



**Credit Valley  
Conservation**  
inspired by nature

# **PLANNING AND DEVELOPMENT SERVICES CUSTOMER SERVICE AND STREAMLINING Action Plan**

**Prepared by: Credit Valley Conservation**

**June 2019**

## **PURPOSE**

The purpose of this document is to outline CVC Planning and Development Services (PDS) department's action plan to demonstrate CVC's continued commitment to customer service excellence in keeping with CVC's corporate Customer Service Charter and consistent with Conservation Ontario's Client Service Streamlining Initiative.

The following is an outline of CVC's PDS department's identified actions for the short term (2019), medium term (2020) and long term (2020 and beyond), in keeping with our commitment to customer service excellence around a client centric approach.

The plan identifies three core themes -- Improve Client Service and Accountability, Increase Speed of Approvals, and Reduce Red Tape and Regulatory Burden -- under which the actions will be carried out.

Note: Appendix 1 provides an illustration of each of the core themes and associated actions CVC's PDS department has committed to, as outlined in more detail below.

## **Link to CVC's Strategic Plan**

- a. Goal 2: Safeguard people, property and communities from Hazards
- b. Goal 7: Ensure that Credit Valley Conservation is a well-managed, sustainable and service driven organization
  - i. CVC's Board approved Customer Service Charter is currently available on CVC's website at <https://cvc.ca/wp-content/uploads/2018/09/customer-service-charter-2018.pdf>

## **CORE THEMES and ASSOCIATED ACTIONS**

### **1. Improve Client Service and Accountability**

#### ***Online Screening Maps, Service Agreements, Guidelines and Data Availability***

- a. Online Regulation Mapping: online regulation mapping is currently available on CVC's website at <https://cvc.ca/planning-permits/regulation-mapping/>

- i. Short Term – no action
  - ii. Medium Term – no action
  - iii. Long Term – update and maintain online mapping as approved
- b. Service Agreements (Memorandum of Understanding): all CVC service agreements/MOUs are available on CVC's website at <https://cvc.ca/planning-permits/planning-services/>. CVC currently has service agreements/MOUs with all partner municipalities except Brampton (currently under review at municipality)
  - i. Short Term – Review existing (or current undertakings) Service Agreement/MOU identify gaps (e.g. Caledon (1997), plan review timelines etc.)
  - ii. Medium Term – Contact municipalities to undertake review and update of Service Agreements/MOUs where necessary
  - iii. Long Term – update and maintain online agreements as approved
- c. Check Lists and Guidelines: all CVC checklists and Guidelines are available on CVC's website at <https://cvc.ca/planning-permits/policies-guidelines/>
  - i. Short Term:
    - 1. Review policy and guideline list and update where necessary
    - 2. Require checklists used as part of complete application process
  - ii. Medium Term:
    - 1. Checklists – develop more 'user-friendly' checklists and ensure used as part of application submission process
    - 2. Guidelines - review guidelines to ensure consistent with best practices and provincial/municipal standards, updating where necessary
  - iii. Long Term – Develop a working group with Province, municipal partners and stakeholders to identify gaps and opportunities where additional guidelines are needed, where existing ones may be improved and for consistency across the GGH
- d. Open Source Data and Publicly Available Data
  - i. Short Term:
    - 1. Explore opportunities to develop online open source data and/or publicly available data portal(s)
    - 2. Identify types of data possible to include in open source and publicly available data (risk management and legal)

3. Identify priority data to include in open source or publicly available data most useful for users (e.g. floodplain mapping data, flood models etc.?)
  4. Review and streamline current data request process (reduce timeframe and administrative burdens – e.g. data sharing agreements etc.)
- ii. Medium Term – develop an open source and publicly available data strategy
  - iii. Long Term – develop an open source and publicly available data project to implement strategy

## 2. Increase Speed of Approvals

### *Application Streams and Service Workflow*

- a. Work Flow Transparency: CVC currently has a Planning and Development Administrative Procedural Manual available on CVC's website at [https://cvc.ca/wp-content/uploads/2012/04/CVC-Procedural-Manual-final\\_Dec\\_2011.pdf](https://cvc.ca/wp-content/uploads/2012/04/CVC-Procedural-Manual-final_Dec_2011.pdf)

In addition, CVC currently has a permit and plan review processes work flow charts on the CVC website at <https://cvc.ca/planning-permits/permits-regulations/permit-review-process/> and <https://cvc.ca/wp-content/uploads/2011/07/Plan-Review-Flowchart.pdf>

- i. Short Term:
    1. Review and update online workflow review process charts – including updated processes and internal procedures (e.g. application checklists, complete application notification, review timelines etc.).
  - ii. Medium Term – review and update Procedural Manual, particularly related to PDS admin policies and procedures.
  - iii. Long Term - review, update and maintain Procedural Manual and associated materials online (workflow process chart etc.) seeking opportunities for further transparency (based on need and overall effectiveness).
- b. Departmental Organization Streamlining
    - i. Plan Review Teams: Currently, CVC PDS structures plan review staff into teams considering expertise (urban vs rural) and to increase consistency and familiarity in decision making (internally and externally):

1. By Municipality: Plan Review Teams are currently structured by municipality (i.e. a planner, planning ecologist and plan review engineer) – this should not be changed
  - a. Short Term:
    - i. Reformat mandatory team bi-weekly Planning Integration Committee (PIC) meetings to include committed senior PDS staff (leadership team) attendance (minimum Sr. Managers):
      1. Triage issues
      2. Coordinate/review file status, timelines and performance standards
      3. Expedite resubmission approvals for minor applications and/or re-submissions
    - ii. Require bi-weekly Triage meetings (opposite PICs) with team members and needed technical support staff to support PIC functions where senior staff not necessary
  - b. Medium Term – evaluate PIC effectiveness at addressing/providing direction on larger scale projects and issues (e.g. often enough? Effective forum for decision making? Reducing resubmissions for files discussed? etc.)
  - c. Long Term – develop an internal working group to monitor and evaluate effectiveness of ‘issues management’ process and provide recommendations to consider for improvements (e.g. joint project assessment meetings, coordinated field assessment meetings etc.)
2. Team Leads and Case/File Facilitator: Currently, planners lead plan review teams and are the lead contacts for file and issue management.
  - a. Short Term:
    - i. Confirm planners lead plan review teams and provide direction on files and identified issues. Clarify case/file facilitators are senior PDS staff and must involve appropriate senior staff (at a minimum – Senior Manager, Planning)
    - ii. Review PDS organizational structure and modify to optimize workflow, ensure

internal/external consistency and support customer service and employee development opportunities are available

- b. Medium Term – develop an internal training strategy for staff education on municipal and development industry processes
- c. Long Term – monitor, review and modify team and organizational structure as needed

c. Complete Application: CVC has a complete application checklist for permit and planning applications available on-line at <https://cvc.ca/wp-content/uploads/2019/08/CVC-Permit-Application-Checklist-2019.pdf>

i. Pre-Consultation: CVC staff offer pre-consultation for permit applications, including site visits (e.g. general development and potential development applications). In addition, CVC staff coordinate with municipal pre-consultation process(es) and attend to provide input

1. Short Term:

- a. Regulation: require mandatory pre-consultation for permit applications, coordinated with required checklist through the complete application process
- b. Plan Review: require staff attend municipal pre-consultation meetings for all applicable applications (e.g. Development Application Review Committee [Mississauga], Development Review Committee [Halton Hills] etc.)

2. Medium Term – coordinate with municipalities to have regular integration/coordination meetings regarding plan input/plan review (e.g. Peel-CA Discussion Forum, Halton Area Planning Partnership/Halton Area Development Managers etc.)

3. Long Term – develop a working group to monitor and review pre-consultation process(es) and identify gaps and efficiency reviews

ii. Complete Application Process

1. Short Term:

- a. Formalize a 'complete application process' for permit applications of all types (minor and major) – requiring formal confirmation to applicants prior to acceptance of application for review (pre-consultation and application checklists required)

- b. Develop standardized (rigid) mandatory timelines to identify application completeness and review timelines (consistent with existing MNRF guidelines) – including for resubmissions
- 2. Medium Term – update application review timelines and coordinate with municipalities
- 3. Long Term - evaluate application and submission timelines, including application quality, and adjust process as necessary

### **3. Reduce Red Tape and Regulatory Burden**

#### ***Policy Alignment and Development***

- a. Planning and Regulation Policies: CVC has a Board approved policy document outlining CVC’s plan review, plan input and regulatory policies – the policy document is available on-line at [https://cvc.ca/wp-content/uploads/2011/01/004-CVC-WPR-Policies\\_APR-2010.pdf](https://cvc.ca/wp-content/uploads/2011/01/004-CVC-WPR-Policies_APR-2010.pdf)
  - i. Short Term – prepare (interim) internal risk-based guidelines for:
    - 1. Types of development (‘minor works’ exemptions)
    - 2. Wetlands (exemptions or wetland status based on size, function and hydrologic connection)
  - ii. Medium Term - begin planning and regulation policies update strategy based on anticipated CAA and Sec 28 regulation (including CRWNHS and offsetting guide)
  - iii. Long Term – update planning and regulation policies based on new CAA and Sec 28 regulation
- b. Service Delivery (review timelines)
  - i. Short Term – track permit application timelines (coordinated with submission requirements, complete application and existing guideline timelines)
  - ii. Medium Term – develop permit application timeline requirements (for non-planning permits, planning related permits and major/minor applications)
  - iii. Long Term:
    - 1. Develop an improved, consistent and more efficient database/tracking system (corporate - SharePoint)
    - 2. Undertake annual reporting (CVC Board, BILD, Province) – coordinating with ‘new’ anticipated Provincial requirements
- c. Cost Recovery and Fees (staff time and resources)

- i. Short Term – track PDS staff time based on plan review, plan input, permitting and EA activities
- ii. Medium Term – conduct analysis of staff time to support fee review and departmental budgeting (BILD 2020 – subdivision fee agreement expires)
- iii. Long Term – undertake annual reporting (CVC Board, BILD, Province), coordinating with ‘new’ anticipated Provincial requirements

d. Evaluation

- i. Customer Service Surveys
  - 1. Short Term - develop customer survey for front counter, permit applications and on-line
  - 2. Medium Term – develop customer survey for plan review customers and strategy for outreach
  - 3. Long Term – undertake annual reporting (CVC Board, BILD, Province)



## **APPENDIX 1**

Illustration of CVC's client centric customer service core themes and associated actions

# IMPROVE CLIENT SERVICE and ACCOUNTABILITY

## Online Regulation Mapping

- **Short Term:** maintain online regulation mapping.
- **Medium Term:** review regulation mapping for consistency with updated regulation.
- **Long Term:** update online mapping with revised floodplain and wetland data (including regulation changes).

## Service Agreements

- **Short Term:** review existing service agreements/MOUs and identify gaps based on best practices (currently online).
- **Medium Term:** contact municipalities to undertake coordinated review and update.
- **Long Term:** update and maintain online agreements as approved.

## Check Lists and Guidelines

- **Short Term:** review online policy and guideline list and identify gaps and update requirements (best practices).
- **Medium Term:** develop more 'user friendly' guidelines and checklists (ensure used as part of application processes).
- **Long Term:** Develop working group to identify gaps and opportunities (guideline needs, industry standards and best practices).

## Open Source/Publicly Available Data

- **Short Term:** explore opportunities to add to existing open source data (flood modeling) and on-line data (floodplain mapping) - based on external demand.
- **Medium Term:** review and streamline current data request process (data sharing agreement requirements, online request etc.).
- **Long Term:** Develop an open source and publicly available data strategy and implement.

# INCREASE SPEED of APPROVALS

## Work Flow

- **Short Term:** review and update online workflow process charts - including internal procedures (application checklists, complete application notification, timelines).
- **Medium Term:** review and update Procedural Manual - particularly related to PDS admin policies and procedures.
- **Long Term:** update and maintain Procedural Manual and associated online information - including administrative policies (fees, timelines etc.).

## Issue Management

- **Short Term:** review and establish mandatory bi-weekly planning team meetings with senior staff (alternate week triage).
- **Medium Term:** evaluate team meeting effectiveness.
- **Long Term:** Develop internal working group to monitor and evaluate effectiveness of 'issues management' process and provide recommendations as needed (particularly related to consistency and timelines).

## Case Facilitation

- **Short Term:** Identify planners as 'team leaders' and Sr Manager Planning as 'case facilitator'.
- **Medium Term:** develop internal training strategy for all staff to educate on municipal and development industry process(es).
- **Long Term:** Monitor, review and modify teams and departmental structure (areas of responsibility, decision matrix) as needed.

## Departmental Organization

- **Short Term:** review PDS organizational structure and modify to optimize work flow, ensure consistency, better support issue management/case facilitation processes and take advantage of growth opportunities.
- **Medium Term:** No action.
- **Long Term:** Monitor and review departmental structure and optimize as needed based on growth opportunities, meeting client needs, resourcing etc..

## Application Process

- **Short Term:** establish and implement formal application process requiring pre-consultation, complete application notification and (iterim) timelines (for plan review and regulations).
- **Medium Term:** update mandatory review timelines coordinated with provincial (regulatory) and municipal (plan review) requirements.
- **Long Term:** develop working group to monitor and review application process(es) and identify gaps, challenges and opportunities.

# REDUCE RED TAPE and REGULATORY BURDEN

## Policy Alignment

- **Short Term:** develop (interim) internal risk based guidelines for types of development (minor works) and wetlands (size, hydrologic connection) - exceptions and exemptions.
- **Medium Term:** develop planning and regulation policy update strategy - 10 year review (updated Act, Regulation - CRWNHS and offsetting).
- **Long Term:** Update Planning and Regulation policies based on strategy.

## Service Delivery

- **Short Term:** track permit and planning application review timelines - coordinated with submission and review requirements.
- **Medium Term:** update permit application timeline requirements based on regulatory requirements.
- **Long Term:** develop an improved and more efficient database/tracking system (corporate/ SharePoint database coordination).

## Cost Recovery

- **Short Term:** track PDS staff time based on plan review, plan input, permitting and EA activities.
- **Medium Term:** conduct analysis of staff time to support/modify fee review and departmental budgeting.
- **Long Term:** develop an improved and coordinated time database/tracking system (with Service Delivery tracking).

## Performance Evaluation

- **Short Term:** develop customer survey for front counter, all permit applications and on-line survey.
- **Medium Term:** develop customer survey for plan review customers and strategy for outreach (municipalities, BILD, OFA etc.).
- **Long Term:** Undertake annual reporting to CVC Board, BILD and Province related to service delivery and cost recovery performance.