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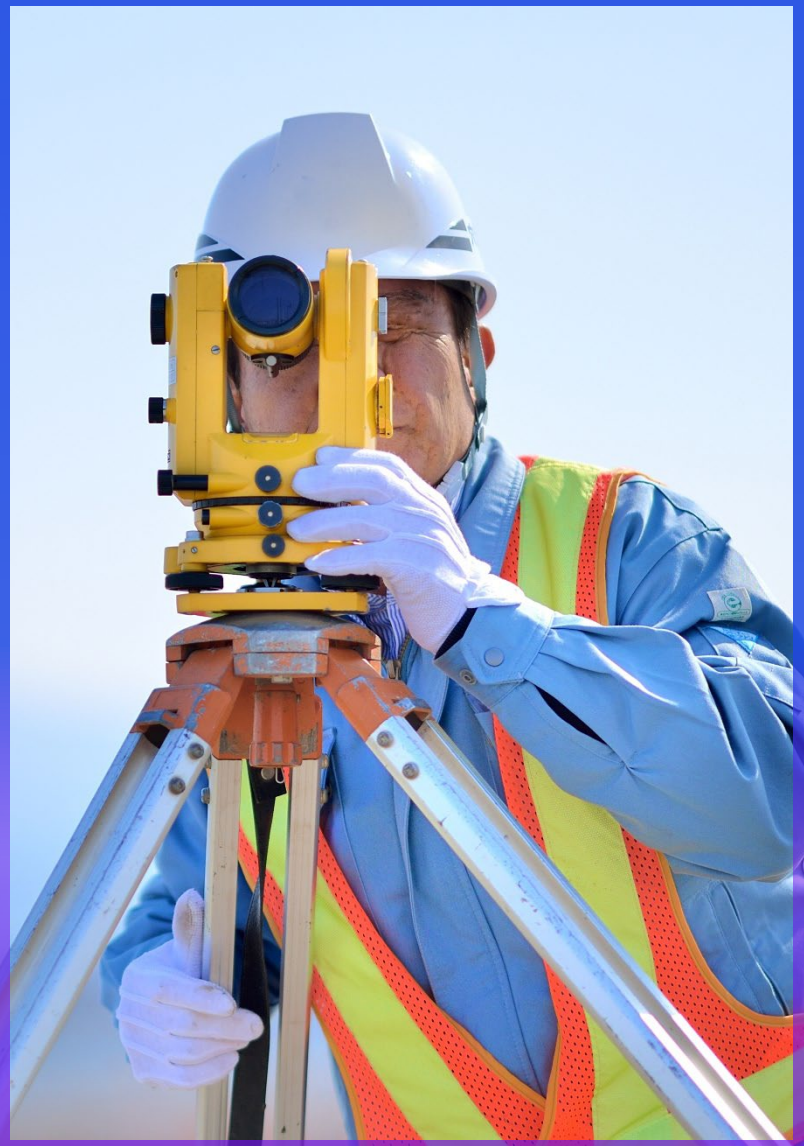
Corporation of the County of Lanark

Planning Department Review

Final Report

January 31, 2023



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KPMG contacts:

Bruce Peever
Partner
Tel: 905-523-2224
bpeever@kpmg.ca

Sana Malik
Senior Manager
Tel: 905-523-6914
sanamalik@kpmg.ca

Esther Lin
Municipal Lead
Tel: 519-747-8291
bsisson@kpmg.ca

Ethan Church
Consultant
Tel: 519-251-5244
ethanchurch@kpmg.ca

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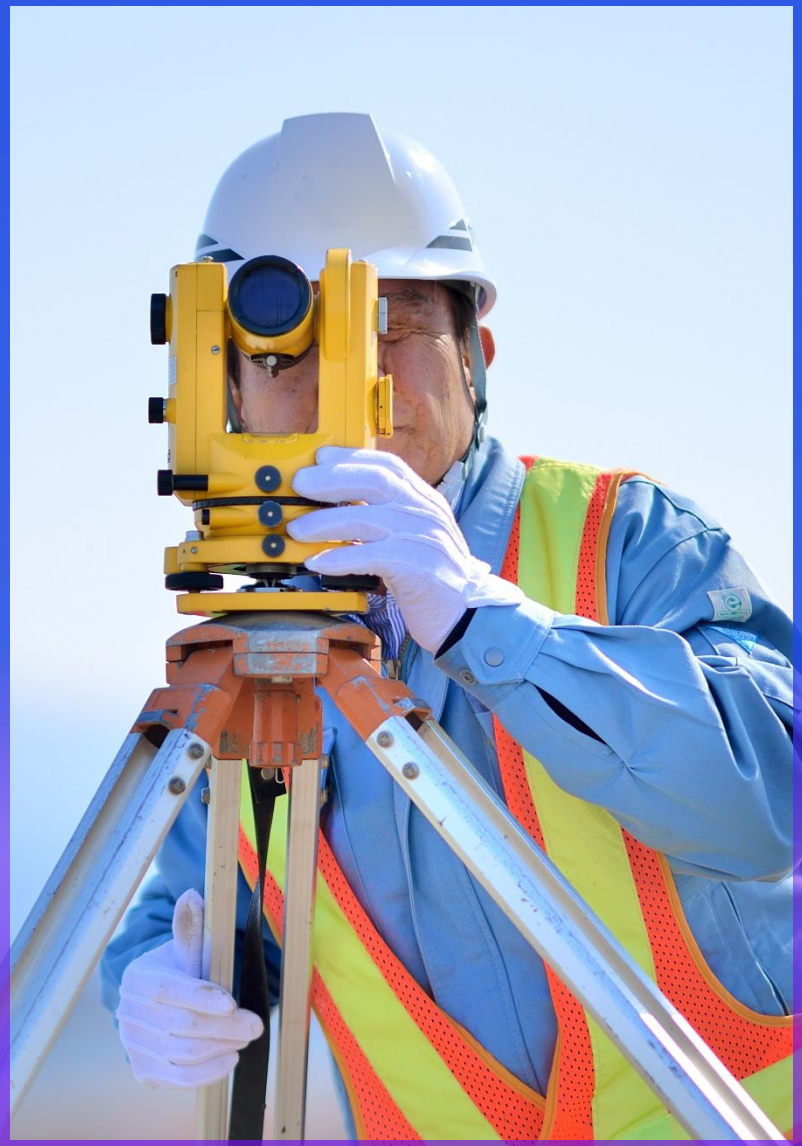
Project Overview



County of Lanark

Planning Department Review

Final Report

Project Overview

Project Objectives – *How have we defined success?*

KPMG has been engaged by the Corporation of the County of Lanark (the "County") to conduct a review of their Planning Department. The objective of this review is to obtain third-party opinion on the best way forward to digitize and streamline the County's application and approval process.

Specifically, the review will:

- Consist of a report outlining strategies to enhance operating efficiencies through process changes, implement new technology, and improve interaction between departments and lower tier municipalities.
- Reduce time and resource requirements for clients by streamlining the development approval process.
- Improve accessibility to planning services through the introduction of new service channels.
- Increase collaboration and coordination with lower tier municipalities.

Project Timing

The project commenced on July 21, 2022 and completed when the Final Report is presented to County Project Team by January 31, 2023.

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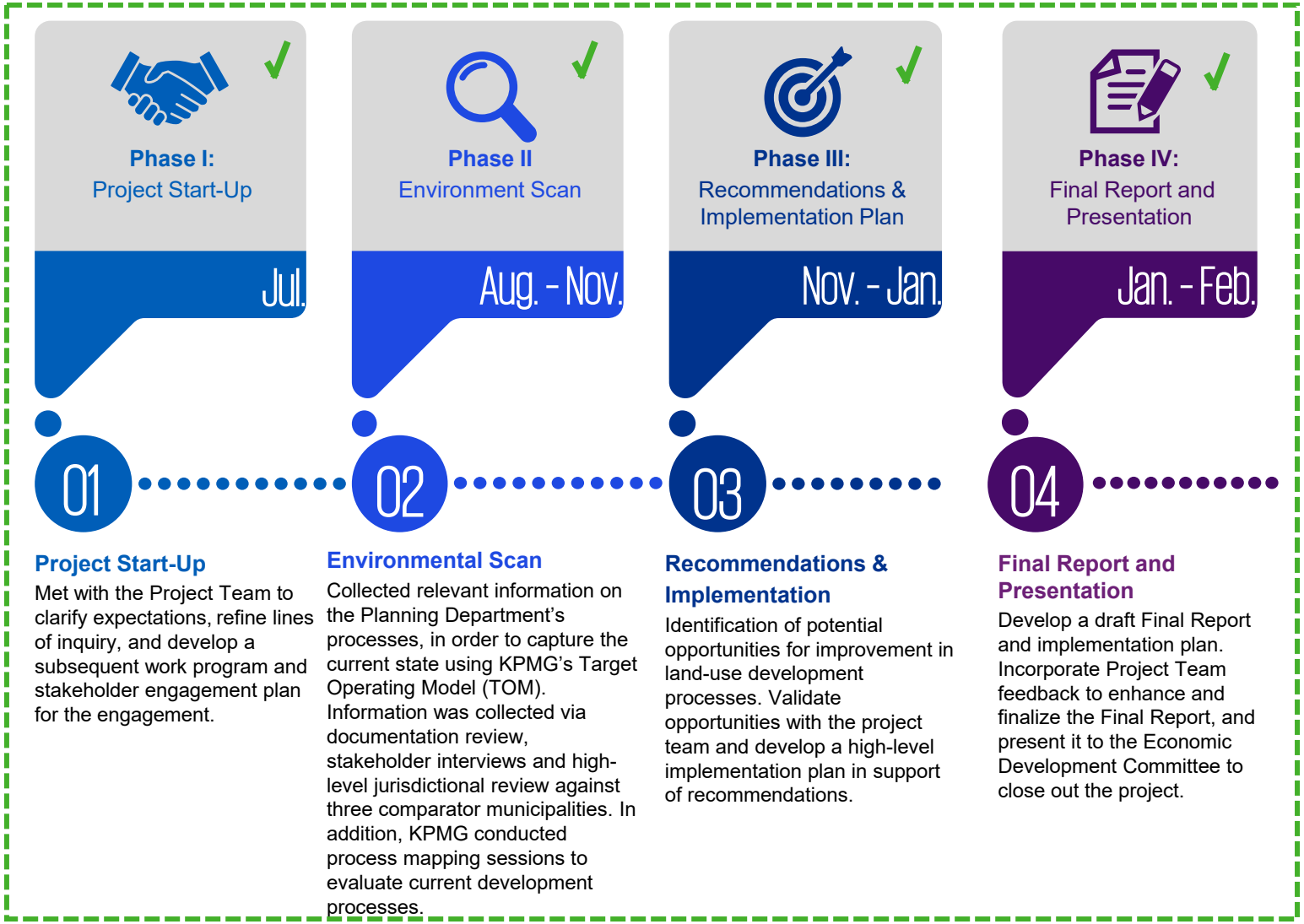
Work Plan

KPMG has conducted the project according to the illustrated work plan, this report summarizes our activities from all phases.

Presentation to Economic Development Committee (scheduled for February 22, 2023)



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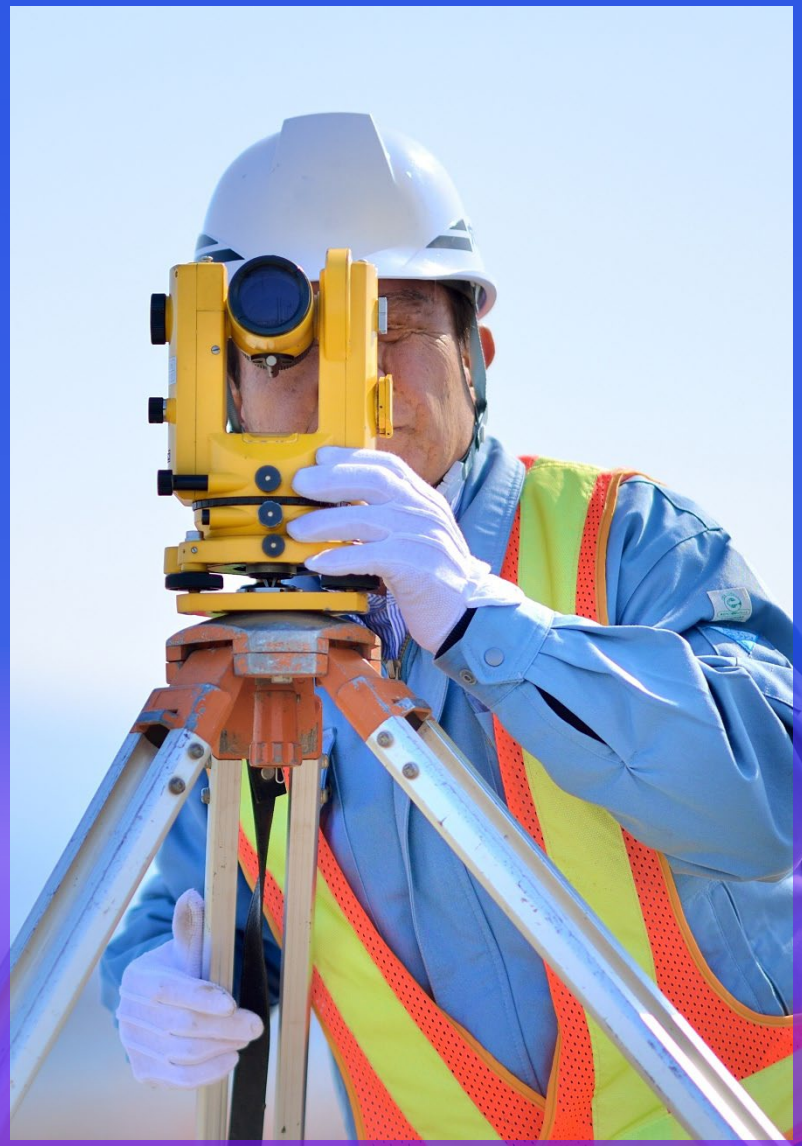
Current to Future State Assessment



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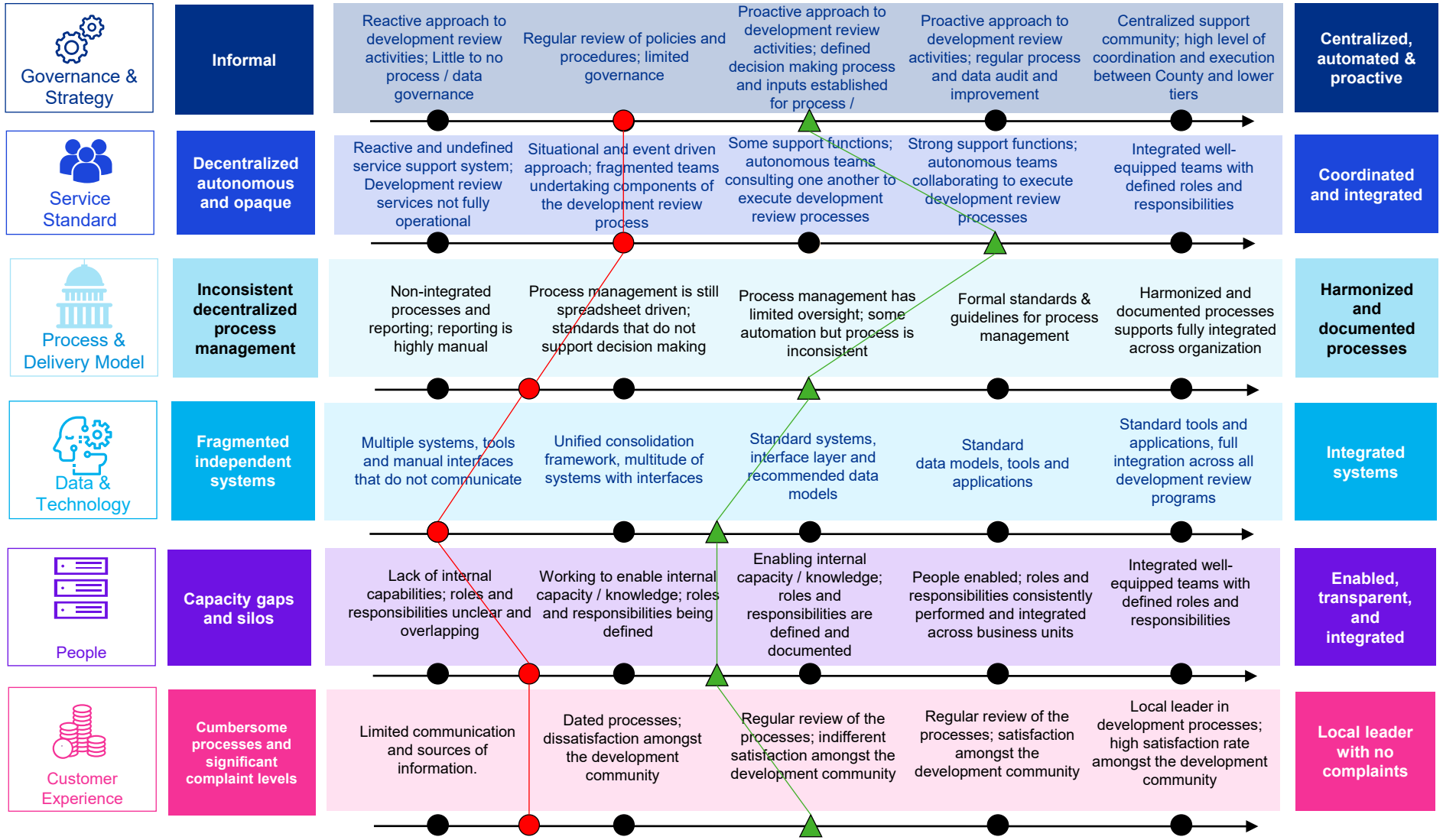
Summary

A clearly defined current state is key to understanding issues, challenges and pain points within an organizational process or function, and the first step in the identification of business gaps and potential improvement initiatives. The collection, management and use of information within the development review process has been complied and examined within each dimension of the TOM to produce a Current State Assessment.



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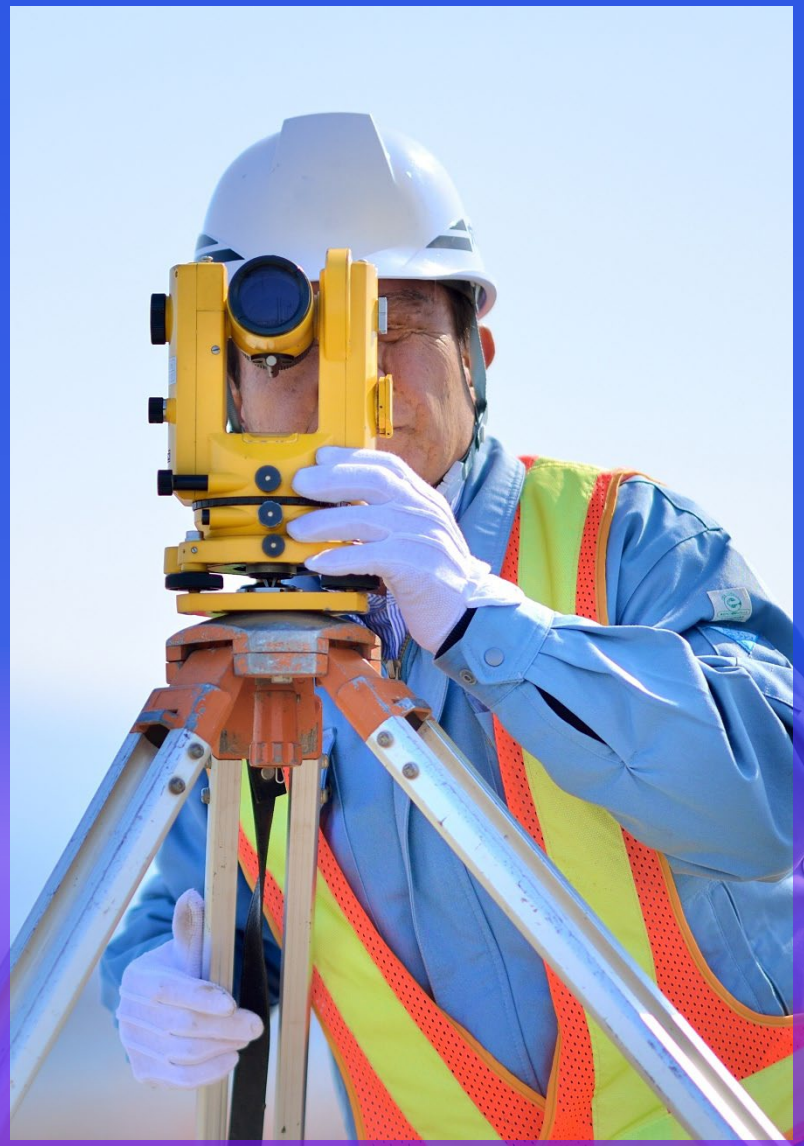
Recommendations and Implementation



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1. Address Provincial Legislative Changes

Observation

The Ontario government has made it a priority to improve the housing situation in the Province. This has included introducing bills such as Bill 109 (More Homes for Everyone Act, 2022) and Bill 23 (More Homes, Built Faster Act, 2022). Municipalities will be adjusting their Official Plans and bylaws to accommodate these legislative changes. This process will take time and create additional pressures to expedite application approvals.

Recommendation

1.1 Establish consistent pre-submission consultation and application submission requirements. This would require streamlining local Official Plans and Bylaw requirements, including what types of studies and surveys need to be completed as prerequisites and as part of application submission.

1.2 Document County SOPs; update forms and checklists for consistent file management. Updated procedures should clearly reflect the roles and responsibilities for all stakeholders (for example, the County, lower tier municipality and the applicant). The SOPs need to take into account the changing Provincial legislation (for example, the role of conservation authorities).

1.3 Refresh County website of application processes and requirements to better educate and inform the public (e.g. flowcharts, FAQs).

1.4 Provide technical assistance (i.e., interpreting the legislation, providing direct guidance on complying with the requirements and assisting with the development of new policies or procedures) to lower tiers.

Complexity	Impact
High	High

Timeline for Implementation: **<6 Months** | **7-12 Months** | **12+ Months**

Rationale and Benefit:

1.1 Update the pre-submission consultation process to include the following:

- Establish study guidelines and terms of reference for studies required as part of a complete application.
- Refresh the quality/ technical review requirements that the lower tiers would need to perform prior to application intake.
- Consider setting a scheduled timeframe (ideally 10-14 days) between the lower tiers sign-off of pre-submission consultation and formal application submission

Front-ending the application process is expected to reduce revisions or other obstacles that could delay the decision timeline and risk missing legislative deadlines. By further streamlining the pre-submission consultation process, the County can drive for a more consistent process among the lower tiers.

1.2 Most stakeholders indicated that they would like the County to update its forms, guidance, and standard operating procedures to clarify roles and responsibilities. This will drive consistent understanding of subdivision and consent application procedures across the County. Currently, the published guidelines on the County website mostly reference the Planning Act, provincial information, and the County's Official Plan. The effort to update County policies and guidelines will address the impact of provincial legislative changes, at the same time, re-establish service expectations for the lower tiers

1.3 Improving the County's websites provides clarity and guidance of planning information to manage customer inquiries.

1.4 Legislative changes, especially Bill 23 amendments, impacts the roles that each key stakeholder group plays (e.g., the role of conservation authorities is reduced, third party appeals are limited, etc.). Lower tier municipalities will need County guidance of implementing these legislative changes, including providing direct technical assistance when needed.

Implementation: The implementation of this recommendation is expected to take less than 6 months, not because the tasks are simple, but because the County needs to respond quickly to legislative changes. Implementation will include the following tasks:

- Assess the scope and magnitude of impacts from Bill 23 and Bill 109 amendments
- Document and update County guidelines and SOPs
- Prepare and publish informative material on the County's website

2. Explore Digital Solutions

Observation

- All stakeholders acknowledged the consent and subdivision processes are manual with limited use of technology for application submissions, file management, and payment processing resulting in increased administrative workload for County planners. Application tracking is a highly manual process (e.g., excel tracking sheets) and creates inefficient communication of application statuses and issues via phone calls, emails, and in-person/virtual meetings. Additional effort is needed to gather, report, and analyze County-wide data and performance.
- Stakeholders expressed interest in expanding digital payment options for development applications. The County currently accepts debit payments and bank transfers for other services.

Recommendation

The County should take a leadership role of exploring digital solutions to administer planning and development applications with features, such as:

- Electronic submission of all County managed applications
- Electronic payment options
- Online tracking and/or automatic notification of application timelines and statuses
- File sharing capabilities with lower tier municipalities and commenting agencies, including reminders of deadlines and outstanding comments. [The County can explore using SharePoint as a file sharing tool as a transitional solution.]

Complexity	Impact
High	High

Timeline for Implementation: **<6 Months** | **7-12 Months** | **12+ Months**

Rationale and Benefit:

Digitizing the development application process enables the County to increase operational efficiencies and improve customer experience. Accepting electronic submissions and digital payment options would further streamline application in-take and review steps, specifically by removing unnecessary tasks (e.g., scanning application material for electronic record keeping purposes).

Tracking applications was identified as a key pain point for customers and lower tiers. Consider software solutions offering a customer portal to view the status of an application with features such as:

- Timelines for key milestones (e.g. application deemed complete, circulated agencies, scheduled for discussion at the County's Land Division Committee or Economic Development Committee, deed stamped)
- Contact information for key County, municipal and commenting agency personnel

The County should coordinate digitization efforts with the lower tiers for a more integrated process to review and approve applications. Some lower tiers are in the process of exploring/implementing different planning software. One municipality is exploring Cloudpermit and another has worked with the CGIS vendor for a custom solution. All lower tiers have expressed an interest in a shared electronic file tracking solution to allow real-time communication of application statuses and a central location for file sharing. The digital solution for the County should consider these sharing capabilities when evaluating digital solutions.

Implementation: The implementation of this recommendation will take 12+ months to oversee the following:

- Determine the system functionalities that the County needs
- Explore software alternatives with vendors and select a suitable option
- Obtain Council's approval to acquire the software
- Initiate discussions with the vendor to develop an implementation plan, timeline and sequencing for software installation/integration
- Consider a strategy to cater to applicants that do not have access to technology
- Schedule training sessions with the vendor to train staff on the new software
- Pilot the software in incremental stages with a specific application type.

At the same time, SOPs and guidelines should be reviewed and updated as part of the digitization effort.

3. Conduct a User Fee Study

Observation

- The County has been experiencing high levels of planning and development applications in recent years with the growth in the real estate market.
- Some stakeholders mentioned that the majority of “good quality” land has previously been developed and the remaining land requires more effort and time to review due to complexity of those plots (e.g., requiring more studies, comments, etc.)
- The County’s recovery of planning expenses for 2020 was 33%.

Recommendation

Conduct a fee review for planning applications to ensure they are competitive and reflective of changing Provincial legislation. The fee review should take into consideration the following:

- Determine the cost recovery strategy. Make any process changes prior to changing fees because process changes will impact the cost of carrying out service activities and hence impact the fee.
- Set a cost recovery target to cover part or all of the cost of providing development services.
- Consider how fees will be structured and collected, for example, consider introducing a non-refundable consultation fee. If electronic payment methods become available, consider how transaction fees will be structured.

Complexity	Impact
Medium	Medium

Timeline for Implementation: **<6 Months** | **7-12 Months** | **12+ Months**

Rationale and Benefit:

The County conducted an in-house fee review in 2020 with minor adjustments to its planning fees. Industry best practices recommend a fee study every 3 – 5 years. The County would benefit from another in-depth user fee study to:

- Address upcoming legislative process changes, including digitization efforts
- Algin with County strategic goals and objectives
- Reflect consumption of County resources
- Benchmark fees, fee structures, and financial policies to maintain market competitiveness

A user fee study is an effective way to understand the total cost of services and to identify potential fee deficiencies. The study analyzes the direct labour cost and indirect overhead spent on delivering the services. Understanding the cost structure will allow the County to make informed decisions of setting cost recovery targets and any subsidization levels, and determining a fee structure by either application types, process activities, or applying a consolidated fee approach.

Implementation: There is a one-time consultant fee to complete the stud. The study is suggested to be part of the 2024 budget. Implementation of this recommendation will take 12+ months to oversee the following:

- Make any necessary process changes that will impact the cost of administering planning and development services
- Facilitate a fee review (most likely with the support of a third party consulting agency)
- Draft and have council approve the updated fee policy

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4. Enhance Stakeholder Experience

Observation

- Applicants need more education on consent and subdivision application procedures (e.g., information needed for an application to be considered complete, processing procedures and turnaround time). Local Planning departments often receive inquiries and complaints from applicants throughout the approval process. The only system to check the status of an application is to manually contact the County via phone or email. Lower-tier municipalities would appreciate proactive communication from the County of application statuses from their communities.
- Stakeholders also would like to clarify roles and responsibilities between the County and the local municipalities in terms of customer inquiry.

Recommendation

Establish process to enhance overall stakeholder (applicant and lower tier) experience:

- Establish a consistent process to address applicant inquiries.
- Develop a process to formally solicit stakeholder feedback (from applicants and lower tiers); could be surveyed annually or after application completion.
- Establish clear communication expectations. For example, when are lower tiers informed of application movement and the type of correspondence.
- Re-establish quarterly County-wide planning meetings with lower tiers to communicate County information and discuss trends/issues.

Complexity	Impact
Low	Medium

Timeline for Implementation: **<6 Months** | **7-12 Months** | **12+ Months**

Rationale and Benefit:

All planning departments across Lanark County receive large amount of inquiries. Clients often do not know where to direct their questions between upper and lower tier. The most common questions are related to land features and transactional history, The County could provide a FAQ list or clarify what type of questions are handled by upper or lower tier. Setting clear expectations at the earliest stage of interaction with customers could reduce ad hoc correspondence, improve staff capacity, and the overall pre-submission consultation process.

Soliciting feedback from applicants or key clients provides useful insight into the effectiveness of the development review process. The County could develop applicant satisfaction surveys to track and improve customer experience. Two types of surveys could be used:

- Pulse-style surveys following application completion milestones to gather real-time insights.
- An annual survey distributed on an industry-wide basis to understand broader program-level satisfaction and trends.

The County once hosted quarterly County-wide planning meetings that was well-received by the lower tiers. All jurisdictions would benefit from resuming such communication. Some considerations include:

- Consider regular one-on-one touchpoints with lower tiers to discuss active files and local planning concerns.
- Provide County-wide training on planning procedures, legislative changes, etc. to ensure consistent understanding of the County's development and land use strategies.
- Take a leadership role (through conversations and training) such that application processes are streamlined amongst lower tiers.
- Consistent dissemination of CGIS data and land registration data.

Implementation: The implementation of this recommendation will take 7-12 months to oversee the following:

- Formalize a process to address applicant inquiries
- Design and implement a customer feedback survey
- Organize County-wide planning meetings with lower tiers

5. Improve Performance Measurement Practices

Observation

- Other than measuring legislative timeframes, the County does not formally track other key performance measures to monitor performance of Planning and Development Services. Lack of a technology solution results in manual tracking of applications and metrics.
- The County's key performance metric is to meet the Planning Act's legislative timeframes.

Recommendation

Improve performance measurement practices to monitor legislative timeframes through use of technology to collect and report KPIs (move away from manual tracking).

- Explore performance tracking capabilities in software solutions (recommendation #2)
- Report key metrics to Council on a quarterly or semi-annual basis

Complexity	Impact
Medium	Medium

Timeline for Implementation: **<6 Months** | **7-12 Months** | **12+ Months**

Rationale and Benefit:

The use and regular review of performance measures are essential to the success of any organization or process. It provides a methodical way to measure progress towards goals and help identify areas of strength and weakness to make informed business decisions. The County could improve its performance management practices by:

- Defining KPIs to measure efficiency and effectiveness
- KPI data collection procedures
- KPI reporting procedures

Sample KPIs to monitor performance:

Category	KPI
Efficiency	• Total elapsed time from complete application to approval • Total elapsed time for each circulation
Effectiveness	• Number of pre-submission consultation meetings • Total consultation hours by application type • Extent to which Official Plan objectives are achieved on an annual basis • Customer satisfaction surveys

Bill 109 Amendment now requires the County to track the 120-day timeline of making planning decisions on combined Official Plan Amendment/Zoning Bylaw Amendment to prevent refunding application fees.

Implementation: The implementation of this recommendation will take 7-12 months to oversee the following:

- Determine key performance metrics to monitor
- Develop a process to automate performance tracking as it relates to exploring software solutions.
- Report performance to Council and senior management on a regular basis

Successful implementation will require the County to adopt more rigorous data management practices to collect and analyze data.

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6. Review Staffing Levels and Evaluate Reporting Structure

Observation

- Multiple stakeholders believe the County's Planning Department is understaffed to meet service demand. The current budget for Planning Services is 1 County Planner, 1 Senior Planner (vacant), and 1 Planning Assistant.
- Turnover throughout the County has contributed to challenges in communication and processing development applications.
- The jurisdictional review indicated that the County has the lowest staffing level amongst the comparator group.

Recommendation

Assess the County's Planning Services' staffing levels to align with the County's land development strategies; to implement legislative changes; and to support current and projected workload and operational needs.

- Consider adding additional Planners and/or Planning Technicians to the County's Planning Service's team
- Improve recruiting, retention and succession practices
- Evaluate the Planning Services' reporting structure

Complexity	Impact
Medium	High

Timeline for Implementation: **<6 Months** | **7-12 Months** | **12+ Months**

Rationale and Benefit:

The County has experienced increased volume and complexity of development applications, which has led to capacity constraints within the County's Planning Services function. Staff turnover has contributed to more challenges and inefficiencies in service delivery.

Currently, the County is planning to add one more Planner and/or Planning Technician to the Planning Services team (from 3 FTE to 4 FTE) to support increase application volume. The County will need to further assess its current and projected workload to identify any additional staffing needs to bridge the gap between resource capacity and service demand. At the same time, the County can explore alternative staffing approaches, such as the use of part-time staff, consultants, co-ops, and other hybrid models, to address operational gaps. The County should proactively manage succession and retention practices to attract and retain talent.

The organizational structure could also be evaluated. Planning Services currently reports under the Clerk's Office division within the County's Corporate Services Department, which is a less common model. Industry common practice is to have a standalone planning department or as part of the broader infrastructure or community development programs. There is opportunity to evaluate alternative organizational structures to create more synergies with other County functions, such as Infrastructure Services, for an end-to-end delivery model of development, engineering, and infrastructure management services.

Implementation: The implementation of this recommendation will take less than 6 months to oversee the following:

- Seek Council approval to add one additional Planner
- Recruit one Senior Planner (vacant position) and one Planner, and determine whether to hire part-time staff and/or consultants.
- Evaluate the County's Planning Services' organizational reporting structure for more cross-function coordination.

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7. Consider a Single Official Plan

Observation

The County has a diverse and environmentally sensitive geological landscape; hence, local Official Plans and bylaws are used to set local land development policies. This has contributed to challenges at the County level to manage development applications efficiently and effectively while administering local policies.

Recommendation

There is a long term opportunity to consider a single OP for the County of Lanark to harmonize planning policy requirements across jurisdictions within the County. To integrate the current local Official Plans, each lower tier municipality would have an individual chapter that speaks to how land will be used at the local community level. At the same time, the County could set the broader strategic development plans in a more coordinated matter.

Complexity	Impact
High	Medium

Timeline for Implementation: **<6 Months** | **7-12 Months** | **12+ Months**

Rationale and Benefit:

The County's Official Plan was enacted after local Official Plans were established leading to siloed land use development policies at the local level. Consolidating the local Official Plans into a single County-wide Official Plan would shape development and land use designations in a more coordinated manner across urban and rural communities of Lanark County. It would also set policies to guide decision making on the overall goals for the human, built, economic, natural environments. The County as a whole will be administrating one Official Plan instead of nine separate Official Plans.

To integrate into a single Official Plan, the County will need to invest in hiring additional planning resources to consolidate the local Official Plans and administer policy requirements. At the same time, this would reduce administrative efforts for the lower tier planning departments.

Implementation: This is a long-term opportunity where the County needs to consult and work with lower tier municipalities to solicit feedback and buy-in.

In the short-term, we suggest the County to focus on streamlining the development applications procedures, recruit and retain additional planning staff, and lead lower tiers on implementing legislative changes and County-wide development strategies.

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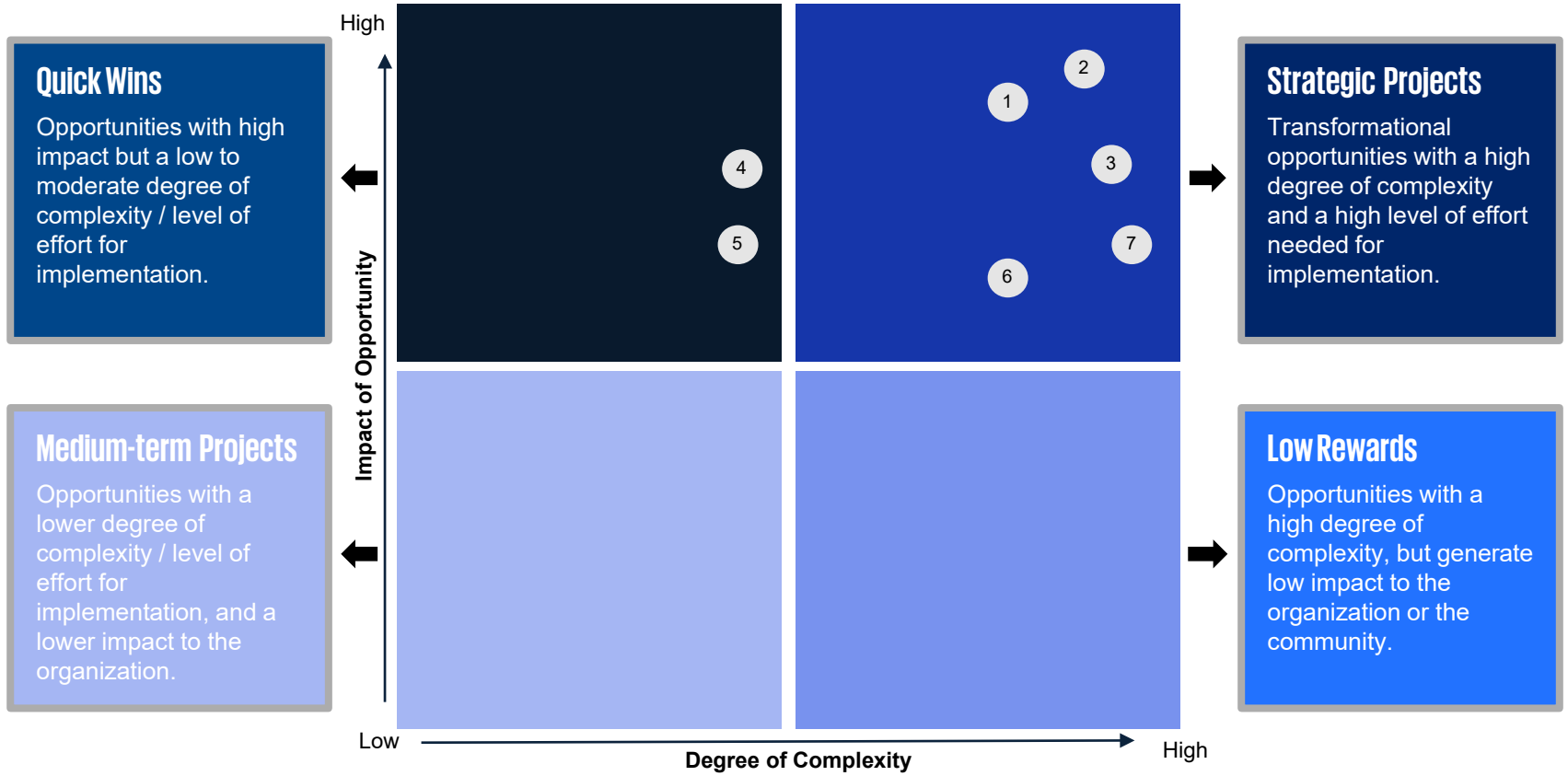
Summary

The County of Lanark engaged KPMG to conduct review of the County's Planning Department. The objective of the review was to obtain third-party opinion on the best way forward to digitize and streamline the County's application and approval process. As part of this work, KPMG performed stakeholder engagement, a jurisdictional review and various other analyses. In collaboration with the Project Team, KPMG identified the County's top seven (7) opportunities that would meet the project objective.

Using the prioritization matrix below, KPMG ranked the opportunities according to (a) their scope of opportunity and (b) their degree of complexity to implement. The matrix can be used to distinguish the opportunities and prioritize the County's resources and effort.

Recommendations Summary:

1. Address Provincial Legislation Changes
2. Explore Digital Solutions
3. Conduct a Fee Review
4. Enhance Stakeholder Experience
5. Improve Performance Measurement Practices
6. Review the County's Planning Services Org Structure
7. Consider a Single Official Plan



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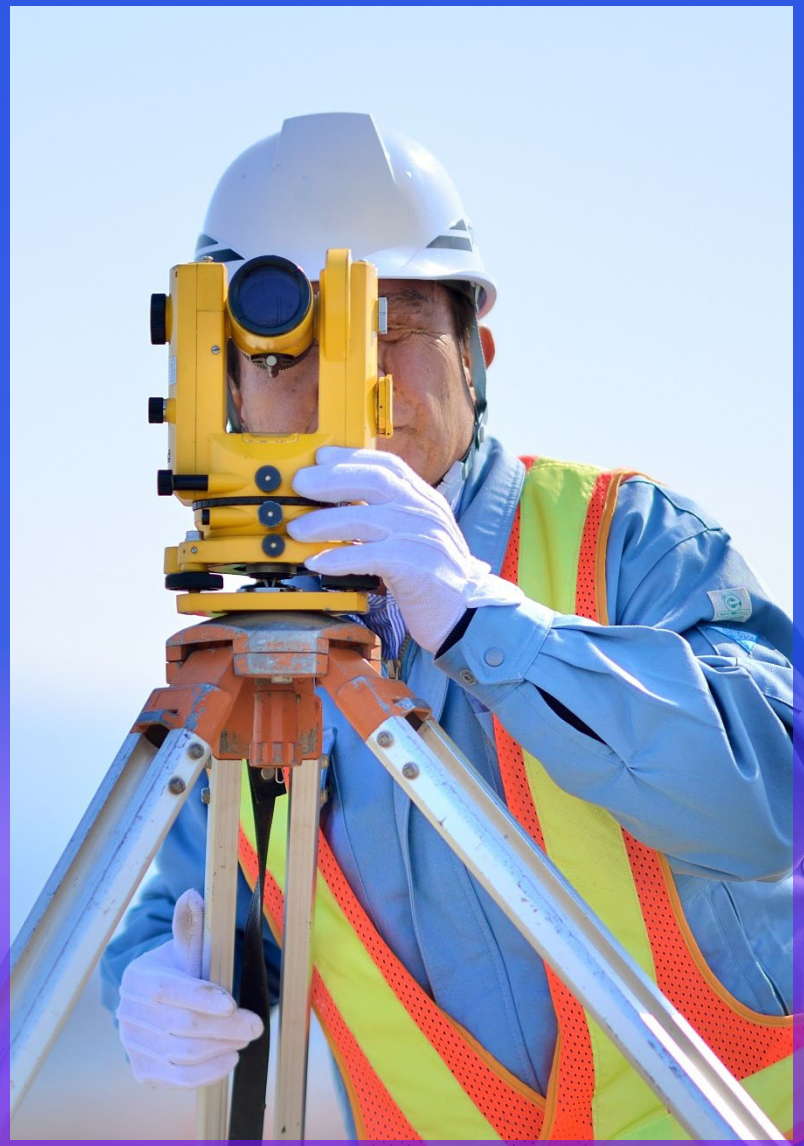
Appendix A: Scope of Review



County of Lanark

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Project Approach

KPMG's approach to this project was divided into four (4) phases. Each phase was focused on the accomplishment of specific tangible objectives and activities. Below is an outline of KPMG's approach for each phase.

Phase 1: Project Initiation	Phase 2: Environmental Scan	Phase 3: Recommendations & Implementation	Phase 4: Final Report & Presentation
July	August to November	November to January	January to February
Met with the Project Team to clarify expectations, refine lines of inquiry, and develop a subsequent work program and stakeholder engagement plan for the engagement.	Collected relevant information on the Planning Department's processes, in order to capture the current state using KPMG's Target Operating Model. Information was collected via documentation review, stakeholder interviews and high-level jurisdictional review against three comparator municipalities. In addition, KPMG conducted process mapping sessions to evaluate current development processes.	Identification of potential opportunities for improvement in land-use development processes. Validate opportunities with the project team and develop a high-level implementation plan in support of recommendations.	Develop a draft Final Report and implementation plan. Incorporate Project Team feedback to enhance and finalize the Final Report, and present it to the Economic Development Committee to close out the project.

Documents Reviewed

Throughout the project KPMG reviewed documentation provided by the Project Team and documentation discovered during desktop research to support the analysis. Below is a listing of the documentation reviewed over the course of this project.

Document Title	Document Title	Document Title	Document Title
Applicationforconsentchecklist2017	ApplicationforConsentGuide2018	ApplicationforConsentMay2020	By-law-2021-44—revised-Tariff-of-Fees
Fillable-Consent-application	Jan-6-Associated-Fees-January-1-2022	ProceduresforProcessingNotice-2014	2015 YEAR END REPORT - LDC - final
2016 YEAR END REPORT - LDC	2017 YEAR END REPORT - LDC - final	2018 YEAR END REPORT - LDC - draft	2019 YEAR END REPORT - LDC
2020 YEAR END REPORT - LDC - JS Amended	2021 YEAR END REPORT - LDC - DRAFT	a-PartLotControlFormReg.2014	a-PartLotControlGuide2014
CONDOMINIUMAPPLICATION-FIllableForm	CondominiumSubmissionRequirements	CountyOPAAPPLICATION-FillableForm	CountyOPAAPPLICATION-ToBePrinted
FlowChart-CondominiumExemption	Lanark Planning Department Review FINAL	OP and OPA Submission Checklist 2018	Procedures and Checklist – Conservation Partners
Procedures Manual Condominium and Exemptions – 2014	Procedures Manual Consents 2017	Procedures Manual OP and OPA – 2018	Procedures Manual Subdivisions – 2017
REPORT TO PLANNING WORKING GROUP COMMITTEE May 2022	SUBDIVISIONAPPLICATIONFORM-2014-Tobeprinted	Subdivisioninformationrequirements	SubdivisionSubmissionInformationCheckilst

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Stakeholders Engaged

Throughout the project KPMG engaged stakeholders to gain an understanding of the current operating environment and obtain their perspectives regarding the desired future state. Below is a listing of all the stakeholders engaged over the course of this project.

Stakeholders Engaged	Stakeholders Engaged	Stakeholders Engaged	Stakeholders Engaged
CAO	County Clerk	Director of Public Works	Treasurer
Planner	Senior Planner	Mayor (Town of Perth), Lanark County Warden	Deputy Mayor (Mississippi Mills), Chair of Economic Development Committee
Chair of Land Division Committee	Senior Planner (Mississippi Mills)	Planner (Tay Valley)	Director of Development Services (Carleton Place)
Planner (Drummond North Elmsley)	Planning Administrator (Beckwith)	Director of Development Services (Perth)	Clerk Administrator / Acting Treasurer (Montague)
Interim CAO / Deputy Clerk (Lanark Highlands)			

Comparators Engaged

Throughout the project KPMG engaged three (3) comparator municipalities to gain an understanding of leading practices employed throughout the Niagara region. Below is a list of the comparators engaged over the course of this project.

Comparators Engaged	Comparators Engaged	Comparators Engaged
United County of Leeds and Grenville (Manager of Planning Services)	County of Renfrew (Manager of Planning Services)	Township of South Frontenac (Senior Planner)

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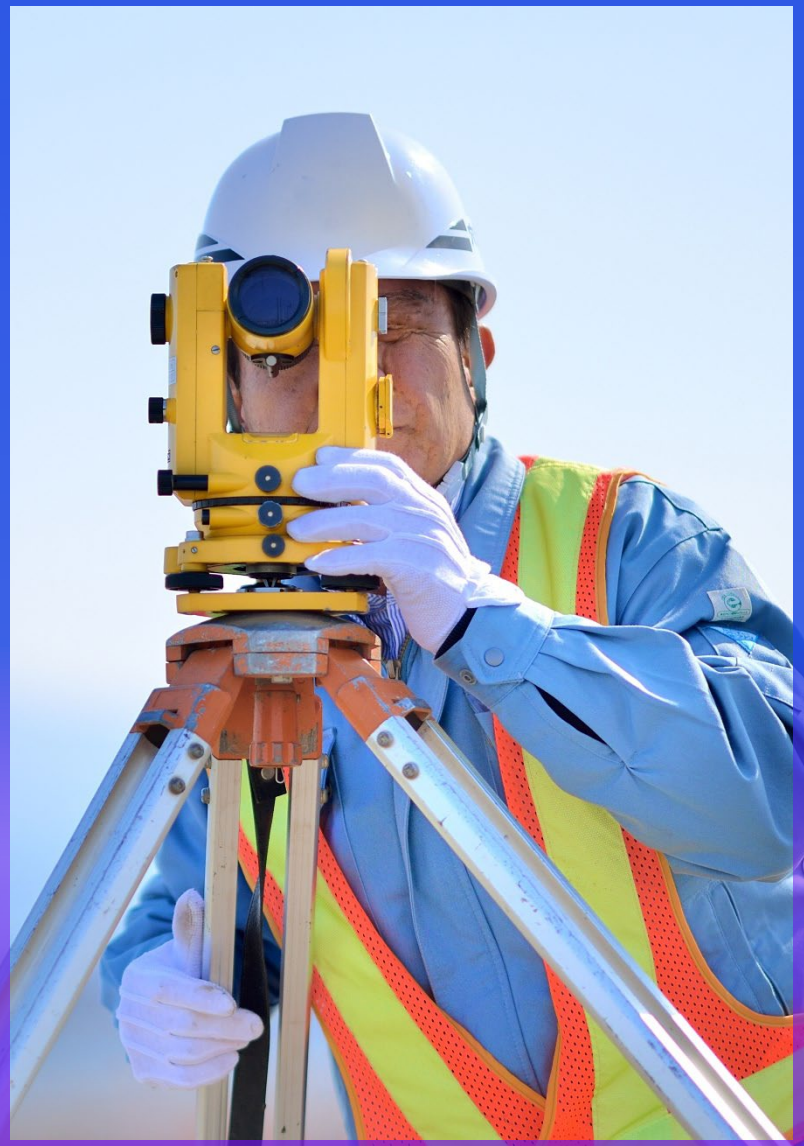
Appendix B: Interim Report



County of Lanark

Planning Department Review

Final Report

Summary of Findings from Consultation

Themes from Stakeholder Consultations

The Engagement Process

As part of the project, 17 interviews and were conducted with the following stakeholders:

Leadership and Staff (6)

- CAO
- County Clerk
- Senior Planner
- Planner
- Treasurer
- Director of Public Works

Elected Officials (3)

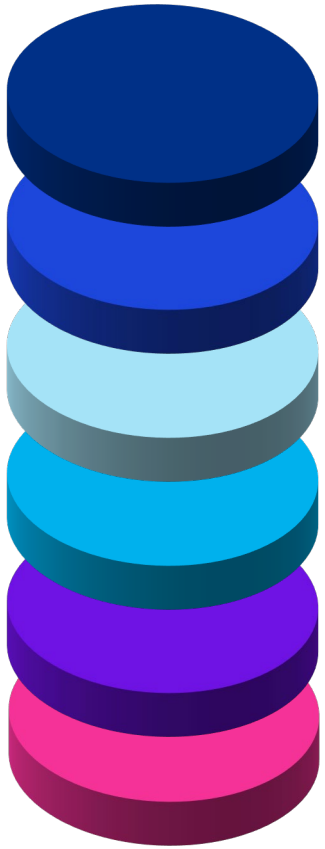
- Mayor of Town of Perth, Lanark County Warden
- Deputy Mayor of Mississippi Mills, Chair of Economic Development Committee
- Chair of Land Division Committee, Lanark County

Lower Tier Municipalities (8)

- Senior Planner, Town of Mississippi Mills
- Planner, Tay Valley Township
- Director of Development Services, Town of Carleton Place
- Planner, Drummond-North Elmsley Township
- Planning Administrator, Beckwith Township
- Director of Development Services, Town of Perth
- Clerk Administrator / Acting Treasurer, Township of Montague
- Interim CAO / Deputy Clerk, Township of Lanark Highlands

Organizing Framework: Target Operating Model

Key themes from the interviews and focus group are organized into six domains as a means of analyzing and understanding the current state of the County's services.



01 Governance and Strategy

The manner in which strategic direction is provided throughout the County and how collaboration between County departments, lower tier municipalities, and external stakeholders are established and maintained.

02 Service Standard

The service standards which dictate how services are delivered; this includes regulatory requirements, Council or management direction and industry best practices.

03 Process and Delivery Model

The core operations, processes, and approaches to deliver services.

04 Data and Technology

The information technology required to manage information / data and support service delivery.

05 People

The structure, reporting and accountability hierarchy, composition, capabilities, and skills of County employees to meet service standards.

06 Customer Experience

The perceptions and experiences from the perspective of customers from end-to-end.

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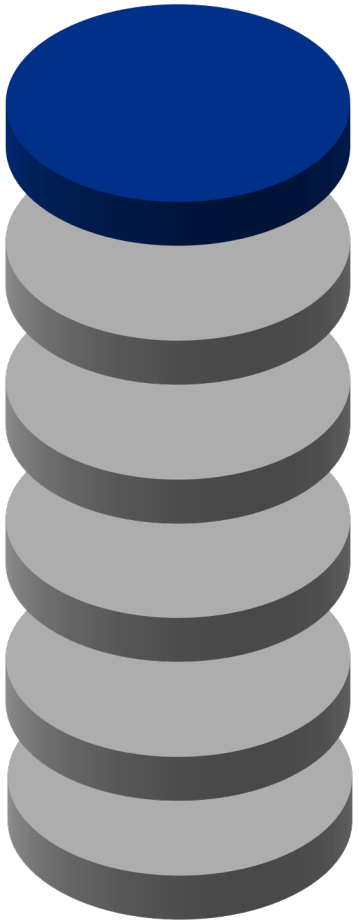
Themes from Stakeholder Consultations



Governance & Strategy

- Planning services are provided by both the County and the lower-tier municipalities. The County is the approval authority for consents (severances), plans of subdivision and condominium, condominium exemptions, part-lot control by-laws, local Official Plan amendments and reviews.
  - Consent applications are reported to the Land Division Committee. Subdivision, condominium and official plan amendment applications are reported to the Economic Development Committee of Lanark County council.
  - Lower tiers help to receive consent and subdivision applications, specifically on answering general inquiries and providing pre-submission consultation meetings, to facilitate submission of complete application packages. Based on the local Official Plans, each lower tier has different requirements and preferences in terms of completing land studies and surveys as part of submission or as a condition for approval.
- Some lower tiers would like the County to take a more strategic and leadership role in land development policies (e.g., affordable housing strategies). There is a perception that the County is focused on administrative priorities. However, other lower tiers prefer the autonomy to set local land development policies.
- Most stakeholders indicated that they would like the County to update its forms, guidance, and standard operating procedures to clarify roles and responsibilities. Currently, the published guidelines on the County website mostly reference the Planning Act, provincial information, and the County's Official Plan.
- Multiple stakeholders have expressed positive feedback of the County's Land Division Committee delegation of authority to allow County Planners to approve simple/non-contentious consent applications. The delegation of authority has supported improvements in operational efficiency.
- In the past, the County would host quarterly meetings with all lower tier Planners to communicate County information and discuss trends and issues. Due to County staff turnover, County-wide planning meetings are no longer conducted. Communication between the lower tiers and the County has been inconsistent and limited to a case-by-case basis.
- Other than measuring legislative timeframes, the County does not formally track other key performance measures to monitor performance of Planning and Development Services.

Key Theme Messages:

- The delegation of authority to allow County Planners to approve consent applications is a positive effort to improve operational efficiency.
- Planners at lower tier municipalities would appreciate if the County resumes regular county-wide planning meetings.

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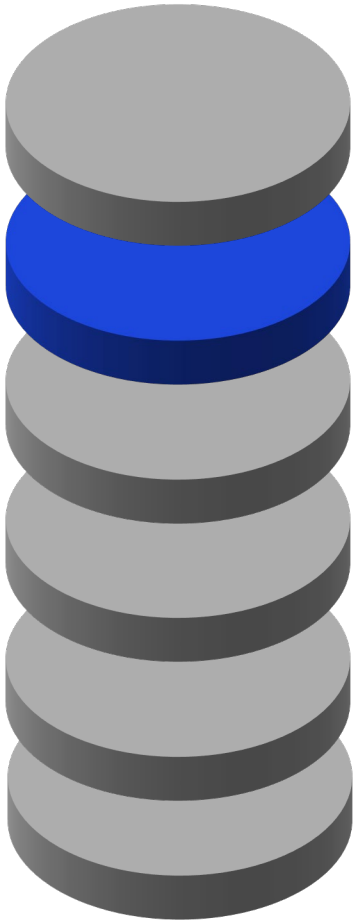
Themes from Stakeholder Consultations



Service Standard

- The County is experiencing high levels of severance and subdivision applications in recent years with the growth in real estate market. Stakeholders noted that the County's Planning Department is meeting service demand with its current resourcing capabilities, but Planning departments across Ontario are under pressure to expedite approval processes to meet public demand. The current resourcing levels and operating approaches may not be sustainable if service demands continue to increase.
  - The Province's Bill 109 implementation is putting more pressure on municipal government to change traditional ways of doing things to meet new legislative requirements.
- The County has a diverse and environmentally sensitive geological landscape; hence, the development of local Official Plans and bylaws are used to set local land development policies. This has contributed to challenges at the County level to manage development applications efficiently and effectively while administering local policies. Most notably on reviewing land surveys and studies at the in-take of applications or as condition requirements for approval.
  - Some stakeholders mentioned that majority "good quality" land has previously been developed and the remaining land to be developed requires more effort and time due to the complexity of those plots (e.g., requiring the need for more studies and circulation of comments).
- Applicants need more education on consent and subdivision application procedures (e.g., information needed for an application to be considered complete, processing procedures and turnaround time). Local Planning departments often receive inquiries and complaints from applicants throughout the approval process. The only system to check the status of an application is to manually contact the County via phone or email.
- The County's key performance metric is to meet the *Planning Act*'s legislative timeframes. Lower-tier municipalities would appreciate proactive communication from the County of application statuses from their communities.

Key Theme Messages:

- The County's resourcing levels may not be sustainable to meet service demand and Bill 109 legislative requirements.
- Local Official Plans and bylaws present challenges in administering consent and subdivision applications at the County level, specifically on the requirements to conduct land surveys and studies.
- Improve public education of consent and subdivision application procedures.

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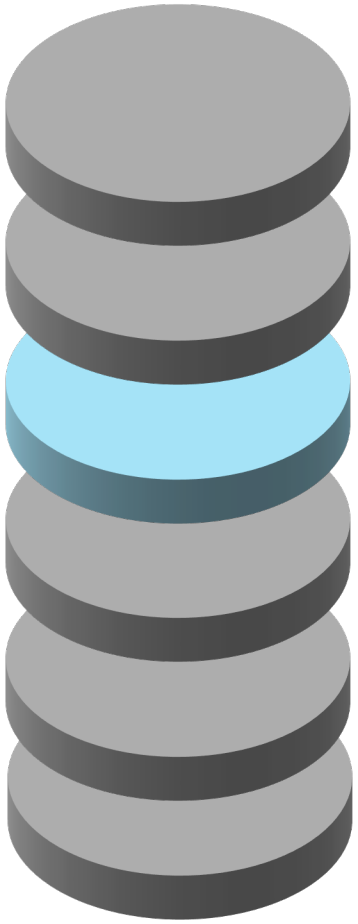
Themes from Stakeholder Consultations



Process & Delivery Model

- Several stakeholders indicated the need for more consistency in processing subdivision and consent (severance) applications. The heterogeneity across the Townships causes confusion, duplication of effort, and delays in the review process.
  - Streamline and clarify application submission processes. Some municipalities submit applications on-behalf of applicants while others require applications to be submitted directly to the County after pre-submission consultation meetings. Some municipalities require studies and surveys to be done upfront, while others request studies and surveys as approval conditions.
  - Lack of documented procedures at the County and at municipalities. The Planning Act, provincial guidelines, Official Plans and zoning bylaws are often used as high-level procedural guiding tools.
  - There has been high turnover of planners across the County. There has been limited training; most planners are learning on-the-job.
- Lower tier municipalities have expressed the importance of pre-submission consultation meetings to establish mutual understanding of application requirements and to identify and resolve potential issues for a successful application.
- Multiple stakeholders noted that application tracking is a highly manual process and creates inefficient communication of application statuses and issues. Communication of application status between the County, agencies, and local municipalities is manual (e.g., phone calls, emails, and in-person/virtual meetings).
  - The County currently only accepts paper submissions and cheque payments. County staff created additional workarounds to process paper applications (e.g., scanning paper, data entries into spreadsheets, etc.) and cheque payments.

Key Theme Messages:

- Streamline processes for more consistency and transparency by updating County guidance and operating procedures, including more structured communication of application statuses.
- Processes are highly manual. Respondents would appreciate a more digitized process.

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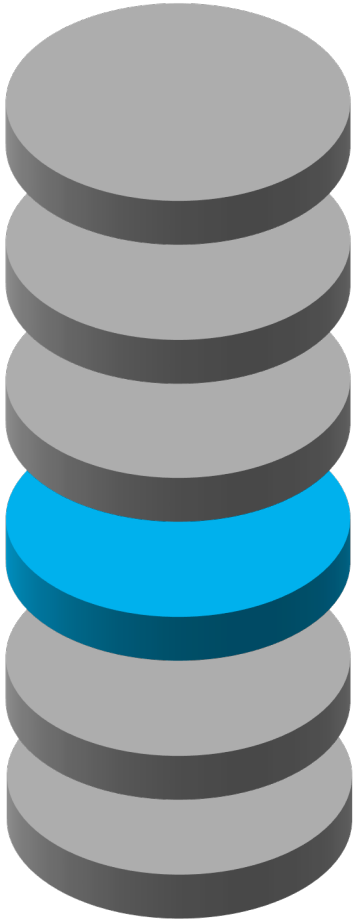
Themes from Stakeholder Consultations



Data & Technology

- All stakeholders acknowledged the consent and subdivision processes are manual with limited use of technology for application submissions, file management, and payment processing. Report writing is mostly done manually in Microsoft Word and file tracking is done in Microsoft Excel. Additional effort is needed to gather, report, and analyze County-wide data and performance.
  - The County's Clerk is in the process of implementing SharePoint for records management. There is opportunity for the Planning Department leverage SharePoint as a file management tool.
  - Stakeholders expressed interest in expanding digital payment options for development applications. The County accepts debit payments and bank transfers for other service fees.
  - All Townships would appreciate electronic file tracking capabilities to allow more real-time communication of application statuses. Communication is mainly facilitated via email, phone, and in-person/virtual meeting tools.
  - Some lower-tier municipalities are in process exploring the use of planning software. One municipality is exploring Cloudpermit and another worked with the CGIS vendor to build custom features.
- Lower-tier stakeholders would appreciate more consistent access to the County's CGIS data. Some municipalities have viewer access to see County's consent and subdivision information; others noted that they cannot view the County's layer of information resulting in data discrepancies.
- It was noted that the County's website needs to be updated to improve user experience of finding planning related information and guidance. Currently, stakeholder feedback noted that the website has limited information to inform applicants of County's service standards and its expectations for applications.

Key Theme Messages:

- The County is open to explore ways to digitize development application review processes.
- All lower tier stakeholders would like more efficient information sharing practices through the use of technology tools.

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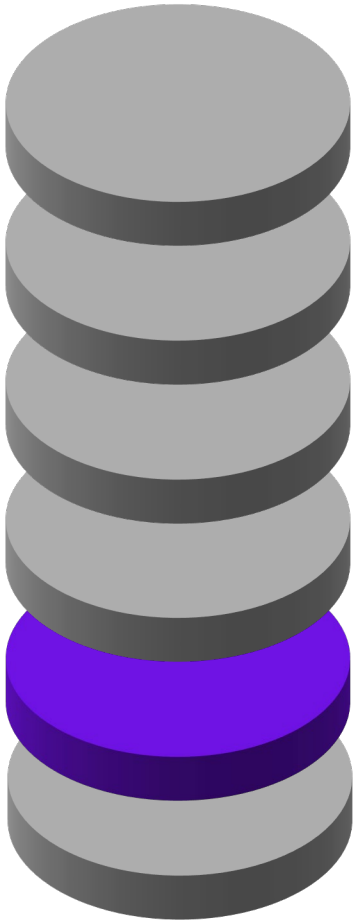

People

- Elected officials recognize the service quality and effort provided by the County's Planning team and all planning personnel throughout the County. Planning and development matters are managed professionally to meet increased service demand and support economic growth.
  - All lower tier stakeholders commended the County's Planning teams guidance and collaborative approach to address questions and issues.
- After hiring a second Planner at the County, multiple internal stakeholders acknowledged improvements in service delivery and response times. Some stakeholders believe the County still needs additional staff to meet the Province's Bill 109 requirements.
  - Several Townships have only one Planner, which is also a concern to efficiently and effectively meet service demand.
- Multiple stakeholders have felt that staff turnover at both the County and lower tier municipalities contributed to challenges in communication and understanding the policies and procedures of the County and at their own municipality.

Key Theme Messages:

- Multiple stakeholders believe the County's Planning Department is understaffed to meet service demand.
- Turnover throughout the County has contributed to challenges in communication and processing development applications.

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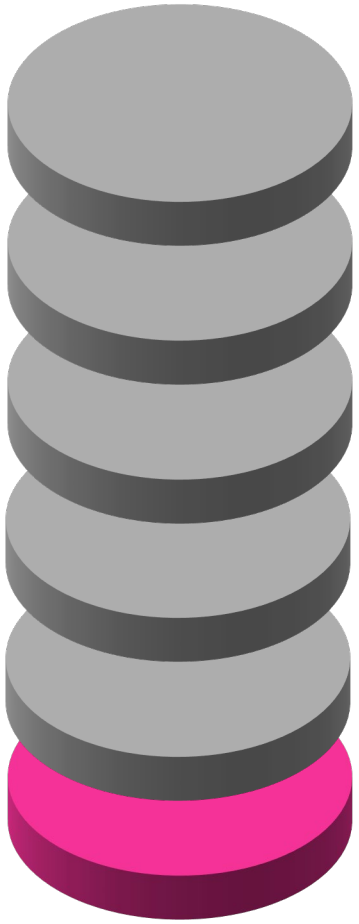
Themes from Stakeholder Consultations



Customer Experience

- Roles and responsibilities between the County and the lower-tier municipalities are unclear to applicants. In most cases, applicants direct all inquiries to the lower-tier municipalities because:
  - The lower tier municipalities' staff are often more accessible to contact;
  - The applicant expects the lower-tier municipality to have answers to their inquiries.
- Applicants sometimes are confused of the consent and subdivision application procedures. Feedback was given that the County and lower-tier municipalities could improve their websites by providing clarity and guidance of planning information to manage customer inquiries. The two most common types of inquiries relate to questions of submission and review procedures and questions regarding the status of specific applications.
- Pre-submission consultation meetings are an essential stage of the application process to provide the applicant with a greater understanding of expectations and requirements for successful applications. Multiple stakeholders interviewed have expressed that the majority of issues in an application can be identified or resolved in pre-submission consultation meetings.
  - Consultation meetings are often led by the lower tier municipalities. Some municipalities would appreciate more County participation; however, they acknowledge County Planners have limited capacity.

Key Theme Messages:

- Applicants are sometimes unfamiliar with the County's application procedures and expectations and inquiries are often directed to local planning departments. More clarify of application procedures and real-time communication of review statuses would help manage customer inquiries and complaints.

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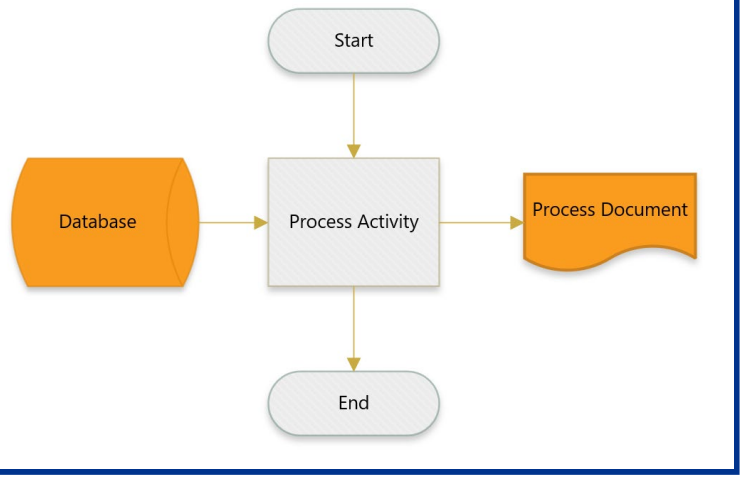
Process Observations

Process Mapping

Engaging Internal Stakeholders

As part of the project, KPMG held process mapping workshops with the County and the lower tier members to understand key activities carried to process consent and subdivision applications.. The workshops helped to identify process inefficiencies and manual activities for improvement consideration. The process maps are included in Appendix B.

The process maps use the following format:



Overview

As part of the project, nine (9) process mapping sessions were organized with both the County and the eight (8) lower tiers to examine the consent and subdivision application processes. Fourteen (14) process maps were created. Observations are organized into the following three (3) sections:

1. Consent (Severance) Approval Process
2. Subdivision Approval Process
3. Summary of Key Themes and Pain Points

Consent (Severance) Approval Process	Subdivision Approval Process	Process Owner	Workshop Participants
■	■	Lanark County	• County Senior Planner • County Planner
■	■	Mississippi Mills	• Senior Planner, Mississippi Mills
■	■	Tay Valley	• Planner, Tay Valley
	■	Carleton Place	• Director of Development Services, Carleton Place
■		Drummond North Elmsley	• Planner, Drummond North Elmsley
■	■	Beckwith	• Planning Administrator, Beckwith
■	■	Perth	• Director of Development Services, Perth
■		Montague	• Clerk Administrator / Acting Treasurer, Montague • Junior Planner, Montague
■		Lanark Highlands	• Interim CAO / Deputy Clerk, Lanark Highlands • Clerk, Lanark Highlands

■ = Process mapped

Note: Some lower tiers saw little/no consent/subdivision applications. In those instances, the process was not mapped.

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Consent (Severance) Approval Process (1/2)

KPMG identified the following opportunities and improvements after conducting process mapping workshops with County staff.

	Observations and Challenges	Improvement Opportunities

County Level	• Working with the lower tiers can be a challenge due to different operating procedures. For example, pre-submission consultation meetings with applicants follows a different protocol among lower tiers.
	• High turnover in lower tier planning staff has created challenges in consistent knowledge and understanding of the County's planning and development processes.
	• Following the formal circulation of an application for comments, there are often delays in receiving comments from agencies (i.e., it often takes more than the prescribed 20 days). Consequences include:
	  ◦ Creating delays in the final approval process.
	  ◦ Commenting agencies provide conflicting comments
	  ◦ The lower tier often delays providing comments until the Conservation Authority and Health Unit has provided comments because they are more likely to discover contentious elements to an application. This either causes the lower tier to rush comments or miss the deadline.
	• Applicants often require the staff to provide significant support for their application; either due to their unfamiliarity with the process or unfamiliarity of local planning procedures due to staff turnover.
	• Tracking applications and communicating updates to the applicant and municipality is a highly manual process. Currently applications are tracked in a Microsoft Excel file visible only at the County level. The County often receives status inquiries via phone and email from the applicant/municipality which is time consuming to respond to.
	• Following consent approval, there is a period of time before the severance is reflected in the County's GIS. Applications are often prepared in batches for GIS updates but unforeseen challenges can cause bottlenecks to updating the system e.g., a recent connection error.
		• County could formalize policies and procedures to drive consistency and clarity for relevant agencies and lower tier municipalities across all stages of an application.
		• There is an opportunity for a more user-friendly approach to pre-consultation, particularly for the inexperienced applicants e.g., one-page checklist with every application to accommodate inexperienced applicants.
		• Formalize and document planning processes from the perspective of both the County and lower tiers to be used in onboarding/training new Planning staff.
		• Review and update the process for checking application status and sending reminders to relevant agencies prior to deadlines.
		• Improve communication to applicants such as update County website, formalize checklists for pre-consultation meetings.
		• Explore solutions to keep lower tiers updated with the status of relevant applications e.g., regular meetings, automated email updates when the status of an application changes, explore the functionality of SharePoint.
		• Review the process for updating CGIS. For example, explore interim updates throughout an application to show pending status with relevant documents and grant lower tiers viewing access.

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Consent (Severance) Approval Process (2/2)

KPMG identified the following opportunities and improvements after conducting process mapping workshops with local planning staff.

	Observations and Challenges	Improvement Opportunities

Lower Tier Municipalities	• Communication with the County was identified as a challenge; particularly communication concerning the status of an application contributing unpredictable and inconsistent workload.
	  • Lower tier municipalities are often unaware when the County deems an application complete; they sometimes only hear about it once a mailing list is requested.
	  • There is unclarity on what is determined to be “contentious” and “non-contentious”. Stakeholders indicated that there is an opportunity to move the non-contentious files faster to streamline the process.
	  • Confusion on what studies are required upfront; and if the requirements vary based on the lower tier geological environment.
	  • The lower tier municipalities do not get notification when the newly created parcel of land is registered.
	• Turnover at the municipal level has contributed to a constant need for training/onboarding and a greater dependence on the County for support in development processes.
	• A high proportion of applicants are inexperienced and require significant hand-holding and support which can be time consuming.
	• Payment procedures needs to be clarified. Some applicants will drop off the cheque for the County and Conservation Authorities at the local municipality and it is then the lower tier responsibility to transfer the cheques.
	• Applicants are unsure of the chain of communication in the application process and will occasionally reach out to the municipality for answers (even though the application status is often only known at the County level)
	• Limited access to County’s GIS data to address client inquiries.
		• Formalize communication procedures such as:
		  • Regular meetings between County and local planning staff.
		  • Agree on a procedure for application updates, e.g., bi-weekly updates or when the status changes.
		• Formalize and document application procedures for training and onboarding of planning staff at the upper and lower tier levels. Include activities such as but not limited to:
		  • Clarifying studies required upfront with the submission of an application versus a condition of consent.
		  • Outline applicable fees and process of payment collection.
		  • Identify relevant agencies and their roles in the application.
		  • Set and enforce deadlines for the various stages of an application.
		• Formalize and document application processes to be available on municipal websites and for onboarding/training resources.
		• Prepare informative resources to be used consistently across municipal websites to provide potential applicants with sufficient information prior to initiating discussions with the County/municipality e.g., flowcharts, checklists, fillable forms, FAQs.
		• Explore CGIS functionality and sharing/accessibility for lower tiers to reduce manual efforts to contact the County for inquiries.
		• Explore the value of creating or sharing resource documents such as the “Consent Inquiry Form” of Mississippi Mills to address initial inquiries before a formal pre-consultation meeting.

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Subdivision Approval Process (1/2)

KPMG identified the following opportunities and improvements after conducting process mapping workshops with County staff.

	Observations and Challenges	Improvement Opportunities

County Level	• Pre-consultation meeting activities are inconsistent between the member municipalities and often result in developers needing to gather additional information before the application can be submitted.
	• There is often a significant lag (i.e., several months/years) between a pre-consultation meeting and the formal submission of a subdivision application. As a result, the comments from the County become outdated.
	• Tracking applications and communicating updates to the developer and municipality is a highly manual process. Currently applications are tracked in a Microsoft Excel file visible only at the County level. The County often receives status inquiries via phone and email from the applicant/municipality which is time consuming to respond to.
	• There is some overlap between the activities of the Economic Development Committee hearing and County Council meeting. The County Council meeting objective is to review recommendations proposed by the Economic Development Committee hearing. Some Economic Development Committee members also sit on the County Council.
	• Policies and procedures have not been updated since 2017.
	• Applications are currently submitted manually with signed physical copies (digital files are submitted via USB hard drives).
	• The County currently only accepts cheque as a mode of payment.
	• The process for collecting fees from the applicant is inconsistent. The fees include a County fee (and deposit), Conservation Authority fee, Municipal fee and Health Unit fee. If the municipality receives the cheques from the applicant, they are forwarded to County for distribution.
		• Formalize and document pre-consultation procedures, such as:
		  • Provide an in-depth form and checklist for pre-consultation objectives and materials to review.
		  • Clarify the stakeholders that need to be involved in pre-consultation (e.g., municipal representative, County Planner, developer, Conservation Authority).
		• Establish and enforce a deadline for the duration of comments' validity from pre-consultation to the application is submitted.
		• Explore SharePoint functionality as the County moves expands it's use for information system management e.g., file sharing with municipality to update applicant
		• Consider opportunities to consolidate Economic Development Committee meeting for recommendations and the County Council approval meeting to save time.
		• Explore automation of application intake e.g., online portal for application submission and tracking.
		• Explore digital payment options and eventually look for ways to automate the payment collection process including automated invoices, collection, and receipt to reduce delays from payment processing. Commenting agencies withhold comments until their payment has been processed.

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Subdivision Approval Process (2/2)

KPMG identified the following opportunities and improvements after conducting the 9 process mapping workshops with County staff. The process maps are included in Appendix A.

	Observations and Challenges	Improvement Opportunities

Lower Tier Municipalities	• Some municipalities rarely handle subdivision applications; others, with recent staff turnover, have limited experience managing subdivision applications.
	• Municipalities have insufficient information of subdivision applications available on their municipal websites. More time is thus spent between the developer and the County/municipality for general inquiries.
	• The County planning staff are consistently highly utilized and irregularly review long-term, low-urgency subdivision applications, which can cause delays if the application is not monitored regularly.
	• Multiple municipalities reported significant back and forth between the developer and the municipality. County Planners play a highly administrative role versus policy guidance.
	• Some larger municipalities (e.g., Carleton Place) that are adequately staffed, have expressed an interest in receiving delegated authority for subdivision approvals to avoid delays and dependence on the County.
	• Physical application documents are still largely used throughout the lower tiers and some are used in addition to digital copies.
	• Lower tiers have expressed the need for the County to play a more proactive role as a strategic leader. Given the pressure from the Provincial government to provide more affordable homes, municipalities need the support from their upper tier to provide unified strategic support instead of addressing the housing crisis in silos.
	• Communication between agencies occasionally conflicts. For example:
	  • The County and lower tier check an application for completeness based on different criteria e.g., an Environmental Impact Study (EIS) is required by Perth but not the County.
	  • The municipality often waits for comments from the CA and other agencies because they are more likely to find contentious elements of an application.
		• Formalize and document subdivision application procedures, checklists and forms consistently across the County for applicants and lower tiers to alleviate uncertainty. This will aid in onboarding and training of new planning staff as well as clarify areas of concern for existing staff. Note: some municipalities such as Mississippi Mills are in the process of mapping and documenting procedure manuals.
		• Update municipal websites consistently with County-approved resources e.g., flowcharts, checklists, fillable forms, FAQs to prepare developers/applicants before formally engaging in pre-consultation.
		• Explore opportunities to delegate administrative tasks from Planners to focus on activities that align with the qualifications of a registered Planner.
		• Explore alternative planning models. For example:
		  • Hiring a Planning Technician, Junior Planner, etc. to oversee a specific type of application or activity across multiple application types.
		• Explore the digitization/automation of application tracking for areas such as:
		  • Issuing reminders to commenting agencies prior to deadline for comments,
		  • Tracking current status including outstanding issues,
		  • Visibility to lower tier municipalities to reduce dependence on manual status inquiries,
		  • Enforcing deadlines e.g., deadline to meet conditions
		• Explore moving to a paperless environment
		• Explore the feasibility of shared service agreements between smaller municipalities that cannot financially justify staffing a full-time Planner.

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Summary of Key Themes and Pain Points

During each process mapping workshop, KPMG worked with key stakeholders to map and evaluate development review processes. Key themes and pain points that span across the County's development review process are identified below:

Manual steps throughout approval processes

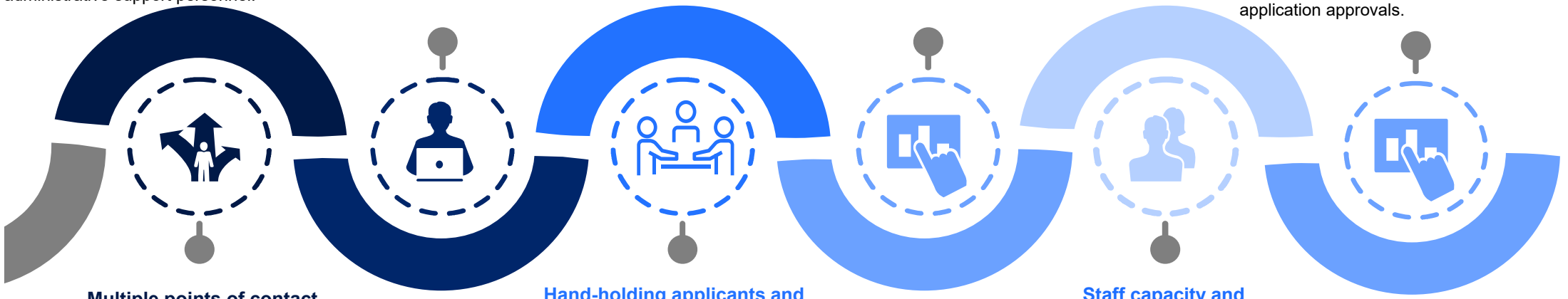
Stakeholders indicated there are a number of manual labour-intensive work steps that require administrative or technological support. Currently, management level positions must manually create letters to applicants, track and reconcile application comments, and issue correspondence via email. These manual processes constrain capacity and can result in delays throughout the approval process. It was also noted that most municipalities lack administrative support personnel.

Inefficient status tracking and poor communication

The status of development applications is tracked manually at the County and at the lower tiers. As a result, applicants/developers are required to call/email the municipality to get status updates. This can also create a bottleneck in the review process as only the County is aware of the current status of an application.

Constant updates and changes to Provincial planning legislation

In recent years, the Ontario government has made it a priority to improve the housing situation in the Province. This has included introducing bills such as Bill 109 (More Homes for Everyone Act, 2022) and Bill 23 (More Homes, Built Faster Act, 2022).
Municipalities will be adjusting their OPs and by-laws to accommodate changes that are made. This process will take time and create additional pressures to expedite application approvals.



Multiple points of contact

Development processes are administered by both Lanark County and the lower tier municipalities. This often creates confusion for applicants during the intake process as some applications are initiated at the Town while others are initiated at the County level.
Stakeholders noted that applicants often start at the municipality and are redirected to the County.
This also creates confusion at the County because processes are inconsistent across the lower tiers.

Hand-holding applicants and chasing comments from agencies

Stakeholder have observed that inexperienced applicants require considerable support from the County and municipal planning staff.
It was often mentioned additional effort is made to collect agency comments.

Staff capacity and administrative workload

Staff capacity was identified as a major pain point throughout all process mapping sessions. Staff turnover throughout the County combined with the increased volume and complexity of development applications has resulted in less support and delays in the review process.
Multiple stakeholders believe that the County Planning department spends considerable time on administrative duties that could be delegated elsewhere.

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Jurisdictional Review

Jurisdictional Analysis - Why Compare to Other Communities

For the purposes of the project, three (3) comparator communities were selected as municipal comparators by Lanark based on characteristics such as population growth, urban/rural characteristics and geography. Interviews were conducted with a focus on understanding the comparator municipalities' operating models, structure, and service delivery volume and performance.

Municipality	Population[1]	Households[2]	Area Square KM[3]
County of Lanark	59,918	30,959	2,979
United County of Leeds and Grenville	56,326	35,846	3,350
County of Renfrew	76,315	48,220	7,358
Township of South Frontenac	18,646	10,606	948

[1] 2020 FIR (2016 census data). South Frontenac has not submitted its 2021 FIR data to the Ministry as of this report date; hence, 2021 Statistics Canada census data is not used
[2] MPAC data reported in the 2020 FIR
[3] Statistics Canada data

The primary purpose of the jurisdictional scan is to understand the performance of comparator municipalities and to identify opportunities to change how the County delivers municipal services, for example:

- Communities with similar financial benchmarks/service levels offer insight into operating efficiencies.
- Communities with different financial benchmarks/service levels offer opportunities to change existing processes to reflect common service levels.

Comparing performance and operational practices have both benefits and risks:

- Provides insight into affordability issues; what a peer municipality can achieve with the same resources.
- Assumes that all variables are the same (assessment base, non-taxation revenues).
- Assumes that taxation and service levels in other communities are 'right'.

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Jurisdictional Review

Summary of Comparator Operating Models

Below are the six (6) key operating model elements which were of greatest significance during comparator interviews.

Governance and Strategy

All upper tiers manage the subdivision application review process. South Frontenac reviews and approves consent applications as a lower tier. Renfrew provides full planning services to its member municipalities.

- Renfrew established its County OP in 2002 with approved amendments to direct changes in the Planning Act.
- Leeds and Grenville established its first County Official Plan (OP) in 2016. There is discussion of integrating the smaller municipalities' local OPs as chapters into the County OP.

Data & Technology

All comparators have challenges with the use of technology and data management. Recent data is tracked in excel spreadsheets supplemented with electronic filing systems.

- Renfrew is using Microsoft Teams as a project management tool to manage review tasks and timelines.
- Leeds and Greenville uses ArcGIS for public notices.
- South Frontenac uses CityView and plans to develop a portal for application intake with online payment capabilities.

Service Standard

All comparators have experienced a significant increase in application volume in recent years. Meeting legislative timelines has become a challenge. Implementation of Bill 109 is adding additional pressure to current resources and comparators are looking for alternatives ways to process and review applications.

People

All comparators are experiencing challenges in recruiting and retaining qualified and experienced Planners. All expressed the need for additional staff to support the growth in service demand.

Communication between upper and lower tier is primarily via emails and phone calls. The upper tiers host regular County-wide planning meetings.

Process & Delivery Model

Across all jurisdictions, application processes have varied at the lower-tier level. This is largely driven by the staffing complements at each organization.

All comparators expressed the importance of having mandatory pre-submission consultations with the applicant and the local municipality to establish mutual understanding of submission requirements and clarify expectations to reduce inefficiencies.

Customer Experience

Main customer complaint is application timelines. All comparators have been looking for ways to provide clearer guidelines of application procedures to reduce re-submissions.

- Both South Frontenac and Leeds and Grenville created consent application flowcharts published on their websites to facilitate consultation discussions.

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Organizational Model and Jurisdictional Authority

	Lanark	Leeds & Grenville	Renfrew	South Frontenac
Consents (severances)				
Plans of Subdivision or Condominium				
Condominium Exemptions				
Part-Lot Control By-Laws				
Local Official Plan Amendments and 5-Year Reviews				
Current staffing levels	• 1 Senior Planner • 1 Planner • 1 Planning Assistant	• 1 Manager • 1 County Planner • 1 Secretary/Treasurer to the Land Division Committee • 1 Planning Assistant	• 1 Manager • 3 County Planners • 2 Junior Planners • 1 Secretary/Treasurer to the Land Division Committee • 10+ staff providing local planning services	• 1 Director of Planning (vacant) • 1 Senior Planner • 2 Planners • 1 Planning Assistant

= Lower tier has delegated authority

= County is the approval authority

Lanark County has 8 lower tier municipalities. Except for Lanark Highlands, each lower tier has their own in-house planner/planning team. Lanark Highland is currently using an external consultant do deliver planning services.

United County of Leeds and Grenville has 10 lower tier municipalities. The lower tiers have hired in-house planners or external consultants to carry out local planning services.

The County of Renfrew has 17 lower tier municipalities; 11 townships contract the County as its planning services provider.

South Frontenac is one of four lower tier municipalities in the County of Frontenac. South Frontenac has its own Planning Department while the other three contracts the County for planning services. South Frontenac performs septic inspections on behalf of the other lower tier municipalities.

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Service Delivery - Digital Tools

One of the key areas for improvement is to digitize processes to increase efficiency and reduce time spent on back-n-forth communication between upper and lower tier planning personnel.

KPMG inquired the comparator municipalities regarding the experience of using digital tools to manage application reviews and approval processes.

Key Takeaways

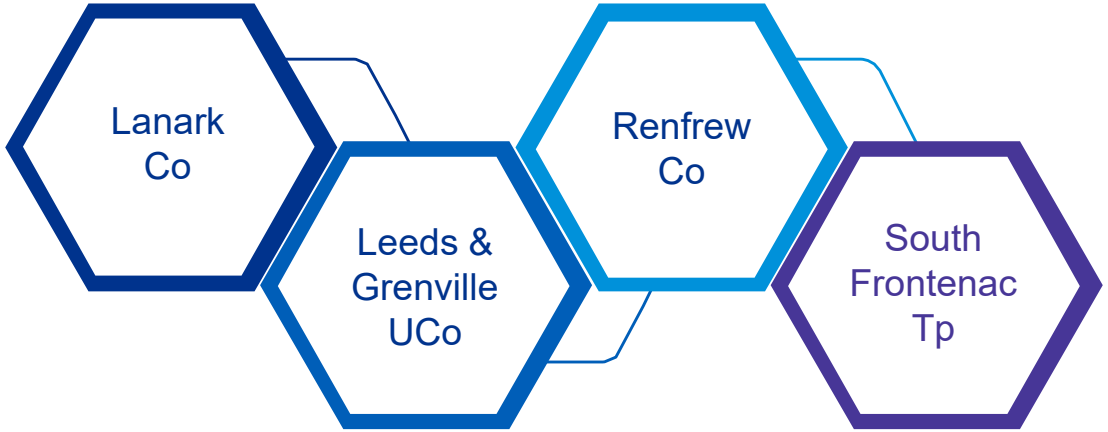
All comparators are looking for ways to better track and manage application files. Renfrew and South Frontenac have found solutions using Microsoft Teams and CityView, respectively. Leeds and Grenville is still using excel to track files. No comparator is using a County-wide digital software solution.

Communication is highly manual and time-consuming. Currently, the comparators have not found a solution for automated messaging.

CloudPermit has approached both Leeds and Grenville and Renfrew to trial their planning module. Both Counties declined to participate due to cost concerns.

- CGIS – mapping tool
- Microsoft Word for report writing
- Microsoft Excel for application tracking
- No shared application tracking system
- Carleton Place uses Cloudpermit for building and may trial the Planning module
- Mississippi Mills added custom features to CGIS to process consent applications

- Renfrew uses Microsoft Teams as project management tool to:
  - Set checklist activities and track deadlines; shared-files for review, commenting, and documentation storage
  - Looking at security features to give lower tier access to expand collaboration
  - $12 / month subscription fee
  - Strong, positive feedback internally



- Leeds & Grenville still processes the majority of applications in hard-copy format
- Excel spreadsheets are used for application tracking
- Communication via email and phone calls
- No electronic filing system

- South Frontenac recently implemented CityView to process planning applications and building permits. Change management challenges include:
  - User training
  - The system is not cloud-based and was originally designed for Building Services. The planning module is a custom, trial project.
  - There is an online payment module, but the Township has is yet to explore such options.
- Currently, significant time is spent on entering application data into CityView. The Township plans to develop a portal for application intake with online payment functions.

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Service Delivery - Application Volume

Historical Consent Applications Received in Lanark County

This chart demonstrates the annual consent (severance) applications received by Lanark County between 2016 and 2021. A common theme of the stakeholder consultations and comparator interviews was that the demand for Planning and Development services has increased significantly in recent years throughout all jurisdictions surveyed. Lanark County is no exception.

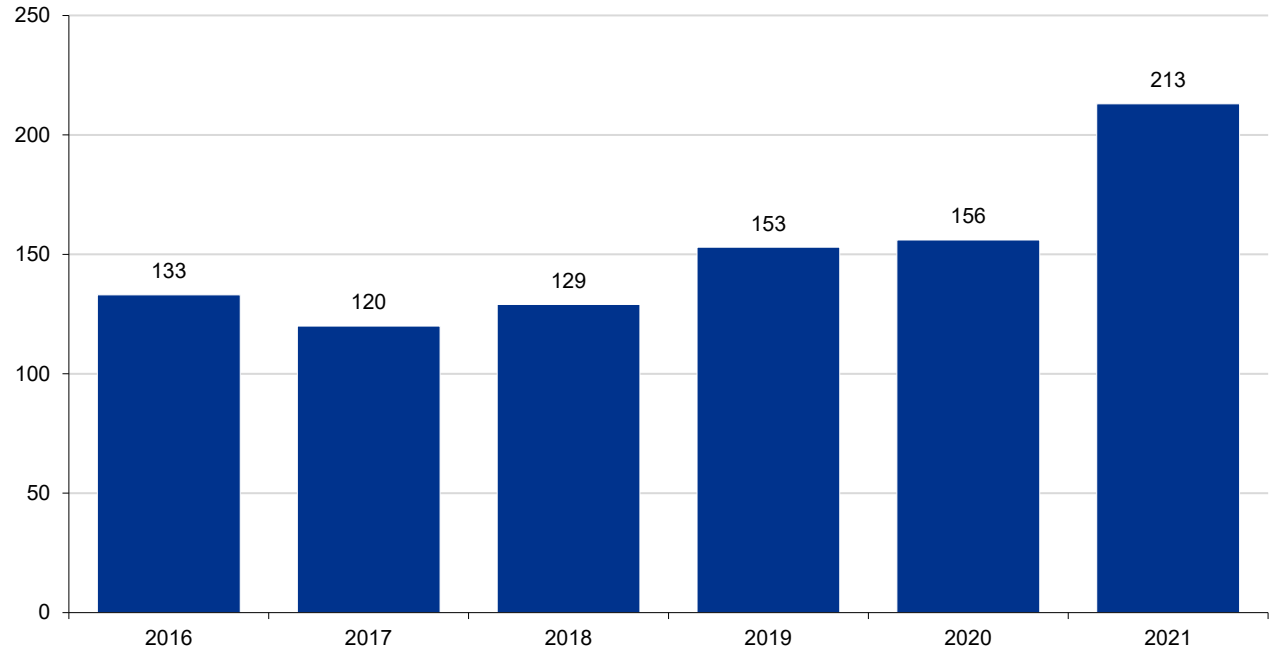
Key Takeaways

The number of consent applications received has significantly increased between 2017 and 2021, growing by 78% from 120 to 213.

The future of planning service demand is uncertain with some conflicting factors such as:

- Interest rates rising,
- Real estate value on the decline,
- Introduction of Bill 109 (More Homes for Everyone Act, 2022, and
- Provincial target of 1.5 million homes built in the next decade.

Consent Applications Received by year in Lanark County



Source – Lanark County 2021 Year End Report

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Service Delivery - Application Volume

Historical Consent Applications Received Among the Comparator Group

As part of the jurisdictional review data analysis, KPMG analyzed the consent (severance) applications processed for the County and its comparators. This metric assisted in obtaining an understanding of the volume and growth of each comparator and its planning and development department.

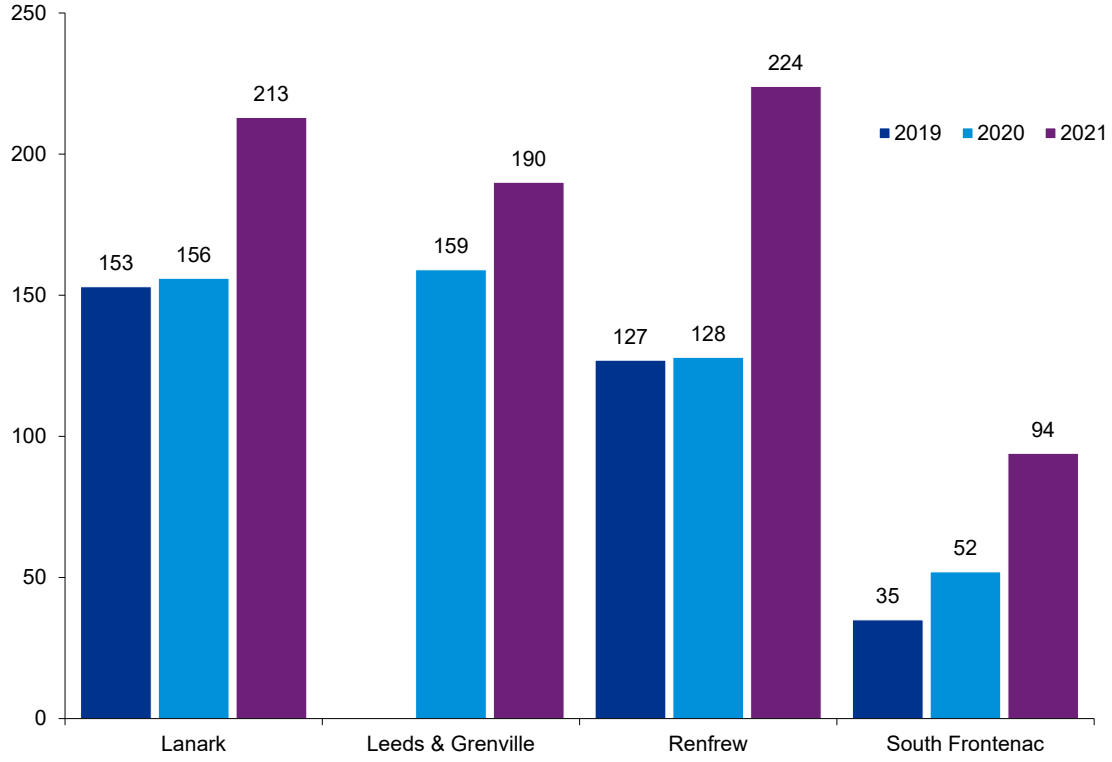
Key Takeaways

All comparators have seen an increase in applications between 2019 and 2021, including a large spike between 2020 and 2021. Lanark saw an increase of 60 applications per year between 2020 and 2021 which represents a 37% increase following a 3% increase the year prior.

South Frontenac saw the largest percentage increase in applications from 35 to 94 (an increase of 170%) between 2019 and 2021. South Frontenac is also the only lower tier municipality in the comparator group, which explains why the volume of applications is lower than the County comparators.

% Change in Expenses Between 2020 to 2021			
Lanark	Leeds and Grenville	Renfrew	South Frontenac
37%	19%	75%	81%

Historical Consent (Severance) Applications Submitted from 2019 to 2021



Source – KPMG analysis of comparator interviews

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Service Delivery - Revenue from Planning and Development

Historical User Fees and Service Charges Among the Comparator Group

This graph summarizes the total revenue (user fees and service charges from planning & zoning and commercial & industrial services) observed by the comparator group in the years 2019 and 2020.

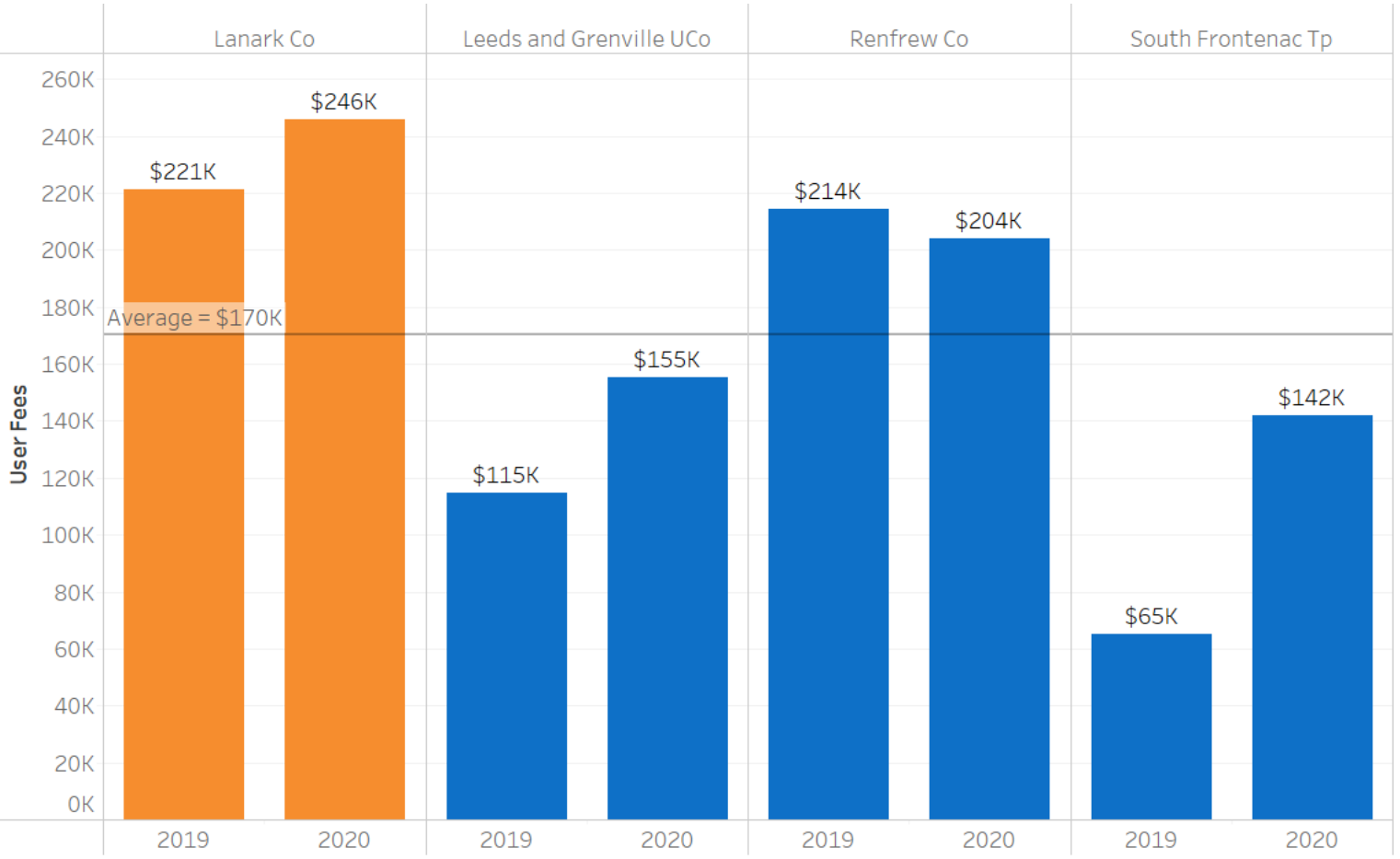
Key Takeaways

Between 2019 and 2020, only Renfrew County observed a decline in revenue from Planning and development services.

Lanark County experienced an increase in revenue services of $25k, which represents a 11% increase in revenue. The average growth among the comparator group was 42%.

South Frontenac reported the largest increase in revenue which more than doubled from $65k to $142k.

% Change in Revenue Between 2019 to 2020			
Lanark	Leeds and Grenville	Renfrew	South Frontenac
11%	35%	(5%)	119%



Source – KPMG analysis of annual Financial Information Returns Schedule 12

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Service Delivery - Expenses from Planning and Development

Historical Expenses (Before Adjustment) Among the Comparator Group

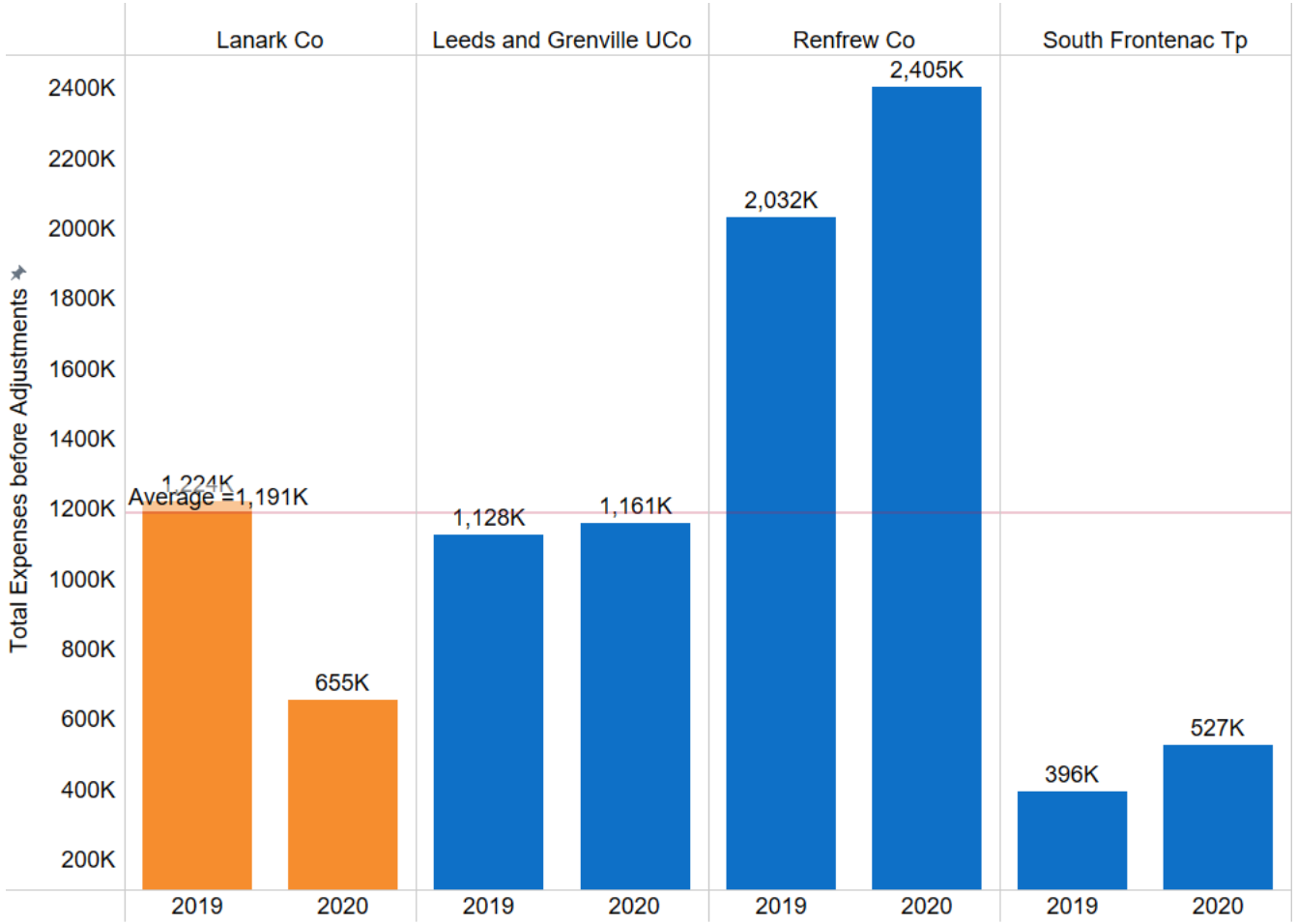
This graph summarizes the total expenses (expenses before adjustment from planning & zoning and commercial & industrial services) observed by the comparator group in the years 2019 and 2020.

Key Takeaways

Between 2019 and 2020, Lanark County was the only comparator that saw a decrease in their Planning and Development expenses.

Total expenses before adjustment in the County **fell by 47%** while the comparators **increased by an average of 18%**.

% Change in Expenses Between 2019 to 2020			
Lanark	Leeds and Grenville	Renfrew	South Frontenac
(47%)	3%	18%	33%



Source – KPMG analysis of annual Financial Information Returns Schedule 40

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Service Delivery - Total Planning Revenue and Expense Per Household

Total Planning Revenue and Expense per Household (2020)

This graph summarizes the total revenue and total expenses for each comparator's planning and development services.

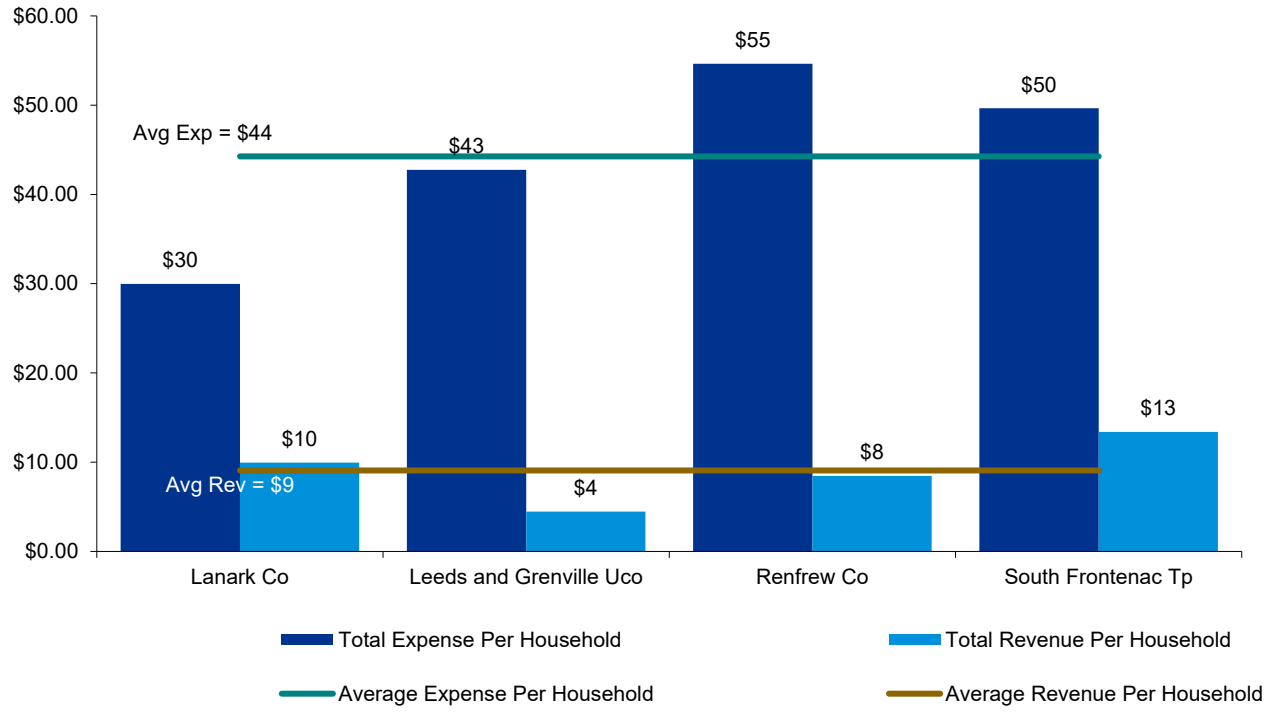
Key Takeaways

Lanark observed the lowest expense per household at a rate of $30 and simultaneously recorded the second highest revenue per household at a rate of $10.

Lanark County observed the highest recovery of planning expenses at 33%. This implies that 67% of the expenses of the department are financed via the County's levy.

Recovery %			
Lanark	Leeds and Grenville	Renfrew	South Frontenac
33%	10%	15%	27%

Total Revenue and Expense for Planning Department Per Household



Source – KPMG analysis of annual Financial Information Returns 2020, Schedule 2, Schedule 12 & Schedule 40

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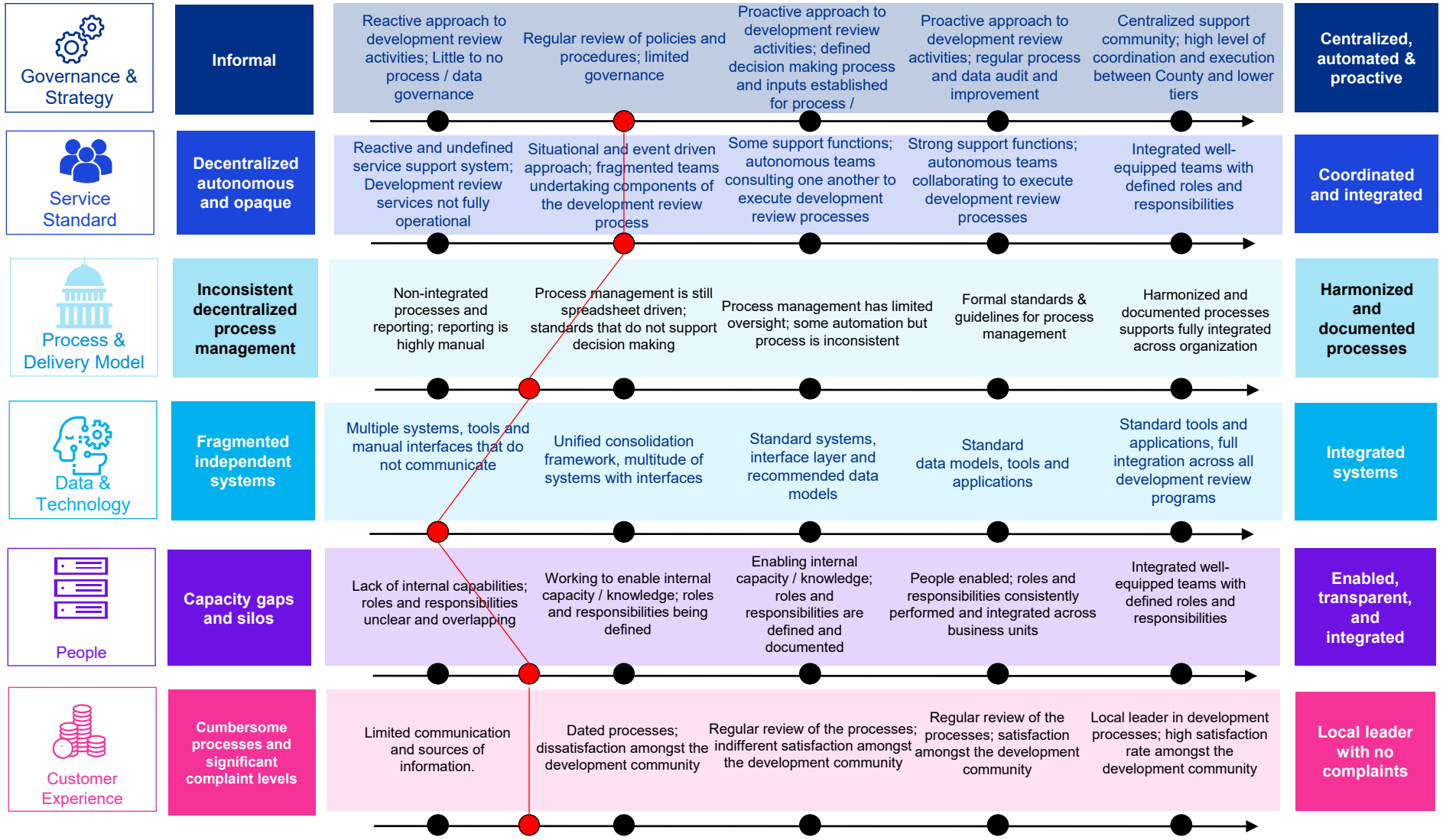
Current State Assessment

Current State Assessment

Summary

A clearly defined current state is key to understanding issues, challenges and pain points within an organizational process or function, and the first step in the identification of business gaps and potential improvement initiatives. The collection, management and use of information within the development review process has been complied and examined within each dimension of the TOM to produce a Current State Assessment.



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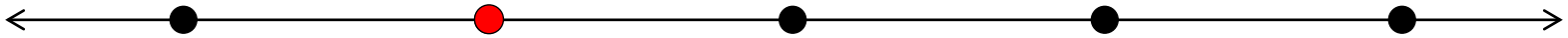
Governance & Strategy

The manner in which strategic direction is provided throughout the County and how collaboration between departments and external stakeholders are established and maintained.

Current State

Governance & Strategy

Informal	Reactive approach to development review activities; Little to no process / data governance	Regular review of policies and procedures; limited governance	Proactive approach to development review activities; defined decision making process and inputs established for process /	Proactive approach to development review activities; regular process and data audit and improvement	Automated, risk-based preventive and proactive approach continuously evolving	Centralized, automated & proactive



Theme	Current State Findings

Process Governance	• All stakeholders recognized that the County's Planning department is seeing unprecedented growth and there is an opportunity to reduce red tape and bureaucracy through digitization and improved technology.
	• The County has developed and updated several resources that outlines the Development and Land Use application approval and review process (e.g., flowchart, checklists, FAQs, etc.).
	• County stakeholders indicated that there might be merit in having a single Official Plan for the entire County. Lower tier municipalities had mixed opinions about having a single OP.
	• It was noted that processes and procedures vary across the lower tier municipalities; and the County staff has to be aware of the nuances across each lower tier municipality.
	• Planning services are provided by both the County and the lower-tier municipalities, however the County manages the Land Division Committee.
	  • The County has the authority to approve consents (severances), plans of subdivision and condominium, condominium exemptions, part-lot control by-laws, local Official Plan Amendments and local Official Plan 5-year Review.
	  • Lower tiers receive and initiate applications (e.g., pre-application consultation for severance applicants) before signing off and sending applications for approval to the County.
	  • Consent applications report to the Land Division Committee. Subdivision, condominium and official plan amendment application report to the Economic Development Committee of Lanark County Council.

Document Governance	• Planning applications are available on the County's website and hard-copies are available at municipal offices for all external applicants. • High reliance on hard copy documentation; the County receives all applications in hard copy, email and/or USB format. This increases the administrative burden on the Planning staff (e.g. all hard copies are scanned and saved on the network drive). • The County has recently updated their reporting (reducing length of reports) to the Land Division Committee using CGIS/Word functionality saving staff time and effort. • The County Planning staff are responsible for file management and overall meet the legal compliance requirements. However, overall file management and record keeping needs to be managed more efficiently (e.g. electronically).
Delegation of Authority	• Multiple stakeholders have expressed positive feedback of the delegation of authority on simple consent applications from the County's Land Division Committee to the County's planners which has relieved some pressure on the County and Land Division Committee. • Stakeholders indicated that there may be an opportunity for further delegated authority.

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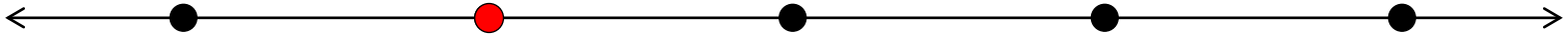
Service Standard

The service standards which dictate how services are delivered; this includes regulatory requirements, Council or management direction and industry best practices.

Current State

Service Standard

Decentralized autonomous and opaque	Reactive and undefined service support system; Development review services not fully operational	Situational and event driven approach; fragmented teams undertaking components of the development review process	Some support functions; autonomous teams consulting one another to execute development review processes	Strong support functions; autonomous teams collaborating to execute development review processes	Centralized support community; high level of coordination and execution between County and lower tiers	Coordinated and integrated



Theme	Current State Findings
Service level targets	• Service standards across the lower-tiers are set at the County level in accordance with the County's SCOP and strategic plan. However, there is no formalized Memorandum of Understanding or Service Level Agreement between the County and the lower tier municipalities.
Service Integration & Coordination	• Stakeholders noted that the planning and development process involves a number of stakeholders (i.e., County, lower tiers and external third parties) which can create confusion for applicants. • The level of communication between the County and lower tier municipalities is inconsistent (e.g. some municipalities have regular touchpoints with County staff while other municipalities meet with County staff only as required). Stakeholders noted that County Planning staff were often unavailable or delayed in responding to inquiries due to the current workload. • There was also limited understanding amongst the lower tier municipalities of each others development application processes. • Unspecified timelines and delayed responses from the County was flagged as a key pain point amongst the lower tier municipalities.
Authority, Approvals, Circulation	• Planning applications are circulated by the County to relevant agencies for comment. All communication is through email or verbal conversations. • The County does not have an automated workflow to manage and track planning applications. The status of development applications is manually tracked using excel spreadsheets. While this method of tracking serves the purpose, it is a labour and time intensive exercise. Lower tiers also track the process at a higher level but are often unaware of the current status of an active application. • The use of a software to automate application tracking could save time and resources.

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Process & Delivery Model

Process and delivery model refers to the core operations, processes, and approaches to deliver the County's services.

Current State

Inconsistent decentralized process management	Non-integrated processes and reporting; reporting is highly manual	Process management is still spreadsheet driven; standards that do not support decision making	Process management has limited oversight; some automation but process is inconsistent	Formal standards & guidelines for process management	Harmonized and documented processes supports fully integrated across organization	Harmonized and documented processes

Theme	Current State Finding

Manual Processes & Workarounds	• Some lower tier municipalities have inconsistent processes and procedures when handling subdivision or consent/severance applications. The discrepancy across the lower tiers often causes confusion, miscommunication and delays in the approval process.
	  • There is an opportunity to streamline and clarify some elements of the process to improve efficiencies.
	  • Most lower tiers lack documented procedures that are customized to their department. In those cases, they often rely on the OP and zoning bylaw documents as high-level guiding tools.
	• There are limited efforts to onboard/train new Planners when they are hired in the lower-tier municipalities which perpetuates informal procedures and more reliance on County Planning staff for support.

Application tracking	• Multiple stakeholders noted that application tracking has been a big challenge with the County. Lower tier municipalities have no visibility over the status of applications and the only way to check application status is to manually contact the County via phone or email. • While applicants often inquire to their local municipality, the local municipality must relay information from the County. The whole process takes time away from lower tier and County staff and effects customer experience.
Formal and documented procedures	• Lower tier municipalities expressed the importance of pre-consultation meetings with applicants. Some lower-tier municipalities indicated the County's role in the preconsultation process is often unclear and not well defined. • Policies and procedures need to be updated with current practices and socialized with the lower tier municipalities.

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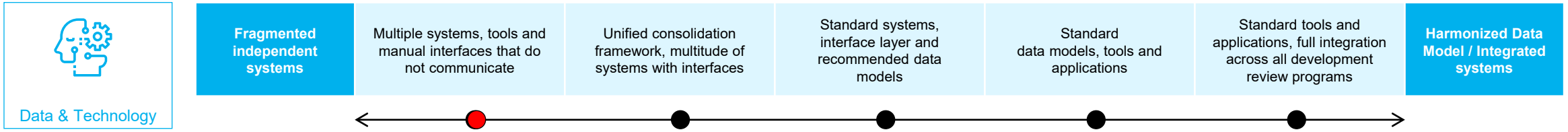
Data & Technology

Data and technology refers to the information technology required to manage information / data and support service delivery.

Current State



Theme	Current State Findings
Centralized Data Access	• Multiple stakeholder acknowledged limited digitization of processes such as records management, application submissions, and payment options. Report writing is mostly done manually in Microsoft Word. While some larger municipalities may have difficulties gathering data for manual reports, the smaller municipalities which receive fewer applications are able to manually aggregate data quickly. • The County Clerk is in the process of implementing SharePoint, a document management and storage software specifically for Council reports.
Analytics Capability	• Without an integrated solution, the County staff does manual tracking of all data and performance metrics (e.g. number of consent applications) • The County, along with several lower tier municipalities, uses CGIS. Stakeholders indicated that CGIS software works well but noted delays in data updates. • Some lower-tier communities have begun using planning software (e.g. CloudPermit is being rolled out in the Town of Carleton Place). There may be an opportunity to consolidate Planning software throughout the County.
Technology Architecture	• The Planning department does not utilize an integrated solution to intake and manage planning applications. • Stakeholders have expressed concerns regarding limited information being available through the County's website as well as lower-tier municipal websites that could assist in informing applicants of expectations for service standards, preparation for pre-consultation meetings, channels of communication, etc. • Cheques and bank drafts are the only modes of payment for the Planning Department; stakeholders indicated there is an opportunity to explore options for accepting online payments. • The County started conducting the Land Division Committee online during the pandemic and the process has continued. The virtual committee was well received by all stakeholders.

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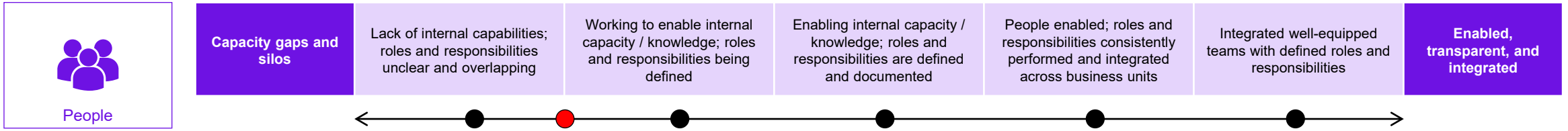
Current State Assessment

People

The structure, reporting and accountability hierarchy, composition, capabilities, and skills of County employees to meet service standards.

Current State



Theme	Current State Findings
Leadership & Culture	• Stakeholders noted that roles & responsibilities of experienced staff are well understood, however turnover in critical positions (i.e., lower tier planning staff) can create unclarity around County processes. Further clarity around the County's role for planning and development could be useful at the lower tier level and with elected officials. • Elected officials recognize the efforts of the Planning service team throughout the County to handle planning and development matters in light of increased service delivery.
Change Management	• Staff at the County and lower tiers are willing to adapt to new digital processes to streamline application review however, there are some concerns that residents might be resistant to digitization due to limited access/experience with technology (particularly in rural areas with limited internet connectivity as well as senior demographics).
Talent Strategy & Capability	• Growth in the community, changing needs of applicants and the increased volume and complexity of planning applications has created capacity constraints within the department. • Recent turnover at the lower tier municipalities and commenting agencies has increased workload for County's planning staff. • Additional training may be required to enable more internal capacity and knowledge. • After the hiring of a second Planner at the County, multiple internal stakeholders observed improvements to service delivery including response times and quality of communication. • All lower tier municipalities appreciated the County planners support and willingness to work together; and indicated that County needs additional staff to efficiently meet service delivery requirements. Service delivery was specially impacted when the County planners went on planned or unforeseen absences. • Some stakeholder indicated there might be benefit in dividing County staff workload geographically.

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Customer Experience

The perceptions and experiences from the perspective of customers from end-to-end.

Current State

Cumbersome processes and significant complaint levels	Limited communication and sources of information.	Dated processes; dissatisfaction amongst the development community	Regular review of the processes; indifferent satisfaction amongst the development community	Regular review of the processes; satisfaction amongst the development community	Local leader in development processes; high satisfaction rate amongst the development community	Local leader with no complaints

Theme	Current State Findings
Communication and Expectations	• Roles and responsibilities between the County and the lower-tier municipalities are unclear to applicants. In most cases, applicants direct all inquiries to the lower-tier municipalities either because lower tier municipalities are more accessible or the applicants expect the lower tier municipality to have answers to their queries. • Information regarding applicant procedures is either limited, inaccessible, or unavailable on the County website as well as most lower-tier websites. There is an opportunity to develop the County and lower-tier websites to provide more information to applicants prior to initiating the application process. • In urban lower-tier municipalities, the majority of applicants are experienced developers which has contributed to lower workload and less “hand-holding” than in rural areas which have proportionally more inexperienced individual applicants. • Multiple stakeholders interviewed expressed that the majority of application issues can be identified or resolved in pre-consultation meetings.
Complaint Management	• Constantly addressing inquiries and complaints received via phone or email contributes to the workload of County and municipal staff. • Applicants are often unaware of expectations regarding application status updates, turnaround times etc. Resultantly, lower-tier Planning departments often receive inquiries and complaints from applicants throughout the approval process. • The majority of complaints received pertain to the lengthy process from application submission to formal approval. • Stakeholders noted that the County should implement a more proactive approach to communicating development processes to reduce complaints and inquiries.
Integrated Payment Solutions	• The County currently only accepts cheque as a mode of payment which needs to either be submitted in-person or mailed to the Planning department • Application fees are required for services provided by the County, lower tier municipalities and Conservation Authority. The process for fee collection is different throughout the County. For example, in some instances the County collects all fees and distributes it on behalf of the applicant. In other instances, the Agencies collect fees directly from the applicant directly.

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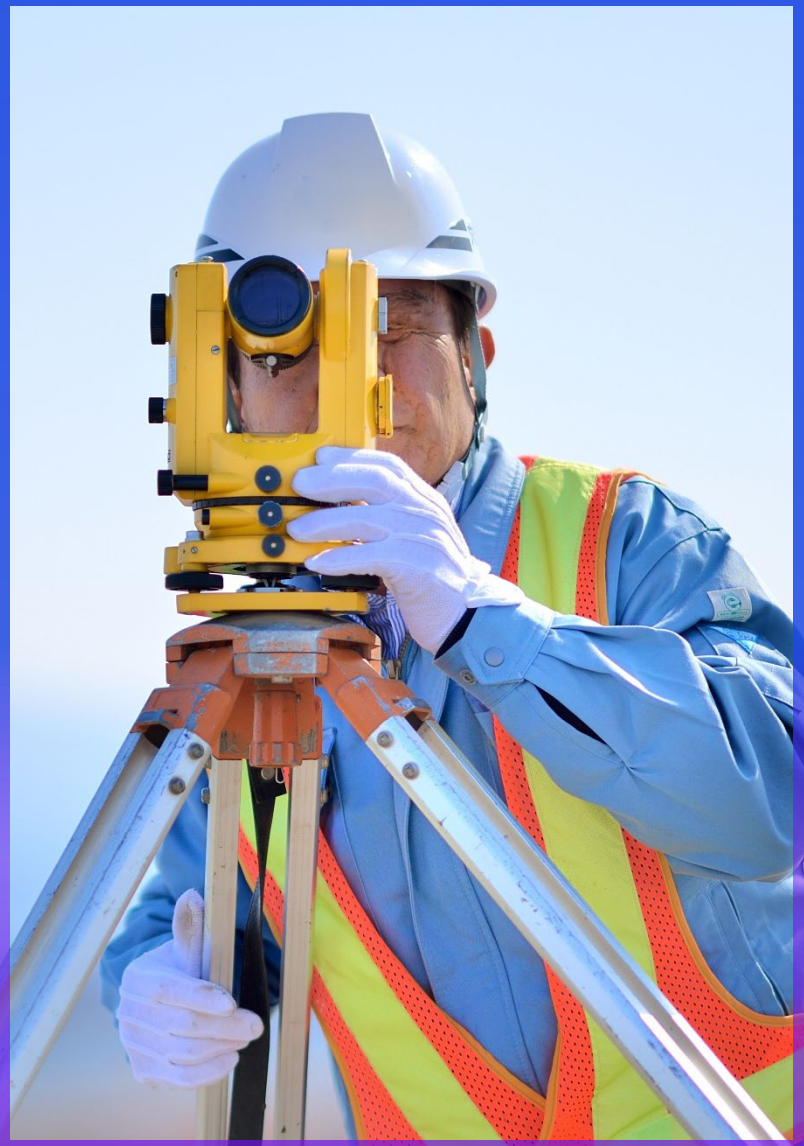
Appendix C: Process Maps



County of Lanark

Planning Department Review

Final Report

Consent (Severance) Approval Process- The County of Lanark

Consent (Severance) Approval

Land Registration

Applicant

Start

Applicant requests Pre-Submission Consultation with Local Municipality

Applicant gathers required submission material

Applicant submits application fee and material to Lower Tier for review

1

Applicant prepares and submits outstanding material to County

Applicant addresses Consent conditions

Applicant prepares new land survey; applicant lawyer prepares deed

Applicant lawyer registers new parcel of land

Lower Tier Planning

Local Planner holds Pre-Submission Consultation Meeting

Local Planner provides applicant list of required submission material

Local Planner reviews application material for completeness

Local Planner signs off that consultation was performed and application material is complete from lower tier's perspective. Local Planner may list other material or studies that the applicant needs to complete after formal submission. Objective is to reduce the need of revisions/resubmissions

Applicant or Local Municiaplity submits application package to County

Local Planner signs the Application Form of completing preliminary severance review

Lower Tier and Agencies inspect conditions are satisfied

Lower Tier and Agencies provide Clearance Letters to County

Planning Department

County Planning Local Drive

County receives application, creates tracking file, and process fees

County Planner reviews application package

Inform applicant and local municipality of incomplete application

1

No

Application complete?

Yes

Majority of applications are submitted in hard-copy with cheque payments. Larger files may submit application material in digital format.

Circulate to Conservation Authority and Health Unit for comments

Close application file

End

Share comments with applicant and local municipality of unfeasible case

Yes

Material concern of feasibility?

No

Circulation application to all other commenting agencies (20-day window)

Issue public notice of application and inform nearby property owners

Collect and track agency and public comments

County Planner prepares staff report

Contentious application?

Yes

No

County Sr. Planner approves application

County issues Notice of Public Meeting

County holds Land Division Committee meeting

Deferred decision?

No

Yes

Notify applicant of deferral and LDC requested information

1

Notice of Decision issued to applicant

Issue Notice of Decition

20-day appeal period

Appeals?

No

Yes

Follow OLT appeal process

End

Issue Notice of No Appeal

Consent granted with conditions

County monitors clearance of conditions (2-year window)

Close file based on OLT decision

County may rescind consent if conditions are not met in 2 years – Applicant can request extension

County verifies all conditions are met

County stamps deed for land transfer

CGIS

County receives proof of registration

County updates CGIS data

Finalize file records and add document reference link to CGIS database

End

Success in process improvement:
County Sr. Planner now has delegated authority to approve non-contentious consents that meet a set of criteria (e.g., comply with Official Plans and provincial policies and regulations, no zoning amendments, no agency or public comments/concerns/objections, etc.).

Process improvement opportunities:

A. Update County policies and procedures:
   1. Lower tier municipalities adopt consistent pre-submission consultation procedures. County clarify expectations (e.g., application checklist and studies to be completed before submission).
   2. Streamline commenting agencies review process to reduce multiple circulations; some agencies prefer to see Conservation Authority and Health Unit comments first. Consider using a portal to share agency comments in real time.
   3. Update County website to better educate applicants of the consent process.

B. Same as the Subdivision Approval Process, explore digital tools for electronic submission of application and status tracking.
   1. Consider updating CGIS more frequently to communicate file status

Consent (Severance) Application Approval Process - The Municipality of Mississippi Mills

Applicant

The Municipality requires all inquiries to be documented by submitting the form – assists with tracking and consistency

Start

Applicant submits the Mississippi Mills Consent Inquiry Form

Applicant prepares application material

1

Applicant works with Township to modify application

Applicant submits application package and fee to the Township

2

Applicant works on clearing conditions

Mississippi Mills Planning Services

CGIS

Planning Admin receives form and saves data into CGIS to track inquiry

Local Planner assesses feasibility of severance proposal

4 weeks to respond.

Provides Planning response on Consent Inquiry Form back to applicant

Local Planner reviews application to ensure there are no conflicts with planning policies

Policy concern?

No

Local Planner signs application form of completing preliminary severance review

Yes

Inform applicant of policy concern

1

Municipality inspects conditions have been cleared

Municipality issues clearance letter to County

County's Land Registration process

County Planning Services

County reviews application and process fees

County deems application complete

County circulates application to all commenting agencies

Local Planner provides Township report on comments and conditions

County issues Notice of Application and notifies nearby property owners

County collects comments from all agencies

County shares consolidated comments with applicant and all agencies

County issues Notice of Public Meeting and prepare LDC report

Yes

Contentious?

No

County Sr. Planner approves application

Land Division Committee hearing

Issue Notice of Decision (20-day appeal period)

Appeal?

Yes

Follow OLT procedures and process file based on outcome

No

Issue Notice of No Appeal

Consent granted with conditions (2-year window)

2

Issue Notice of Decision to applicant

End

Process Improvement Opportunities:

A. More communication and clarity of application status. The Municipality has been emailing the County Planning Admin to acknowledge receipt of application or to inquiry application status.
B. More collaborative approach to share comments more timely between commenting agencies.
C. Notification of when the Municipality's application file will be presented to the Land Division Committee so the lower tiers can actively listen in to the meeting. The current workaround is to download all LDC agendas and the County's Planning reports after the LDC meetings.
D. Include drawings or maps in County's Notice of Decision to better understand the application background.
E. Clarify how often the County's CGIS data is updated.

Digital Tools used at Mississippi Mills

- CGIS to track application files
- SharePoint for file management

Consent (Severance) Application Approval Process - Tay Valley Township

Applicant

Start

Applicant contacts the Township to inquire potential consent application

Applicant schedules pre-submission consultation meeting

Applicant prepares application material

Applicant submits application package and local fee to the Township

Applicant works with Township to modify application

1

Applicant submits application package and fees to County

The Township is no longer aware of the status of the file without manually following-up with the County

2

Applicant works on clearing conditions

Tay Valley Planning Services

Refer applicant to contact County to search for land division records

Local Planner assesses feasibility of severance proposal

Local Planner provides list of required application material

Local Planner reviews application to ensure it meets policy and all required studies are completed

Application concern?

No

Yes

Inform applicant of concern

1

Local Planner signs application form of completing preliminary severance review

Process local planning fees

Local Planner provides Township report on comments and conditions

Local Planner provides mailing list

Township inspects conditions have been cleared

Township issues clearance letter to County

County's Land Registration process

County Planning Services

County provides severance history

The Township does not have access to view the County's CGIS records property and severance history.

County reviews application and process fees

County deems application complete

County circulates application to all commenting agencies

County issues Notice of Application and notifies nearby property owners

County collects comments from all agencies

County shares consolidated comments with applicant and all agencies

Contentious?

Yes

No

County issues Notice of Public Meeting and prepare LDC report

Land Division Committee hearing

Issue Notice of Decision (20-day appeal period)

Appeal?

Yes

No

Follow OLT procedures and process file based on outcome

Issue Notice of No Appeal

Consent granted with conditions (2-year window)

2

County Sr. Planner approves application

Issue Notice of Decision to applicant

End

Process Improvement Opportunities:

A. Consider digitizing application submission and review procedures to better management review timelines.

B. Improve communication between County and lower tiers on application status, including access to the County's CGIS data. There is opportunity to share other agency comments more timely and to ensure conditions are captured wholistically.

C. Clarify application procedures and improve public education (e.g., website updates) of application requirements and steps.

Consent (Severance) Approval Process - The Township of Drummond North Elmsley

Applicant

Start

Applicant contacts the Township to inquire potential consent application

General/informal inquiry of the process, application requirements, Township policies, etc.

Applicant prepares application material

Applicant works with Township to modify application

1

Applicant submits application package and local fee to the Township

Applicant submits application package and fees to County

Before singing off, there is an effort to find all the contentious issues before the fee needs to be paid for an application. This, however, can be very time consuming before it even reaches the County.

2

Applicant works on clearing conditions

Drummond North Elmsley Planning Services

Local Planner assesses feasibility of severance proposal

Assesses if there are any contentious elements (e.g., property search of GIS data and severance history) to the proposed property.

Application feasible?

Yes

No

End

Local Planner provides list of required application material

Local Planner reviews application for completeness and accuracy

Complete necessary studies as part of application package

Application complete?

Yes

No

1

Inform applicant of incomplete application

Local Planner signs application form of completing preliminary severance review

List additional studies as conditions

Local Planner provides Township report on comments and conditions

Local Planner provides mailing list

Township inspects conditions have been cleared

Township issues clearance letter to County

County's Land Registration process

County Planning Services

Process Improvement Opportunities:

A. Clarify what studies and reports need to be completed as part of application package. Also clarify what studies and reports the lower tiers need to review as part of pre-submission consultation process.
B. Improve communication of application status and when the new lot is registered.
C. Clarify guidance/checklist of what "contentious" means. Public often interpret the Township's sign-off as application approval. The consultation process is significant and a lot of weight is put on lower tiers to flag issues early on.
D. Update County guidance information and streamline/simplify the process - The website could be improved to better educate applicants. The Township has access to the County's CGIS data; however, access may not be consistent across the lower tier municipalities. Consider electronic file-sharing practices between the County and lower tiers.

County reviews application and process fees

County deems application complete

County circulates application to all commenting agencies

County issues Notice of Application and notifies nearby property owners

County collects comments from all agencies

County shares consolidated comments with applicant and all agencies

Contentious?

Yes

No

County issues Notice of Public Meeting and prepare LDC report

County Sr. Planner approves application

Land Division Committee hearing

Issue Notice of Decision to applicant

Issue Notice of Decision (20-day appeal period)

Appeal?

Yes

No

Follow OLT procedures and process file based on outcome

End

Issue Notice of No Appeal

Consent granted with conditions (2-year window)

2

Consent (Severance) Application Approval Process - Beckwith Township

Applicant

Start

Applicant contacts the Township to inquire potential consent application

Applicant prepares application material

Applicant submits application package and local fee to the Township

Applicant submits application package and fees to County

1

Applicant works on clearing conditions

Beckwith Planning Services

Local Planner assesses feasibility of severance proposal

Application feasible?

Yes

Local Planner provides list of required application material

No

End

Inform applicant of Township's decision to not support application

Local Planner reviews application

Prepare report for Township Planning Committee review

Committee approval?

No

Yes

Local Planner signs application form of completing preliminary severance review

Local Planner provides Township report on comments and conditions

Local Planner provides mailing list

Township inspects conditions have been cleared

Township issues clearance letter to County

County's Land Registration process

County Planning Services

County reviews application and process fees

County deems application complete

County circulates application to all commenting agencies

County issues Notice of Application and notifies nearby property owners

County collects comments from all agencies

County shares consolidated comments with applicant and all agencies

Contentious?

Yes

No

County Sr. Planner approves application

County issues Notice of Public Meeting and prepare LDC report

Land Division Committee hearing

Issue Notice of Decision (20-day appeal period)

Appeal?

Yes

Follow OLT procedures and process file based on outcome

No

Issue Notice of No Appeal

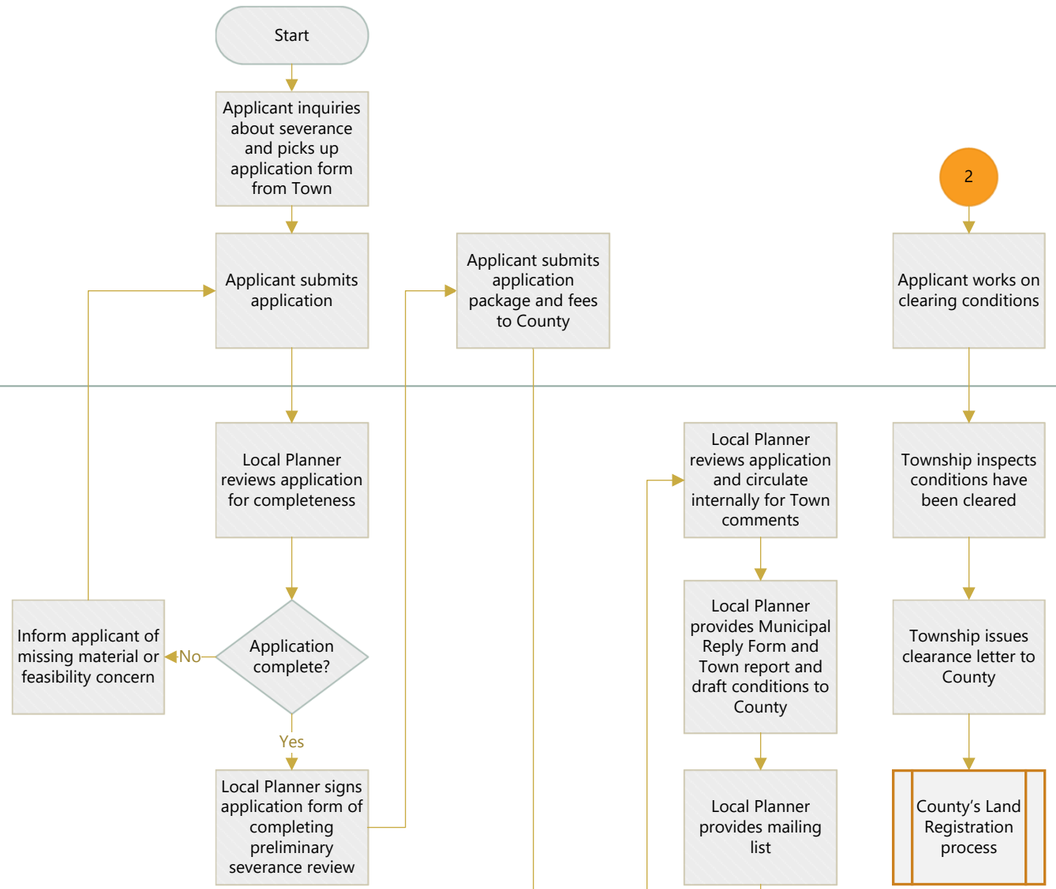
Consent granted with conditions (2-year window)

1

Issue Notice of Decision to applicant

End

Consent (Severance) Approval Process - The Town of Perth



Process Improvement Opportunities:

A. Clarify which studies are required upfront to be considered as complete submission, and which studies can be conditions and the deadlines to complete these studies. The County could update its Official Plan or Development Guidelines regarding these requirements to facilitate consistency among the lower tier municipalities.

B. Both the County and the Lower Tiers need to document standard operating procedures.

C. Digitize application review procedures:

1. Utilize electronic file-sharing tools instead of email to share and communicate application information.
2. Clarify when and how frequent the County updates its CGIS data. Allow lower tiers to view the County layer data.

D. Improve communication of application status:

1. The Town is not always included in all communications between the County and the applicant.
2. The Land Division Committee sometimes change or remove Town conditions without further consultation. On the other hand, the Town needs to provide more explanation of its conditions.
3. After the Town issues Clearance Letters, the Town does not receive notice of land registration. The is a time lag (6-24 months) of MPAC data updates. This can cause delays or gaps in the building permit approval process.

Consent (Severance) Approval Process - The Township of Montague

Applicant

Start

Applicant inquires eligibility of severance proposal

Applicant prepares application material

Applicant submits application package and local fee to Montague

Use excel spreadsheet to track all files. Each application has a tracking checklist

Applicant works with Township to modify application

Applicant resubmits application

Applicant submits application package and fees to County

1

Applicant works on clearing conditions

Montague Planning Services

Local Planner reviews policies and County GIS data of eligibility

Local Planner holds Pre-submission Consultation Meeting

Local Planner provides list of required application material

Montague receives application, creates tracking file and process fee

Local Planner reviews application for accuracy and completeness

Review if meeting local policies or if required studies are completed before application submission

Application complete?

No

Yes

Provide review comments to applicant

Lists studies that need to be completed upfront as part of application submission or as a condition. Township now does septic review.

Local Planner reviews revised application and deems complete

Township commissions application; Local Planner signs application form of completing preliminary severance review

Local Planner lists required studies to be submitted to the County on the application form

Local Planner provides report to County on comments and conditions

Local Planner provides mailing list to County, publish report on Township website

Township inspects conditions have been cleared

Township issues clearance letter to County

County's Land Registration process

Process Improvement Opportunities:

A. Clarify when studies are required to be completed – suggest as an application requirement before a file can be deemed complete. This creates more transparency for all agencies when commenting files. Also drives more process consistency across the county.
B. Improve communication between upper and lower tier planning departments in terms of the status of application files.
C. Refresh County website information of application forms, procedures, timelines, roles and responsibilities. Applicants are often unaware of approaching condition deadlines; it is unclear who is responsible to follow up.
D. Digitize application review procedures, e.g., digital submission of application material, online payment, notification of file status, and file sharing tools with commenting agencies

County Planning Services

County reviews application and process fees

Circulate application to agencies for comments with deadline

County issues Notice of Application and notifies nearby property owners

County collect comments from agencies

County shares consolidated comments to applicant and all agencies

Contentious?

Yes

No

County issues Notice of Public Meeting and prepare LDC report

County Sr. Planner approves application

Land Division Committee hearing

Issue Notice of Decision to applicant

Issue Notice of Decision (20-day appeal period)

End

Appeal?

Yes

No

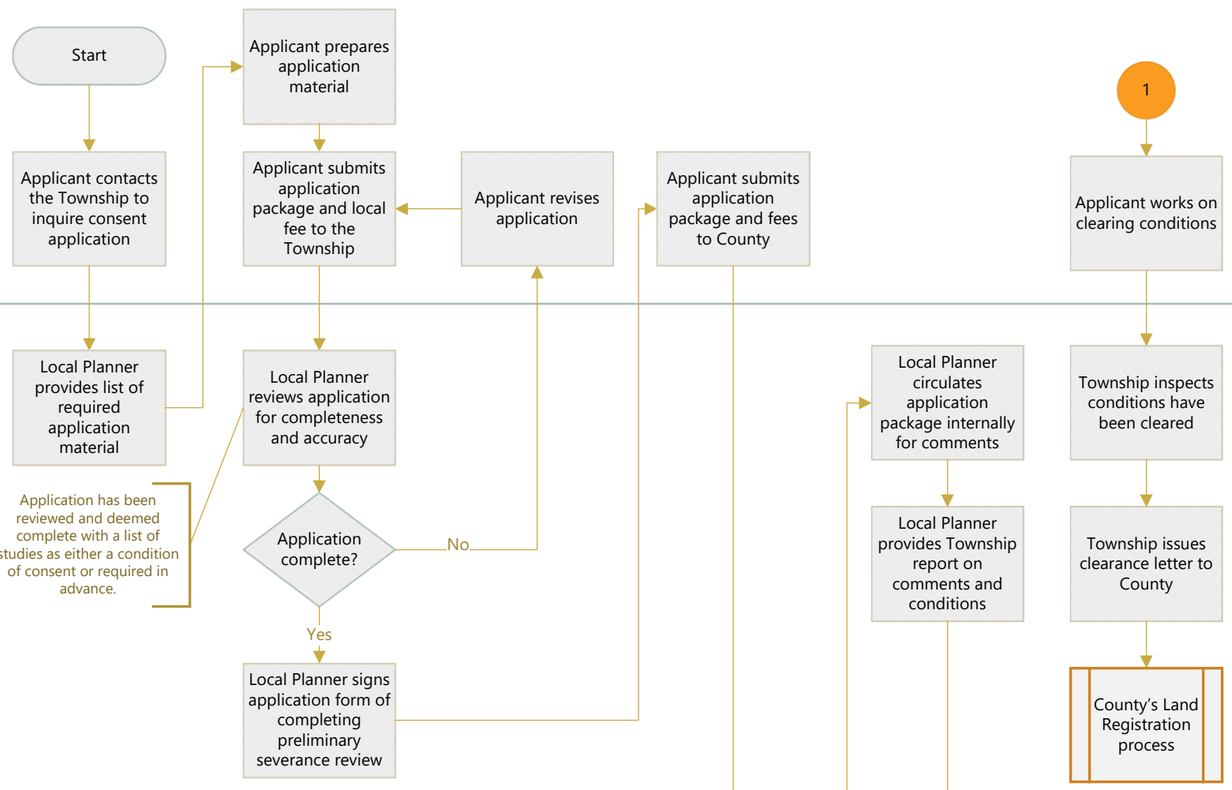
Follow OLT procedures and process file based on outcome

Issue Notice of No Appeal

Consent granted with conditions (2-year window)

1

Consent (Severance) Approval Process - The Township of Lanark Highlands



Process Improvement Opportunities:
Pre-submission consultation are mostly held in person by appointments with the Planning Consultant. The Township would like further clarification regarding:
A. Payment procedures – some applicants will drop off application payments at the Township.
B. Sharing comments from other agencies to avoid conflicting feedback or conditions. Ensure all Township conditions are consolidated into County's conditions for consent.
C. Communication of application status.
D. Communication of updated land registry data – timely informing the lower tiers that the deeds for new lots are stamped.
E. Access to the County's layer of CGIS data.

Subdivision Application Approval Process- The County of Lanark

Draft Plan Approval

Plan Registration

Applicant / Developer

Start

Developer requests Pre-submission Consultation Meeting

1

Developer prepares necessary application material

Developer submits subdivision application and fees to County

5 hard copies and 5 USBs of all application material. All fees are collected via cheque. Fees include payment to County, Conservation Authority, Township, and Health Unit

Developer addresses review comments

Developer addresses comments; sometimes works directly with agencies

Multiple types of conditions need to be met prior to registration of Subdivision Plan, such as zoning amendment, grading and site alteration, engineering servicing drawings, etc.

Developer addresses Draft Plan Conditions

Developer prepares Subdivision Plan (M-Plan) for final approval

Planning Services

County Planner coordinates Pre-submission Consultation Meeting

County holds Pre-submission Consultation Meeting with applicant

County compiles and sends meeting notes and application checklist to all participants

County Planning Local Drive

County receives application, creates tracking file, and process fees

File tracking and review comments done in excel/ word

County Planner reviews application

Application complete?

No

Informs applicant of incomplete application

1

Yes

County Planner reviews comments and shares comments with applicant

30-day timeline to collect agency and public comments

Issue public notice of application to nearby property owners and on County website

Issue Notice of Application and circulate application material to commenting agencies

County coordinates public meeting with local municipality

County issues Notice of Public Meeting

Local municipality hosts public meeting

County compiles and tracks public meeting comments

County compiles public meeting comments; Lower Tier prepares minutes

County sends Status Report to applicant and local municipality

Yes

Agencies inform County of conditions and whether comments are addressed

County prepares Technical Report summarizing application and Draft Plan conditions

Present Technical Report at Economic Development Committee (EDC) meeting for recommendation

EDC provides recommendation to County Council

County Council reviews and approves EDC recommendations

Issue Notice of Decision

20-day appeal period

Appeals?

No

Issue Notice of No Appeal

Yes

Follow OLT appeal process

Close file based on OLT decision

End

County issues Draft Plan Approval (granted for 3 years)

County monitors clearance of conditions (3-year window)

Lower Tier Municipality enters into Subdivision Agreement

End

Agencies inspect conditions are satisfied

Agencies provide Clearance Letters to County

County CAO signs Subdivision Plan as final approval

County registers Subdivision Plan with Ontario Land Registry Office

Lower Tier Municipality registers Subdivision Agreement

File is transferred to Lower Tier to initiate Site Plan Approval process

End

Process improvement opportunities:

A. Formalize pre-submission consultation meeting procedures and documents required in advance to the meeting. For example, require submission of a Pre-submission Consultation Meeting request form, concept plan, and other preliminary background information.

B. There is opportunity to implement a timeframe limit between the pre-submission consultation meeting and the formal application submission date to avoid information to become outdated (e.g., one year timeframe or list expiration date of consultation comments).

C. Implement electronic payment options. The County currently only accepts cheque payments. Improve tracking of fee collection between Planning and Finance.

D. Explore digital tools for electronic submission of application and status tracking.

1. Refresh the County's subdivision forms, policies, and application review procedures (e.g., accept online/ electronic submission of applications).
2. The County is implementing SharePoint and there is an opportunity to explore SharePoint functions for electronic file management.
3. Improve communication of application status with lower tier municipalities by establishing a more formal tracking process. For example, using a "shared" tracking spreadsheet with the lower tier planners. SharePoint has functionality to share files with external users.

Subdivision Application Approval Process - The Municipality of Mississippi Mills

Applicant / Developer

Start

Developer contacts the Town of subdivision proposal

Developer contacts the County to set up pre-submission consultation meeting

Developer prepares necessary application material

Developer amends proposal to address comments

Developer contacts the Town to discuss amendments

Developer submits revised application to County

Developer addresses public comments

Developer addresses Draft Plan Conditions

County Planning Services

County coordinate and host the pre-submission consultation meeting

County Planner documents meeting notes and notifies applicant of submission requirements

County organizes meeting with Developer. Mississippi Mills participates and provides pre-submission comments to County to share with the Developer

County receives application, creates tracking file, and process fees

County reviews application for completion

Issue Notice of Application and circulate application to commenting agencies

County sends consolidated comments to applicant and agencies

County collect comments from all agencies

County receives revised application package

County issues public notice of application to nearby property owners and on County website

County collects public comments

County provides public comments to applicant and agencies

County coordinates public meeting with Mississippi Mills

After 20-day appeal period

County issues Notice of No Appeal

County presents application to EDC/County Council and issues Notice of Decision

Finalize draft conditions, issue Draft Plan Approval

County Plan Registration process

Mississippi Mills Planning Services

Local Planner discusses feasibility and local policy requirements

Applicant discusses the feasibility of subdivision proposal with the municipality

Local Planner and internal departments review application

Local Planner emails comments to County

Local Planner provides review changes to address comments

The objective is to clear as many comments as possible before the public meeting

Mississippi Mills holds public meeting

Local Planner prepares technical report, draft conditions, subdivision agreement

Present draft conditions and subdivision agreement to Local Council for approval

Local Planner sends lower tier report and conditions to County

Work with Developer to ensure conditions are met

Issue Clearance Letter to County

Execute subdivision agreement

Process Improvement Opportunities:

A. Improve website information on the subdivision application and approval process.
B. Establish SOPs at the County level and at Mississippi Mills
C. Digitize file management processes to create staff capacity at both upper and lower tier, specifically on sharing review comments and communicating application status.
D. There is opportunity for the County to provide more policy guidance instead of administrating files.
E. Reassess the County's staff levels. Currently, the County has only one Planner managing subdivision application files. If the County hires more Planners, consider assigning geographical responsible areas to further collaborate with local municipalities.

Subdivision Application Approval Process - Tay Valley Township

Applicant / Developer

Start

Developer contacts the County to set up pre-submission consultation meeting

Developer prepares necessary application material

Developer submits application package

Developer works on addressing comments and sends revisions to County

Developer addresses public comments

Developer addresses Draft Plan Conditions

County Planning Services

County coordinate and host the pre-submission consultation meeting

County Planner documents meeting notes and notifies applicant of submission requirements

County receives application and process fees

County reviews application for completion

Issue Notice of Application and circulate application to commenting agencies

County sends consolidated comments to applicant and agencies

County collect comments from all agencies

County receives revised application package

County issues public notice of application to nearby property owners and on County website

County collects public comments

County provides public comments to applicant and agencies

County coordinates public meeting with Tay Valley

After 20-day appeal period

County issues Notice of No Appeal

Finalize draft conditions, issue Draft Plan Approval

County presents application to EDC/County Council and issues Notice of Decision

County Plan Registration process

Tay Valley Planner Services

Township participates in the consultation and provides pre-submission comments

Comments focus on studies that the Developer needs to complete as part of application submission

Local Planner and internal departments review application

Local Planner emails comments to County

Tay Valley Township has not processed a subdivision application in the past 8 years due to limited water and sewer infrastructure with a highly vulnerable aquafer and commuting distance to the City of Ottawa.

Tay Valley holds public meeting

Local Planner prepares technical report, draft conditions, subdivision agreement

Present draft conditions and subdivision agreement to Local Council for approval

Local Planner sends lower tier report and conditions to County

Work with Developer to ensure conditions are met

Issue Clearance Letter to County

Execute subdivision agreement

Subdivision Application Approval Process - The Town of Carleton Place

Applicant / Developer

Start

Developer contacts the Town of subdivision proposal

Developer contacts the County to set up pre-submission consultation meeting

Developer prepares necessary application material

Developer amends proposal to address comments

Developer contacts the Town to discuss amendments

Developer submits revised application to County

Developer addresses additional comments

If extension requires major changes to draft plan, then changes will need to go through the review process again

1

Developer addresses Draft Plan Conditions

Extension needed?

No

Developer requests inspections

Yes

County Planning Services

County invites all relevant agencies; applicant brings concept plan for discussion

County coordinate and host the pre-submission consultation meeting

County Planner documents meeting notes and notifies applicant of submission requirements

County receives application, creates tracking file, and process fees

County reviews application for completion

Issue Notice of Application and circulate application to commenting agencies

County sends consolidated comments to applicant and agencies

County collect comments from all agencies

County receives revisions and updates tracking file

County Planner reviews amendments and re-circulate application to commenting agencies

County provides consolidated comments to applicant and agencies

County collects public and other agency comments

County issues public notice of application to nearby property owners and on County website

County coordinates public meeting with Carleton Place

After 20-day appeal period

County issues Notice of No Appeal

Finalize draft conditions, issue Draft Plan Approval

County presents application to EDC/County Council and issues Notice of Decision

County evaluates extension request

Extension approved?

Yes

1

No

Draft Plan Approval expired

End

Carleton Place Planning Services

Local Planner provides informal, high level policy requirements

OneDrive (Microsoft SharePoint)

Carleton Place creates local tracking file

Local Planner emails comments to County

Local Planner provides informal consultation to review amendments

Carleton Place reviews amendments

Evaluate against local Official Plan, zoning bylaw, etc. Special studies: hydrogeological report, servicing and stormwater management report, transportation impact study, etc.

Local Planner and internal departments review application again local policies

Local Planner and internal departments review special studies

Yes

Additional comments?

No

Inform County of no further comments; provide mailing list

Carleton Place holds public meeting

Carleton Place documents meeting minutes and attendance list

Consolidates all other agency comments into subdivision agreement

Local Planner prepares technical report, draft conditions, subdivision agreement

Present draft conditions and subdivision agreement to Carleton Place Council for approval

Local Planner sends lower tier report and conditions to County

Carleton Place inspects developer work

Execute subdivision agreement and issues clearance letters

County Plan Registration process

Process improvement opportunities:

A. The Town would like delegated authority as vast amount of administrative work is done by the lower tier. Alternatively, the County needs more staff capacity to better lead the review of application files.

B. Digitize the process (e.g., digital file submissions, digital payment options). Streamline comments collection, file tracking, and deadline enforcement in a less manual way by refreshing planning manuals and operational procedures. Reduce the effort needed to chase comments.

C. There is opportunity for the County to provide more comments/guidance regarding a specific application's impact to the County's overall development and housing strategies.

Digital tools used at Carleton Place:

- Accepts digital payment for local planning applications
- SharePoint for data management
- Implementing Cloudpermit for building permits and will evaluate whether to implement the planning module.

Subdivision Application Approval Process - Beckwith Township

Applicant / Developer

Start

Developer contacts the County to set up pre-submission consultation meeting

Developer prepares necessary application material

Developer submits application package

Developer works on addressing comments and sends revisions to County

Developer addresses public comments

Developer addresses Draft Plan Conditions

County Planning Services

County coordinate and host the pre-submission consultation meeting

County Planner documents meeting notes and notifies applicant of submission requirements

County receives application and process fees

County reviews application for completion

Issue Notice of Application and circulate application to commenting agencies

County sends consolidated comments to applicant and agencies

County collect comments from all agencies

County receives revised application package

County issues public notice of application to nearby property owners and on County website

County collects public comments

County provides public comments to applicant and agencies

County coordinates public meeting with Beckwith

Finalize draft conditions, issue Draft Plan Approval

County issues Notice of No Appeal

County presents application to EDC/County Council and issues Notice of Decision

County Plan Registration process

Beckwith Planning Services

Town participates in the consultation and provides pre-submission comments

Local Planner and internal departments review application

Local Planner emails comments to County

Beckwith holds public meeting

Local Planner prepares technical report, draft conditions, subdivision agreement

Present draft conditions and subdivision agreement to Local Council for approval

Local Planner sends lower tier report and conditions to County

Review engineering drawings and set security deposits

Conduct site inspections for initial and final acceptance

Issue Clearance Letter to County

Execute subdivision agreement

Beckwith has not processed a subdivision application in recent years. The Township is mostly involved in engineering review and condition inspections of the subdivision approval process.

Subdivision Application Approval Process - The Town of Perth

Applicant / Developer

Start

Developer contacts the County to set up pre-submission consultation meeting

Developer prepares necessary application material

Developer submits application package

Developer works on addressing comments and sends revisions to County

Developer addresses public comments

Developer addresses Draft Plan Conditions

County Planning Services

County coordinate and host the pre-submission consultation meeting

County Planner documents meeting notes and notifies applicant of submission requirements

County receives application and process fees

County reviews application for completion

Issue Notice of Application and circulate application to commenting agencies

County sends consolidated comments to applicant and agencies

County collect comments from all agencies

County receives revised application package

County issues public notice of application to nearby property owners and on County website

County collects public comments

County provides public comments to applicant and agencies

County coordinates public meeting with Perth

After 20-day appeal period

Finalize draft conditions, issue Draft Plan Approval

County issues Notice of No Appeal

County presents application to EDC/County Council and issues Notice of Decision

County Plan Registration process

Perth Planning Services

Town participates in the consultation and provides pre-submission comments

Local Planner and internal departments review application

Local Planner emails comments to County

Perth holds public meeting

Local Planner prepares technical report, draft conditions, subdivision agreement

Present draft conditions and subdivision agreement to Local Council for approval

Local Planner sends lower tier report and conditions to County

Work with Developer to ensure conditions are met

Issue Clearance Letter to County

Execute subdivision agreement

Process Improvement Opportunities

A. Further clarify the submission requirements and expectations (e.g., quality of drawings) for pre-submission consultation.
B. Further sync or streamline County and local level policy requirements, specifically on completion of studies.
C. Clarification on how to address Developer change requests after Draft Plan Approval.
[Note - Perth has not processed a subdivision application in the past 3 years. The Town is mostly involved in engineering review and condition inspections of the subdivision approval process.]

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