

TO: The Chair and Members
of the Board of Directors,
Credit Valley Conservation

SUBJECT: **PLANNING AND DEVELOPMENT SERVICES
CUSTOMER SERVICE AND STREAMLINING ACTION
PLAN**

PURPOSE: **To seek endorsement of the Board of Directors of CVC for
Planning and Development Services Customer Service and
Streamlining Action Plan**

BACKGROUND:

Conservation Authorities Liaison Committee

In 2007 conservation authorities (CAs) participated with the Ontario Home Builders Association (OHBA) and the Building Industry and Land Development Association (BILD) along with municipalities, the province and other stakeholders as members of the Conservation Authorities Liaison Committee (CALC). In 2010, the Ministry of Natural Resources and Forestry (MNRF) and Ministry of Municipal Affairs and Housing (MMAH) approved updated *Policies and Procedures for Conservation Authority Plan Review and Permitting Activities* that would form part of MNRF's Policies and Procedures Manual. Among other things, the document clarifies CA's roles and responsibilities in municipal planning, plan review and *Conservation Authorities Act* Section 28 permitting as it relates to growth management.

In addition, through 2011 MNRF required all CA's to report monthly on Section 28 permit review timelines that were developed as a pilot for best practices. In all permit categories (minor and major) CVC complied with the review timelines approximately 95% of the time.

Customer Service Optimization

To further assist in the implementation of MNRF's updated policies CVC Planning and Development Services (PDS) undertook a planning service enhancement review, led by Planning Solutions Incorporated. Upon completion of the review in mid-2011, a report was prepared titled *Customer Service Optimization - CVC Planning Department*. The report contained several recommendations targeted at improvements for program administration and service delivery including staff capacity and workload, application quality, the politics of planning and regulations, plan review/permitting program administration, application review timeframes, work flow, value added service and fees.

Since that time, PDS staff has been monitoring service delivery performance, on an ad hoc basis, to evaluate the plan review and regulation programs' service delivery effectiveness and efficiency.

Conservation Ontario Client Service and Streamlining Initiative

Most recently, PDS staff has directly engaged with Conservation Ontario (CO) and partner CAs in program reviews to explore opportunities for further customer service improvements and increased accountability.

At the CVC Board of Directors meeting in March 2019, PDS staff presented an overview of PDS' programs and services, including a review of CVC's roles and responsibilities related to planning and regulatory functions, department organizational structure, and CVC's watershed planning and regulatory policy framework. At that same meeting, the Board endorsed (CVC Board Resolution #31/19) three key solutions developed by a working group of CA General Managers and Chief Administrative Officials created by CO to pursue CA plan review and regulation program streamlining and client service standards in response to the provinces' 'Modernizing Conservation Authority Activities' initiative and to recognize the role CAs play in supporting the province's priority to increase housing supply.

The three key solutions endorsed by the Board included the following:

1. Improve client service and accountability;
2. Increase speed of approvals; and
3. Reduce red tape and regulatory burden.

At that time, the Board also directed staff to continue to work with CO and stakeholders to identify additional improvements, and to implement actions associated with the solutions as soon as possible.

ANALYSIS:

Since March 2019, PDS staff have been engaged with CO and partner CA staff participating in the following client service and streamlining project activities:

1. CO client service delivery training for CA planning and regulatory staff (CVC hosted one of the Central Ontario CA sessions):
 - a. Full day interactive training session given by Capstone Development and Training Inc.;
 - b. Attended by several CA staff across the province (Southern, Central, Eastern and Northern) – including CO staff; and
 - c. 12 CVC PDS planning, regulation and senior technical staff attended.
2. Development of templates and guidelines to assist in standardizing CA outputs:
 - a. CA client service standards for planning and development reviews – including service delivery standards, review and approval process checklists, as well as standards for making guidelines, agreements and other key information publicly available;
 - b. Template for CA/municipal service agreement framework for planning and development approvals;
 - c. Guideline for CA fee administration for plan review and permitting; and

- d. Templates for CA planning and development related comments.
3. CA work/process flow review for plans of subdivision and site plans (on-going) and recommended improvements/standards; and
4. Identifying legislative opportunities for reducing red tape and regulatory burden.

Customer Service and Streamlining Action Plan

In addition, a 'made-in-CVC' *Planning and Development Services Customer Service and Streamlining Action Plan* (June 2019) was created for immediate implementation (see Schedule 'D', Appendix 1). The action plan builds on past PDS program and service enhancements already implemented, as well as:

- MNRF's updated policies and procedures,
- Recommendations from the *Customer Service Optimization – CVC Planning Department* report; and
- The key solutions, activities, templates and guidelines developed by CO's working group and client service and streamlining initiative.

The action plan is also a reflection of PDS's long standing leadership role in customer service excellence and PDS staff's continued commitment to improvements in program and service delivery.

The purpose of this action plan is to outline the PDS department's planned program monitoring and service improvement actions, and to demonstrate a continued commitment to customer service excellence in keeping with CVC's Board approved corporate Customer Service Charter. The action plan identifies three core themes consistent with the CO working groups key solutions, and provides detailed actions to be undertaken for the short term (2019), medium term (2020) and long term (2020 and beyond).

Table 1 outlines each core theme and targeted action area identified in the action plan. The full details, including specific actions for each target action area and associated timeframes for completion are contained in the full action plan attached as Schedule 'D', Appendix 1.

Table 1 – PDS Action Plan Core Themes and Target Action Areas

CORE THEMES	TARGET ACTION AREAS
Improve Client Service and Accountability	<ul style="list-style-type: none"> ➤ Online Regulation Mapping ➤ Service Agreements ➤ Checklists and Guidelines ➤ Open Source/Publicly Available Data
Increase Speed of Approvals	<ul style="list-style-type: none"> ➤ Work Flow ➤ Issue Management ➤ Case Facilitation ➤ Departmental Organization ➤ Complete Application Process
Reduce Red Tape and Regulatory Burden	<ul style="list-style-type: none"> ➤ Policy Alignment ➤ Service Delivery (review timelines) ➤ Cost Recovery and Fees (staff time and resources) ➤ Customer Service Surveys ➤ Monitor and Evaluate Performance

Although it is not the purpose of this report to evaluate and update the Board on results from the action plan's specific actions or the status of their implementation, Table 2 provides a preview of some specific actions completed as of October 2019.

Table 2 – PDS Action Plan Core Themes and Key Specific Actions Completed

CORE THEMES	*KEY SPECIFIC ACTIONS COMPLETED
Improve Client Service and Accountability	<ul style="list-style-type: none"> ➤ Update online regulation mapping; ➤ Undertake service agreement reviews; ➤ Prepare/update technical guidelines. ➤ Update CVC PDS website to include planning and development 'checklist' to increase transparency**;
Increase Speed of Approvals	<ul style="list-style-type: none"> ➤ Update work flow, application checklists and timeline standards ➤ Optimize departmental structure and plan review teams ➤ Appoint team leads ➤ Appoint departmental case/file facilitator ➤ Develop/adopt complete application process guide
Reduce Red Tape and Regulatory Burden	<ul style="list-style-type: none"> ➤ Prepare (internal) risk-based guidelines for permit review ➤ Track permit application timelines ➤ Track PDS staff time to support cost recovery and resourcing

* as of October 2019

** includes links to the following webpages: client experience survey, permit and regulations, planning services, policies and guidelines, property enquiries (FAQ); CVC planning contacts; on-line regulation mapping, CVC Customer Service Charter and PDS Customer Service and Streamlining Action Plan

It is proposed that a detailed evaluation and implementation status report on the specific actions in the action plan be provided to the Board annually, beginning late 2020. This timing will allow an appropriate amount of time to implement the plan, as well as adequate time to collect data for a meaningful analysis to support the evaluation of program service delivery, cost recovery and customer service performance indicators.

COMMUNICATIONS PLAN:

Copies of this report will be forwarded to member municipalities, Conservation Ontario, Greater Golden Horseshoe Conservation Authorities, and the Building Industry and Land Development Association for their information.

FINANCIAL IMPLICATIONS:

There is no financial impact to CVC for this project.

CONCLUSION:

In 2007 the Province created the CALC to support an update to MNRF's *Policies and Procedures for Conservation Authority Plan Review and Permitting Activities*. Since that time, PDS has been working to ensure consistency with provincial service delivery guidelines and implementing program improvements to ensure effective and efficient program administration and client services.

In March 2019, the Board endorsed three key solutions to form the framework for PDS customer service and streamlining activities. At that time, the Board directed PDS staff to work with CO and stakeholders to identify additional improvements, and to implement these solutions as soon as possible. In June 2019, PDS staff developed the *Planning and Development Services Customer Service and Streamlining Action Plan* (June 2019) – building on the Board endorsed 3 key solutions.

It is recommended the Board endorse the attached action plan (Schedule 'D', Appendix 1), and that PDS staff report back to the Board with a detailed evaluation and implementation status report on the specific actions contained in the action plan annually (beginning late 2020).

RECOMMENDED RESOLUTION:

WHEREAS the CVC Board of Directors endorsed the three key solutions developed by the Conservation Ontario working group to improve client service and accountability; increase speed of approvals; and reduce red tape and regulatory burden; and

WHEREAS the Board of Directors directed staff to work with Conservation Ontario and stakeholders to identify additional improvements and implement the solutions as soon as possible;

THEREFORE BE IT RESOLVED THAT the report entitled "Planning and Development Services Customer Service and Streamlining Action Plan" be received and appended to the minutes of this meeting as Schedule 'D'; and

THAT the Board of Directors endorses the Planning and Development Services Customer Service and Streamlining Action Plan attached as Schedule 'D', Appendix 1; and further

THAT Planning and Development Services staff report back to the Board of Directors with a detailed evaluation and implementation status report on the specific actions contained in the action plan annually, beginning late 2020.

Submitted by:



Josh Campbell MES, RPP
Director, Planning and Development Services

Recommended by:



Deborah Martin-Downs
Chief Administrative Officer