



Comprehensive Review of Development Review & Policy Formulation Processes

Final Report

City of Vaughan

November 2021





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1 Executive Summary

Executive Summary

The City of Vaughan (City or Vaughan) is a fast-growing municipality with a bold ambition to provide class-leading development services.

In April 2021, the City retained KPMG LLP (KPMG) to conduct a comprehensive assessment of its development review and policy formulation processes.

Throughout our work, staff and industry stakeholders emphasized the City's highly skilled staff, growth-oriented culture and smooth transition to digital service delivery during the pandemic as differentiators against municipal peers in the Greater Toronto Area (GTA).

Vaughan's development review and policy formulation processes are working well but the volume and complexity of development is changing. With a recently opened subway line and another on the way, Vaughan is transitioning from suburban to more complex urban development patterns. To build a world-class city, Vaughan's development review and policy formulation processes will have to evolve to keep pace.

This report includes 27 recommendations to help Vaughan deliver fast, effective and customer-focused development services. These recommendations are grounded in extensive stakeholder engagement, global leading practice and build on the City's existing strengths. Taken together, our recommendations will help Vaughan address the pressures of changing development patterns and maximize the benefits of the City's exceptional growth.

Project Background

The objective of our assessment was to identify recommendations to help ensure that Vaughan's development review and policy formulation processes are efficient, effective and customer focused. Our scope included a review of:



Services, processes, procedures and supporting documentation



The roles and responsibilities of staff, departments and other stakeholders



Application management practices, including governance, project management and customer service



Development-related timelines and performance management practices.

Our work focused on four specific development application types (Official Plan Amendments, Zoning Bylaw Amendments, Plans of Subdivision and Site Plan Applications) and two supporting policy framework processes (Secondary Plans and Block Plans).

This report and our recommendations are grounded in a robust evidence base including both qualitative and quantitative sources of information, including:

More than 30 one-on-one interviews with senior staff from 10 departments as well as elected officials and external commenting partners¹;

¹ Commenting partners are internal and external stakeholders that review and provide comments on development applications.

Executive Summary

Two process improvement workshops with frontline development review and development policy staff;

Two industry focus groups with more than 30 industry representatives, including developers, urban planners, design professionals and other consultants;

Three online surveys targeting residents' associations, industry and City staff with more than 280 total respondents;

Jurisdictional benchmarking including both global leading practice and research into six comparable GTA municipalities; and,

A review of over 80 documents and 15 sample development applications as well as an analysis of data from the City's PlanIt system.

Additional information about our approach is included in Appendix A.

Current State Assessment

Vaughan's development review and policy formulation processes are working well. Strengths identified through our assessment include:



A growth-oriented and improvement-focused culture



The interdisciplinary, team-based approach used in the Vaughan Metropolitan Centre (VMC)



Recent improvements to the pre-application consultation process



The City's Development Liaison Committee (DLC) for industry engagement

Our assessment also identified that while the foundation is strong, there is room for improvement. The fundamental challenge facing Vaughan's development review and policy formulation processes is how to scale operations to address the increasing complexity and volume of development. It is a challenge faced by similarly fast-growing suburban municipalities across Canada. Additional information about our current state assessment is included in Appendix B.

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Recommendations

This report includes 27 recommendations to help Vaughan scale operations to match the increasing complexity and volume of development. The recommendations build on the City's strengths by:

Formalizing the development review and policy formulation processes to increase consistency, predictability and transparency;

Streamlining the circulation process to reduce delays and conflicting comments;

Expanding the team-based model used in VMC to other high-growth areas;

Establishing process-wide governance to improve oversight and accountability;

Developing new project management tools to accelerate timelines and enhance the applicant experience;

Enhancing delegation to increase the staff time available for more valuable work; and,

Improving public engagement through a plain language audit and new public-facing tools.

Taken together, it would be reasonable for the City to seek annual cost savings of up to 10% to 15% from these recommendations, based on our experience in other jurisdictions and leading practice in municipal service delivery review.²

A summary of our recommendations is included in Figure 1 on Page 9. All of our recommendations are expected to have positive impacts on service levels. To assist in the prioritization of recommendations, in Figure 2 on Page 12 we provide a matrix estimating the service level impact and implementation effort of each recommendation. A detailed discussion of each recommendation is included in Section 2.

² KPMG has relied on the City for the completeness, accuracy, appropriateness, and reliability of all information provided. The City is responsible for the decisions to implement any of the potential opportunities identified and for considering their impact. Implementation of these opportunities will require City management to plan and test any changes to ensure that Vaughan will realize satisfactory results. Furthermore, KPMG has not evaluated these opportunities for relevance, risks, or progress towards achieving expected results. Initiatives that are outside of the scope of our engagement have been considered when identified by the City, but there may be other initiatives that may have a significant impact on KPMG's observations and insights.

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Next Steps

Section 3 presents an implementation plan with detailed actions for each of our recommendations. As an immediate next step, the City should identify a dedicated team and supporting governance structure to implement the proposed plan included in this report. To facilitate implementation, we have also included recommended implementation resourcing and a governance structure as well as a high-level change management and communications framework.

Successfully implementing the recommendations identified in this report will require sustained executive-level support and substantive engagement and collaboration with staff, industry and other development-related stakeholders. It will also be important to integrate the implementation of this report into related City transformation programs.

How to Read this Report


The body of this report has three sections. Section 1 is this Executive Summary, Section 2 outlines our recommendations, and Section 3 presents our proposed implementation plan.

We have also included six appendices with supporting material. Our project work plan and current state assessment are presented in Appendices A and B, respectively. The current state assessment was previously shared in our Interim Report. Appendix C presents our jurisdictional benchmarking, which includes global leading practice, a maturity assessment and success factors identified through comparator research. Appendices D, E and F present additional supporting material, including a list of documents reviewed and stakeholders engaged through our work.


Executive Summary


Figure 1 presents our recommendations. They are organized into the six layers of our assessment framework, described in Appendix A. Additional detail about each recommendation is presented in Section 2.


Figure 1: Recommendations

Layer	Recommendations
 Services and Process	<ul style="list-style-type: none">2.1.1 Create standard operating procedures to increase the consistency, predictability, and transparency of the development review and policy formulation processes.2.1.2 Refresh circulation guidelines and include an opt-in approach to accelerate application review cycle times and reduce late-stage comments.2.1.3 Standardize how comments are shared with applicants to ensure that comments have been addressed and accelerate review timelines.2.1.4 Provide staff with a project management toolkit to improve process consistency and increase their capacity for more valuable work.2.1.5 Establish a formal internal and external meeting structure for complex applications to align commenting partners and improve customer service.2.1.6 Implement formal development application streams to increase system capacity and improve resource allocation.2.1.7 Establish an automated application review mechanism to incentivize application quality and accelerate review timelines.2.1.8 Streamline the staff report approval process to reduce delays and increase the staff time available for higher value work.


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Layer	Recommendations
 Resources, Organization, and Governance	<p>2.2.1 Expand the integrated, team-based model used in VMC to other high growth areas.</p> <p>2.2.2 Establish a city-wide governance structure for the development review and policy formulation processes to improve accountability and portfolio management.</p> <p>2.2.3 Clarify the roles and responsibilities of development review and policy formulation staff and other stakeholders through a publicly available terms of reference document.</p> <p>2.2.4 Establish a job rotation program for development planning and development policy staff to improve collaboration and career development opportunities.</p> <p>2.2.5 Establish quarterly meetings with major external commenting partners to review the development application portfolio, resolve issues, and discuss priorities.</p>

Layer	Recommendations
 Performance Management	<p>2.3.1 Establish an interdepartmental performance measurement framework to improve the management and evaluation of the development review and policy formulation processes.</p> <p>2.3.2 Develop a comprehensive set of key performance indicators to support the new performance measurement framework.</p> <p>2.3.3 Expand time tracking to all development review related functions to improve resource management, transparency, and performance measurement.</p>

Layer	Recommendations
 Technology and Information	<p>2.4.1 Accelerate the transition to a new workflow management system to enable improved business performance.</p> <p>2.4.2 Develop and implement a data sharing strategy to enhance transparency and application quality.</p>

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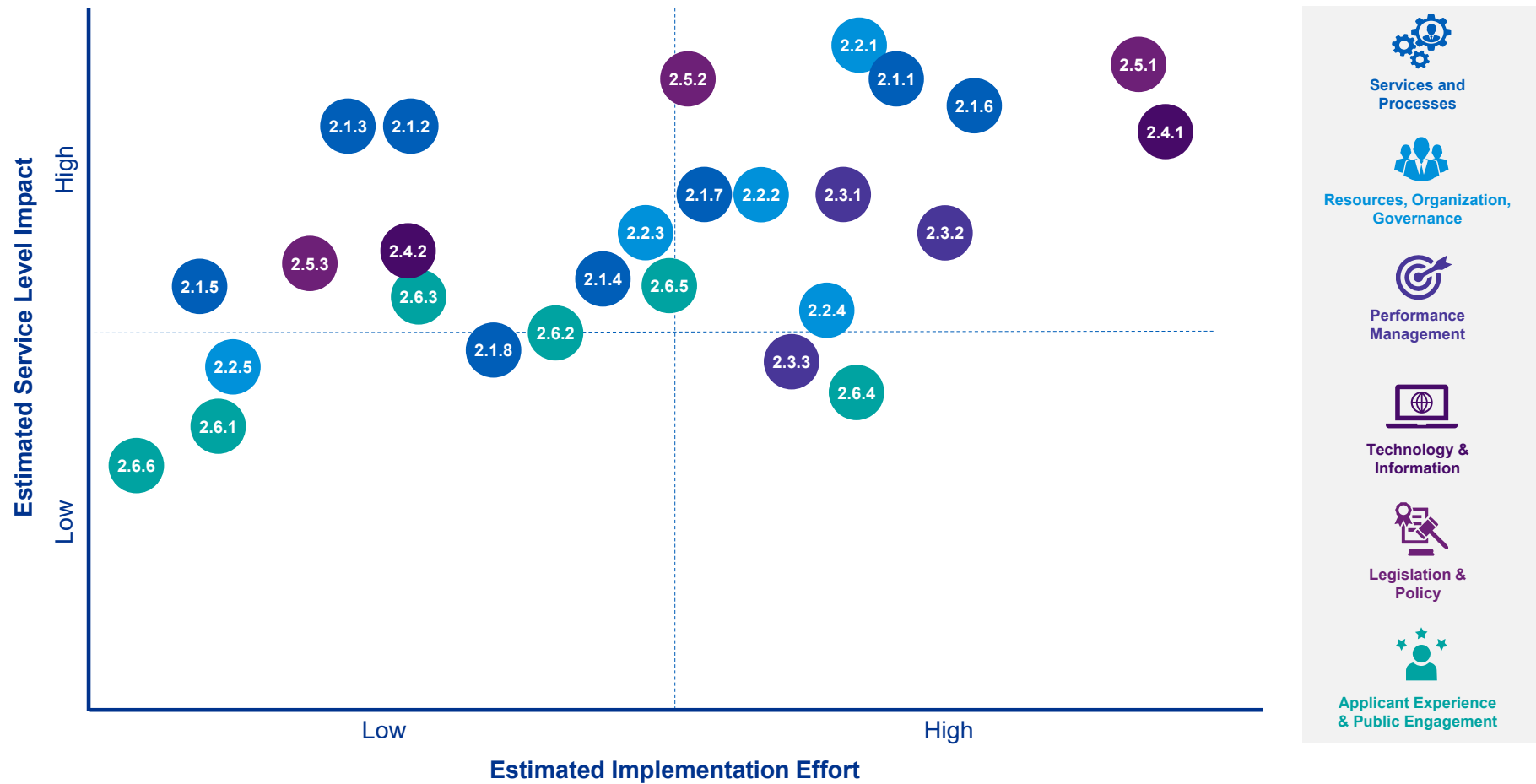
Layer	Recommendations
 Legislation and Policy	2.5.1 Undertake a detailed study to evaluate the costs and benefits of eliminating the block plan.
	2.5.2 Develop and implement standard operating procedures and supporting tools to improve the efficiency and effectiveness of the secondary plan and block plan processes.
	2.5.3 Expand site plan delegation to decrease timelines and staff capacity for higher value work.

Layer	Recommendations
 Applicant Experience and Public Engagement	2.6.1 Create applicant satisfaction surveys to measure applicant satisfaction with the development review and policy formulation processes.
	2.6.2 Create two-way learning opportunities for applicants, staff and other commenting partners to improve application quality and customer service.
	2.6.3 Develop a user-friendly “Planning and Development 101” guide for staff, applicants, members of the public and residents’ associations to enhance understanding of the development review and policy formulation processes.
	2.6.4 Develop a formal public engagement policy to outline when and how public consultation should take place outside of statutory requirements.
	2.6.5 Conduct a plain language audit to improve public facing development-related communications and supporting materials.
	2.6.6 Use semi-annual meetings with residents’ associations to improve information sharing.

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Figure 2 presents an estimate of the service level impact and implementation effort for each of our recommendations.

Figure 2: Service Level / Implementation Matrix





2 Recommendations

Recommendations

In this section, we present our recommendations to improve the efficiency and effectiveness of Vaughan's development review and policy formulation processes.

Our recommendations are organized according to the six layers of our assessment framework. They are grounded in a robust evidence base, including:

More than 30 one-on-one interviews with senior City staff from 10 departments, as well as elected officials and external commenting partners;

Two process improvement workshops;

Two industry workshops with more than 30 industry representatives, including developers, urban planners, design professionals, and other consultants, as well as representatives from the Building Industry and Land Development Association;

Three online surveys targeting City staff, industry representatives, and residents' associations;

Four co-design workshops with PGM staff, including senior leadership, managers, and frontline staff;

A review of more than 80 documents, 15 sample development applications, and multiple data reports;

A jurisdictional benchmarking review of six comparable Greater Toronto Area municipalities; and

KPMG leading practice research for development review and policy formulation processes.


Additional detail about our assessment framework and evidence base is provided in Appendix A. Unless otherwise stated, recommendations apply to all development application types within the scope of our review.

These recommendations should be read alongside the City's related transformation programs, such as the PGM Service Review.

Recommendations

2.1 Services and Process

This section presents our recommendations related to the services and processes layer of our assessment framework. This layer includes the processes, practices and procedures used to deliver the City's development-related services.

Layer	Recommendations
 Services and Process	<ul style="list-style-type: none">2.1.1 Create standard operating procedures to increase the consistency, predictability, and transparency of the development review and policy formulation processes.2.1.2 Refresh circulation guidelines and include an opt-in approach to accelerate application review cycle times and reduce late-stage comments.2.1.3 Standardize how comments are shared with applicants to ensure that comments have been addressed and accelerate review timelines.2.1.4 Provide staff with a project management toolkit to improve process consistency and increase their capacity for more valuable work.2.1.5 Establish a formal internal and external meeting structure for complex applications to align commenting partners and improve customer service.2.1.6 Implement formal development application streams to increase system capacity and improve resource allocation.2.1.7 Establish an automated application review mechanism to incentivize application quality and accelerate review timelines.2.1.8 Streamline the staff report approval process to reduce delays and increase the staff time available for higher value work.

2.1.1 Create standard operating procedures to increase the consistency, predictability, and transparency of the development review and policy formulation processes.

Our research indicates that the development review and policy formulation processes are largely informal. While there are exceptions, such as the recently updated pre-application consultation process, most processes and procedures are unwritten and rely heavily on staff experience or other institutional knowledge. Where processes and procedures are documented, they are often not current. Project and practice management tools, such as reporting templates, are limited.

The relatively low level of process formalization reduces consistency, predictability, and transparency for both applicants and staff. Process steps, application requirements and other work-related elements often vary significantly across staff and departments. Informal, unwritten processes also create barriers to staff onboarding and training.

To address these gaps, Vaughan should consider systematizing its development review and policy formulation processes by developing standard operating procedures (SOPs) for each development application type and policy process, including, but not limited to³:

³ Additional detail about the proposed SOPs for the secondary and block plan processes are included in Recommendation 2.5.2.

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- Official Plan Amendments;
- Zoning By-law Amendments;
- Plans of Subdivision;
- Secondary Plans; and
- Block plans.

SOPs are an industry leading practice that improve the consistency, predictability and transparency of a process by clearly documenting how that process should be completed. In the development review and policy formulation context, an SOP should identify:

- Process steps, milestones and indicative timelines (e.g., pre-application consultation, application intake, application circulations and escalation);
- The roles and responsibilities of staff, applicants, and other stakeholders, including specific roles and responsibilities at each process step;
- Supporting governance and decision-making mechanisms; and,
- Performance measurement.

Once developed, each SOP should be supported by a process map illustrating process steps, decision gates, timelines and the defined roles of each relevant stakeholder.

Alongside SOPs, Vaughan should consider developing terms of reference (TORs) for the most frequent studies and technical reports that support applications. As a starting point, the City should consider working with the Region of York, which is developing a standard suite of TORs for use by all regional municipalities.

When complete, SOPs and TORs should be made available to all staff in an easily accessible online location and incorporated into training and professional development activities. Accountability should be assigned to an individual or working group responsible for keeping these tools current and addressing ongoing staff or applicant feedback. Vaughan should also consider using these tools as a point of reference for engaging Council, the Province and/or peer municipalities in continuous improvement initiatives.

2.1.2 Refresh circulation guidelines and include an opt-in approach to accelerate application review cycle times and reduce late-stage comments.

Alongside the SOPs and TORs identified in Recommendation 2.1.1, the City should consider developing new circulation guidelines for each development application type and policy process.

Circulation guidelines are an industry leading practice and should include:

- Criteria to trigger the circulation of an application to each internal and external commenting partner;
- The jurisdiction of each commenting partner (i.e., the issues or areas that they should address);
- A timeline for providing comments; and,
- A format for sharing comments.

Our current state assessment indicated that applications are often circulated to commenting partners who do not need to review the application and that partners often provide comments on areas outside of their jurisdiction. Commenting guidelines would help address these issues,

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accelerating application timelines and reducing late-stage comments – a key industry pain point. Guidelines would also help reduce commenting partner workloads, increasing service levels and the time available for more valuable work.

Alongside circulation guidelines, the City should consider implementing an opt-in rule whereby commenting partners would be required to indicate if they want to be included on any subsequent circulations. Commenting partners that did not opt in would not participate in subsequent circulations, reducing the number of commenting partners and the complexity of subsequent circulations. The application lead would retain discretion to recirculate an application to any commenting partner as necessary. An opt-in approach would be a significant shift from current practice and would need to be aligned to the authorities of the City's commenting partners.

2.1.3 Standardize how comments are shared with applicants to ensure that comments have been addressed and accelerate review timelines.

The City's process for sharing development application comments with applicants varies significantly across staff and departments. City staff and industry stakeholders identified three specific inconsistencies:

- Format (the templates and documents used by staff to communicate their comments);
- Mechanism (the tool used to share comments, like email or PlanIt); and,
- Timing (whether comments from different commenting partners are consolidated or shared immediately upon receipt by the lead planner).

Applicants' approaches to addressing comments are similarly unstandardized. For example, the City does not require applicants to use a prescribed format to identify how they have addressed City comments at re-submission.

This is inefficient and increases the administrative burden on staff and applicants. It often contributes to the same comment being provided on subsequent circulations or to conflicting comments. To address this gap, the City should consider standardizing the delivery of comments to applicants by:

- Using standard commenting templates for all staff;
- Requiring standard commenting templates for use by applicants at resubmission, including the use of a cover memo or table to identify how comments have been addressed;
- Identifying a standard mechanism to transmit comments to applicants; and,
- Consolidating comments from commenting partners before sharing with applicants.

Standardizing the delivery of comments to applicants will:

- Improve consistency in the commenting process by standardizing commenting practices across departments;
- Facilitate the identification of conflicting and contradictory comments through clearly itemized comments from each of the commenting partners;
- Reduce the administrative burden on staff and applicants by eliminating the need to itemize, consolidate and verify comments from different commenting partners; and
- Improve service levels and accelerate review timelines.

The City should consider using the templates and other commenting practices originally developed for VMC as a starting point for the improvements included in this recommendation.

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This recommendation should also be considered in the context of the City's implementation of a new workflow management system, which may offer additional opportunities to streamline the delivery of comments to applicants.

2.1.4 Provide staff with a project management toolkit to improve process consistency and increase their capacity for more valuable work.

In addition to comment templates identified Recommendation 2.1.3 and the SOPs and TORs identified in Recommendation 2.1.1, the City should consider developing a suite of project management tools to support the development review and policy formulation process, including:

- Templates for all milestone reports and major touchpoints with applicants;
- Application management tools, including schedules, checklists, issue trackers and risk registers; and,
- Meeting management tools, including agendas, minutes, and decision registers.

Our research indicates that while some departments have developed their own project management tools, they are not yet consistently used or, in many cases, not widely accessible.

Inadequate case management of development and policy application files was identified by staff and applicants as a significant pain point. Providing staff with a suite of project management tools would help address this and improve consistency, transparency, and file management. These time-saving measures will become increasingly important given the increasing volume and complexity of development coupled with applicant expectations for better service delivery.

These tools should be made available to staff in an accessible online location and incorporated into training and onboarding. This recommendation should also be read alongside the planned implementation of a new workflow management system, which may offer additional opportunities to improve file management.

2.1.5 Establish a formal internal and external meeting structure for complex applications to align commenting partners and improve customer service.

Development review is a complex City service. It requires frequent and ongoing communication, coordination and collaboration with applicants and staff from many different departments.

Staff and industry stakeholders indicated that while these activities take place today, they tend to be reactive rather than proactive, and that there are few formal structures that allow staff and applicants to come together to discuss application-related issues. Meetings that do take place are often not attended by the right staff and/or staff in attendance have not had the time and resources to adequately prepare.

A formal internal and external meeting structure would address this gap and help the City to:

- Enhance customer service by providing applicants with pre-scheduled touchpoints with staff at major milestones;
- Facilitate the early identification and resolution of conflicting comments, increasing service levels and accelerating application review timelines; and,
- Reduce the administrative burden associated with scheduling, attending and preparing for *ad hoc* meetings, particularly for the lead planner.

Our recommended meeting structure is identified in Table 1. This structure was developed through our co-design process, includes feedback from both staff and applicants, and is grounded in our leading practice research. It includes formal meetings at three application milestones (pre-

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application consultation, circulation and each subsequent circulation). It also extends the current pre-application consultation process from the identification of application requirements to a preliminary identification of substantive application-related issues.

Table 1: Recommended Meeting Structure

Development Review Milestone	Meeting	Description
Pre-Application Consultation	Internal Meeting	Internal staff meeting to review application and align on key issues to be resolved, including substantive application-related issues and application requirements.
	External Meeting	Staff-applicant meeting to review proposed application, identify preliminary issues, identify application requirements and align on next steps.
Initial & Subsequent Circulations	Internal Meeting	Internal staff meeting to review consolidated comments, reconcile any conflicts and identify a consistent, unified City.
	External Meeting	Staff-applicant meeting to review consolidated comments and discuss next steps.

As a starting point, the internal and external meeting structure should only be used for complex development applications. The City should also consider building on the meeting structures currently used for complex projects in VMC.

Internal and external meetings should be attended by all relevant staff as identified by the lead planner (e.g., staff from Development Planning, Development Engineering, Policy Planning & Environmental Services, Building Standards, Infrastructure Development, Parks Infrastructure Planning & Development, Public Works, etc.). Similarly, applicants should be encouraged to bring all relevant consultants to staff-applicant meetings. The lead planner should be responsible for the meeting agenda and record of decisions.

To reduce scheduling challenges and enable broad participation, the City could consider introducing pre-calendared meeting days, regularly occurring blocks of time reserved for staff and applicant meetings.

2.1.6 Implement formal development application streams to increase system capacity and improve resource allocation.

The City should consider establishing the four-tiered streaming matrix for Official Plan Amendment, Zoning By-law Amendment, and Site Plan applications identified in Figure 3, below.

Recommendations

Figure 3: Application Streaming Matrix

Stream Category	Description	Potential Stream Characteristics
Green	Low complexity applications	<ul style="list-style-type: none"> › Guaranteed completion times › Streamlined process steps / application requirements
Yellow	Medium complexity applications	<ul style="list-style-type: none"> › Subject to regular review and process steps
Red	Highly complex applications	<ul style="list-style-type: none"> › Application assigned to a senior, dedicated interdisciplinary team with experience in complex applications
Grey	Applications that will likely be refused (regardless of complexity)	<ul style="list-style-type: none"> › Applications assigned to a senior, dedicated interdisciplinary team with Ontario Land Tribunal experience › Applications expedited for refusal

While some application sorting does take place today, the practice is inconsistent and informal. The proposed streaming matrix would replace the current informal approach and help the City to:

- Improve system capacity by incentivizing applications that require fewer circulations (and thus use fewer staff resources);
- Quickly exit resource intensive applications that are unlikely to be approved;
- Enhance resource allocation by allowing management to match staff to the requirements of each stream; and,
- Enhance service levels by allowing processes to be tailored to the requirements of each stream.

The four-stream matrix was developed through our co-design process and should be considered a starting point for further consideration. The first three streams (green, yellow and red) are differentiated by application complexity. The fourth stream (grey) is for applications that are likely to be refused. Processes and staff skillsets would be tailored to each stream. The lead planner should be empowered to apply the streaming criteria following the submission of a complete application.

The proposed streaming matrix is flexible. For example, the streaming criteria could be refined to include additional criteria, like application quality or alignment to the City's policy framework. The streaming matrix could also be expanded to other application types, such as subdivision applications.

2.1.7 Establish an automated application review mechanism to incentivize application quality and accelerate review timelines.

Our research indicates that development applications typically require more than three circulations and frequently exceed five circulations. Each circulation adds to the time and cost of a development application. Staff and industry stakeholders identified a number of factors that contribute to high numbers of circulations, including:

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- The informal commenting and circulation practices identified in Recommendations 2.1.1-2.1.3;
- Inadequate review by internal commenting partners; and,
- Application quality, including the failure to address comments on resubmission.

To address these issues, the City should consider establishing an automated application review mechanism. Prior to the third circulation, all applications would be escalated for review to the Director Management Table identified in Recommendation 2.2.2. The purpose of the review would be to identify why an additional circulation is necessary and to determine an action plan to expeditiously complete the review of the application, streamlining the review process.

The proposed circulation limit draws on leading practice identified in our jurisdictional research and was refined through our co-design workshops. A review mechanism would result in a meaningful reduction in application processing and circulation times by:

- Incentivizing staff to provide detailed review and comments early in the development review process;
- Dissuading applicants from resubmitting materials without addressing prior comments; and
- Incentivizing applicants to improve application quality.

To enhance accountability, the action plan identified through the review process should be monitored by the Director Management Table. The City should also consider incorporating related key performance indicators (KPIs) into the performance management framework included in Recommendation 3.3.1.

Similarly, the City could consider additional fees beyond a certain number of circulations where the reason for additional circulation(s) lies with the applicant. This was identified by comparable jurisdictions as an effective way to incentivize application quality and reduce the number of circulations.

2.1.8 Streamline the staff report approval process to reduce delays and increase the staff time available for higher value work.

Our research indicates that the internal approval process for a development-related staff report takes approximately eight weeks. A report typically requires review by up to eight individuals, including staff at the City Manager and Deputy City Manager levels, with each review cycle taking one week.

The report approval process was consistently identified by managers and frontline staff as a significant process inefficiency that extended application review times and contributed to staff workloads.

To address this process inefficiency and improve service levels, the City should consider streamlining the report approval process by:

- Reducing the number of approvals required from eight to three (Manager, Director, Deputy City Manager);
- Reducing the scope of any senior-level staff review (Deputy City Manager and above) to substantive comments; and,
- Clearly identifying a concise window for each reviewer to provide comments.


In addition to these process improvements, the City should consider having the report's primary author, typically the lead planner, speak to the report at Committee of the Whole and/or City

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Council. Providing the lead planner with a role at Committee of the Whole and/or City Council would provide valuable experience and reinforce the planner as file lead.

2.2 Resources, Organization, and Governance

This section presents our recommendations related to the resources, organization, and governance layer of our assessment framework. This layer includes the roles and responsibilities of different stakeholders and the organizational and governance structures that support the development review and policy formulation processes.

Layer	Recommendations
 Resources, Organization, and Governance	<p>2.2.1 Expand the integrated, team-based model used in VMC to other high growth areas.</p> <p>2.2.2 Establish a city-wide governance structure for the development review and policy formulation processes to improve accountability and portfolio management.</p> <p>2.2.3 Clarify the roles and responsibilities of development review and policy formulation staff and other stakeholders through a publicly available terms of reference document.</p> <p>2.2.4 Establish a job rotation program for development planning and development policy staff to improve collaboration and career development opportunities.</p> <p>2.2.5 Establish quarterly meetings with major external commenting partners to review the development application portfolio, resolve issues, and discuss priorities.</p>

2.2.1 Expand the integrated, team-based model used in VMC to other high growth areas.

VMC uses a team-based model for development review that integrates core commenting partners (urban planners, urban designers, development engineers and transportation engineers) within a single organizational structure. Outside of VMC, commenting partners generally sit in different departments or sections, and provide comments as requested through a circulation process.

The team-based model is a leading practice used by comparable jurisdictions. Internal and external stakeholders consistently indicated that the VMC model has been highly successful. The benefits of a team-based approach include:

- Improved coordination, collaboration and communication, which reduces interdepartmental conflict, accelerates application review timelines and improves service levels;
- Enhanced accountability for development applications; and,
- Professional development opportunities through consistent exposure to the expertise and experience of other team members.

Building on the success of VMC, the City should consider expanding the team-based model to other high-growth areas, such as Yonge-Steeles. Focusing on other high-growth areas will allow the City to leverage the tools, templates and structures developed for VMC, reducing the barriers to change.

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Over the longer term, the City should also consider opportunities to expand the team-based model to other development application types. For example, teams could be established for each of the streaming categories identified in Recommendation 2.1.6. Opportunities to expand the team-based model should be considered alongside a more detailed organizational review of the departments that support the development review and policy formulation processes.

2.2.2 Establish a city-wide governance structure for the development review and policy formulation processes to improve accountability and portfolio management.

Development review and policy formulation are city-wide processes that require coordination and decision-making by many different departments, particularly given the increasing complexity of development activity. While there are regular interdepartmental leadership meetings within PGM, there is no formal process-wide mechanism to manage development-related resources and priorities.

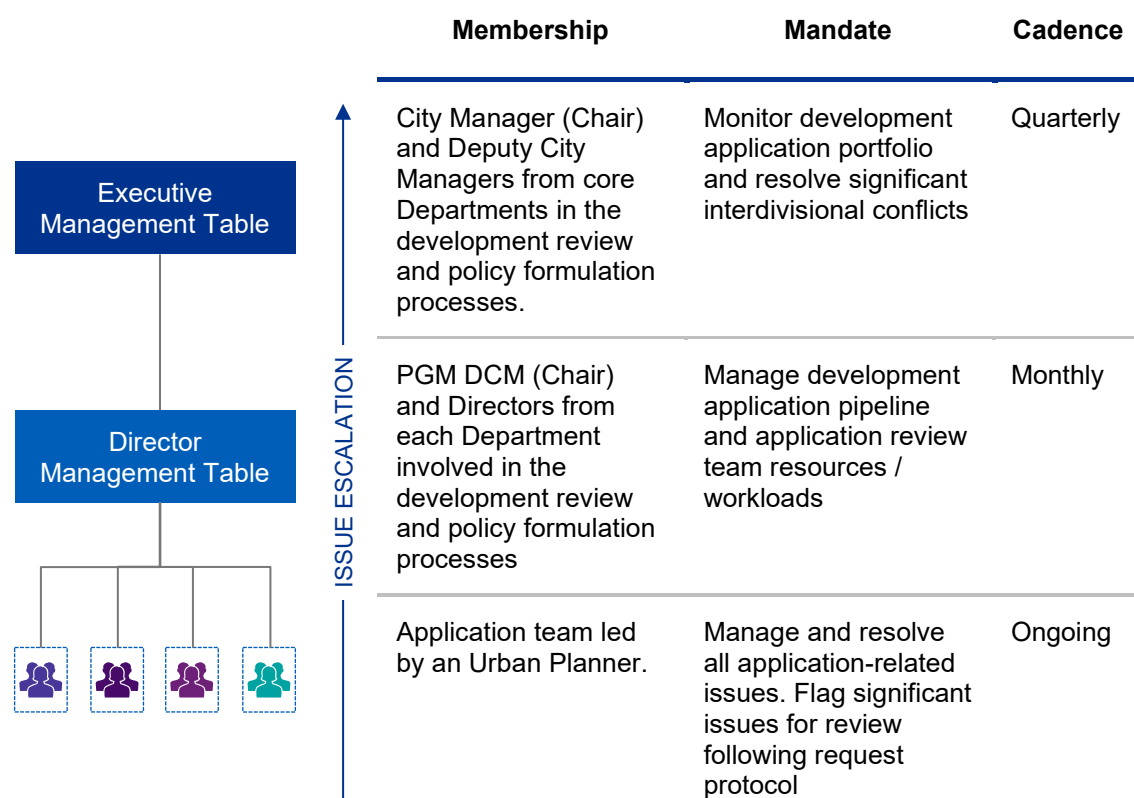
To address this gap, the City should consider establishing a formal city-wide governance structure for the development review and policy formulation processes. An interdepartmental governance structure will help the City to:

- Proactively monitor the development pipeline, including application volumes and overall performance;
- Coordinate and prioritize work and staff resources across departments;
- Quickly resolve interdepartmental conflicts; and,
- Identify and address systemic issues.

Our proposed governance structure is set out in Figure 4 below. It draws on leading practice and our co-design workshops and should be considered a starting point for consideration. This structure is meant to formalize and replace existing *ad hoc* structures, reducing overall meeting times.

Recommendations

Figure 4: Proposed Governance Structure



Clear criteria should be established to identify issues that warrant escalation through the proposed governance structure. These criteria should be established and included within the SOPs identified in Recommendation 2.1.1.

The proposed governance structure could also be used as a forum to address requests for exemptions from development-related standards. The City does not currently have a formalized process to address exemption requests – a significant pain point identified by staff and industry stakeholders.

2.2.3 Clarify the roles and responsibilities of development review and policy formulation staff and other stakeholders through a publicly available terms of reference document.

Our research indicates that the roles and responsibilities of development review and policy formulation staff, commenting partners, and other stakeholders are not well defined. This contributes to:

- Inconsistent processes, procedures and practices;
- Unclear decision-making structures;
- Duplication and, in some cases, conflict as stakeholders can provide comments on issues outside of their jurisdictions.

Recommendations

To address this challenge, the City should consider clarifying the roles and responsibilities of development review and policy formulation stakeholders through a publicly available TOR document. The TOR should include:

- The role of the urban planner as application lead, including specific authorities to enable the urban planner to project manage development application files and resolve conflicting comments;
- The jurisdiction of each internal and external commenting partner (i.e., the specific areas for which each partner should and should not provide comments) as well as the responsibility of each commenting partner to facilitate the resolution of conflicting comments
- The role and responsibilities of applicants, including expectations related to application quality; The role of the local councillor, including the local councillor's role vis-à-vis the local community and the local councillor's role as decision-maker as a member of City Council; and,
- The broader role of City staff as providing recommendations to City Council based on experience and expertise, and the role of City Council as decision-maker.

As noted in Recommendation 2.1.4, the project management of development application files was a significant gap identified by staff and industry stakeholders. The TOR can help address this gap by clearly delineating the project management-related role of the lead planner as well as any supporting authorities.

The TOR should be made available in a publicly accessible location, such as the City's development website or portal. To enhance transparency and effectiveness, the TOR should be incorporated into the SOPs identified in Recommendation 2.1.1 as well as ongoing training and development.

2.2.4 Establish a job rotation program for development planning and development policy staff to improve collaboration and career development opportunities.

City staff consistently indicated that development planning and policy planning are not well integrated. Impacts identified through our stakeholder research include:

- Ineffective development review, including the inconsistent or incomplete application of policy and related guidelines and standards;
- Ineffective policy development, including the development of policy that is difficult to implement.

Put simply, a great development planner requires a deep understanding of development policy, and a great policy planner requires a deep understanding of development review.

To improve the integration of development planning and policy planning staff, the City should consider implementing a job rotation program for development planning and development policy staff. Select staff would rotate between departments for a set period of time in order to gain a deeper understanding of other departments' processes, procedures, and objectives. In our experience, an effective job rotation program is typically six to 12 months in length and involves staff at the same level of seniority. The job rotation program would also provide career development opportunities for aspiring leaders, providing a fuller understanding of the City's development services.

Recommendations

2.2.5 Establish quarterly meetings with major external commenting partners to review the development application portfolio, resolve issues, and discuss priorities.

The City should consider establishing quarterly meetings with major external commenting partners, including the Toronto & Region Conservation Authority, the Ministry of Transportation and York Region. The meetings should be used to:

- Identify and address systemic issues;
- Resolve application-specific issues, such as conflicts and disagreements;
- Gather feedback on proposed policy and related changes; and
- Review the City's development application pipeline, including its application-related priorities.


Quarterly meetings with major external partners will allow the City to:

- Accelerate application review timelines by aligning priorities across each organization and quickly addressing application-related conflicts; and,
- Build strong working relationships with important development review and policy formulation stakeholders.

The City should consider developing a TOR document that outlines the roles and responsibilities of each party, including a meeting schedule and standing agenda.

2.3 Performance Management

This section presents our recommendations related to the performance management layer of our assessment framework. This layer includes the tools and structures used to measure, monitor and evaluate the development review and policy formulation processes.

Layer	Recommendations
 Performance Management	<p>2.3.1 Establish an interdepartmental performance measurement framework to improve the management and evaluation of the development review and policy formulation processes.</p> <p>2.3.2 Develop a comprehensive set of key performance indicators to support the new performance measurement framework.</p> <p>2.3.3 Expand time tracking to all development review related functions to improve resource management, transparency, and performance measurement.</p>

2.3.1 Establish an interdepartmental performance measurement framework to improve the management and evaluation of the development review and policy formulation processes.

Performance measurement is critical to successfully scaling Vaughan's development review and policy formulation processes. The City is implementing an objectives and key results (OKR) framework to enhance performance measurement. OKRs are in place for the Development Planning Department and include a number of baseline measures, such as the number of development applications received by type and the number of pre-application consultation meetings.

Recommendations

The emerging OKR framework is a strong starting point; however, our research indicates that there is significant room for improvement:

- Existing performance management approaches tend to focus on individual departments rather than the end-to-end development review and policy formulation processes;
- Many critical elements are not currently tracked or measured, such as the number of circulations, total circulation time, total commenting partner review time, total staff time, or total time with applicant;
- Reporting mechanisms and related systems are highly manual and time-intensive; and,
- Performance-related information that is collected can be difficult to access and manipulate, reducing its effectiveness as a performance management tool.

Building on the momentum of the emerging OKR framework, the City should consider developing an interdepartmental performance measurement framework for the development review and policy formulation processes. At a minimum, the framework should include:

- The identification of end-to-end and department-specific OKRs and KPIs, including efficiency and effectiveness measures (see Recommendation 2.3.2 for more information), for each department involved in the development review and policy formulation processes;
- OKR and KPI collection procedures;
- OKR reporting procedures, including the identification of appropriate OKRs for each major stakeholder group and how they will be shared;
- A process for evaluating City staff and departments against the OKRs implemented; and
- A process for reviewing the effectiveness of OKRs.

Alongside the proposed framework, the City should consider developing performance management dashboards for different development review stakeholders, including senior management, elected officials and industry. The dashboards would allow the City to tailor information and the level of detail to each stakeholder group while increasing transparency and oversight.

The baseline information being collected through the existing OKRs for the Development Planning Division will be critical to building out the broader, interdepartmental performance measurement framework included in this recommendation. The new performance measurement framework should also be developed alongside and integrated into the City's new workflow management system.

2.3.2 Develop a comprehensive set of key performance indicators to support the new performance measurement framework.

As part of the performance measurement framework identified in Recommendation 2.3.1, the City should develop a comprehensive set of KPIs to support the effective management and oversight of the development review and policy formulation processes. The KPIs should be integrated into the City's emerging OKR framework (e.g., as activities to measure how objectives will be achieved). KPIs should include both efficiency and effectiveness indicators:

- **Efficiency:** measures productivity or the amount of resources used to produce a given output (usually expressed as cost or effort per unit of output); and,
- **Effectiveness:** measures the extent to which an activity or service achieves a desired outcome.

Recommendations

A list of potential KPIs is included in Table 2. These KPIs are based on KPMG leading practice, a review of existing OKRs in place for the Development Planning Division, and jurisdictional research. They are not exhaustive and are meant as a starting point for further review and discussion.

Table 2: Key Performance Indicators

Category	Key Performance Indicator
Efficiency	<ul style="list-style-type: none"> › The number of circulations by application type › Total elapsed time between each process milestone (including pre-application consultation, submission, complete application, circulation, and decision) › Total elapsed time for each internal commenting partner to provide comments (for each circulation) › Total elapsed time for each external commenting partner to provide comments (for each circulation) › Total elapsed time that the file remained with the applicant (from complete application to approval) › Total staff time for each application by commenting partner and circulation › Total elapsed time that the file remained with the applicant (for each circulation) › Staff cost by circulation and application type
Effectiveness	<ul style="list-style-type: none"> › Applicant satisfaction surveys › Public satisfaction surveys › Number of new comments for each circulation › Number of comments unaddressed by the applicant for each circulation › Number of exemptions from the City's current standards and guidelines › Number of pre-application consultation meetings › Number of public engagement meetings hosted by the City and by applicants › Total public engagement hours by application type and circulation

The City should establish a baseline for each KPI. The baseline should be identified through an analysis of past performance. Where historical performance data is unavailable, the City could look to regional municipal peers and/or follow an iterative approach aligned to the growing availability of high-quality data and information.

As noted in Recommendation 2.3.1, once new KPIs are established, they should be reviewed regularly for effectiveness as part of the proposed performance measurement framework.

Recommendations

2.3.3 Expand time tracking to all development review related functions to improve resource management, transparency, and performance measurement.


Time tracking is a standard industry practice that can provide important business insights and improve the overall management and performance of complex processes and services. In the development review context, time tracking can:

- Help establish more realistic and accurate application processing timelines;
- Provide greater insight into staff workloads and productivity, allowing management to better allocate work across individuals and teams; and,
- Enhance understanding of the overall costs of the development review process, which is a fee-based service.

Time tracking currently takes place in the Policy Planning & Special Projects Department, which includes VMC. The City should build on this strength by expanding time tracking to all development review and policy process staff. A city-wide approach to time tracking would provide an end-to-end view of the time and cost of processing development-related applications. Select data and information gathered through time tracking could be shared with applicants and the public to provide additional insights and improve transparency around the development review process. Time tracking is also critical for many of the performance measures identified in Recommendation 2.3.2.

2.4 Technology and Information

This section presents our recommendations related to the technology and information layer of our assessment framework. This layer includes the data, information and technology that supports the development review and policy formulation processes.

Layer	Recommendations
 Technology and Information	<p>2.4.1 Accelerate the transition to a new workflow management system to enable improved business performance.</p> <p>2.4.2 Develop and implement a data sharing strategy to enhance transparency and application quality.</p>

2.4.1 Accelerate the transition to a new workflow management system to enable improved business performance.

Modern workflow management systems are an important enabler of business performance. The City has identified a new workflow management system and is beginning to plan for the transition. There are many opportunities to integrate the recommendations included in this report with the new system, including:

- Streamlined circulation practices (Recommendations 2.1.1-2.1.3);
- The development of a project management toolkit (Recommendation 2.1.4);
- Enhanced performance measurement (Recommendations 2.3.1-2.3.2); and,
- Information sharing with applications (Recommendation 2.3.3).

Recommendations

A detailed analysis of business and system requirements was outside the scope of this assessment; however, our stakeholder and leading practice research identified the following capabilities that should be included in the new system:

- **City-wide:** All commenting partners involved in the development review and policy formulation processes should be able to use the same, modernized system. Similarly, the system should provide a common online platform for circulating comments across commenting partners, and integrate with existing City databases;
- **Automation:** Routine business processes and data entry should be automated to reduce the administrative burden on staff. Similarly, the system should provide automated time-based flags and alerts for key tasks and application-related deadlines;
- **Project management:** The system should support advance project management tools and techniques, including application-based time entry and start-stop comment tracking for all commenting partners;
- **Data and information:** The system should be capable of capturing high quality data to support enhanced performance management;
- **Applicant facing:** The system should include applicant-facing portals for all development application-related tasks and processes (e.g., accessing comments, uploading application materials and/or resubmission packages, submitting inquiries, viewing application status, submitting payments, etc.), as well as information sharing (e.g., City reports, models, studies, by-laws, etc.).

Several municipalities included in our jurisdictional research recently implemented new workflow management systems and supporting software tools. Interviewees consistently identified the following factors as important to consider for a successful implementation:

- **Staff engagement:** as the primary users of the new system, City staff should be substantively engaged in the identification of business requirements as well as testing and prototyping;
- **Business process design:** the implementation of a new system is an opportunity to review and streamline existing business processes. This work should precede implementation and contribute to the identification of business requirements;
- **Industry engagement:** similar to staff, industry should be substantively engaged in the development of any industry-facing components, such as applicant-facing portals and collaboration tools;
- **Change management:** a successful transition requires careful planning, change management and education. Stakeholders' needs should be identified during the early stages of the planning process and continually monitored throughout the transition; and,
- **Resourcing:** given the effort required to transition to a new workflow management system, the City should ensure that the transition team is adequately resourced and includes capabilities to support internal and external communications, change management and training.

2.4.2 Develop and implement a data sharing strategy to enhance transparency and application quality.

Our research indicates that important data and information related to the development review and policy formulation process is not easily accessible online. Staff and industry stakeholders identified two specific types of data and information that are important to make more accessible:

Recommendations

- Information related to the status of a development application, such as the individuals assigned to review the application and whether an application has been reviewed by a particular commenting partner; and,
- Information to support development application studies and other requirements, such as traffic and sewer capacity models as well as technical studies and reports from previous development applications.

To address this gap, the City should consider developing a data sharing strategy for the development review and policy formulation processes. The strategy would identify:


- Development-related information that can be made available (e.g., application status, informational models that support technical studies, etc.);
- An easily accessible online location;
- How data and information is to be collected and the process for making the data and information available online; and,
- A mechanism to review development-related information to ensure that it remains up to date.

As a starting point, the City should inventory the development-related information it currently makes available online. The inventory should include engagement with staff and industry to identify frequently requested information and to ensure that the data and information shared by the City is made available in an accessible format.

2.5 Legislation and Policy

This section presents our recommendations related to the legislation and policy layer of our assessment framework.

While the majority of recommendations included in this report are relevant to both the development review and policy formulation processes, this layer includes recommendations that focus specifically on the policy formulation process.

Layer	Recommendations
 Legislation and Policy	<p>2.5.1 Undertake a detailed study to evaluate the costs and benefits of eliminating the block plan.</p> <p>2.5.2 Develop and implement standard operating procedures and supporting tools to improve the efficiency and effectiveness of the secondary plan and block plan processes.</p> <p>2.5.3 Expand site plan delegation to increase timelines and staff capacity for higher value work.</p>

2.5.1 Undertake a detailed study to evaluate the costs and benefits of eliminating the block plan.

The block plan is a non-statutory process led by participating property owners following the adoption of a secondary plan. It serves as a “blueprint” for the creation of plans of subdivision by identifying the location of servicing, infrastructure and other details.

Staff and industry stakeholders consistently indicated that the secondary plan and block plan processes have become blurred, resulting in duplication, increased timelines and additional costs. While the block plan served a useful purpose during earlier stages of Vaughan’s development,

Recommendations

the need for a distinct block plan process is no longer clear as the City shifts towards more urban development patterns.

Our research indicates that eliminating the block plan will require detailed study that is outside the scope of our assessment. While stakeholders consistently indicated that the City should consider eliminating the block plan, there was no consensus on how the elements that are currently identified through the block plan process should be addressed and/or integrated into supporting policy processes, such as the second plan or plan of subdivision.

Along those lines, the City should consider undertaking a detailed study to evaluate the costs and benefits of eliminating the block plan. The study should:

- Engage staff, industry and relevant property owners;
- Consider elements of the block plan that can be i) eliminated, ii) streamlined or iii) integrated with related policy processes;
- Consider the roles and responsibilities of the City and property owners, including the potential cost for shifting responsibility of block plan elements from property owners to the City; and,
- Evaluate the average time and cost to complete a block plan as well as the average time and cost to complete related policy processes.

We anticipate that the proposed study will take between nine and 12 months to complete. The City may consider retaining a third-party consultant with planning expertise to conduct the study, which would help ensure transparency and may reduce the overall study time.

2.5.2 Develop and implement standard operating procedures and supporting tools to improve the efficiency and effectiveness of the secondary plan and block plan processes.

Alongside Recommendation 2.1.1, the City should consider developing SOPs for the secondary plan and block plan processes. The proposed SOPs should be developed following the completion of the review included in Recommendation 2.5.2. The SOP for the block plan process should only be developed if the review concludes that the block plan process should be retained.

Staff and industry stakeholders consistently indicated that the secondary and block plan processes were often inconsistent. Requirements, process steps, timelines and terms of reference were all identified as elements that could vary significantly across applications, reducing transparency and predictability.

To address this challenge, the City should develop SOPs for the secondary and block plan processes. The SOPs should identify:

- Specific criteria to trigger the use of both secondary and block plans;
- Process steps, milestones and indicative timelines;
- The roles and responsibilities of staff, applicants, and other stakeholders, including specific roles and responsibilities at each process step;
- Supporting governance and decision-making mechanisms;
- Performance measurement; and,
- Related process tools, such as templates for reporting and communications and TORs for required studies.

Recommendations

2.5.3 Expand site plan delegation to increase timelines and staff capacity for higher value work.

In accordance with the City's Site Plan Control By-law 123-2013, a number of different site plan and related applications are delegated to staff, including: employment area development, with certain exceptions, amendments to complex agreements and minor modifications to existing buildings, among other things.


City staff consistently characterized the existing scope of delegated authority for site plans as narrow. Staff also noted that reporting site plan applications to Council extended timelines and reduced the time available for more valuable work, particularly for routine or non-complex applications.

Many comparable Ontario municipalities delegate approval for all types of site plan applications to staff, including Brampton, Burlington, Mississauga and Toronto. Interviewees from these jurisdictions engaged through our comparator research indicated that the broader delegation reduced reporting requirements, increased staff capacity and accelerated timelines.

Building on existing authorities, the City should consider delegating approval for all types of site plan applications to staff. The existing "bump-up" provision, which allows an application to be escalated to City Council for approval at the request of two members of Vaughan Council, allows for Council and public involvement in more complex or controversial site plan applications.

2.6 Applicant Experience and Public Engagement

This section presents our recommendations related to the applicant experience and public engagement layer of our assessment framework. This layer includes how applicants interact with the development review and policy formulation processes as well as the public engagement process.

Layer	Recommendations
 Applicant Experience and Public Engagement	<p>2.6.1 Create applicant satisfaction surveys to measure applicant satisfaction with the development review and policy formulation processes.</p> <p>2.6.2 Create two-way learning opportunities for applicants, staff and other commenting partners to improve application quality and customer service.</p> <p>2.6.3 Develop a user-friendly "Planning and Development 101" guide for staff, applicants, members of the public and residents' associations to enhance understanding of the development review and policy formulation processes.</p> <p>2.6.4 Develop a formal public engagement policy to outline when and how public consultation should take place outside of statutory requirements.</p> <p>2.6.5 Conduct a plain language audit to improve public facing development-related communications and supporting materials.</p> <p>2.6.6 Use semi-annual meetings with residents' associations to improve information sharing.</p>

Recommendations

2.6.1 Create applicant satisfaction surveys to measure applicant satisfaction with the development review and policy formulation processes.

Vaughan should consider developing applicant satisfaction surveys to enhance the City's ability to measure, monitor and improve the customer experience. Building on the success of the DLC, the City should consider two types of surveys:

- An annual survey distributed on an industry-wide basis to help the City understand system-level satisfaction and trends in the process; and
- Randomly selected surveys following completion of application milestones to gather real-time insights into immediate challenges and opportunities that require action.

Both surveys should include opportunities to gather feedback from different industry stakeholders, such as developers, urban planners, engineers and other types of consultants. Applicant feedback would help the City align service level improvements with applicant needs.

Leading practice suggests that the applicant satisfaction surveys should be short, easy to complete, and generally involve one to five questions. The City should consider measuring applicant satisfaction with the following aspects of the development review and policy formulation processes:

- Timelines;
- Customer service;
- Clarity and transparency;
- Availability of information; and
- Value for money.

The results of the satisfaction surveys should be published internally and externally. They should also be incorporated into the performance measurement framework identified in Recommendation 2.3.1.

2.6.2 Create two-way learning opportunities for applicants, staff and other commenting partners to improve application quality and customer service.

The City should establish formal, two-way learning opportunities for applicants and staff, particularly for manager-level and frontline staff. While the DLC was identified as a successful forum by staff and industry stakeholders, participation is generally restricted to City leadership and senior executives from the development industry.

Sessions could take the form of annual training events, staff-applicant workshops, or webinars. Several opportunities identified in comparable jurisdictions include:

- Training for industry representatives and consultants on City processes, policies and guidelines to improve application quality;
- Introductions to development strategies and land economics for City staff to enhance their understanding of applicant needs and improve customer service;
- Webinars by external commenting partners for applicants and staff to better understand the requirements of external commenting partners.

The City should engage industry associations to identify industry needs and effective learning opportunities. The City should also consider promoting staff participation in professional networking events, such as industry conferences, to foster collegiality and understanding.

Recommendations

2.6.3 Develop a user-friendly “Planning and Development 101” guide for staff, applicants, members of the public and residents’ associations to enhance understanding of the development review and policy formulation processes.

The City should consider developing an online resource that provides a comprehensive overview of the development review and policy formulation processes. The guide should include:

- An introduction to the provincial planning framework;
- An overview of Vaughan’s development-related objectives;
- A High-level description of the development review and policy formulation processes, including the link to external commenting partners;
- The roles and responsibilities of staff, applicants, elected officials and the public;
- Information related to key process steps (e.g., process maps) and critical public engagement milestones;
- Frequently Asked Questions; and
- Contact information and links to additional resources/materials, such as the Official Plan.

A user-friendly guide would enhance overall understanding of the development review and policy formulation processes. The guide should be made available on the City’s website and be included in staff training and public engagement activities. In developing the guide, the City should engage staff, applicants and members of the public to understand the type of information that would be most beneficial to each group and how that information should be presented.

2.6.4 Develop a formal public engagement policy to outline when and how public consultation should take place outside of statutory requirements.

Senior City staff and elected officials identified public engagement as a priority for additional service level improvements. While Vaughan often goes above and beyond statutory requirements, the City does not yet have a formal approach to guide staff on how the public should be engaged in the development review and policy formulation processes. As a result, there are inconsistencies in public engagement practices. Residents’ associations also identified this issue as a significant pain point. More than 9 out of 10 people surveyed (95%) stated that the public engagement and consultation process in Vaughan is either “in need of improvement” or “ineffective”.

The City should develop a formal public engagement policy to identify when and how public consultation should take place outside of statutory requirements. An effective policy would include:

- The objective and outcomes of public consultation in Vaughan’s development review and policy formulation processes;
- The roles and responsibilities of staff, applicants and members of the public;
- Specific criteria to trigger engagement outside of statutory requirements;
- Specific engagement approaches, such as community meetings, online surveys and working groups;
- How feedback from public engagement will be collected and used in the development review and policy planning processes.

Recommendations

2.6.5 Conduct a plain language audit to improve public facing development-related communications and supporting materials.

Residents' associations and elected officials consistently indicated that the language and materials used to communicate with the public about development applications and the development review and policy formulation processes are complex and often confusing, which creates barriers to participation.

To improve development-related communications, the City should conduct a plain language audit of all public facing development-related communications and supporting materials. The plain language audit should:

- Incorporate best practices for public engagement and communications;
- Identify the specific types of information that is most helpful to different stakeholder groups;
- Identify the most effective tools and tactics to convey information to different stakeholder groups; and,
- Ensure communications and supporting materials comply with accessibility requirements.

The audit should include engagement with the public, residents' associations and elected officials to help identify the most important types of development-related information and the most effective way of conveying that information.

The findings from the plain language audit should be built into the Planning and Development 101 guide identified in Recommendation 2.6.3.

2.6.5 Use semi-annual meetings with residents' associations to improve information sharing.

Semi-annual meetings with residents' associations have the potential to improve service levels by strengthening communications and opportunities for relationship building with an important stakeholder group. They could also be used to address recurring community concerns with the development review and policy formulation processes outside of application-by-application meetings. Meetings should include:

- The City's development-related priorities and objectives;
- The development application portfolio, at both the City and neighbourhood levels;
- Policy and other relevant updates; and
- An open session for residents to ask questions and express concerns about systemic issues and trends.

The proposed semi-annual meetings would also provide a forum for the City to gather public feedback on the proposed improvements to engagement and communications identified in Recommendations 2.6.3-2.6.5.



3 Implementation Plan

Implementation Plan

This section presents a proposed plan for the implementation of the recommendations included in Section 2. It includes five subsections and is based on KPMG leading practice. Where possible, the implementation plan should be integrated into existing transformation programs, including the PGM Service Review.

Table 3: Implementation Plan Subsections

#	Subsection	Description
3.1	Implementation Structure	High-level resourcing and governance required to successfully implement the recommendations.
3.2	Implementation Roadmap	Specific actions and timelines for each of the recommendations included in Section 2.
3.3	Implementation Matrix	An impact-effort matrix to support Vaughan in the prioritization and sequencing of recommendations for implementation.
3.3	Implementation Scorecard	Performance measures to monitor progress and help demonstrate success.
3.4	Change Management Framework	A framework to drive effective change management.
3.5	Communications Framework	A framework to structure effective communications.

3.1 Implementation Structure

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

Based on the scope of the recommendations included in Section 2, we recommend the creation of a dedicated Implementation Team to lead, monitor, and report on the implementation of the recommendations in this report.

We anticipate the Implementation Team will require one full-time project management resource to lead the implementation, along with one to two support staff. The project management and supporting resources should be dedicated full time to the implementation and have experience with business transformation initiatives as well as the development review and policy formulation processes. Based on the roadmap included in Section 3.2, we anticipate staff will be required for approximately 18 months.

The capabilities of the Implementation Team should include:

- Program and project management;
- Change management;
- Communications;
- Stakeholder engagement (internal and external);
- Business process improvement; and,

Implementation Plan

— Experience.

The Implementation Team will also need to draw on staff with subject matter expertise in the development review and policy framework processes (e.g., development planners, policy planners, urban designers, engineers, etc.) throughout the implementation on an as-needed basis

Alongside the Implementation Team, Vaughan should establish a clearly defined, interdepartmental governance structure to facilitate implementation-related decision-making and empower the Implementation Team to drive change. We recommend an Implementation Committee with the following membership:

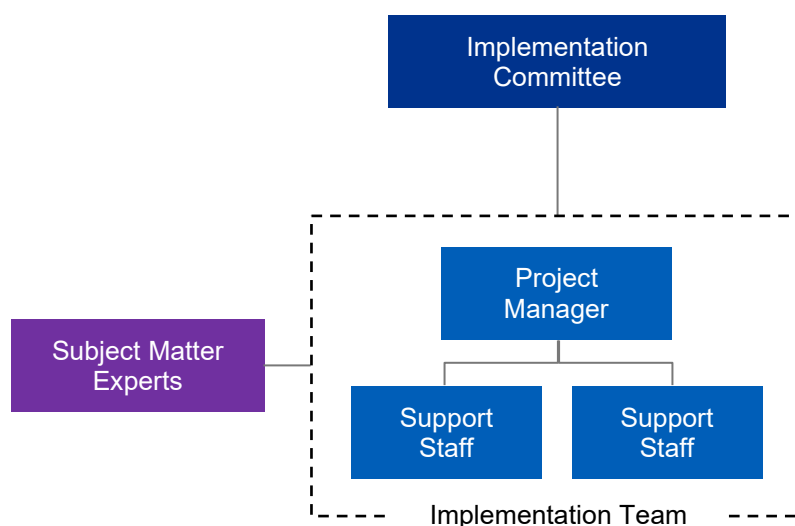
- The Deputy City Manager, PGM (Chair)
- The Director, Development Planning
- The Director, Policy Planning & Special Projects
- The Director, Development Engineering
- The Director, Building Standards

The mandate of the Implementation Committee should include strategic direction and oversight of the implementation of recommendations included in this report, decision-making on key approvals, and monitoring implementation progress and overall project success.

Figure 5 shows the structure and reporting relationships for the Implementation Team and Implementation Committee, while Table 4 below outlines the membership and roles and responsibilities for both.

The implementation roadmap included in Section 3.2 includes key activities for the Implementation Team and key approvals for the Implementation Committee.

Figure 5: Implementation Team Structure



Implementation Plan

Table 4: Implementation Team Membership and Responsibilities

Role	Membership	Responsibilities	Meeting Cadence
Implementation Committee	<ul style="list-style-type: none"> › Deputy City Manager, PGM (Chair) › Director, Development Planning › Director, Policy Planning & Special Projects › Director, Development Engineering › Director, Building Standards 	<ul style="list-style-type: none"> › Strategic direction and oversight › Escalation point for most difficult issues 	Bi-monthly
Implementation Team Project Manager	<ul style="list-style-type: none"> › One Project Manager 	<ul style="list-style-type: none"> › Day-to-day management of all implementation activities › Accountable for the implementation plan, timelines, and related deliverables › Reporting to the Implementation Committee 	Ongoing
Implementation Team Support Staff	<ul style="list-style-type: none"> › One to two Support Staff 	<ul style="list-style-type: none"> › Delivery of the implementation roadmap › Coordination and engagement of internal and external stakeholders › Change management and communications activities 	Ongoing
Subject Matter Experts	<ul style="list-style-type: none"> › Experienced staff from development-related departments identified by the Implementation Team 	<ul style="list-style-type: none"> › Subject matter advice to assist with implementation of specific recommendations › Change management support (i.e. act as change champions) 	Ongoing

3.2 Implementation Roadmap

This subsection presents the implementation actions for each of our recommendations. This roadmap includes an 18-month timeline based on the implementation structure outlined in Subsection 3.1. In some cases, noted in the roadmap, full implementation may stretch beyond 18 months and/or require additional dedicated funding.

Implementation Plan

Services and Process






Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation		Description of Activities
2.1.1	Create standard operating procedures to increase the consistency, predictability, and transparency of the development review and policy formulation processes.	 <ul style="list-style-type: none"> › Inventory existing SOPs and TORs, identifying those that can be implemented immediately and those that require updating. › Implementation Team to work with internal and external stakeholders (including industry) to identify additional SOPs and TORs for development. › Updated SOPs and TORs should be made available on the City's website. › Consider identifying a specific SOP and TOR lead to review, update and maintain SOPs and TORs.
2.1.2	Refresh circulation guidelines and include an opt-in approach to accelerate application review cycle times and reduce late-stage comments.	 <ul style="list-style-type: none"> › Inventory existing circulation guidelines and related documents. › Implementation Team, in consultation with subject matter experts, to develop draft circulation guides for review by all external commenting partners. Consider beginning with guidelines for the most frequent application type(s). › Draft circulation guidelines to be submitted to Implementation Committee for approval. › Consider piloting opt-in rule to refine before full later implementation.
2.1.3	Standardize how comments are shared with applicants to ensure that comments have been addressed and accelerate review timelines.	 <ul style="list-style-type: none"> › Inventory current submission memos, commenting templates and practices, and lessons learned from commenting partners. › Implementation Team to prepare draft commenting templates leveraging internal precedents. Templates to be finalized and submitted to Implementation Committee for approval. › Commenting templates to be made available to both City staff and applicants via the City's website.

Implementation Plan

Services and Process



Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation		Description of Activities
2.1.4	Provide staff with a project management toolkit to improve process consistency and increase their capacity for more valuable work.	
		<ul style="list-style-type: none"> › Inventory and assess the project management tools currently in place/use and assess for relevance. Identify other areas of the City that may have related or similar tools. › Implementation Team to work with City staff to understand gaps in project management tools throughout the development review and policy formulation process. › Perform a jurisdictional scan to identify project management tools and processes used by comparable jurisdictions. › Work with City staff to develop templates, application management tools, and meeting management tools. › Gather feedback from development review staff. › Make project management tools accessible to City staff in an easy-to-access location. › Incorporate into standard training and onboarding processes.
2.1.5	Establish a formal internal and external meeting structure for complex applications to align commenting partners and improve customer service.	
		<ul style="list-style-type: none"> › Implementation Committee to approve the meeting structure as described in Recommendation 2.1.5. › Implementation Team to document proposed meeting approach, including timelines, objectives and outcomes, attendee checklists, roles & responsibilities, project management tools and templates. › Launch meeting structure for go-forward applications. Consider implementing on a pilot basis to refine prior to full rollout.

Implementation Plan

Services and Process



Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation		Description of Activities
2.1.6	Implement formal development application streams to increase system capacity and improve resource allocation.	
		<ul style="list-style-type: none"> › Implementation Team to work with internal and external stakeholders to refine streaming matrix and develop SOP for streaming. › Implementation Team to develop transition plan to implement new streaming system, including internal & external communications. › Launch application streaming process for go-forward applications. Consider implementing on a pilot basis to refine prior to full rollout.
2.1.7	Establish an automated application review mechanism to incentivize application quality and accelerate review timelines.	
		<ul style="list-style-type: none"> › Implementation Team to develop draft SOP for automatic review based on Recommendation 2.1.7. › Engage staff and industry on draft SOP and update based on feedback. › SOP should include development of templates for escalation-related intake and reporting. › Implementation Committee to approve SOP. › Develop change management / communications plan to support rollout of new mechanism. › Implement automated review mechanism. Consider initial pilot to refine prior to city. › Begin tracking application escalations to support continuous improvement.
2.1.8	Streamline the staff report approval process to reduce delays and increase the staff time available for higher value work.	
		<ul style="list-style-type: none"> › Implementation Team to develop streamlined report approval process based on the process identified in Recommendation 2.1.8. › Implementation Committee to approve new process. › Begin tracking approval process and refine approach as needed.

Implementation Plan

Resources, Organization, and Governance






Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation	Description of Activities
<p>2.2.1</p> <p>Expand the integrated, team-based development model used in VMC to other high growth areas.</p>	 <ul style="list-style-type: none"> › Implementation Team to document team-based model used in VMC, including membership and processes. › Identify other high-growth areas in Vaughan that the team-based approach could be applied to. › Develop TOR for team-based approach, identifying membership, mandate, processes and accountability structures. › Implementation Committee to approve TOR and list of high-growth areas. › Undertake change management planning and begin transition in identified areas.
<p>2.2.2</p> <p>Establish a city-wide governance structure for the development review and policy formulation processes to improve accountability and portfolio management.</p>	 <ul style="list-style-type: none"> › Implementation Team to draft TOR for governance structure proposed in Recommendation 2.2.2, identifying membership and mandate of each governance layer, as well as escalation criteria and existing structures that should be suspended. › Implementation Committee to approve TOR. › Transition from existing practices to new interdivisional governance structure. › Evaluate effectiveness of new structure annually.
<p>2.2.3</p> <p>Clarify the roles and responsibilities of development review and policy formulation staff and other stakeholders through a publicly available terms of reference document.</p>	 <ul style="list-style-type: none"> › Document existing roles and responsibilities, leveraging existing documentation and job descriptions. › Develop draft TOR and engage internal and external stakeholders. Update incorporating feedback. › Submit revised TOR to Implementation Committee for approval. › Reflect the TOR in job descriptions as they are updated and include in development review and policy formulation-related training and onboarding. › Embed the accountabilities included in the TOR into the City's development review workflow management system.

Implementation Plan

Resources, Organization, and Governance





Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation		Description of Activities
2.2.4	Establish a job rotation program for development planning and development policy staff to improve collaboration and career development opportunities.	
		<ul style="list-style-type: none"> › Identify existing job rotation programs across the corporation, identifying potential models. › Working with human resources, Implementation Team to develop job rotation policy based on Recommendation 2.2.4. › Engage development planning and development policy staff on draft policy. Revise accordingly. › Implementation Committee to approve updated policy. › Begin job rotation program. Consider a pilot before full roll out.
2.2.5	Establish quarterly meetings with major external commenting partners to review the development application portfolio, resolve issues, and discuss priorities.	
		<ul style="list-style-type: none"> › Consult with external commenting partners to gain buy-in and identify a support resource from their organizations. › Implementation Team to develop draft TOR, including proposed meeting details (time, agenda, objectives, etc.). › Implementation Committee to approve TOR. › Begin quarterly meetings and monitor for effectiveness.

Implementation Plan

Performance Management



Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation		Description of Activities
2.3.1	Establish an interdepartmental performance measurement framework to improve the management and evaluation of the development review and policy formulation processes.	<ul style="list-style-type: none"> › Implementation Team to inventory existing performance measures used across the development review and policy formulation processes, including metrics, systems, collection frequency, and use. › Implementation team to develop detailed project plan to develop performance measurement framework. Planning should be integrated into the upcoming implementation of a new workflow management system, considering new tools, capabilities, and automation opportunities. › Integrate framework with KPIs identified as part of Recommendation 2.3.2. › Implementation Committee to approve the performance measurement framework prior to implementation.
2.3.2	Develop a comprehensive set of key performance indicators to support the new performance measurement framework.	<ul style="list-style-type: none"> › Implementation Team to inventory existing KPIs used as part of existing performance management practices. › Implementation Team to conduct a jurisdictional scan to identify valuable development review and policy formulation process KPIs, using those included in Recommendation 2.3.2 as a starting point. › Implementation Team to consult with internal and external stakeholders to refine and improve on existing KPIs and workshop the implementation of new ones.
2.3.3	Expand time tracking to all development review related functions to improve resource management, transparency, and performance measurement.	<ul style="list-style-type: none"> › Implementation Team to inventory existing time tracking practices within the Policy Planning & Special Projects group. › Develop business case for time tracking along with a work plan to implement it. Implementation Committee to approve. › Align implementation of expanded time tracking with new workflow management system.

Implementation Plan

Technology & Information



Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation		Description of Activities
2.4.1	Accelerate the transition to a new workflow management system to enable improved business performance.	
		<ul style="list-style-type: none"> › Review recommendations included in this report to identify potential business requirements and other considerations for the new system. › Engage staff and industry to help identify business requirements and other capabilities, starting with those identified in Recommendation 2.4.1. › Engage comparable jurisdictions to identify change management and related resourcing requirements to ensure a successful transition.
2.4.2	Develop and implement a data sharing strategy to enhance transparency and application quality.	
		<ul style="list-style-type: none"> › Implementation Team to work with relevant staff to inventory existing data and information that is: (a) available but not currently online; (b) under development; and (c) not currently under development. › Engage all stakeholders with a role in the development review process to participate in the inventory, with a focus on commenting partners that oversee requirements (e.g., transportation studies, groundwater studies, etc.). › Implementation Team to develop a comprehensive data/information sharing strategy that identifies how the information should be used and how information/data will be shared with applicants and across applications. › Implementation Team to lead the development of a roadmap to make the additional data/information available online. › Implementation Committee to approve strategy and roadmap. › Begin implementing roadmap.

Implementation Plan

Legislation and Policy



Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation		Description of Activities
2.5.1	Undertake a detailed study to evaluate the costs and benefits of eliminating the block plan.	
		<ul style="list-style-type: none"> › Develop workplan to undertake study identified in Recommendation 2.5.1. Consider retaining external consultant to accelerate process. Undertake procurement if necessary. › Engage internal and external stakeholders as part of cost-benefit analysis. › Finalize recommendations and bring to Implementation Committee for approval. Undertake change management planning for transition to future state.
2.5.2	Develop and implement standard operating procedures and supporting tools to improve the efficiency and effectiveness of the secondary plan and block plan processes.	
		<ul style="list-style-type: none"> › Inventory existing documentation and procedures related to the secondary plan and block plan processes, identifying gaps. › Implementation Team to work with internal and external stakeholders (including industry) to develop draft SOPs and supporting tools. › Implementation Committee to approve draft SOPs. › Updated SOPs and TORs should be made available on the City's website.
2.5.3	Expand site plan delegation to increase timelines and staff capacity for higher value work.	
		<ul style="list-style-type: none"> › Implementation Team to document current delegations, identifying additional opportunities for site plan delegation in line with Recommendation 2.5.3. › Implementation Team to conduct cost-benefit analysis of additional delegations, identifying time and cost savings to staff and applicants. › Implementation Team to prepare report outlining cost-benefit analysis for approval by Implementation Committee. › City Council to review and approval report.

Implementation Plan

Applicant Experience and Public Engagement






Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

Recommendation		Description of Activities
2.6.1	Create applicant satisfaction surveys to measure applicant satisfaction with the development review and policy formulation process.	 <ul style="list-style-type: none"> › Gather leading practices for customer satisfaction surveys, including those already in use by the City (e.g., content, platforms, frequency, use, etc.). › Implementation Team to develop customer satisfaction surveys, using Recommendation 2.6.1 as a starting point. › Develop data collection strategy for how feedback will be utilized and leveraged. › Implement surveys and begin collecting data.
2.6.2	Create two-way learning opportunities for applicants, staff and other commenting partners to improve application quality and customer service.	 <ul style="list-style-type: none"> › Gather feedback from staff and applicants about ideas/programs to support two-way learning opportunities including those described in Recommendation 2.6.2. › Implementation Team to develop a business case for a two-way learning program (i.e. training opportunities, work plan, costs, anticipated benefits). Implementation Committee to approve business case. › Identify lead internal resource with ownership of the program. › Implement learning program.
2.6.3	Develop a user-friendly “Planning & Development 101” guide for staff, applicants, members of the public and residents’ associations to enhance understanding of the development review and policy formulation processes.	 <ul style="list-style-type: none"> › Inventory existing training and informational material for the development planning and policy formulation processes. › Consult with key stakeholders to identify the type of information and material to be included in the guide, building on Recommendation 2.6.3. › Implementation Team to prepare draft development & planning guide, incorporating feedback from stakeholders and addressing gaps in existing information and materials. Socialize with key stakeholders and incorporate feedback. › Publish guide on City’s website. Include in training and onboarding activities.

Implementation Plan

Applicant Experience and Public Engagement






Timeline for Implementation

0-6 Months

6-12 Months

12-18+ Months

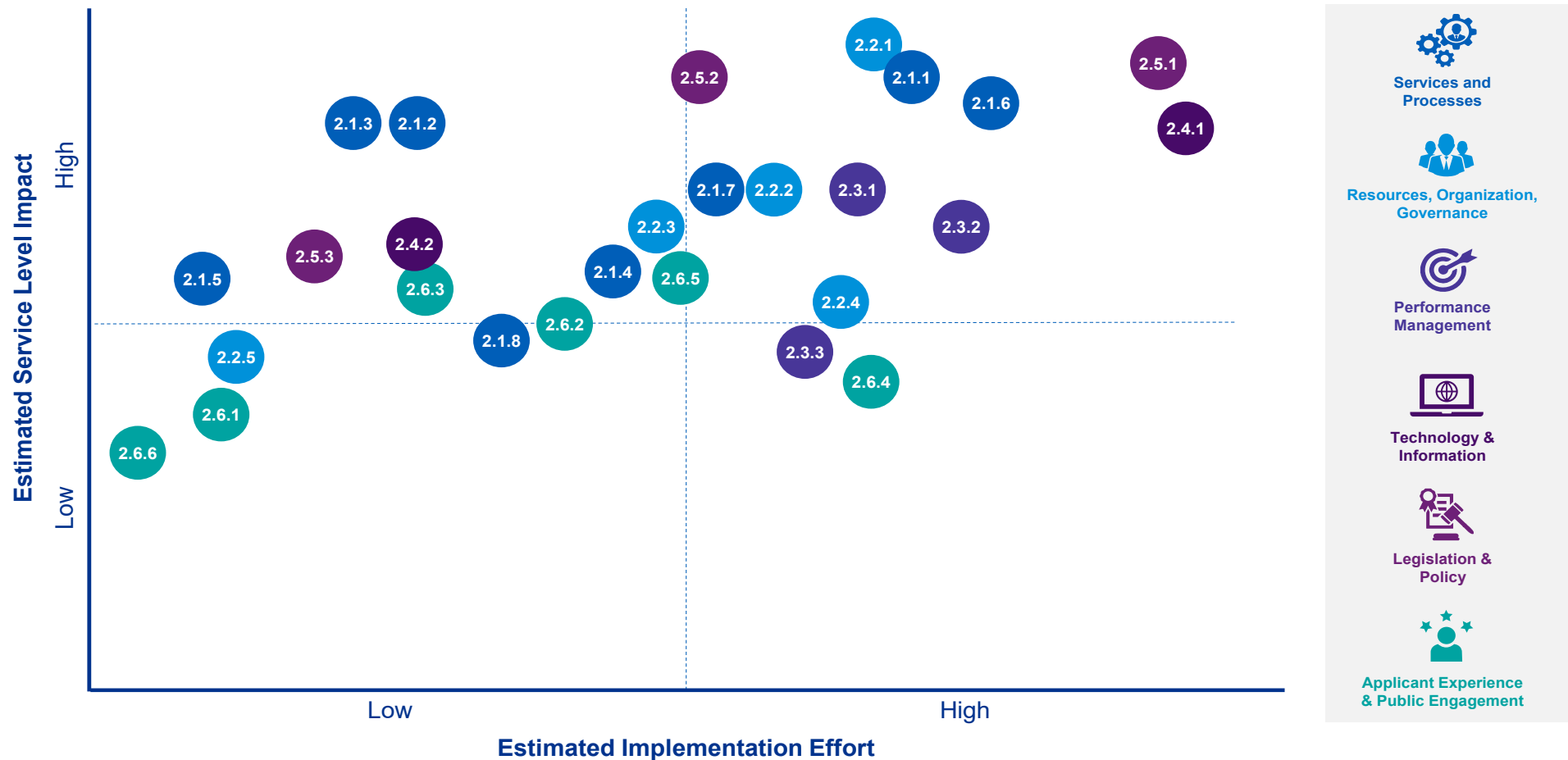
Recommendation		Description of Activities
2.6.4	Develop a formal public engagement policy to identify when and how public consultation should take place outside of statutory requirements.	 <ul style="list-style-type: none"> › Collect and analyze information related to current public engagement practices. › Consult with residents' associations, elected officials, and the public to inform consultation needs outside of statutory processes. › Implementation Team to develop a draft public consultation policy based on Recommendation 2.6.4, incorporating feedback from public engagement process. › Implementation Committee to review and approve public consultation policy. › Implement public consultation policy.
2.6.5	Conduct a plain language audit to improve public facing development-related communications and supporting materials.	 <ul style="list-style-type: none"> › Perform assessment of current public facing development-related communications and supporting materials. › Identify instances of industry-specific language and terminology for revision. › Consult with residents' associations, elected officials, and the public to identify communication needs and aspects of existing communications that are not easy-to-understand.
2.6.6	Use semi-annual meetings with residents' associations to improve information sharing.	 <ul style="list-style-type: none"> › Consult with residents' associations to develop structure and framework for effective meetings, including meeting length, format and topics. › Implementation Team to develop schedule and implement standing meetings with residents' associations. › Engage participants to evaluate effectiveness of meetings.

Implementation Plan

3.3 Implementation Matrix

Figure 6 presents an estimate of the service level impact and implementation effort for each of our recommendations.

Figure 6: Service Level / Implementation Matrix



Implementation Plan

3.4 Implementation Scorecard

This section presents a scorecard to assist in measuring the implementation of the recommendations included in Section 2. To facilitate change it is critical to demonstrate progress to help build buy-in with internal and external stakeholders.

This scorecard should be reviewed and approved by the Implementation Committee and reviewed on a monthly basis by the Implementation Team. The scorecard can also be used to track the implementation of specific recommendations.

Figure 7: Implementation Scorecard

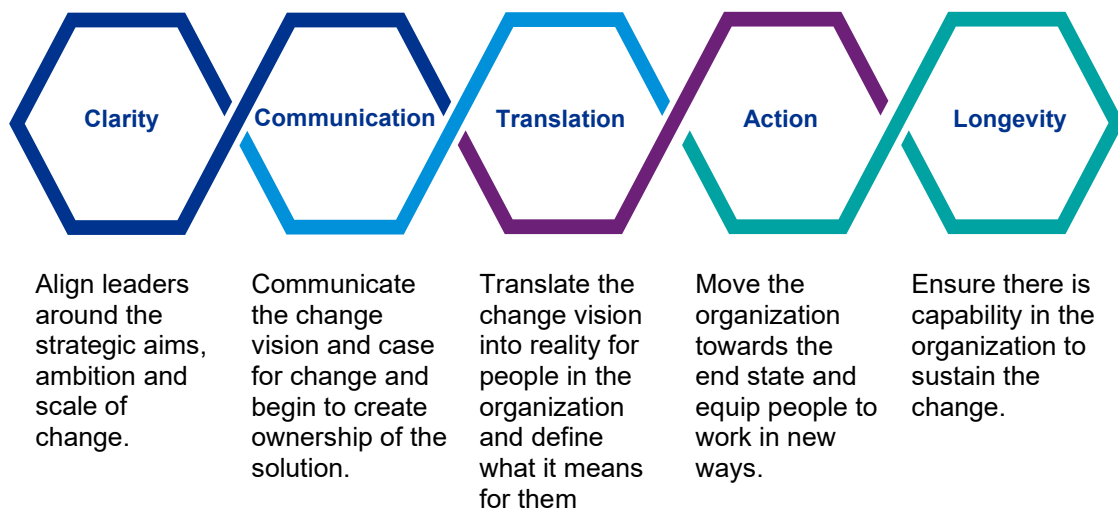
Success Factor (Intended Outcome)	Checklist (Y/N)
Implementation Structure	
The recommendations and roadmap included in this report have been approved by City Council.	
A clear project governance has been established and is working well (see Section 3.1).	
Sufficient staff capacity and resources are dedicated to the tasks ahead and are working well (see Section 3.1).	
Project Management	
Work plans exist to support the implementation of all recommendations.	
A complete communications strategy and accompanying communications plans are developed for relevant recommendations.	
Recommendations are implemented according to roadmap timelines. Delays are justified and communicated.	
Status updates are regularly provided to the Implementation Committee and other key stakeholders (as appropriate).	
Recommendations that have been implemented are reviewed every six to 12 months for effectiveness.	
Applicant & Public Experience	
Applicants are engaged in the implementation process (e.g., through regular status updates).	
The applicant experience is measured and improving.	
The public is engaged in the implementation process (e.g., consulted on appropriate recommendations).	
The public engagement experience is measured and improving.	

Implementation Plan

3.5 Change Management Framework

Effective change management aligns leaders and staff around change that is clearly defined, justified and well-communicated. Figure 8 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 in this report.

Figure 8: KPMG's Change Management Framework



To help ensure stakeholders are willing, ready and able to implement change, Vaughan should focus on:

- 1 Clarity:** Ensure senior City leadership understands and is committed to the importance of aligned, visible, and ongoing support for an improved development review process. Formalize this support in the establishment of the Implementation Committee included in 3.1.
- 2 Communication:** Develop and implement a detailed communications plan that clearly articulates the overall case for change to each stakeholder group. Consider identifying champions in each development review-related Department to help spread the message. Ensure approval of this report and its roadmap is widely communicated.
- 3 Translation:** Transition from vision to execution by assigning the Implementation Team. Clearly define the Implementation Team's roles, responsibilities and mandate. Develop detailed change management plans for the recommendations included in Section 2.
- 4 Action:** 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 Longevity:** Use the Implementation Scorecard to measure progress and maintain momentum. Continue to monitor the impacts of recommendations and effects on stakeholder groups.

Implementation Plan

3.6 Communications Strategy

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

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

These principles should be used as a starting point for the development of a tactical communications plan to support the implementation of the recommendations included in Section 2. 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.

Table 5 provides additional detail on each of the five communications principles included in this section.

Table 5: Communications Principles

Principle	Outcomes	High Level Tactics
Equip leaders and change agents.	Organizational leadership and change champions have the tools needed to promote the case for change.	During the first 90 days, provide a refresher course in change management and effective communications for leaders and change agents. Continuously update key messages and communication tools for leadership to ensure they remain relevant and effective.

Implementation Plan

Principle	Outcomes	High Level Tactics
Develop tailored key messages.	Different stakeholder groups are targeted with specific key messages, increases the chances of success	<p>Identify different internal and external stakeholder groups involved in the development review process.</p> <p>Review how the overall implementation roadmap will impact each group as well as the implementation of specific recommendations.</p> <p>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.</p>
Communicate consistent messages	Key messages are developed and are consistent across initiatives and time, and align with the broader goals of the Development Services Commission.	<p>Identify near-term milestones and any quick wins/</p> <p>Develop and leverage key messages consistently through all communications to build consistency, credibility and support.</p> <p>Create a common look and style for change communications. Use it consistently in materials so that communications are recognizable.</p>
Reinforce messages	Multiple opportunities are created for key stakeholders to provide input.	<p>Provide regular communications which set specific, clear and relevant expectations and then report back on progress.</p> <p>Use existing communication channels (email, internal portals, the online planning portal) to regularly share information.</p> <p>Develop standards and messages for the change writ-large and cater messaging in tactical communications plans that support individual initiatives.</p> <p>Encourage two-way dialogue and feedback from stakeholders to continuously improve communication approaches.</p>
Engage industry	Initiatives underway are consistently communicated to industry stakeholders to maintain their awareness and buy-in.	<p>Provide structured, formal updates to industry groups, leveraging existing mechanisms, like the Development Liaison Committee.</p> <p>Follow up with all industry stakeholders engaged by KPMG to provide a status update and opportunity to review and validate this report.</p>



4 Appendices

A Approach & Work Plan

The City retained KPMG in April 2021 to conduct a comprehensive assessment of its development review and policy formulation processes.

A project sponsor group and steering committee of directors from across PGM provided oversight and direction. The steering committee and sponsorship group included:⁴

- Haiqing Xu, Deputy City Manager, PGM;
- Mauro Peverini, Chief Planning Official, PGM;
- Bill Kiru, Acting Director, Development Planning;
- Christina Bruce, Director, Policy Planning & Special Projects;
- Ben Pucci, CBO & Director, Building Standards; and
- Frank Suppa, Director, Development Engineering.

Day-to-day oversight was provided by an interdepartmental project team. The review was funded by the Province of Ontario via the Audit and Accountability Fund.

A.1 Objectives and Scope

The purpose of our review was to ensure that Vaughan has efficient and effective development review and policy formulation processes by:

- Finding efficiencies to streamline the policy formulation and development approval processes;
- Increasing service levels in the policy formulation and development approval processes; and
- Clarifying roles and responsibilities, while ensuring thorough and meaningful plan review and excellence in city planning.

Our assessment included a review of three development application types:

- Official Plan Amendments;
- Zoning By-Law Amendments; and
- Plans of Subdivision.

For each application type, our scope included processes, management practices, roles, responsibilities, timelines, performance measures, information and technology. Also included in the assessment were the supportive policy framework processes, including block plans and secondary plans.

Our scope included the complete end-to-end development review and policy formulation processes, including pre-application consultation, application intake, circulation, public engagement, and decision. The review included an assessment of the following development-related focus areas:

- Roles and responsibilities of staff and departments;
- Staff resources and skillsets;
- Development application management and governance practices; and
- Review timelines and key performance metrics.

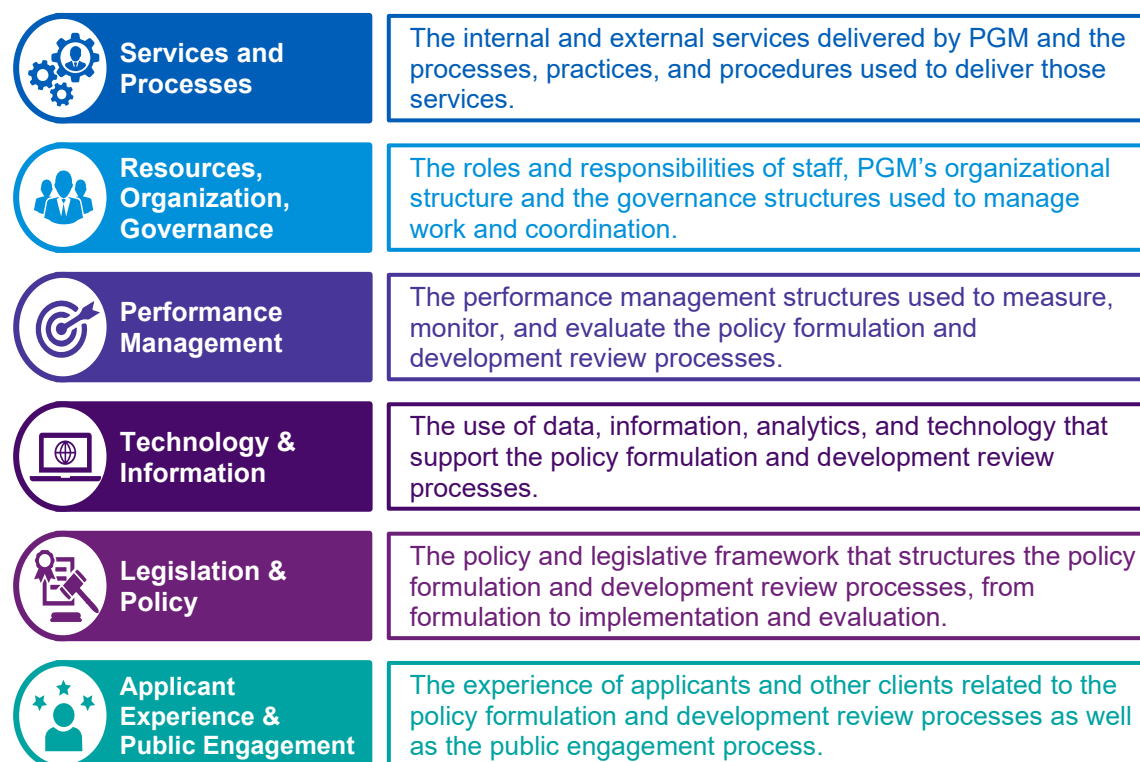
⁴ During our review, an organizational change took place that impacted the sponsor group and steering committee membership. Here we note membership at the conclusion of our work.

A Approach & Work Plan

A.2 Methodology

The assessment framework used for the review had six layers and is described in Figure 9 below. We used the assessment framework to structure our research activities and organize our findings.

Figure 9: Assessment Framework

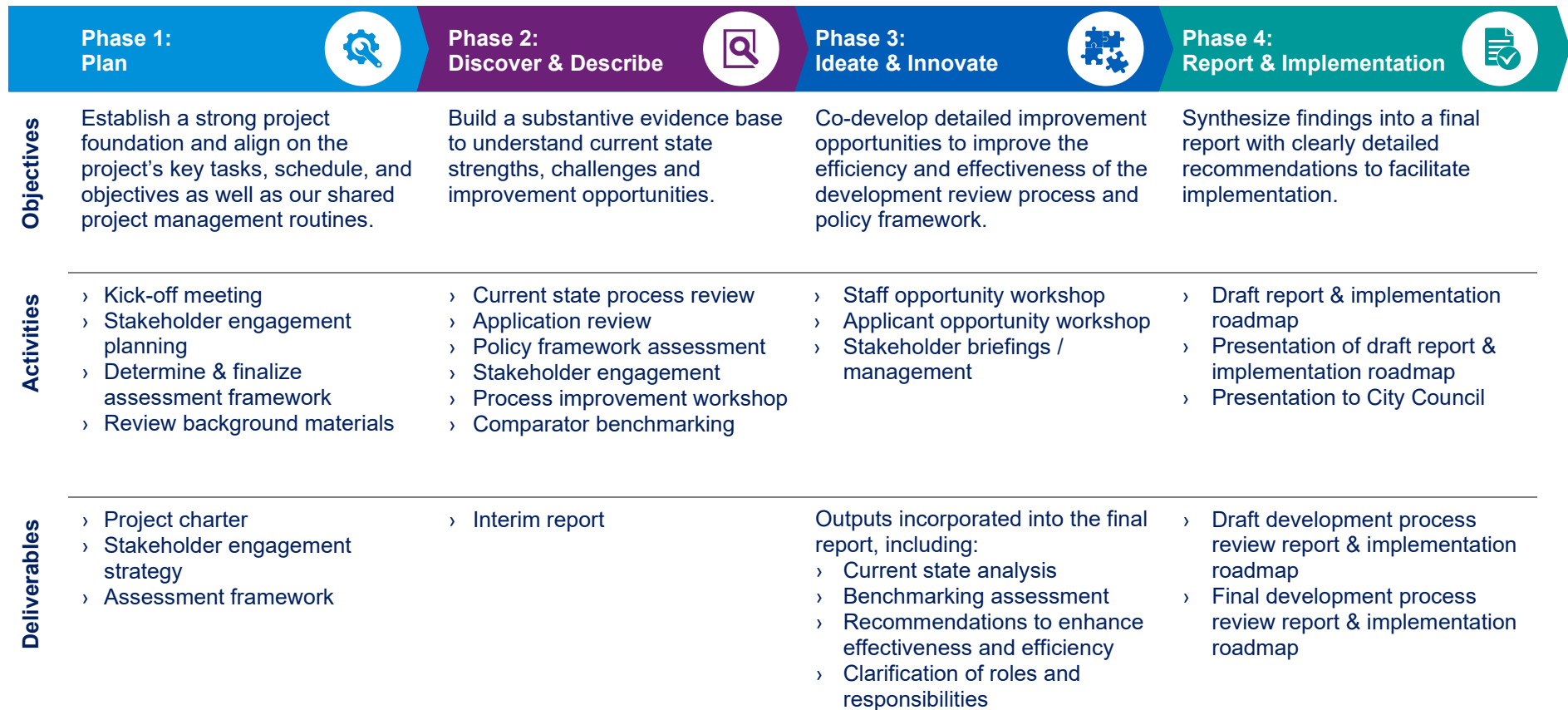


A.3 Work Plan

Work began in April 2021 and closed in October 2021. Our approach comprised four phases, shown in Figure 10 below. Many of the phases of our work were overlapping and iterative.

A Approach & Work Plan

Figure 10: Project Work Plan



A Approach & Work Plan

Plan

During the first phase, we worked closely with the City's Project Manager to confirm the assessment's objectives and work plan. In April 2021, we facilitated a kick-off meeting with the Project Team and PGM leadership team to validate the assessment's updated project objectives and work plan. We also reviewed and refined the project charter and stakeholder engagement strategy, including the identification of stakeholders, tactics and engagement timelines. The engagement strategy and updated project charter was presented to and approved by the project steering committee and sponsorship in May 2021.

Discover & Describe

During the second phase, we built a robust evidence base to understand and evaluate the current state, as well as identify challenges and initial opportunities for improvement. A detailed breakdown of strengths and challenges identified as part of the current state assessment is included in Appendix B.

Several qualitative and quantitative data sources were used to construct our initial evidence base:

- Document review;
- Data review;
- Stakeholder research;
- Process improvement and co-design workshops; and
- Survey questionnaires.

Each is explained in greater detail below.

Document Review & Analysis

We conducted an in-depth review of more than 80 documents provided by the City. Documents included organizational charts, process maps, guidelines, policy documents, job descriptions and performance measures, as well as prior reviews, reports and studies. We also reviewed 15 sample development application files (ongoing and completed) to develop a better understanding of the current state of the development review process. Additional documents were identified and reviewed throughout our engagement. Internal and external stakeholders, in particular, provided helpful direction on additional studies and background materials. A list of documents reviewed is included in Appendix D.

Data Review & Analysis

We conducted an analysis of data and information obtained from the City's PlanIt system to identify challenges and improvement opportunities, as well as to test and verify initial findings from stakeholder engagement sessions.

After an initial data request in May 2021, we conducted several data workshops with City staff to understand the PlanIt system and verify our approach and understanding. The data review consisted of reviewing data related to application submissions, circulations, timeframes, and approvals over a period between 2014 and 2021. A list of the data sources reviewed is included in Appendix D.

A Approach & Work Plan

Due to limitations of the City's data system, including challenges extracting and manipulating the data, as well as limited data collection practices, we were unable to conduct a fully comprehensive data review and analysis.

Stakeholder Engagement

We conducted a comprehensive stakeholder engagement exercise, which included approximately 50 hours of stakeholder engagement with more than 70 internal and external stakeholders. Our stakeholder engagement activities included:

- Over 30 one-on-one interviews with senior City staff, elected officials and external commenting partners, including York Region and the TRCA;
- Five focus groups with PGM leadership, manager-level and frontline staff representing departments engaged in the development review process; and
- Two focus groups with over 30 industry representatives, including developers and consultants, as well as representatives from the Building Industry and Land Development Association.

To encourage frank and constructive dialogue, interviews and focus groups were conducted confidentially and without attribution. Notes were taken to facilitate our analysis but were not shared externally.

One-on-one interviews were typically 30-90 minutes in length. We followed a semi-structured approach that included interview guides with questions distributed in advance but allowed interviewees to identify new issues. Focus groups were several hours in length, and followed a similar, semi-structured approach.

Alongside interviews and focus groups, we also conducted two process improvement workshops with frontline staff. We used a Lean approach to map the development review and policy formulation processes, identifying pain points, strengths and improvement opportunities.

A complete list of the stakeholders engaged in our work is included in Appendix E.

We also developed and distributed online surveys for PGM staff, industry representatives, and residents' associations. The surveys were open for several weeks and included questions focused on existing strengths, challenges, and improvement opportunities. In total, 280 responses were received across the three surveys. A list of the survey questions is included in Appendix F.

We synthesized our findings into an interim report. The interim report included a summary of the current state, as well as a long list of improvement opportunities for consideration and additional development during Phase 3. The interim report was presented to the Project Team and sponsors group in August 2021.

Ideate & Innovate

During the third phase, we refined our preliminary improvement opportunities into the recommendations included in this final report. We used two main inputs to develop the future state model: co-design workshops and a jurisdictional benchmarking study.

Co-Design Workshops

We developed several key improvement opportunities included in our interim report through four co-design workshops with PGM leadership, PGM managers, PGM frontline staff, and industry representatives. During the workshops, we worked alongside stakeholders to review and refine

A Approach & Work Plan

key improvement opportunities. A fifth, policy-focused workshop was conducted with a focus on the block plan and secondary plan processes. Outputs from the workshops were incorporated into this report.

Jurisdictional Benchmarking

The purpose of the jurisdictional benchmarking study was to gather leading practice information to inform the development of our recommendations.

Our approach had two distinct phases. In the first phase, we compared Vaughan's development review and policy formulation processes against leading practice identified through KPMG research and work with Canadian and global municipalities. In this phase, we conducted desktop research into each city's development review processes using publicly available materials, such as relevant research reports, benchmarking studies, and existing industry leading practice. The output from this phase was included in our Interim Report.

In the second phase, we conducted more detailed research into six comparator municipalities to identify specific opportunities for Vaughan's development review and policy formulation processes. We focused on what each jurisdiction does well, rather than a side-by-side comparison or analysis of each jurisdiction's development review or equivalent processes.

Working closely with the Project Team, we identified six jurisdictional comparators based on criteria including: population size and growth, geography, development volume, development type and complexity, operational or policy innovation, and reputation for city-building. The following Ontario municipalities were included as part of the benchmarking study:

- Brampton
- Markham
- Burlington
- Mississauga
- Toronto
- Richmond Hill

For each jurisdiction, we conducted desktop research and, where possible, one phone-based interview with a senior staff person from a relevant department or division. Additional information about the jurisdictional benchmarking study is included in Appendix C.

Report & Implementation

During the fourth and final phase, we synthesized our findings into this final report and implementation roadmap. Draft versions of this report were shared with and reviewed by the Project Team and PGM leadership. Revisions have been incorporated into this final version.

B Current State Assessment

This section summarizes our findings about the strengths and challenges facing the development review and policy formulation processes in Vaughan. The strengths and challenges are organized into the six layers of our assessment framework. These findings were included in our Interim Report.

B.1 Services and Processes

Strengths

Pre-Application Process

- Meetings are scheduled quickly, include relevant staff, and clearly identify application requirements.
- The pre-application consultation process was consistently identified as a strength by staff and applicants.

Circulation Memos

- External commenting partners identified the circulation memos used by Vaughan as best in class.

Geographic-Focused Approach to Vaughan Metropolitan Centre

- The VMC is a growth centre. Recognizing the unique development opportunity, the City created a tailored service delivery model for the geographic area.

Challenges

Process inconsistencies across individual staff, departments, and geographies

- The development review process - from application requirements to specific process steps to the use of specific tools and templates - varies significantly across individual staff, departments and geographies. This reduces consistency, predictability and transparency for applicants and staff.
- The development review process, outside of VMC, is largely informal (i.e., procedures and rules are not generally written down and communicated internally and externally), which contributes to inconsistencies.

Limited project and practice management tools

- Outside of VMC, project and practice management tools are limited or, in many cases, out of date (e.g., templates for reports or agreements, schedules, risk registers, etc.). This can contribute to inconsistencies, increasing administrative workloads and creating barriers to onboarding and training.

Conflicting and late-stage comments

- Conflicting and late-stage comments from staff and commenting partners increase application review times, applicant frustration and, in many cases, application costs.

B Current State Assessment

Increasing application volumes and application complexity

- Development application volumes have increased by over 40% since 2014. This growth has occurred without significant increases to development staffing levels, which has significantly increased staff workloads.
- The complexity of development applications is also increasing as the City shifts towards more complex infill and high-rise development patterns. This adds to workload pressures and increases application review timelines, particularly given the increasing need for exceptions and deviations to existing policies and standards.

Broad, inconsistent circulation and commenting practices

- Development applications are often circulated to commenting partners that do not need to review the application or have already provided comments, increasing application review times, staff workloads and contributing to late stage comments.
- Comments are not provided in a consistent format by internal commenting partners, increasing the administrative burden on applicants.

Complex report approval process

- The approval process for development-related staff reports takes approximately eight weeks and can involve significant time and effort from senior staff, which extends application review times and contributes to administrative workloads and staff frustration.

Inconsistent, shifting application priorities

- Development and application priorities can change quickly, disrupting the application processing queue and extending application review times.
- There is no mechanism for City staff to identify which applications to prioritize and how to prioritize them.

Application quality

- The quality of applications and supporting studies can sometimes be poor, particularly on initial submissions. This increases application review times and reduces the staff time available for more valuable work.

B.2 Resources, Organization, and Governance

Strengths

Integrated, Case Management-Based Approach in VMC

- The VMC has implemented a multidisciplinary team with expertise across multiple core development review areas.
- The case management approach is also supported by project management tools and templates.

B Current State Assessment

Human Capital

- Interviewees identified Vaughan's human capital as a reason the City has been able to process the sustained application volumes and complexity it has been experiencing.
- Highly skilled, motivated staff excited to help shape Vaughan's urban growth. City staff were described by interviewees as having a "can do" attitude, "creative" approaches, and "collaborative disposition".
- Reputation for being more responsive and customer service focused than GTA peers.

Emerging Interdepartmental Governance

- Monthly PGM-wide leadership meetings help to facilitate the resolution of development-related issues.

Challenges

Project manager role not defined, resourced, or empowered

- Outside of VMC, there is no well-defined or empowered project or case manager associated with development applications.
- While many internal and external stakeholders identified the planner as the "application lead," most planners lack the time, tools and authority to manage applications across processes and commenting partners.

Informal development review process governance

- Development review is an interdepartmental process that requires coordination across many different departments, particularly given the increasing complexity of development activity.
- While there are regular interdepartmental leadership meetings, there is no formal process-wide mechanism to manage development-related resources and priorities or identify and resolve conflicting comments and policy objectives, contributing to delays and staff and applicant frustration.

No mechanism to address exceptions from development standards

- There is no formal mechanism to resolve exceptions or deviations from development-related standards, which contributes to delays, applicant frustration and staff workloads.

Unclear roles and responsibilities

- The development review-related roles and responsibilities of internal and external commenting partners and other development review stakeholders are not well defined.
- Commenting partners often provide comments on issues outside of their areas of jurisdiction, resulting in duplication, additional work and delays.
- The role of the lead planner is not well defined or established, negatively impacting their ability to effectively manage project files.

B Current State Assessment

B.3 Performance Management

Strengths

Time tracking used in places

- Within the VMC and some groups in Policy, time tracking is used to help manage certain components of work and resources.

Challenges

No performance management framework

- While some departments have development-related performance measures in place and others are in developments, the development review process is not currently supported by an end-to-end performance management framework.
- City staff, applicants, and other development stakeholders lack a clear understanding of the City's overall and application-specific targets and performance. This reduces transparency and predictability while creating barriers to effective management, accountability and oversight.

Limited measurement of development process-related information

- Many critical elements of the development review process are not currently tracked or measured (e.g., application processing timelines, circulation metrics, etc.). Those elements that are tracked are difficult to manipulate and/or are limited to specific departments.
- The lack of development review-related measurement and information is a barrier to effective performance management.

B.4 Technology and Information

Strengths

Service Delivery Response to COVID-19

- Shift to digital service delivery during the pandemic was faster and more seamless than many municipal peers.

Identification of new workflow management system

- The City is currently in the midst of implementing a replacement project for its current application management platform (PlanIt). The City is identifying the features and associated implementation plan for the rollout of the new system.

B Current State Assessment

Challenges

Legacy, non-integrated technology systems

- While a replacement project is underway, the current application management platform (PlanIt) is highly manual and not integrated across departments, adding to staff workloads and limiting the amount and type of development-related information that can be collected and manipulated.
- Information and data that is tracked using the current application management platform is difficult to extract and manipulate, a significant barrier to performance management.

B.5 Legislation and Policy

Strengths

New policies developed or underway for intensification areas

- The City has identified, developed, or is in the midst of developing new policy frameworks for identified intensification areas.

Challenges

Role of development planning staff in the policy formulation process

- Internal and external stakeholders consistently indicated that the role of development planning staff in the policy formulation process is often limited.
- This gap can negatively impact the implementation of policy, increasing staff workloads and application review times.

Relationship between block plans and secondary plans

- Internal and external stakeholders consistently indicated that the block plan and secondary plan processes are not clearly defined and that requirements can often overlap, resulting in duplication and delays.
- Similarly, the lack of formal requirements or processes associated with the block and secondary plan processes contributes to increased workloads and reduces transparency and consistency for staff and applicants.

Policy gaps

- In some areas, Vaughan's development policy framework has not kept pace with the City's fast-changing development patterns, resulting in policy gaps that increase the need for bespoke and often time-consuming solutions while reducing transparency and predictability.

No site plan delegation

- Site plan approval is not delegated to staff with the result that even routine site planning applications must be reported to City Council, increasing application review times and reducing the staff time available for higher value work.

B Current State Assessment

B.6 Applicant Experience and Public Management

Strengths

Industry Engagement

- The Development Liaison Committee and its regular cooperation with BILD to engage industry in the development process has been recognized as effective by industry participants.

Customer-Focused Culture

- Many industry stakeholders recognized Vaughan for having a customer and growth focused culture.

Challenges

Sometimes adversarial culture

- Many industry stakeholders indicated that the relationship between staff and applicants can sometimes be adversarial, which is a barrier to the collaboration and trust required for an effective and efficient development review process.

Limited, often reactive, customer service

- Many industry stakeholders indicated that the development review process is not always customer focused. Customer service tends to be reactive rather than proactive, increasing the project management burden on applicants.

Application status and related information

- Information about specific applications (e.g., the staff assigned to an application, whether an application has been reviewed by a specific commenting partner) is not easily accessible to applicants or the public, reducing transparency and increasing administrative workloads.
- Similarly, there is limited publicly available information about the application process and related requirements, which contributes to application quality issues.

Complex language and communications

- The language and materials used to communicate with the public about development applications and the development review process are complex and often confusing, a significant barrier to effective public engagement.

Increasing expectations for public engagement

- Changing development patterns are increasing public expectations for engagement in the development application process.
- 95% of Residents Association members surveyed felt that the public engagement and consultation process is ineffective or in need of improvement.
- There is no formal mechanism or process to facilitate or identify the need for additional public engagement on development applications outside of statutorily required meetings.

C Jurisdictional Benchmarking

This section summarizes our jurisdictional benchmarking. It has three subsections: i) global leading practices, ii) a maturity assessment and iii) success factors identified through our research of comparable GTA municipalities. Information about our approach to jurisdictional benchmarking is included in Appendix B.

C.1 Global Leading Practice

This subsection presents a summary of global leading practices and is based on our research of more than 30 complex Canadian and global jurisdictions. We have also incorporated insights from relevant third-party research reports, benchmarking studies, and industry leading practice.⁵ The most relevant jurisdictions included in our research are included in Table 6.

Table 6: Leading Practice Jurisdictions

Canada	United States	Global
Vancouver, BC	New York City, NY	Auckland, New Zealand
Calgary, AB	Chicago, IL	Melbourne, Australia
Edmonton, AB	Seattle, WA	Abu Dhabi, UAE
Toronto, ON	San Francisco, CA	
Mississauga, ON	Los Angeles, CA	
Hamilton, ON	Phoenix, AZ	
Ottawa, ON	Dallas, TX	

Leading practices for the development review and policy formulation processes are described below and organized into the six layers of our assessment framework.

Services and Processes

- Focus effort and resources during the early stages of the development review process to understand the application and identify potential complications.
- Sufficiently resource project leads and empower them to manage development applications in an efficient and productive manner.
- Tailor the available resources and processes to each applicant's specific needs. Give extra consideration and risks and resources to previously identified risks.
- Use standard operating procedures, terms of reference, and other practice management tools to improve application review speed, consistency, and transparency.
- Establish mechanisms to identify and prioritize strategic applications.

⁵ Relevant research includes reports and studies sourced from BILD, RESCON, World Bank, Statistics Canada, OECD, and others.

C Jurisdictional Benchmarking

Resources, Organization and Governance

- Use integrated, multidisciplinary teams to improve speed, consistency and collaboration of application review and commenting circulation.
- Establish a formal, process-wide governance structure to improve oversight and accountability.
- Identify and empower a dedicated operational lead for the end-to-end development review process. Consistent leadership ensures accountability and improves overall governance.
- Formalize staff and applicant meetings at critical application milestones to improve communication, coordination, and collaboration.
- Clearly define the roles, responsibilities, and timelines for all commenting partners and development review stakeholders to decrease circulation periods.

Performance Management

- Establish an integrated, process-wide performance management framework.
- Regularly review the effectiveness of the performance management framework and supporting performance metrics.
- Develop dashboards to improve oversight and accountability.
- Use time tracking for development related staff to improve resource management.

Technology & Information

- Use a modern, process-wide application management platform to improve application speed, consistency, and oversight. Application management platforms are increasingly useful in a digital world.
- Leverage groupware to improve internal and external collaboration by standardizing technology tools.
- Establish self-service applicant portals.
- Continually identify and make available critical development review-related information to improve application quality and reduce application costs.

Legislation & Policy

- Delegate the authority of simple, minor, or low risk development-related approvals to staff.
- Integrate development planning staff into the policy planning process (and vice versa) for increased understanding and enhanced collaboration.
- Regularly and systematically review development policy, guidelines and standards for effectiveness, efficiency, and cost. Consider including sunset clauses where applicable.
- Use a cost-benefit analysis (or similar tool) to evaluate policy, guidelines, and standards prior to implementation.
- Make all development policy, guidelines, and standards available online in an easy-to-use portal to improve applicant experience.

C Jurisdictional Benchmarking

Applicant Experience & Public Engagement







- Actively engage industry and industry associations in the development review and policy formulation processes.
- Proactively share resources and information with industry to improve application quality and overall communications.
- Encourage high quality applications with streamlined processes and other prioritization incentives.
- Use plain, easy-to-understand language in all public-facing development-related communications.
- Create public-facing development guides (e.g., a “development 101” presentation) to improve education and awareness.

C Jurisdictional Benchmarking

C.2 Maturity Assessment

This subsection includes our maturity assessment of Vaughan's development review and policy formulation processes against the global leading practices identified in the previous subsection. It is important to note that this assessment is based on global leading practice rather than Vaughan's performance against GTA peers. This assessment was presented in our Interim Report.

Figure 11: Industry Practice Maturity Assessment

	Maturity Assessment	Rationale
Services & Processes		<ul style="list-style-type: none"> › A maturing pre-application consultation process effectively identifies application requirements, making the process more transparent. › A project management approach is used in VMC with supporting project and practice management tools.
Resources, Organization & Governance		<ul style="list-style-type: none"> › The VMC model integrates core development review staff into a single organizational unit for increased collaboration. › Development functions and related staff are largely consolidated in PGM with regular department leadership meetings.
Performance Management		<ul style="list-style-type: none"> › Time tracking is used in some, but not all, development-related departments. › No formal performance management framework is in place for the development review process. However, initiatives are underway to develop performance measures in certain areas.
Technology & Information		<ul style="list-style-type: none"> › The transition to a modern application management system is underway. › Development-related information and data are difficult to obtain and manipulate. › The transition to digital service delivery during the pandemic was fast and effective.
Legislation & Policy		<ul style="list-style-type: none"> › Vaughan has developed new policy to facilitate development in high-growth areas. › There is limited delegation of routine and low-risk development-related approvals. › Development planning and policy planning staff are not well integrated.
Applicant Experience		<ul style="list-style-type: none"> › The Development Liaison Committee is a strong foundation for additional industry engagement. › Public-facing information can be difficult to understand and engagement outside of the statutory process can be inconsistent.

C Jurisdictional Benchmarking

C.3 Success Factors

This subsection identifies five success factors for development review and policy formulation processes used in comparable GTA municipalities. Our research included the following six municipalities:

- Brampton;
- Burlington;
- Markham;
- Mississauga;
- Richmond Hill; and
- Toronto.

Our research focused on what each jurisdiction does well, rather than a side-by-side comparison or analysis of each jurisdiction's development review and policy formulation processes. These insights informed the recommendations included in Section 2 of this report.

Focus Effort During Early Stages to Address Volume and Complexity

Like Vaughan, many of the municipalities included in our research are transitioning from suburban to more urban development patterns, increasing the volume and complexity of development applications.

To address these challenges, a number of the jurisdictions included in our research are focusing staff resources during the early stages of the development review process. Like Vaughan, many jurisdictions use mandatory pre-application consultation processes. Interviewees identified the following enablers of a successful pre-application consultation process:

- Broad attendance from relevant City departments and consultants on the applicant team;
- Internal pre-meetings to align City departments, including the identification of application-specific priorities; and,
- The identification of materials and information necessary to provide substantive feedback, while balancing the time and cost to applicants of preparing such materials.

While some interviewees focus the pre-application process on the identification of application requirements, others use the process to identify substantive application-related issues that should be considered by the applicant prior to submission, which can help to surface and address issues as early as possible.

Delegation of Authority

Delegating authority to staff is another tactic identified by interviewees to address the increasing volume and complexity for changing development patterns. For example, a majority of the jurisdictions included in our research delegate all site plan approvals to staff. Interviews identified the following benefits:

- Reduces staff reporting requirements, particularly for lower risk and lower complexity applications, allowing staff to focus on higher value work;
- Reduced City Council's workload; and
- Expedites review timelines.

C Jurisdictional Benchmarking

Fees to Incentivize Application Quality

Many of the jurisdictions included in our research use or are considering the use of additional fees to incentivize application quality. The additional fees are triggered after a set number of circulations and only charged if the additional circulation is driven by the applicant. The benefits identified by interviewees include:

- Cost-recovery for the staff time associated with additional circulations;
- Reduced circulations, increasing approval times and reducing staff workloads; and,
- Increased application quality on resubmission.

Interviewees also noted that the additional fees provided a strong incentive for applicants and staff to address issues promptly as they arise, contributed to faster approval times. In one jurisdiction, staff have the discretion to waive the additional fee if an applicant is making significant efforts to address previous comments.

Formal Acknowledgement of Comments

To reduce resubmissions, several comparator jurisdictions use a formal checklist when providing comments to applicants. Applicants are required to initial each comment to acknowledge receipt, strengthening accountability. When resubmitting an application, applicants must provide a response to each checklist item that describes how the comment was addressed.

Interviewees noted that requiring comments to be acknowledged on receipt resulted in higher quality resubmissions and enhanced collaboration between staff and applicants.

City-wide Governance Structures

Like Vaughan, many of the municipalities engaged through our research identified interdepartmental coordination and collaboration as a significant challenge. Common issues included:

- Conflicting comments on development applications;
- Aligning priorities across organizational units; and,
- Ensuring adequate resourcing across organizational units.

To address these issues, a number of jurisdictions developed interdepartmental governance structures to support the development review and policy formulation processes. While models and level of formality varied significantly across comparators, interviewees consistently identified a number of benefits associated with these structures, including:

- Providing leadership and staff with an “end-to-end” view of the development review and policy formulation processes, including a stronger sense of being “on the same team;”
- An effective mechanism to quickly resolve interdepartmental conflict and align priorities; and
- An effective forum to communicate city-wide and departmental policy and other changes.

D Documents Reviewed

This appendix presents the documents reviewed during our assessment.

Table 7: Document Register

Document List		
#	Document Name	Date Received
Project Initiation		
1	Project Governance - Development P+P Review	27-Apr-21
2	Vaughan - Dev. & Policy Review - Kick-Off Presentation (2021.04.28)	27-Apr-21
Organizational Charts		
3	1. Dev. Planning Org Chart - Apr 2021	29-Apr-21
4	2. VMC Org	29-Apr-21
5	3. PPES - Org Chart - Apr 2021	29-Apr-21
6	4. Development Engineering - April 2021	11-May-21
7	5. Building Standards - April 2021	11-May-21
Process Maps		
8	Development Planning - Amanda Part A Process Map - Oct 15	04-May-21
9	PAC Process - Current State & Options	04-May-21
10	PAC Process Maps - Applicant Perspective v.4	04-May-21
11	PAC Process Maps Nov 30	04-May-21
12	PAC Process Maps v.8	04-May-21
13	DRAFT - Dewatering Future State	12-May-21
Development Planning Portal Project Documents		
14	DAAP Phase 2 Project Charter Final	04-May-21
15	DRAFT - Development Application Form Apr 7	04-May-21
16	DRAFT - PAC Form	04-May-21
17	DRAFT - Water Discharge Information Form - Apr 21	04-May-21
PGM Review Project Documents		
18	1 - DRAFT - PGM Action Plan Themes and Timeline	04-May-21
19	2 - DRAFT - PGM Action Plan All	04-May-21
20	5. PGM Review - Discovery Workshop - Managers - Report Back	04-May-21
21	0. PGM Review Roadmap	12-May-21
22	3. Managers Workshop Visioning Session - Full Notes	12-May-21
23	4. Managers Workshop Visioning Session - Themes	12-May-21
Data		
24	2021 Application Amount Stats	04-May-21
25	2021 Monthly Application Unit Stats	04-May-21
26	2021 PAC Tracking Statistics	04-May-21
27	GIS RawData	04-May-21
28	PGM - Quarter 1 2021 Report	04-May-21
29	PGM - Quarter 1 2021 Report	04-May-21
30	Waste Matrix Sheet PAC Process Nov 30	04-May-21
31	RadGridExport Apr 20 21	20-May-21
32	Active Applications by Ward Revised May 2021	19-May-21

D Documents Reviewed

Document List		
#	Document Name	Date Received
Supporting Material for Development Review		
33	2021 Development Application Fee Calculator	14-May-21
34	2021.03 DE Revisions_ PAC - Appendix A - DE Reports ONLY Final	14-May-21
35	2021.03 DE Revisions_ PAC - Appendix B - DE Reports and Fee Checklist Final	14-May-21
36	2021.03 DE Revisions_ PAC Understanding Form_Final	14-May-21
37	Building Standards - DAAP Reporting Requirements	14-May-21
38	DE - DAAP reporting requirements.v2	14-May-21
39	Development Planning Data Points_Oct-29-2020	14-May-21
40	DRAFT - Development Application Form Apr 7 - DE comments	14-May-21
41	DRAFT - Development Application Form Apr 7	04-May-21
42	DRAFT - PAC Form	04-May-21
43	DRAFT - Water Discharge Information Form - Apr 21	04-May-21
44	Draft PAC Website Information_RR Edits_Nov-16-2020	14-May-21
45	Draft PAC Website Information_RR Edits_Oct-16-2020	14-May-21
46	Pre-Application Consultation (PAC)	14-May-21
Job Descriptions		
47	CT46 Planner 1 (Dev. Plng) (002)	18-May-21
48	CSR Job Description	18-May-21
49	CSR JD - Final Draft with Approval signatures	18-May-21
50	Sr Urban Designer April12014	18-May-21
51	M715 FINAL Business Analyst PGM	18-May-21
52	M453 Senior Manager of Development Planning Final JE Strg	18-May-21
53	M17 Senior Planner_Dev	18-May-21
54	JOB DESCRIPTION Planner	18-May-21
55	CT117 GIS Mapping Technician (Dev. Plng.)	18-May-21
56	CT108 Senior GIS Mapping Technician (Dev. Plng.)	18-May-21
57	CT46	04-Jun-21
58	M14 Manager of Development Engineering	04-Jun-21
59	M17 - Senior Planner-Development	04-Jun-21
60	M314 Storm Drainage Engineer (Dev-Trans. Eng.)	04-Jun-21
61	M399 Project Manager - Parks Development VMC	04-Jun-21
62	M420 - Project Manager - Planning Vaughan Metropolitan Centre (VMC)	04-Jun-21
Job Descriptions		
63	M453 Senior Manager Development Planning	04-Jun-21
64	M520 FINAL Development Engineering Lead	04-Jun-21
65	M740 FINAL Transportation Project Manager	04-Jun-21
66	CT287 Planner - Policy Planning	04-Jun-21
67	M133 FINAL Manager of Policy Planning	04-Jun-21
68	M211 - Senior Planner - Environmental	04-Jun-21

D Documents Reviewed

Document List		
#	Document Name	Date Received
69	M349 Manager Environmental Sustainability (City Mgrs Off.)	04-Jun-21
70	M352 Sustainability Coordinator	04-Jun-21
71	M629 Manager Policy Planning Long Range	04-Jun-21
72	CT32 FINAL Cultural Heritage Coordinator	04-Jun-21
73	CT236 FINAL Urban Designer	04-Jun-21
74	CT307 FINAL Planning Technician	04-Jun-21
75	M220 - Manager of Urban Design	04-Jun-21
76	M497 Manager Special Projects	04-Jun-21
77	M605 FINAL Senior Heritage Planner	04-Jun-21
78	M696 FINAL Project Manager - Urban Design-2019-02-25	04-Jun-21
Other Reports		
79	Development Planning Implementation Strategy Draft Jan 9 2020	04-Aug-21
80	ICI Report - DAAP	04-May-21
81	Planning and Growth Management Portfolio Business Strategy - Our Focus 2018-2020	04-Aug-21
82	VaughanOrg Review Response to Mauro's Comments June 16 2019	04-Aug-21

E Stakeholders Engaged

This appendix presents the stakeholders consulted during our initial engagement activities.

Table 8: Vaughan City Staff

Vaughan City Staff			
#	Name	Position	Department
1	Mauro Peverini	Chief Planning Official	PGM
2	Bill Kiru	Acting Director	Development Planning
3	Christina Bruce	Director	Policy Planning & Env. Sustainability
4	Amy Roots	Director	VMC
5	Ben Pucci	CBO & Director	Building Standards
6	Frank Suppa	Director	Development Engineering
7	Haiqing Xu	Deputy City Manager	PGM
8	Nancy Tucket	Sr. Manager, Development Planning (East)	Development Planning
9	Fausto Filipetto	Manager, Long-Range Planning	PPES
10	Tony Iacobelli	Manager, Environmental Sustainability	PPES
11	Gerardo Paez Alonso	Manager, Strategic Parks Initiatives	VMC
12	Jennifer Cappola-Logullo	Manager, Development Engineering	VMC
13	Juan Carlos Molina	Manager, Data Management & Analytics	Office of DCM
14	Stanislav Tsysar	Interim Manager, Development Inspection & Grading	Development Engineering
15	Lee Salvati	Manager, Inspection Services & DCBO	Building Standards
16	Dan Mitta	Project Manager, Vaughan Hospital	Building Standards
17	Raphael Costa	Director	Economic & Cultural Development
18	Nick Spensieri	Deputy City Manager	Infrastructure Development
19	Vince Musacchio	Director	Infrastructure Planning & Corporate Asset Management
20	Jack Graziosi	Director	Infrastructure Delivery
21	Jamie Bronsema	Director	Parks Infrastructure Planning & Development
22	Martin Tavares	Manager	Parks and Open Space Planning
23	Kevin Huang	Senior Planner	Parks Development
24	Zoran Postic	Deputy City Manager	Public Works
25	Paul Salerno	Director	Real Estate
26	James Steele	Director	Environmental Services

E Stakeholders Engaged

Vaughan City Staff			
#	Name	Position	Department
27	Kathy Kestides	Director	Office of Transformation & Strategy
28	Caterina Facciolo	Deputy City Solicitor, Planning and Real Estate Law	Legal Services
29	Judy McNeely	Legal Counsel - Development / Real Estate	Legal Services
30	Todd Coles	City Clerk	Office of the City Clerk
31	Mark Antoine	Development Planning	Senior Planner
32	Carol Birch	Development Planning	Planner
33	Christopher Cosentino	Development Planning	Planner
34	Margaret Holyday	Development Planning	Senior Planner
35	Daniela DeGasperis	Development Planning	Planner
36	Frank Milkovich	Dev. Planning - Urban Design & Cultural Heritage	Urban Designer
37	Shirin Rohani	Dev. Planning - Urban Design & Cultural Heritage	Urban Designer
38	Chrisa Assimopoulos	Dev. Planning - Urban Design & Cultural Heritage	Urban Designer
39	Katrina Guy	Dev. Planning - Urban Design & Cultural Heritage	Cultural Heritage Coordinator
40	Ruth Rendon	Policy Planning and Environmental Sustainability	Senior Planner
41	Michelle Moretti	Policy Planning and Environmental Sustainability	Senior Planner
42	David Marcucci	Policy Planning and Environmental Sustainability	Long Range Senior Planner, OMB
43	Ash Faulkner	Policy Planning and Environmental Sustainability	Long Range Planner, Policy Planning
44	Paul Grove	Development Engineering	Transportation Engineer
45	Pirooz Davoodnia	Development Engineering	Transportation Engineer
46	Nadia Porukova	Development Engineering	Development Engineer
47	Garett Dvernichuk	Building Standards	Senior Zoning Examiner
48	Sarah Scauzillo	Building Standards	Zoning Examiner
49	Jessica Kwan	VMC	Senior Planner
50	Natalie Wong	VMC	Senior Planner
51	Alex Lee	VMC	Development Engineer
52	Musa Deo	VMC	Development Engineer
53	Nick Borescu	Dev. Planning - Urban Design & Cultural Heritage	Urban Designer
54	Ben Nagarajah	Dev. Planning - Urban Design & Cultural Heritage	Urban Designer

E Stakeholders Engaged

Table 9: Elected Officials

Vaughan Elected Officials		
#	Name	Position
1	Maurizio Bevilacqua	Mayor
2	Mario Ferri	Deputy Mayor, Local and Regional Councillor
3	Gino Rosati	Local and Regional Councillor
4	Linda D. Jackson	Local and Regional Councillor
5	Marilyn Lafrate	Ward 1 Councillor
6	Tony Carella	Ward 2 Councillor
7	Rosanna DeFrancesca	Ward 3 Councillor
8	Sandra Yeung Racco	Ward 4 Councillor
9	Alan Shefman	Ward 5 Councillor

Table 10: External Partners

External Partners		
#	Agency	Position
1	York Region	Director, Community Planning and Development Services
2	York Region	Manager of Development Planning
3	York Region	Senior Planner
4	TRCA	Planner
5	TRCA	Associate Director
6	TRCA	Sr. Planner
7	MTO	Head, Corridor Management - West
8	Metrolinx	Project Manager
9	Metrolinx	Project Manager, Third Party Projects Review
10	Metrolinx	Project Manager
11	Metrolinx	Senior Manager, Transit Network Planning
12	Metrolinx	Development Manager, Heavy Rail
13	ONE Ontario	Director, Business Development
14	ONE Ontario	CEO, AECO Innovation Lab

E Stakeholders Engaged

Table 11: Industry Workshop Participants

Industry Workshop Participants		
#	Organization	Position
1	KLM Planning	Principal Planner
2	SmartReit	Exec. VP, Development
3	Humphries Planning	President
4	Greenpark	Planner
5	Dentons Canada LLP	Associate
6	Malone Given Parsons	Founding Partner
7	Miller Thomson LLP	Partner
8	Pound & Stewart Planning - Cityplan Portal	Principal Planner
9	SCS Consulting Group Ltd.	Project Manager
10	The Municipal Infrastructure Group	Vice President
11	Toromont Industries Ltd.	Facilities & Environment
12	Fiera Private Debt	Managing Director, Real Estate Financing
13	Greenpark	President
14	Humboldt Properties	Director, Development
15	KLM Planning	President
16	Menkes	VP Planning and Development
17	Plaza Corp	VP Development
18	SCS Consulting	Water Resources Engineer
19	Signature Communities	Vice President
20	TACC	Planning and Government Relations Manager
21	TACC	Sr. Development Manager
22	TACC	Land Development
23	BILD	Planner, Policy & Advocacy
24	BILD	President
25	Aspen Ridge Homes	Vice President
26	SmartCentres	Development Manager
27	Liberty Developments	Sr. Vice President
28	LiVante Developments	Senior Manager
29	BILD	Planner, Policy & Advocacy
30	BILD	Planning Coordinator
31	BILD	Planning, Policy & Advocacy Coordinator

F Survey Questionnaires

This appendix presents the online surveys used during our engagement activities. The surveys are presented by stakeholder group.

PGM Staff

About You

1. Which PGM department do you work in?
 - ☐ Building Standards
 - ☐ Development Engineering
 - ☐ Development Planning
 - ☐ Policy Planning & Environmental Sustainability
 - ☐ Vaughan Metropolitan Centre
 - ☐ Other (if selected, please identify)
2. Which of the following positions best describes you?
 - a. Manager or above
 - b. Senior staff
 - c. Staff
3. How many years of experience do you have in your field?
 - ☐ 0-5 years
 - ☐ 6-10 years
 - ☐ 11-15 years
 - ☐ 16-20 years
 - ☐ 20+ years
4. Which application types/plans do you have direct experience with at the City? Please select all that apply.
 - ☐ Official Plan Amendment
 - ☐ Zoning By-Law Amendment
 - ☐ Site Plan Application
 - ☐ Plan of Subdivision
 - ☐ Block Plan
 - ☐ Secondary Plan
 - ☐ Other (if selected, please identify)

Your Experience at Vaughan

5. Thinking about your experience in the City of Vaughan, how would you describe the overall development review process?
 - ☐ Outstanding
 - ☐ Effective
 - ☐ Needs Improvement
 - ☐ Ineffective
6. Why did you select that answer?

The following six questions (#8 – 13) touch on several key elements of an effective development review and policy formulation process. From your experience at Vaughan, please indicate whether you agree or disagree with the statements below.

F Survey Questionnaires

7. **Transparency:** application requirements, timelines and processes are clear and easy to understand for applicants, staff, and other stakeholders.
 - a. Strongly agree
 - b. Agree
 - c. Neutral
 - d. Disagree
 - e. Strongly Disagree
8. **Consistency:** application requirements, timelines and processes are generally similar across individuals and geographies.
 - a. Strongly agree
 - b. Agree
 - c. Neutral
 - d. Disagree
 - e. Strongly Disagree
9. **Timeliness:** applications are processed in a timely way.
 - a. Strongly agree
 - b. Agree
 - c. Neutral
 - d. Disagree
 - e. Strongly Disagree
10. **Customer service:** City staff are attentive and responsive to applicants and other development stakeholders.
 - a. Strongly agree
 - b. Agree
 - c. Neutral
 - d. Disagree
 - e. Strongly Disagree
11. **Staff support:** City staff are supported through training, mentoring, and career development.
 - a. Strongly agree
 - b. Agree
 - c. Neutral
 - d. Disagree
 - e. Strongly Disagree

F Survey Questionnaires

12. **Accountability:** roles, responsibilities, and decision-making structures are clear and well understood.

- a. Strongly agree
- b. Agree
- c. Neutral
- d. Disagree
- e. Strongly Disagree

13. How would you describe Vaughan's culture?

- a. Outstanding
- b. Effective
- c. Needs Improvement
- d. Ineffective

14. Please tell us why you chose that answer.

The Development Review Process

15. Thinking about Vaughan's development review process, please describe what the City does really well.

16. What are the three biggest challenges in the development review process? If possible, please list challenges in order of importance.

- Item 1:
- Item 2:
- Item 3:

17. Do those challenges vary by ward, geography or application type?

- ☐ Yes (if yes, please elaborate)
- ☐ No

18. What are the three biggest opportunities to improve the development review process? If possible, please list the opportunities in order of importance.

- Item 1:
- Item 2:
- Item 3:

19. Do you have any additional comments or feedback on the development review process that you think are important to consider?

The Policy Formulation Process

20. Thinking about Vaughan's policy formulation process (e.g., the Block Plan and Secondary Plan processes), please describe what the City does really well.

21. What are the three biggest challenges in the policy formulation process? If possible, please list challenges in order of importance.

- Item 1:
- Item 2:
- Item 3:

F Survey Questionnaires

22. Do those challenges vary by ward, geography or application type?

- ☐ Yes (if yes, please elaborate)
- ☐ No

23. What are the three biggest opportunities to improve the policy formulation process? If possible, please list the opportunities in order of importance.

- Item 1:
- Item 2:
- Item 3:

Do you have any additional comments or feedback on the policy formulation process that you think are important to consider?

Industry Representatives

About You

1. Which industry group best describes you?

- ☐ Developer
- ☐ Urban Planner
- ☐ Lawyer
- ☐ Engineer
- ☐ Design Professional
- ☐ Other (if selected, please self-identify)

2. How many years of experience do you have in your field?

- ☐ 0-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 20+ years

3. How many development applications have you worked on in the City of Vaughan?

- ☐ Under 10
- ☐ 10-19
- ☐ 20-29
- ☐ 30+

4. Which application types / plans do you have direct experience with at the City of Vaughan? Please select all that apply.

- ☐ Official Plan Amendment
- ☐ Zoning By-Law Amendment
- ☐ Site Plan Application
- ☐ Plan of Subdivision
- ☐ Other (if selected, please specify)

F Survey Questionnaires

Your Experience

5. Thinking about your experience with the City of Vaughan, how would you describe the overall development review process?
 - ☐ Outstanding
 - ☐ Effective
 - ☐ Needs Improvement
 - ☐ Ineffective
6. Can you tell us why you chose that answer?
7. Thinking about your experience with other municipalities, how would you describe Vaughan's development review process:
 - ☐ Best in Class
 - ☐ Above Average
 - ☐ Average
 - ☐ Below Average

The following five questions (#8 – 12) touch on five key elements of an effective development review and policy formulation process. From your experience at Vaughan, please indicate whether you agree or disagree with the statements below.

8. **Transparency:** application requirements, timelines and processes are clear and easy to understand for applicants, staff, and other stakeholders.
 - ☐ Strongly agree
 - ☐ Agree
 - ☐ Neutral
 - ☐ Disagree
 - ☐ Strongly Disagree
9. **Consistency:** application requirements, timelines and processes are generally similar across individuals and geographies.
 - ☐ Strongly agree
 - ☐ Agree
 - ☐ Neutral
 - ☐ Disagree
 - ☐ Strongly Disagree
10. **Timeliness:** applications are processed in a timely way.
 - ☐ Strongly agree
 - ☐ Agree
 - ☐ Neutral
 - ☐ Disagree
 - ☐ Strongly Disagree

F Survey Questionnaires

11. **Customer service:** staff are attentive and responsive to applicants and other development stakeholders.
- ☐ Strongly agree
 - ☐ Agree
 - ☐ Neutral
 - ☐ Disagree
 - ☐ Strongly Disagree
12. **Accountability:** roles, responsibilities, and decision-making structures are clear and well understood.
- ☐ Strongly agree
 - ☐ Agree
 - ☐ Neutral
 - ☐ Disagree
 - ☐ Strongly Disagree

The Development Review Process

13. Thinking about Vaughan's development review process, please describe one or two things that the City does really well:
14. What are the three biggest challenges related to Vaughan's development review process? If possible, please list challenges in order of importance.
- Item 1:
 - Item 2:
 - Item 3:
15. Do those challenges vary by ward, geography or application type?
- ☐ Yes (if yes please elaborate)
 - ☐ No
16. What are the three biggest opportunities to improve the development review process? If possible, please list the opportunities in order of importance.
- Item 1:
 - Item 2:
 - Item 3:
17. Do you have any additional comments or feedback on the development review process that you think are important to consider?

The Policy Formulation Process

18. Thinking about Vaughan's policy formulation process (i.e. block plans and secondary plans), please describe one or two things that the City does really well:
19. What are the three biggest challenges related to Vaughan's policy formulation process? If possible, please list challenges in order of importance.
- Item 1:
 - Item 2:
 - Item 3:

F Survey Questionnaires

20. Do those challenges vary by ward, geography or application type?
- ☐ Yes (if yes please elaborate)
 - ☐ No
21. What are the three biggest opportunities to improve the policy formulation process? If possible, please list the opportunities in order of importance.
- Item 1:
 - Item 2:
 - Item 3:
22. Do you have any additional comments or feedback on the policy formulation process that you think are important to consider?
23. Do you have experience working with block plans and, if so, do you have any comments or feedback on challenges or improvements to Vaughan's use of block plans specifically, and the associated policy formulation process that you think are important to consider?
24. Do you have experience working with secondary plans and, if so, do you have any comments or feedback on challenges or improvements to Vaughan's use of secondary plans specifically, and the associated policy formulation process that you think are important to consider?

Residents' Associations

About You

1. In which area of the City is your association located?
- ☐ Woodbridge
 - ☐ Maple
 - ☐ Thornhill
 - ☐ Concord
 - ☐ Kleinburg
 - ☐ Vaughan Metropolitan Centre
 - ☐ Other (if selected, please identify)

Your Experience with Vaughan

Thinking about your experience with development applications and the City of Vaughan, please indicate whether you agree or disagree with the statements below:

2. **Information** about the development review process and development applications is generally accessible and easy to understand:
- ☐ Strongly Agree
 - ☐ Agree
 - ☐ Neutral
 - ☐ Disagree
 - ☐ Strongly Disagree

F Survey Questionnaires

3. **Public consultations** and other public meetings related to specific development applications are generally informative and helpful:
- ☐ Strongly Agree
 - ☐ Agree
 - ☐ Neutral
 - ☐ Disagree
 - ☐ Strongly Disagree

The Development Review Process

4. Thinking about the development review process and your experience with specific development applications, how would you describe the public engagement or consultation process?
- ☐ Outstanding
 - ☐ Effective
 - ☐ Needs Improvement
 - ☐ Ineffective
5. Please elaborate on your answer to the question above.
6. Thinking about your association, what are the biggest challenges related to your experience with Vaughan's development review process?
7. How could those challenges or pain points be overcome?
8. Thinking about Vaughan's development review process, please describe what the City does really well.
9. Thinking about the development review process, how could Vaughan improve how it gathers community and neighbourhood feedback about a development application?

The Policy Formulation Process

10. Thinking about your association, what are the biggest challenges related to your experience with Vaughan's policy formulation process (i.e., block plans and secondary plans)?
11. How could those challenges or pain points be overcome?
12. Thinking about Vaughan's policy formulation process, please describe what the City does really well.
13. Do you have any additional comments or feedback that you would like to be considered as part of the review?



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