standard Operating Procedure (SOP) and supporting documentation to clearly outline application requirements and approximate the processing time is required. As such, the Steering Committee recommends that Staff be directed to develop an SOP and Application Submission Manual to outline the requirements and expectations for the City and development community to ensure quality submissions are prepared and received, and to reduce the instances of incomplete planning applications or multiple application resubmissions. The DAP report also recommends establishing the following with respect to the Development Review meetings cycles;

- a cycle of “pre-consultation only” development review meetings,
- streamlining each meeting to pertinent staff and technical matters only;
- establishing criteria for when a pre-consultation letter may be issued in lieu of a formal pre-consultation meeting for straight forward applications;
- creating a manual/by-law to outline the requirements/process for pre-consultations; and,
- requiring acknowledgement by the applicant that the requirements for pre-consultation have been met prior to a formalized meeting and subsequent future planning applications.

Moving forward, the Steering Committee will work towards implementing these recommendations, drawing on resources in Long Range Planning to provide direct support for project management, complete research, and process review. Staff will report back with an interim and end of year progress report to update the Task Force on the progress made to date.

## **9.3 Technology Solutions**

A key observation in the DAP report is the inefficient use of staff time (upwards of 80%), spent on completing manual administrative tasks, mainly due to outdated processes and limitations in technology. The DAP report firmly emphasizes the importance of modernized workflow tools (such as the AMANDA software) and an online application submission portal to meet many of the key objectives outlined in the original KPMG report and DAP report. Staff is already experiencing an increase in workload and application volumes, which is projected to significantly increase as more greenfield land in the expansion areas moves through the development approvals process, and so improvements to workflow tools, data management, combined with increases in staff resources will be necessary to keep pace with the volume of applications both now and in the future.

### **9.3.1 AMANDA Workflow Tool and Online Development Application Portal**

The DAP report notes that while several city departments use AMANDA software, outside of the Building Department, the tool is not being utilized to its full potential as a centralized development application tracking tool to manage DAP. Recently, the City upgraded AMANDA to the latest release, purchased the AMANDA web services for integrations, and purchased the Planning Approvals module and its supporting Conditions Clearance module, all to support the modernization of the DAP process.

The technology solutions supporting the DAP report are twofold; first is the full implementation of the AMANDA product to support all Planning processes and those which integrate with Building and Development Engineering. Second, is the implementation of a customer portal by which applicants can more easily submit



development applications, and track the application through the approvals process.

### **9.3.2 Full AMANDA Implementation**

Currently, the AMANDA software system is used in the following three business areas:

- a. Building Department for all types of permits, building permit searches, zoning compliance certificates, bylaw complaints and all orders;
- b. Engineering Department for several types of permits and backflow devices;
- c. Clerks for business licensing; and,
- d. Tax department for property tax (this is a completely separate Amanda module called Open Tax).

AMANDA is not currently treated as a “corporate application” in that support for these systems is generally provided by the user department itself, with some assistance from IT as necessary. In order to effectively roll out the use of the AMANDA system as a development tracking, data management and workflow tool, and to support a future online application portal, the AMANDA software tool should be rolled out as a corporate IT solution.

In addition to rolling out the AMANDA software corporately, the AMANDA program itself needs to be configured to support the full spectrum of development applications and approvals. To test pilot this process, a key deliverable of the Phase 2 Performance Concepts work plan included a full build out (Proof of Concept) for the Site Plan process, which is nearing completion. Staff has worked with Performance Concepts within a testing environment to configure the AMANDA software for site plan applications and will be able to build off of this work to inform the creation of all the necessary folders required to support DAP. The Steering Committee’s assessment of this work concludes that the Proof of Concept meets the City’s needs and expectations.

### **9.3.3 Technical Configuration of the Software and Required Reports**

Given the expertise required to configure the AMANDA software, the Steering Committee is seeking direction from the Task Force to solicit a proposal from North Lake Design Lab, to configure all the required Planning functions and those functions that integrate with Building and Development Engineering. North Lake Design Lab is the consultant currently under contract with the City as part of the DAP review and responsible for building the site plan module in AMANDA as a proof of concept deliverable. A secondary deliverable would be to create a full set of reports to monitor key performance indicators and to provide management data on target to actual time durations that happen between steps of the various planning processes. If approved, a fulsome work plan, schedule, and project cost will be presented to the Task Force and Council for consideration.

#### **9.3.4 Identify City Resources to Support the Configured Software**

An existing IT Services resource has been identified to participate in the development of the Planning and Development Engineering configuration of Amanda. This person will work with the consultant and existing Amanda support staff to not just configure the Amanda system, but to take on the lead support role for Planning and Development Engineering after it goes live. As the AMANDA software will be used across multiple departments and Commissions, it is important that we build a robust support model with sufficient backup resources and cross-training across AMANDA modules, similar to how we manage other corporate systems, with at least two staff members able to support it, using the standard service ticketing process, using corporate reporting solutions, managing all system integrations centrally, coordinating upgrades, and software license management. As noted previously, a staff report will be coming forward to identify the staff resources required to support the recommendations contained in this report.

#### **9.3.5 DAP Customer Portal**

A fully configured and integrated AMANDA system will bring a significant level of improvement and sophistication to the development approvals process. Once the software has been

configured to support the planning application process, the final step will be to implement a customer portal that integrates with the AMANDA system which will bring additional benefits to the Corporation such as;

- Online application submission;
- Document and message exchanges with City staff;
- File progress tracking;
- Fee payments; and,
- Automated application screening for completeness.

The detailed requirements for such a portal was not done as part of the DAP project. The ideal sequence of events would be to begin work on the AMANDA implementation and focus efforts on this process until the program is live and stabilized. This is going to require significant business process changes and it will take time to adjust to the new business processes. Once the system and processes are stable, the City be in a position to move onto the next phase of defining requirements for and implementing a digital portal. However, given the timing to implement a corporate digital portal, staff are looking at interim steps to procure a solution for the Building Department, which can then be leveraged to build out a fulsome DAP solution. The landscape for these software tools is changing rapidly, and by the time AMANDA is fully implemented, the situation could be much different than it is today. As such, the development of a full online customer service portal may be premature at this time, however staff will continue to review options to implement a portal once the implementation of AMANDA is fully underway.

## **9.4 Governance**

In September 2021, Planning Staff brought forward a report identifying areas where the delivery of technical planning services provided by the Planning Department could be streamlined by delegating six (6) services to Staff, and revising certain existing delegated authority to the Chief Planner/Director of Planning. The recommendations to delegate additional approvals to the Chief Planner, as outlined in the staff report, was approved by Council and directly relates to recommendations in the DAP and KPMG reports, that staff look for opportunities where measured

delegation of authority could be enhanced. While this task is complete, it's important to note that staff will continue to review opportunities to improve functions by streamlining the delivery of services where necessary.

The DAP report also identifies opportunities to reconfigure the current Committee of the Whole meeting structure to include meetings for development approvals only. The current COW - Planning and Administration meeting structure often includes several other pertinent reports and matters to be addressed by the Committee, however this limits the amount of statutory public meetings scheduled for each COW meeting. With the anticipated increase in planning application volumes, it may become necessary for the City to consider a separate meeting cycle exclusively for planning matters and increase the opportunity for more applications to move through the meeting cycle more quickly. Staff will continue to monitor this matter, and should the need for an additional meeting cycle arise, staff will prepare a report with input from the necessary departments for Council consideration.

## **9.5 Implementation of the KPMG Recommendations: Status Update**

By way of background, the Building Review Task Force was formed in October, 2019. A high level review was conducted in 2020 with a finalized Development Review Process Assessment prepared by KPMG and approved by Council on Oct 13, 2020. Phase 1 of the review resulted in forty recommendations for implementation, which have since been analyzed and prioritized by the Steering Committee. Of the forty-five (45) KPMG recommendations, attached as **Appendix B**, the following represents the current completion status:

- 9 are complete;
- 17 are in progress, or planned to put into progress in 2022;
- 14 require a technology solution (AMANDA) to be fully implemented;
- 3 Not started; and
- 2 do not apply to DAP specifically, but represent corporate-wide recommendations to be implemented through a separate process.

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A fully digital end-to-end Development Application Process (DAP) is required in order to deliver an efficient and effective process, and to address the outstanding recommendations in the KPMG report.

## 10.0 Financial Implications

There are no financial impacts to the municipality associated with this report. Should the Steering Committee be directed to solicit a formal proposal from North Lake Design Lab, a fulsome work plan and cost estimate will be presented to the Task Force and Council for review and consideration.

## 11.0 Conclusion

This report presents the Task Force with an implementation plan and road map to implement the twenty three (23) “Do Now” recommendations outlined in the final DAP report. A key deliverable of the DAP review has been to develop “As Should Be” process improvements, based on a fully digitalized workflow management tool and online application portal and the staff resources to support these improvements. This report also provides an overall status update with respect to the forty-five (45) recommendations contained in the KPMG report, and while many of the recommendations require technology improvements (AMANDA Workflow tool/ online application portal) in order to implement, staff have been able to implement several of the administrative recommendations to improve service delivery in the interim while the DAP review has been underway.



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In adopting this report, is a by-law or agreement required? If so, it should be referenced in the recommendation section.

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By-law required	<input type="checkbox"/> yes <input checked="" type="checkbox"/> no
Agreement(s) or other documents to be signed by Mayor and/or City Clerk	<input type="checkbox"/> yes <input checked="" type="checkbox"/> no
Is the necessary by-law or agreement being sent concurrently to Council?	<input type="checkbox"/> yes <input checked="" type="checkbox"/> no