



MAKE IT HAPPEN TASK FORCE

Final Report of Issues and Solutions

Working Group #1: *Timelines for Approvals and Reporting of KPI's*

Project Name:	Timelines for Approvals and Reporting of KPI's		
Sponsor:	Make it Happen Task Force		
Chair:	Regional Councillor Gordon Landon ext. 7534		glandon@markham.ca
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Purpose:	<p>The development industry could better manage their development process if they could receive commitments by the Town for processing times for specific stages within the subdivision, site plan and building permit applications. In addition, efficiencies will be sought from external agencies to improve their processes within the subdivision; site plan and building permit applications. These agencies may include; Region of York, TRCA, MTO, MOE, CNR, Powerstream, District Energy, etc. Systems need to be established to determine whether time frames have been met (KPI's) and to report out the results at certain times throughout the year. This information will assist during the budget process in determining resources required to process future applications.</p>		
Synopsis of Findings:	<p>To provide a degree of certainty for the development industry, updating of process mapping for subdivision, site plan and building permit applications, be provided to indicate what needs to be completed at what stage, by whom and a targeted time frame for completion for each step within the process. This update should include the recommendations from the other working groups and should be made available for all internal staff through the DAP manual, external agencies, development industry and the public at large.</p> <p>The group agreed KPI's should be put in place to determine how well the targeted time frames are being met and report out at specific times throughout the year. These KPI's can also be used at budget time to determine the required resources needed to provide services for the upcoming business year. Amanda is capable of automatically determining these KPI's if systems are put in place and users update Amanda on real time.</p> <p>The group agreed that some of the external agencies were taking too long to comment on their applications. Efficiencies needed to be sought by each of the external agencies.</p>		

Recommendations and Action Items Summary:

Mapping Processes and KPI's

- Staff will improve the existing processes to show efficiencies, and to include the recommendations from the other working groups
- Work that needs to be completed at each stage within the processes will be identified in the DAP manual for internal staff
- Amanda will be updated to include the revised processes
- Staff using Amanda will be retrained on the new processes and will be tracked to make sure they are using it
- Brochures for the public will be finalized to show them what they need to do within the processes and what happens at each stage
- Time frames will be established for each stage
- Amanda systems will be setup to automate the tracking of the time frames

External Agencies

All agencies met said that the earlier they were involved in the process the faster they can process the applications. They all believe that a standing review committee involving all affected external agencies would be more productive than paper or e-mails. The following is an update to the numerous meetings that were held over the summer:

York Region

Would like to have 2 people on a committee, one person would be planner and the other a transportation planner. They feel an estimated 50% of applications could be exempt from being processed or circulated by the York Region and the recirculation would be only to departments effected. We are currently waiting second meeting where York Region will give us their KPI's and their checklist used to check applications.

TRCA

The TRCA has indicated that they have two planners for Markham who also would like to sit on this committee looking at new applications. They think this will speed up approvals. They also made a proposal to have Markham pay them include \$200,000 per year into our DC charge to be used by them to review Environmental Assessments. The Region and other municipals are doing this and find it really helps with EA's.

Powersteam

They would also like be included on this committee to see applications early. They will share their internal process with us.

Federal Government, Susan Cadis, MP

We had a problem with replacing a bridge deck and the Federal Government required an EA be completed as it was abutting a stream that was navigable. We have asked Susan to see if Department of Transportation and Department of Fisheries could delegate their authority to the TRCA. The Federal Government involvement in our municipality makes little sense.

Minister of Municipal Affairs, Province

Victor Doyle has been assigned our request and is meeting with us next week. We hope to deal with all Provincial agencies through him as it is too time consuming to meet every ministry.

District Energy

We had one meeting with the Chair but have not yet scheduled a meeting with staff.

We still need to meet with other agencies e.g. CN, CP, etc. It is absolutely essential that we move to Amanda 5 so that everybody, that is entitled to, can view the progress of their application. Also, the standing review committee meeting must be useful. If there is no application affecting an agency then they do not need to come. If this meeting becomes a time waster we will have defeated its purpose. We really need to rethink paper flow and e-mails.



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Working Group #2: *Communications, Client Support and Team Building*

Project Name:	Communications, Client Support and Team Building		
Sponsor:	Make it Happen Task Force		
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Project Purpose:	<p><i>The purpose of this project is to improve communications between the various parties involved in the processing of development applications. These include communication between applicant/clients and staff as well as communication between staff of various departments and disciplines. The objective is to ensure accurate, consistent and timely communication is conveyed to the right parties at the right time, and in a positive, proactive manner.</i></p>		
Synopsis of Findings:	<p>The group agreed that the district team approach to processing development applications continues to be effective and the organizational team structure around it should remain. However, the group determined that clear expectations regarding the roles and responsibilities of the development managers and each of the team members needed to be specified. These expectations need to include specific guidelines for communicating with clients/applicants, senior staff and Council, as well as with other team members and staff of other departments/agencies. The group also recognized that there are many new staff on the district teams who may not have worked in the matrix reporting structure of the team environment and may not be well versed in the team approach. It was agreed that, working with staff from the Human Resources Department, a new team training program should be development as soon as possible and run for all district team members.</p>		
Recommendations and Action Items Summary:	<ol style="list-style-type: none">1. Comprehensive Team Training Program including:<ul style="list-style-type: none">• Job Competency Modeling• Team Development• Conflict Resolution ProcessProgram kick-off is scheduled for November 6th, 2007 and will continue throughout 2008.2. Core Competencies<ul style="list-style-type: none">• The corporate core competencies of “customer focus”, “team oriented”, “effective communication” and “customer focus” have been customized for the positions of development manager and the team members.• Senior Staff have endorsed the competencies and they have been districted to the managers for discussion and implementation through the performance review process		

3. Other items to group addressed included:

- On-going need for the teams to celebrate successes
- Need to improve team work flow through the use of AMANDA
- The need to balance town objectives and “good planning” with applicant expectations (note: Group #1 may be able to address this in part through the process brochures)
- Need for project management training for key positions in the team structure (will work with H.R. on this)
- Need for comprehensive urban design guidelines so applicants understand the Town’s expectations. It was noted that efforts are underway to address this.



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Working Group #3: Streamlining of Legal Agreement Process

Project Name: Streamlining of Legal Agreement Process			
Sponsor:	Make it Happen Task Force		
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Project Purpose:			
<i>Streamlining the subdivision and site plan agreement processes; evaluate the current process and determine areas that can be “standardized”; improve consistency.</i>			
Synopsis of Findings:			
<p>Improve communication to experienced and inexperienced applicants through use of better, publicly available materials, access to Amanda V for application input and status</p> <p>Improve the subdivision agreement process for staff by updating the Subdivision Agreement and preparation of “pick list” of standard clauses</p> <p>Streamlining of application forms, better on-line forms, standard agreements</p> <p>Facilitate pre-consultation between applicant and staff involved in the agreement process, validate the information required to proceed to the next step in the process, streamline application forms and standardize documents</p>			
Recommendations and Action Items Summary:			
Communicate Subdivision Agreement process and requirements to inexperienced applicants			
Improve the process for commencing the Subdivision Agreement			
Facilitate early pre-servicing of subdivisions			
Improve Subdivision Agreement preparation for commenting departments			
Streamline routine/uncomplicated Site Plan applications			
Communicate process requirements for Site Plan applications			
Reduce Regional involvement in Site Plan applications			

Expedite commencement of Site Plan Agreement preparation

Reduce multiple submissions of plans for Site Plan Applications

Integrate Condominium application process (tenure only) into site plan process



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Working Group # 4 Letters of Credit

Project Name: Letters of Credit			
Sponsor: Make it Happen Task Force			
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Project Purpose:			
<i>To examine and make recommendations related to the letter of credit processes for the Town of Markham including value of letters of credit, reductions, releases, administration, and risk management.</i>			
Synopsis of Findings:			
<p>Letter of Credit Task Force Subcommittee looked at opportunities to streamline the letter of Credit requirements and process for development applications, to reduce the Developers security requirements where possible while ensuring that the Town remains protected in terms of potential risk management. The review of securities was largely focused on the security amounts held during the two year Acceptance for Maintenance period. Larger developments appeared to be over secured, whereas smaller developments are under secured in terms of the Town’s ability to draw on securities to complete uncompleted or deficient public works and servicing. Several process improvements were discussed and agreed to in principal subject to Council’s approval including:</p> <ul style="list-style-type: none"> • Revisions to Acceptance for Maintenance Security amounts • The use of a Master Maintenance Letter of Credit for multiple phase development or developments under one development company/group. • Backdating of start of Acceptance for Maintenance period • Partial Acceptance for Maintenance • Developers Access to Amanda • Reduced Letter of Credit processing time • Site Plan release process <p>Several other operation relative issues were identified and will require further discussion with the respective departments.</p>			
Recommendations and Action Items Summary:			
<ol style="list-style-type: none"> 1. <u>Acceptance for Maintenance</u> <ul style="list-style-type: none"> • Developers requesting reduced security amounts during 2 year Acceptance for Maintenance period. New letter of credit amounts are proposed which reflect the potential risk to the Town. Council approval will be required. 2. <u>Length of Acceptance for Maintenance Period</u> <ul style="list-style-type: none"> • Developers requesting reduced Acceptance for Maintenance period from 2 years to 1 year. Length of maintenance period to remain unchanged at two years. 3. <u>Master Maintenance Letter of Credit.</u> <ul style="list-style-type: none"> • Release of Public Works Letter of Credit @ Maintenance and use Master Maintenance Letter of Credit to secure. Similar Master of Letters of Credit agreements have been 			

used in the past for multi phase developments and can be adapted for use as a Master Maintenance Letter of Credit. Council approval will be required.

4. Delegation of Authority
 - Developers requesting delegation of authority to staff for Acceptance for Maintenance to reduce wait time and approval for Council report/meeting. No significant time savings would result. No further action is required.
5. Backdating Acceptance for Maintenance Period
 - To be reviewed on an individual basis.
6. Partial Acceptance for Maintenance of Subdivisions
 - To allow development to proceed to Acceptance for Maintenance where servicing cannot be fully completed due to other factors. To be reviewed on an individual basis.
7. Ranking of Developers
 - Rank developers based on their past performance and track record. Higher ranked developers to provide lower Letter of Credit security requirement. This has the potential to be discriminating and prohibitive. No further action required.
8. Site Plan Letters of Credit
 - Further review with the affected departments required regarding cross utilization of securities.
9. Letter of Credit Processing Time
 - Revision to expenditure control policy required.
10. Amanda Access
 - Developers requesting access to Amanda. Recommend to be implemented at the time of AMANDA upgrades.
11. Snowploughing and Streetlight/Energy Costs charged to Developers
 - To be reviewed with the Operations Department.
12. Potential Town charges for water main operational inspections, flushing, testing etc.
 - To be reviewed with the Operations Department.
13. Lot Grading Security
 - Reduce lot grading security requirements. Recommend security amount to remain unchanged.
14. Site Plan Completion of Works
 - Deficiencies remain/not addressed by Developer. No action to complete Often 10+ years. Finance, Legal and Engineering to review available options and solutions, to require Developers to fulfil their obligations in a timely fashion.
15. Phase Site Plan Securities
 - Security requirements for multiple phased site plans Security amounts to be reviewed with developers at time of Site Plan Agreement Preparation.
16. Letter of Credit Recommendations
 - Periodic review



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Working Group 5#: *Development Application Software/ Automating User Interface*

Project Name: Development application processing software/automating user interface

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Development Representatives:

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Project Purpose:

To identify where process automation would reduce approval times and improve service quality and identify where an Internet enabled interface may improve the speed and effectiveness of communication among the Town, developer, builders, other agencies and the public. In addition this group was to look at opportunities for deploying technology to improve convenience, reduce costs or enhance regulatory effectiveness for the development approval process.

Synopsis of Findings:

This group was able to visualize the benefits in moving to improved automation that would eliminate duplication, allow real time tracking, and provide consistency and to create overall efficiencies within the entire application/development process. The Town's automation tool is AMANDA. It is a powerful process management tool with a large array of capabilities that has been incompletely deployed in Markham. Process management is a significant challenge for all applications. Opportunities arise for the deployment of AMANDA in many of the Town's business units to improve the processing of these applications. In addition by using a Web Access (Amanda 5) could permit developers to view their status of applications in real time, enable commenting agencies to submit their comments directly to the AMANDA application folder and permit on-line payments for many of Markham permits/licences and applications. The following are examples of how AMANDA has shown its worth in an integrated environment:

- Building, Bylaw, Engineering and Planning Departments depend on the same AMANDA property database
- Property database is being linked to the Inside Markham GIS viewer.
- Building Permit folders are linked through AMANDA to Municipal Services folders which are administered jointly by Waterworks, Engineering and Fire departments
- Building Permit folders are linked through AMANDA to Subdivision and site plan folders which are administered primarily by the Planning Department

- Development Charge calculation and collection processes are integrated between Finance Department and Building Department
- Letters of Credit folders are accessible by Finance Department and the departments requiring the security.

The group was clearly seeking improved automation throughout the entire development process to improve efficiencies and save time.

Recommendations and Action Items Summary:

Within the Towns current application of Amanda, improvements are being made on a continual basis to improve the efficiencies of our processes (e.g. site plan process). In addition changes to the implementation of Amanda need to be completed to incorporate the recommendations of the other working groups of this Task Force. A plan will be developed this Fall to incorporate these recommendations.

Additional modules within the current application can be purchased to further enhance capabilities of Amanda before going to a web base application. Property condition module has been purchased by the Town and will be deployed over the next few months within the planning process to improve the insertion and tracking of conditions attached to a folder/property. Letter of credit service has been asked for but is currently not funded. It will more fully integrate securities of an application with the Finance Inspection Departments. Time and activity module is also lacking funding. This module will permit the tracking of time associated with each activity within a process to allow staff to manage resources better. Both of these areas are seeking funding from Council within the next month.

An 'audit' of the AMANDA implementation is currently being undertaken to help direct improvements in the scripts used, documentation of business rules, and adherence to best accounting practices.

A 2008 project approval will be sought to enable AMANDA's capabilities on the Internet that will include the purchase and implementation of Amanda 5. These will include enhanced Planning modules, email interface with external agencies, process status query and on-line application submission. On line zoning bylaw capability, full digital submission/annotation of drawings and e-Commerce capacity is anticipated in subsequent business cycles. Other opportunities to incorporate Amanda into other business areas of the corporation include:

- Integration of property tax information with other property information will assure reliability and data integrity for all property database users
- Cash management system currently being sought will enable bills produced in AMANDA and payments received in the new system to remain synchronized
- Engagement of outside role players such as TRCA, MOE, etc. can be achieved so that site plans, building permit and subdivision prerequisites are effectively managed without redundant data entry and correspondence.



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Working Group #6: Complete Application Submission and Pre-Consultation Requirements

Project Name: Complete application submission and pre-consultation requirements

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Project Purpose:

The Town can request that any person or public body seeking to obtain the approval of an Amendment to the Official Plan, an Amendment to a Zoning By-Law, the approval of a Plan of Subdivision, or the approval of a Consent provide such other information or material that Council considers it may need, but only if the Town's Official Plan contains provisions relating to requirements under the applicable subsections of the Planning Act. The intent of this project is to produce a draft Official Plan amendment with appropriate requirements.

Prior to the submission of an application for Official Plan Amendment, Zoning By-law Amendment or Plan of Subdivision, applicants may be required to meet with appropriate Town Staff to determine what studies, plans and other items are required to support an application, but only if the Town has passed a By-law to require pre-consultation. The intent of this project is to produce a draft By-law that defines pre-consultation requirements.

Synopsis of Findings:

- amending the Official Plan to add policies regarding complete Consent, Official Plan, Draft Plan of Subdivision and Zoning By-law amendment applications is appropriate (a draft of the Official Plan Amendment is attached); and
- enactment of a pre-application consultation By-law to require applicants to consult with municipal staff before submitting Official Plan amendment, Site Plan approval, Draft Plan of Subdivision and Zoning By-law amendment applications is appropriate.

Recommendations/Action Items:**Staff to:**

- write a report to Development Services Committee to get authority to call a Public Meeting for the proposed Complete Application Official Plan amendment;

The report will also include:

- a description of the procedures to evaluate Consent, Official Plan, Subdivision and Zoning By-law application completeness; and
- a description of complete application notification procedures for Official Plan, Subdivision and Zoning By-law applications; and
- recommendations regarding the enactment of a pre-application consultation By-law to require applicants to consult with municipal staff before submitting applications for Official Plan amendment, Site Plan approval, Draft Plan of Subdivision and Zoning By-law amendments (a draft of the pre-consultation By-law to be considered by Development Services Committee will be attached).