

Staff Report P2024-09

Committee 2024-04-08

Council 2024-04-22

Amendments

Submitted To: Committee of the Whole | Council

Submitted By and Prepared By: Summer Valentine, Director of Planning, Building and Economic Development, Peggy Slama, Director of Engineering and Public Works, and Monica Quinlan, Treasurer

Subject: Development Process and Fees Review – Presentation of Final Reports

Recommendation

THAT Report P2024-09, “Development Process and Fees Review – Presentation of Final Reports” dated April 8, 2024, inclusive of the appended Phase One and Two Final Reports and Process Maps, be received as guiding documents for continuous improvement within the development review and approvals system, including the general principle that “growth pays for growth”;

AND THAT staff be directed to return to Council, as resources permit, prior to implementation of any recommendations that require or would benefit from endorsement or further direction to facilitate action as outlined in Report 2024-09.

Amendments

None.

1. Executive Summary

The Town of Collingwood recognizes the need to improve the development review and approval (DAP) process to address community expectations, enhance customer service, achieve efficiencies, work more collaboratively with internal Town Divisions and

external agencies, provide clarity and timely responses to the development industry, and enhance transparency and understanding for the general public. To that end, budget was allocated in 2023 and 2024 to undertake a Development Process and Fees Review (“the Review”), looking at the entire system from planning, through engineering, to building permit issuance and construction, including supporting divisions such as Finance, PRC, Clerks, and Fire Services. Beyond streamlining, the Review estimates the full cost of application processing and provides recommended fee revisions and highlights resource gaps. The Review was undertaken within the context of ongoing significant legislative changes at the Provincial level and with the acknowledgement of the continued housing crisis and the subsequent need for additional supply to come to market expeditiously. The resulting Phase One (Process) and Phase Two (Fees) Final Reports (“the Final Reports”) provide a general path forward for continuous improvement within the development review and approvals system. The information contained within the Final Reports is extensive and substantial. With the current number of vacant positions in the Planning, Engineering, and Environmental Services Divisions, along with a variety of other factors, staff would proceed with internal, operational, and/or minor procedural changes incrementally as resources and time allow. Any major shifts in process, delegated authority, staffing levels, fees, or any other action requiring or benefitting from Council direction would be forwarded under separate cover to Council for endorsement, particularly where there is a budget or development industry impact.

2. Analysis

Background

A DAP review has been a municipal objective for several years, recognizing that a comprehensive concurrent review of development processes and fees has never been undertaken. The Town’s investments in technology, specifically the CityView software, for receiving and processing development applications and permits, as well as the increasing volume and complexity of files and recent legislative changes impacting the planning process (e.g. Bills 13, 109, 23, 97 and 134) combined to increase the urgency for the Review.

A Request for Proposals (RFP) was issued for professional consulting support to undertake the Review in December 2022 and closed in February 2023. Through the Town's procurement evaluation process, Performance Concepts Consulting and Dillon Consulting Limited were selected as the successful consultants ("the Consulting Team") and engaged to assist the Town with the Review. The Consulting Team has 15 years of experience working with over 25 municipalities across Ontario on similar DAP reviews. The project kicked off in March 2023 and in accordance with the RFP, the work was divided into two Phases. Phase One focused on the review and streamlining of DAP processes and Phase Two built on this work to recommend a "right-sized" fee and resourcing structure to support the modernized DAP process. Activity on this project proceeded through the balance of 2023 and was disrupted by staffing shortages in the Planning, Engineering and Environmental Services Divisions, with the Final Reports being delivered in the first quarter of 2024.

Further information on the project methodology for each Phase of the Review is contained in the Final Reports, including summaries of consultation with the development industry, partner agencies, peer reviewers, Council members, and key staff teams. The Final Reports are attached as Appendices A and B respectively.

Defined Project Outcomes

As outlined in the RFP, the project objectives are as follows:

Phase One – Process Review

- Recommend process improvements that are based on industry best practices from comparable municipalities and incorporate compliance requirements of applicable legislative, policy or regulatory changes.
- Processes must utilize technology that supports a fully integrated workflow tool (CityView currently in use), automation and electronic documentation to maximize efficiencies.
- Determine if Town staff have adequate or appropriate delegated authority to efficiently process and, where appropriate, approve or close development applications consistent with legislative requirements.

- Recommendations are to recognize and promote inter-departmental and inter-agency collaboration where applicable and also define roles and responsibilities within different processes, specifically for applications throughout their entire processing cycle, including key communication points.
- Require production of process documentation in the form of process maps, flow charts, templates, checklists and/or guides for internal/external use and as reference tools for the public to understand the processes and how/when they are able to engage.
- Development of key performance indicators associated with development process milestones that can be tracked and reported.
- Determine if existing staff resources and skillsets are sufficient to deliver the recommended processes while meeting legislative timelines and community/development industry expectations.

Phase Two – Fees Review

- Recommend a methodology and mechanism to update fees and deposits with the ability to forecast revenue, including identified opportunities for new revenue or cost-recovery.
- Ensure any changes to fees and deposits are defensible, equitable and in line with comparable municipalities, with the appropriate balance of full cost recovery and general levy impact, and comply with applicable legislation.
- Recommend application and agreement templates that are reflective of streamlined processes, fees and legislative requirements. Language is to be clear on what charges are recoverable from the proponent and when during the application process as well as if these charges are applied against a deposit.
- Fee and deposit structures are to be coordinated and consistent between the various Departments/Divisions within the Town providing in scope services.
- Consider implications of relevant legislative, policy or regulatory changes, particularly where planning fees for certain applications are subject to refund if legislative timelines not met.

Since the RFP was issued, the Affordable Housing Master Plan was generally endorsed by Council and further underscored the connection between improved delivery of housing supply and affordability and a high-functioning development review and approvals system.

Analysis

Context

As noted through the 2024 budget process, the Town of Collingwood is moving toward a program and service-based system to clearly identify the work that staff delivers and the objectives that the Town as a whole is trying to accomplish (see Figure 1). The program and service-based approach has numerous benefits including:

- A clear understanding of how current resources (i.e. human and financial) are allocated and what service levels are being attained.
- Allocating the resources effectively.
- Creating a framework to enable continuous improvement.
- Identifying best practices and efficiencies.
- Avoiding duplication of efforts and directing efforts toward the appropriate resource.
- Providing a framework for risk management analysis.

While the RFP for this project was developed prior to the confirmation of the program and service-based system, the Review aligns well with the above objectives. The Review focuses on improvements to the Development and Growth Program (green), more specifically the Development Management Service, inclusive of associated subservices. Ontario Building Code Administration and Enforcement is also part of this project, but because processes are highly regulated by the Province, the majority of the focus in that service area is in the Phase Two Final Report addressing fees. Further, DAP processes have a wider indirect corporate impact on other services such as Growth Planning, Economic Development, Housing Supports, and many others under the Environmental Management Conservation and Sustainability (blue), Community Safety and Standards (yellow), Community Health and Wellbeing (orange), Arts, Culture and Heritage (purple), and Community Access and Mobility (red) Programs.

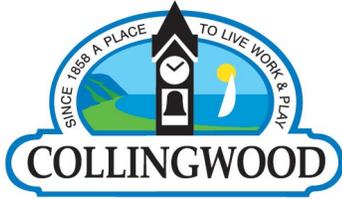


Figure 1: Programs and Services Framework

PROGRAMS & SERVICES								
PROGRAMS	Development & Growth	Environmental Management, Conservation & Sustainability	Community Safety & Standards	Community Health & Well-being	Arts, Culture & Heritage	Community Access & Mobility	Municipal Governance & Civic Engagement	Corporate & Customer Services
	Plan and deliver a physically complete community, and support economic success	Manage, mitigate and improve environmental impacts today and for the future	Set community standards so all can enjoy the community and enhance the safety of individuals and property within the community	Inspire and support the physical and mental well-being of all people our community through inclusive opportunities that foster social interactions and a sense of place and belonging	Recognize and strengthen arts, culture and built heritage within the community	Integrated, safe and accessible movement of people and goods across multiple modes of transportation (e.g., active, transit, cars, etc.)	Effective, responsible and accountable governance and two-way engagement of residents, businesses and visitors	Excellence in the administration of the Municipal government
SERVICES	Growth Planning* Land Use Parks, Rec and Culture* Roads & Active Transportation Stormwater Wastewater Linear* Wastewater Overall* Water* Development Charges*	Climate Change Action Climate Action Plans Energy Mgmt Wastewater Non-linear & Treatment Operations & Maintenance - Pump Stations - Third Party Services -Septage treatment Non-Linear Asset Management Planning Non-Linear Capital Projects Delivery Stormwater Management Asset Mgt & Capital Work Operations & Maintenance Environmental Containment	Community Standards* Bylaw Development & Enforcement Private Enforcement Animal Control Business Licencing * Property By-law Admin * Police Fire Fire Prevention & Public Education Fire Suppression & Emergency Response Emergency Management	Parks, Trails & Amenities Parks, Trails and Amenities Marina & In-Water services Noxious Species Mgt Urban Forestry/ Tree Canopy Protection** Community Recreation Spaces* Community Gathering Space (Library) Community Recreation Activities* Library Community Activities Building Community Well-being & Inclusion Water Treatment & Distribution Asset Mgt Planning Capital Project Delivery Operations & Maintenance - Operations - Third Party Services Backflow Prevention	Conservation & Promotion of Heritage & Culture * Museum Collection Cultural Diversity & Inclusion Heritage Permits Heritage Incentives Heritage Committee Community Arts & Culture Build Arts & Culture Capacity Public Art Promotion & Awareness Museum Activities* Community & Public Events Circulation & Curation of Library Materials	Roads & Active Transportation* Asset Mgt Capital & Minor Capital Projects Delivery Operations & Maintenance ROW Permits and Locates Parking Payment & Enforcement * Crossing Guards * Transit HR Operations Compliance, Health & Safety Talent Management Labour Relations Succession Planning Performance Management Compensation & Benefits Talent Acquisition Employee Experience Other Engineering Services *	Governance Support* Parliamentary Procedures & Clerking Accountability Council Relations & Support Communications Internal Communications External Communications Public Commissioner* Vital Statistics* Municipal Elections Support* Records* Records Management FOI Council Representation Corp Facilities Mgmt Corp Fleet Mgmt Corp Fleet Mgmt Asset Disposal & Sale Municipal Law Enforcement* Customer Service* Corp Office Support	Strategic Planning & Leadership (CAO) Strategic Planning & Leadership (Library CEO) Legal* Legal Advice & Corp Agreements Land Needs, Acquisition & Disposal By-Law Appeals and Municipal & Provincial Prosecution* Risk Mgmt* Enterprise Risk Management Insurance Procurement Support * Corporate Finance Financial Budgeting & Planning Financial Accounting & Reporting Cash Mgmt Debt Mgmt Taxation Asset Management Information Technology Network Infrastructure Maintenance & Support Business Applications GIS and Data Telecommunications Support End User Technology Support Asset Disposal and Sale
	Development Management* Planning Act Applications Committee of Adjustment Third Party Peer Reviews Development Agreements Provision of Conditions & Requirements * Administration of Approved Planning Applications & Agreements Rights of Way, Encroachments & Easements Right of Way Utility Consents Economic Development* Business Retention & Expansion Investment Attraction Tourism Promotion & Support Business Support Business Encroachments * Housing Supports Affordable Housing Initiative Social Housing	Source Water Protection Ontario Building Code Admin & Enforcement						

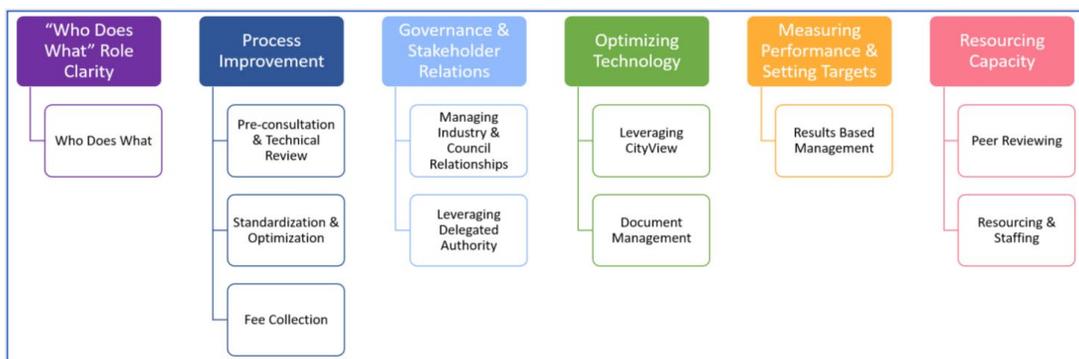
Phase One Final Report – Process Review

The Phase One Final Report provides a structured review of the existing Town of Collingwood DAP processes through critical and consultative lenses. The Final Report provides background on the legislative context, outlines a methodology based on LEAN principles, reviews the “current state” processes through a SWOT analysis, summarizes consultation, and culminates in a suite of nearly 50 “future state” strategic and tactical recommendations in a variety of thematic categories (see Figures 2 and 3).

Figure 2: Approach to DAP Review Process Recommendations



Figure 3: Future State Recommendations Thematic Categories

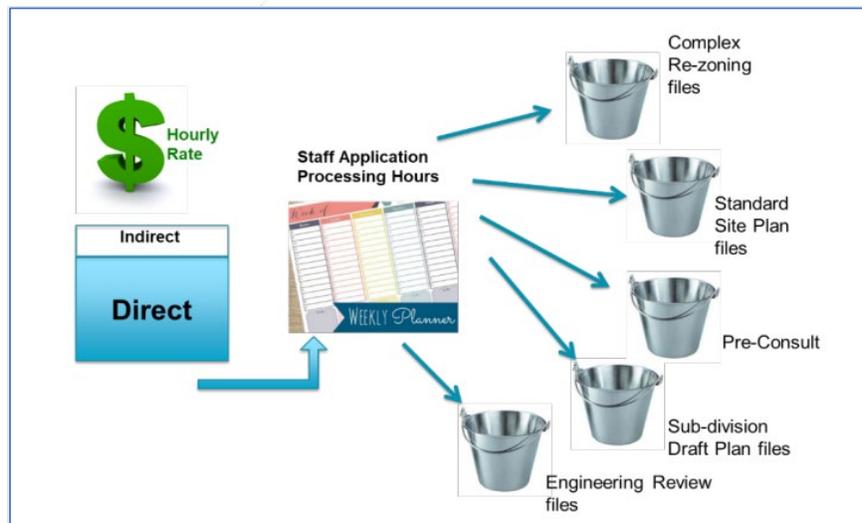


The Consulting Team has also advanced an aggressive implementation plan and schedule, that could be achieved in three years if fully funded, resourced, and pursued vigorously. Accompanying the Phase One Final Report is a series of detailed “future state” process maps (Appendix C), including timeline and role identification, for the most common applications under the *Planning Act* and the related pre-consultation and post-approval activities. These maps can be used as guideposts to mark progress or as templates for detailed process manuals and could be simplified in the future for public posting to increase the general community understanding of the DAP processes.

Phase Two Final Report – Fees Review

The Phase Two Final Report takes a defensible and industry standard activity-based costing approach to DAP fee structuring. Defensibility is important as land use planning fees can be appealed to the Ontario Land Tribunal, and more rarely engineering or building permit fees can be challenged through the courts. The Final Report provides a detailed methodology generally depicted in Figure 4. It is important to note that processing efforts, recommended fee increases, and assessed staff capacity levels are all based on the ideal “future state” process maps and do not necessarily reflect the current realities, inefficiencies, and subsequent resource pressures facing DAP delivery Divisions.

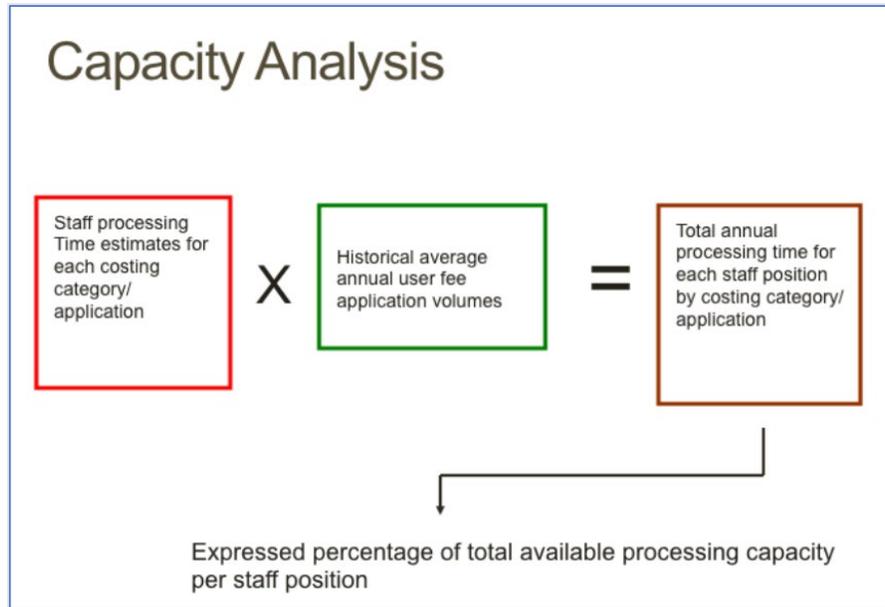
Figure 4: Activity Based Costing Model



The recommendations also take into account fees from comparator municipalities and the concept of “growth pays for growth” when determining a percentage of full cost of application or permit processing to be allocated to the development industry, recognizing that many projects also have benefits to the existing community (e.g. new parks, trails, connecting infrastructure, housing supply, job creation, school sites, etc.). In general, but not in all cases, the Consulting Team is recommending 75% of the full cost recovery be the determinant of the application fees, with 25% covered by the taxbase. Additional information on the proposed fee structure is found in the Financial Impacts section of this Report.

The Phase Two Final Report also includes a staff capacity analysis (see Figure 5) for DAP related tasks only, recognizing that many job descriptions include functions beyond DAP such as growth policy, inquiries, OLT matters, corporate or infrastructure projects, administration and oversight of related programs and services (e.g. heritage permits, economic development, housing supports, by-laws, etc.) and so on. Similar to the fees review, the capacity analysis assumes an ideal “future state” that would be achieved by implementing the process recommendations from the Phase One Final Report. The “current state” and unknown demand for additional review cycles, combined with chronic staff shortages and challenges recruiting, exacerbate the issue of staff capacity. The bottom line is that staff end up far busier managing DAP processes than is indicated in the baseline capacity analysis.

Figure 5: Capacity Analysis Approach



In addition, currently the Town collects and uses application “contingency fees” to recover costs for a range of specialized consulting or peer review services applied to DAP including special studies, legal review, additional site visits/meetings, and technical projects that are above and beyond the base application fee. Most of this work is undertaken by outside consultants or legal services hired by the Town and paid for by the developer. A shift to a draw-down deposit model is being recommended as a more efficient approach to managing these funds.

A three-year phased in approach to fee and deposit increases is outlined by the Consulting Team as a method that would 1) provide time for the development industry to adjust to the higher costs and 2) allow process improvements to be implemented that are necessary to drive the DAP system forward more effectively, leading to improved performance and greater acceptance of increased fees.

Next Steps

Staff are recommending that the Final Reports and associated “future state” process maps be received as guiding documents for continuous improvement within the development review and approvals system, including the general principle that “growth pays for growth”. Staff are not advising that the documents be endorsed for action in their entirety at this time. The rationale for the recommendation is a combination of the following:

- The Final Reports are information dense and require time for Council and staff to fully digest the content and understand the change-management impacts. Implementation of recommendations that require or would benefit from Council approval will be brought forward at future dates, thus allowing for targeted analysis of a smaller subset of recommendations at any one time.
- The majority of the recommendations are internal, operational, and/or minor in nature (i.e. updating/creating forms, templates, standard comments, and agreements, ensuring role clarity, developing process manuals and performance indicators, refining technological tools, improving document management, etc.) and do not require Council endorsement for staff to action.
- The Final Reports represent the Consulting Team’s professional opinion, most of which is supported by staff but some recommendations may require refinement to maximize success in the Collingwood context.
- Currently the key Divisions that drive DAP processes are experiencing a high level of vacancies in the existing staff complement, with four vacancies at the time of writing this Report in the Planning, Engineering and Environmental Services positions involved in DAP, and two additional Planning Services vacancies recently filled after recruiting challenges that lasted several months. To fill vacancies, the Town has taken a proactive approach to recruit staff in the developmental phase of their careers. The Town is invested in working with these skilled employees to obtain the experience requirements of their roles. However, during this interim period, teams are challenged to meet baseline legislative requirements, with limited resources for continuous improvement.
- The Consulting Team estimates that implementation of the recommendations will cost approximately \$100,000 to \$150,000, and the budget allotment in 2024 is \$40,000 from the Affordable Housing Reserve earmarked for improvements to technology in DAP tracking and workflow.
- Staff are expecting further Provincial legislative and policy changes to be announced in the near term that may materially influence some recommendations and the overall path forward for streamlined processes and fee structures.

Notwithstanding the above, some of the more significant recommendations impacting processes or fees, especially those with substantial effects on external partners, or where a regulatory or policy change is required, including any activities where additional budget or public meetings are needed, would either necessitate or benefit from Council direction and endorsement. Examples requiring one or more future Council touchpoints or decisions include 1) changes to staff delegated authority within the DAP system, fee structures or implementation of a two-stage pre-consultation process necessitating by-law amendments, 2) requests for additional staff or budget allocation, and 3) any adjustment to building permit fees, which must be preceded by a public meeting in accordance with the *Ontario Building Code Act*. Examples where Council direction is not required but may be beneficial include major process revisions such as 1) sunset clauses on conditional site plan approvals, 2) “one-and-done” circulation of formal applications, and 3) formalizing sequential application processing to reduce the risk of fee refunds. Some recommendations may also benefit from a legal review prior to implementation.

In the context of the implementation and phase-in plans outlined in the Final Reports, staff will review the recommendations for advancement to Council where needed or desirable and bring those items forward as time permits or where they can be efficiently combined with other existing processes such as the annual budget, development charges updates, or yearly review of fees. In the meantime, staff will also begin incremental implementation of internal, operational or minor recommendations to promote continuous improvement as resources allow.

Financial Impacts

The total budget for the Development Process and Fees Review allocated in 2023 was \$135,000, with carry-over of unspent funds into 2024 to allow for the completion of the project. The project was completed on budget without any scope changes required.

To action the recommendations in the Final Reports, the Consulting Team estimates \$100,000 to \$150,000 over a three-year period will be required. \$40,000 from the

Affordable Housing Reserve Fund was earmarked by Council through the 2024 Budget deliberations and endorsement of the Affordable Housing Master Plan for implementation of the Final Reports as a means to accelerate processes and decrease costs to bring housing supply online faster.

In February 2024, staff applied for a Rural Economic Development (RED) grant administered by the Ontario Ministry of Agriculture Food and Rural Affairs (OMAFRA). The application was made under the Economic Diversification and Competitiveness Stream: Technology Adaptation/Innovation Initiatives for matching funds to streamline DAP processes, with a focus on improving the use of technology. Should the grant application be successful, up to a total of \$80,000 would be available to update Cityview (i.e. the \$40,000 noted above and \$40,000 in RED grants) in accordance with the recommendations of the Final Reports. The planning module in Cityview is not configured to reach its maximum potential to automate and modernize intake and tracking of applications and the post-approval engineering module has yet to be created and deployed.

Implementation of certain strategic or tactical recommendations may require additional budget allocation, which staff will advance either through the annual budget process or as in-year amendments for consideration by Council.

The fee structure outlined in the Phase Two Final Report would shift the municipality toward full cost recovery of the effort required to process and review development applications, with reduced reliance on tax base subsidies. While staff would suggest some adjustments to the Consulting Team's recommendations may be warranted, the general principle of a "growth pays for growth" approach is supportable. The proposed fee structure, with adjustments advanced by staff in a future comprehensive report, would result in a significant increase in revenue (~\$500,000/year) and could be phased in over time. These additional funds could be used to acquire additional human resources, whether staff or consultants, to fill identified gaps in effort required to drive a streamlined DAP system. Where tax dollars are no longer used to subsidize the DAP

processes, these could be reallocated to other priority program areas as directed by Council.

3. Input from Other Sources

The Development Process and Fees Review consultation program is summarized in the Final Reports and included conversations with the development industry, partner agencies, peer reviewers, staff involved in DAP, and Councillors. The project also involved in internal steering group, inclusive of senior staff from Planning, Building, and Engineering Services as well as Finance, who reviewed all draft products and participated throughout the initiative in providing feedback to the Consulting Team.

This Report was forwarded to Department Heads on April 2, 2024 and the content responds to the feedback received.

4. Applicable Policy or Legislation

The following legislation and policies are typically part of the DAP review process, further legislative overview is included in the Final Reports:

- *Planning Act* (1990)
- *Municipal Act* (2001)
- *Building Code Act* (1992)
- Provincial Policy Statement (2020)
- Growth Plan for the Greater Golden Horseshoe (2020 Consolidation)
- Simcoe County Official Plan (2016)
- Town of Collingwood Official Plan (2004)
- Town of Collingwood Zoning By-law 2010-040
- Various Town of Collingwood Master and Strategic Plans, Guidelines and Standards

5. Considerations

- | | |
|---|--|
| <input checked="" type="checkbox"/> Community Based Strategic Plan: | Progresses towards achieving CBSP Goal |
| <input checked="" type="checkbox"/> Services adjusted if any | Streamlining Development management Services |
| <input checked="" type="checkbox"/> Climate Change / Sustainability: | No net effect on climate change/sustainability |
| <input checked="" type="checkbox"/> Communication / Engagement: | Public Engagement has occurred |
| <input checked="" type="checkbox"/> Accessibility / Equity, Diversity, Inclusion: | Not Applicable |
| <input type="checkbox"/> Registered Lobbyist(s) relating to content: | Not Applicable |

Next steps and future action required following endorsement:

As resources permit, bring forward recommendations requiring/benefitting from Council direction or endorsement and begin incremental implementation of internal, operational and/or minor recommendations to promote continuous improvement.

6. Appendices and Other Resources

Appendix A: Town of Collingwood Development Process and Fees Review – Phase 1: Development Approvals Process (DAP) Review Final Report, Performance Concepts Consulting and Dillon Consulting Limited, March 2024

Appendix B: Town of Collingwood Development Process and Fees Review – Phase 2: Fees Review Final Report, Performance Concepts Consulting and Dillon Consulting Limited, March 2024

Appendix C: “Future State” Process Maps, Performance Concepts Consulting and Dillon Consulting Limited, March 2024

7. Approval

Prepared By:

Summer Valentine, Director of Planning, Building and Economic Development

Peggy Slama, Director of Engineering and Public Works

Monica Quinlan, Treasurer

Reviewed By:

Sonya Skinner, CAO

CAO Comments:

Endorsed on April 3, 2024 to proceed to COW

P2024-09 Appendix A



Town of Collingwood

Development Process and Fees Review

Phase 1: Development Approvals Process (DAP) Review – Final Report

March 2024 – 23-5948



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A Implementation Roadmap

Introduction

Performance Concepts Consulting Inc. (“Performance Concepts”) in association with Dillon Consulting Limited (“Dillon”) was retained by the Corporation of the Town of Collingwood (“Collingwood”) to review the Development Approvals Process (“DAP”) and provide Recommendations to improve/modernize DAP execution and performance. In response to province-wide DAP regulatory changes and servicing capacity challenges specific to Collingwood, it is critically important for Collingwood to identify and implement LEAN-style development approvals efficiencies moving forward.

The Performance Concepts/Dillon team has conducted an objective, evidence informed Review to identify DAP efficiencies and capitalize on a diverse portfolio of performance improvement opportunities. This DAP Review has encompassed process execution, modernization of technology tools, staffing/resourcing capacity issues, engagement with internal and external stakeholders, and a 3-year Implementation Roadmap to guide Collingwood towards impactful improvement of its development approvals model. The Findings and Recommendations put forward in this Final Report will support Council and the Town’s DAP staff team in making informed investment decisions regarding the Future State DAP model for Collingwood.

The Performance Concepts/Dillon team is appreciative of the professional engagement and insights offered by Council, the Collingwood staff team, and external stakeholders throughout this DAP review. These contributions have shaped our third-party analysis and informed our portfolio of Recommendations. With receipt of this Report, the DAP performance improvement journey for Collingwood is just beginning. Collingwood is well positioned to advance the proposed DAP Performance Improvement 3-year Implementation Roadmap with rigour and determination. Relentless focus on executing the 3-year Roadmap will produce a significant return-on-investment (ROI) for Collingwood.

A companion Technical Report dealing with Collingwood DAP fees modernization has also been submitted to the Town. Fee modernization has been aligned with Future State DAP process maps and the Recommendations set out in this Final Report.

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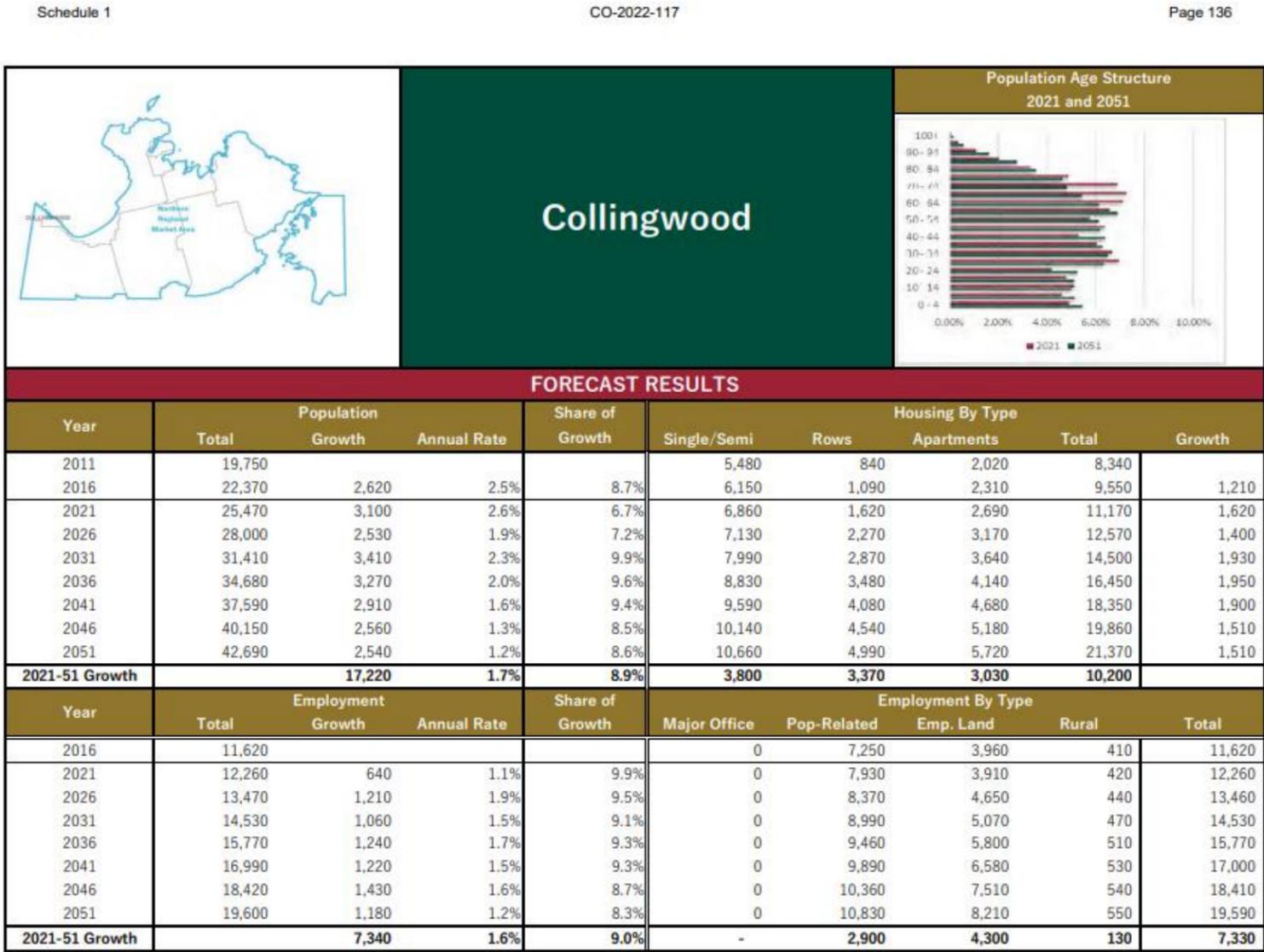


1.1

Collingwood’s DAP Landscape

Collingwood is expected to experience population and employment growth within the current planning horizon. The growth for Collingwood identified in the County of Simcoe 2051 forecast is set out below. The forecast has been incorporated into the Town’s new OP and requires conformity by Collingwood.

Figure 1: Town-wide Development Forecast



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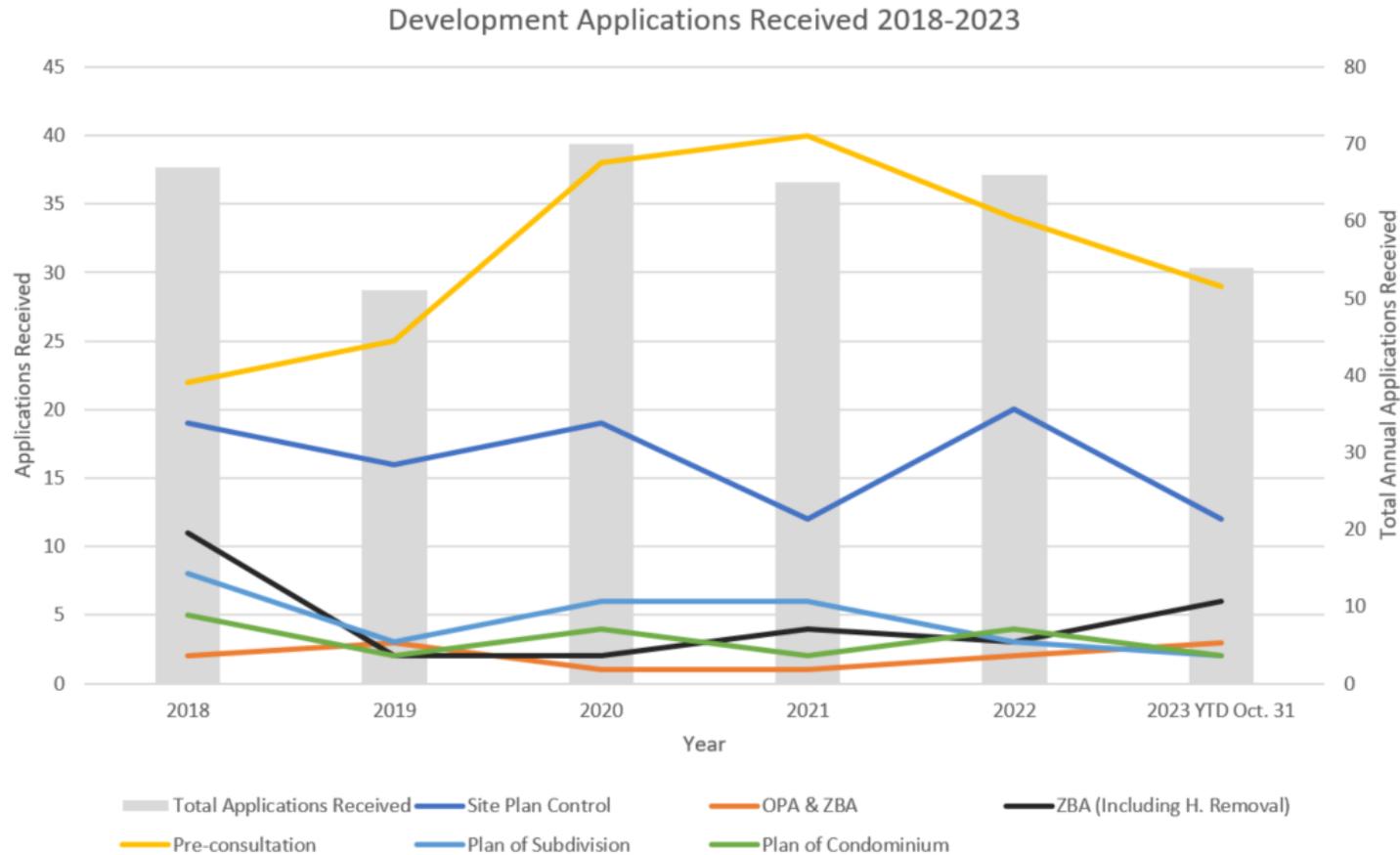
Source: County of Simcoe Growth Forecast and Land Needs Assessment, Hemson

1.2 Historic DAP Application Volume Trends

DAP Planning application volume trends are set out below **Figure 2** and **Table 1**. As illustrated in the Figure, from 2018 to 2023 the majority of Collingwood’s core DAP applications are for Site Plan (SP) Approvals (including Amendments to SP Agreements, Minor Adjustments to SP Agreements and both major and minor SP applications). The total annual number of core DAP applications has remained reasonably consistent from 2018 onwards, although the number of Site Plan applications dipped in 2021 during the depths of the COVID pandemic. Notably, there has been a significant increase in the number of Pre-consultation sessions since 2020, indicating a likely uptick in future development activity.

Table 1 below provides more granular tracking data on specialized/less frequent application categories such as Communication Towers, Part Lot Control, and Easements. **Table 1** also includes Committee of Adjustment Consent and Minor Variance files.

Figure 2: Development Application Trends 2018 to 2023



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Table 1: Full Breakdown of Application Trends 2018 to 2023

DAP Application Volumes: 2018 to 2023	2018	2019	2020	2021	2022	2023 YTD Oct 31	Total
Amendment to Site Plan Control Agreement	4	3	0	4	7	5	23
Condominium Exemptions	5	2	4	1	4	2	18
Consents	19	7	12	7	11	9	65
Deeming By-Law	2	2	2	1	1	1	9
New Draft Plan Review of Subdivision; Revision to Draft Approved Plan of Subdivision	5	0	2	0	1	2	10
Easements	0	1	1	1	1	0	4
Encroachments	0	1	1	4	3	0	9
Extensions of Draft Plan of Subdivision	3	2	3	6	0	0	14
Minor Adjustment to Site Plan Control Agreement	3	3	5	2	7	2	22
Minor Variance	33	36	19	24	29	19	160
New Draft Plan Review of Condominium	0	0	0	1	0	0	1
Official Plan & Zoning By-Law Amendments	2	3	1	1	2	3	12
Part Lot Control	4	8	1	4	2	0	19
Pre-Consultation Files	22	25	38	40	34	29	188
Radiocommunication Tower applications	0	0	3	1	0	0	4
Registration of Plan of Subdivision	0	1	1	0	2	0	4
Site Plan App – Major	7	8	10	5	5	3	38
Site Plan App – Minor under 500 sq m	5	2	4	1	1	2	15
Zoning By-law Amendments (incl. removal of H)	11	2	2	4	3	6	28
Total	125	106	109	107	113	83	643

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1.3 Development Realities: ICBL & SCAP

An Interim Control By-law (ICBL) is a tool enabled through the *Planning Act* that allows a municipality to pause development while it manages a specific issue that has been identified. Collingwood Council passed an ICBL to address water supply servicing capacity constraints on April 26, 2021 that was in effect until July 19, 2023, when the final ICBL-related appeal was withdrawn. Moving forward, Interim Control By-law Exemptions are no longer required to allow development to proceed.

Servicing capacity constraints identified in 2021 are forecast by Town staff to continue for approximately the next ten years. Initially water, and then wastewater, treatment plants will need to be upgraded. Growth pressures will continue across this period. The Town of Collingwood has implemented a robust system for the allocation of municipal water and wastewater servicing capacity that is anticipated to remain in place at minimum until such time as adequate water and wastewater infrastructure and capacity are available to support development. This process, known as the Servicing Capacity Allocation Policy (SCAP) was approved by Council in March 2022, and comprehensively updated in January 2023 following public and development industry input. SCAP outlines a sustainable, transparent and orderly process to prioritize capacity allocation for projects that provide the greatest benefit to the Town and includes a time limit on the allocations. Numerous Ontario municipalities have policies/systems in place to allocate servicing capacity and standard *Planning Act* processes need to be adjusted to coordinate with the SCAP merit-based system. The local development industry does not support SCAP extension to address upcoming wastewater servicing challenges and is advocating for the Town to be more proactive in upgrading the wastewater treatment plant before capacity constraints are realized.

1.4 A Rapidly Evolving DAP Regulatory Framework

The rapidly evolving *Planning Act* regulatory framework provides a mix of opportunities and problematic constraints for Collingwood as the Town seeks to modernize/improve DAP execution.

1.4.1

Bill 13: Facilitating Greater Delegated Authority to Municipal Staff

On December 2, 2021, the Province passed the *Supporting People and Businesses Act, 2021 (Bill 13)*, which amended the *Planning Act* to allow Councils to delegate the authority to pass Zoning By-laws that are minor in nature to a committee of Council or municipal Planning staff. This optional delegation of permission includes decisions for Temporary Use By-laws, the lifting of Holding provisions, and other Minor Zoning By-law Amendments (minor ZBAs). Delegation allows for greater flexibility and was generally seen as an opportunity to compress application processing timeframes without unduly compromising governance accountability. The implementation of Bill 13 delegation provisions reduces the number of “low/no controversy” DAP decisions that are made by Council, frees-up Planning staff time from preparing detailed reports on routine files, and enables Councils to focus on the strategic land use and DAP priorities of the municipality. Numerous Ontario municipalities have initiated/passed Official Plan Amendments (OPAs) to capitalize on the expanded benefits of this delegated authority and amended their respective Delegation By-laws accordingly.

1.4.2

Bill 109: Streamline Timeframes & Make Refunds Available

On April 14, 2022, the Province passed the *More Homes for Everyone Act, 2022 (Bill 109)*, which is described as the initial step in implementing the recommendations of the Ontario Housing Affordability Task Force (OHATF). The Act resulted in numerous amendments to the *Planning Act* aimed at reducing red tape, accelerating development timeframes, and streamlining approvals with the ultimate objective of increasing housing supply in Ontario. Specific changes to the *Planning Act* include, but are not limited to, the following:

- Requiring municipalities to provide refunds for stand-alone or concurrent (with an Official Plan Amendment) Zoning By-law Amendment and Site Plan application fees where no decision/approval is delivered during the statutory timeframe;
- Municipalities can mandate mandatory Pre-consultation for Site Plans and apply complete application “deemed complete” requirements for Site Plan applications (s. 41(3.4));
- The introduction of a new Ministerial zoning tool, referred to as the Community Infrastructure and Housing Accelerator;
- An established review process for Community Benefit Charge by-laws;

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- Amendments to parkland requirements on lands designated as Transit-Oriented Communities;
- Empowering the Minister with new powers regarding certain OPAs and new Official Plans;
- Empowering the Minister to make regulations for the use of surety bonds as security for conditions imposed by a municipality on planning approvals; and
- Mandatory delegation of site plan approval decisions to staff (no Council bump-up is possible).

The table below sets out the mandated processing timeframes that trigger cascading Bill 109 refunds for Section 69 Planning fees.

Table 2: Mandated Processing Timeframes

Application Type	No Refund	50% Refund	75% Refund	100% Refund
Combined OPA & ZBA Application	Decision within 120 days	Decision within 121 and 179 days	Decision within 180 and 239 days	Decision by 240 days or later
ZBA Application	Decision within 90 days	Decision within 91 and 149 days	Decision within 150 and 209 days	Decision by 210 days or later
Site Plan Application	Approval within 60 days	Approval within 61 and 89 days	Approval within 90 and 119 days	Approval by 120 days or later

It should be noted that at the time Bill 109 was passed, municipalities across Ontario were nowhere near meeting the new statutory timeframes for Site Plan, OPA and ZBA applications. The entire Ontario municipal sector is now at risk of being compelled to provide mandatory Planning fee refunds that will erode DAP revenue streams and subsequently trigger significant municipal property tax impacts. The prescribed timeframes that trigger Bill 109 mandatory Site Plan and ZBA fee refunds are unachievable for Collingwood using its traditional DAP service delivery model.

Municipalities across Ontario have adopted a range of Bill 109 process adaptations to avoid fee claw backs/refunds. These include expanded Pre-consultation models (with varying depths of pre-application technical review focused on targeted submission items) as well as fee design adjustments. The Building Industry and Land Development Association (BILD) has selectively appealed the Official Plans of growth municipalities



that have opted for mandatory technical review processes prior to formal applications being submitted. Ontario Land Tribunal (OLT) rulings on the Bill 109 adaptations adopted by these municipalities challenged by BILD have not yet been determined. Regulatory clarity around Bill 109 process adaptations remains a significant risk for municipal DAP service delivery models across Ontario. This Report keeps these OLT challenges in mind when referencing the need for Collingwood to fashion its own customized Bill 109 adaptation strategy.

1.4.3

Bill 23: Development Charges, Role of the Upper Tiers & Housing

Bill 23, the *More Homes Built Faster Act* Reading was introduced at the Provincial Legislature for its First on October 25, 2022 and was passed on November 28, 2022.

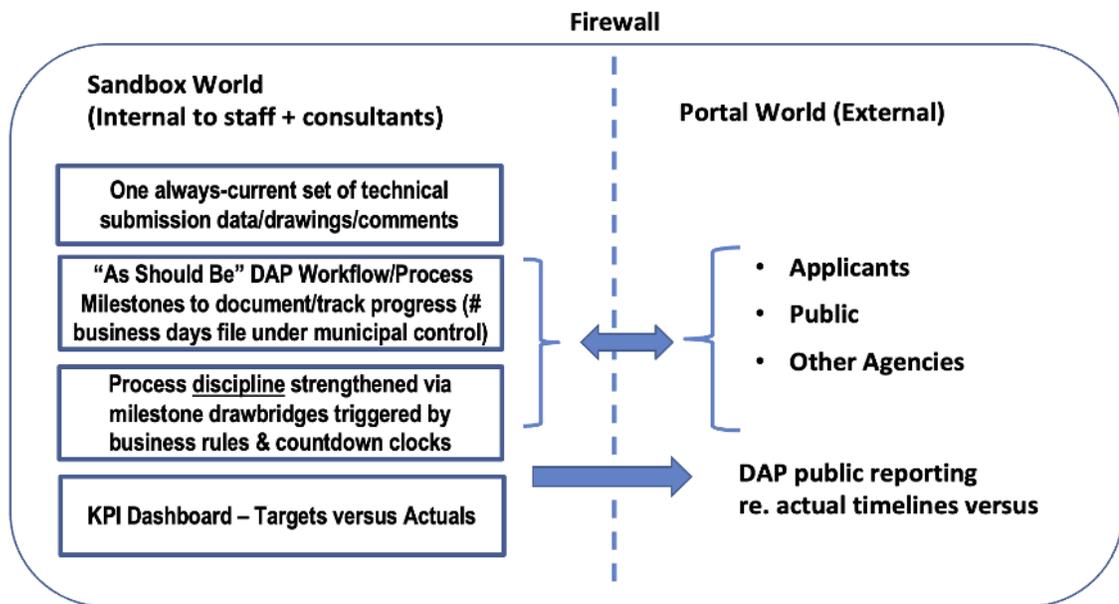
This legislation is part of the Province’s plans to achieve building 1.5 million residential units by 2031. Bill 23 implements recommendations from the Ontario Housing Affordability Task Force Report. The bulk of these residential units will be built in 29 larger growth municipalities, which have now been expanded to 50+ municipalities that will reach a population of greater than 50,000 people prior to 2031, with Bill 23 requiring each of these municipalities to develop Council-approved “Pledges” on how they will meet their assigned housing construction quota. Bill 23 also introduced sweeping changes to *Development Charges Act* (DCs), significantly limiting the scope of Regional government and Conservation Authorities in land use planning and set out other DAP changes relevant to both upper-tier and local municipalities across Ontario.

Bill 23 will remove upper-tier Councils’ roles in approving land-use planning decisions and will reduce DC funding to municipalities for infrastructure once the operative provisions come into force and effect. The changes introduced in Bill 23 will impact status-quo DAP execution models and will hinder Collingwood’s ability to support a “growth pays for growth” DAP model. If the DC funding provisions embedded in Bill 23 come into force, existing property taxpayers and ratepayers of Collingwood/Simcoe County – as with most other growth municipalities in southern Ontario – will be required to fund future growth-related infrastructure to support the accelerated construction of housing, unless there is funding from senior levels of government to make up the DC shortfall.

1.5 Embracing a Modernized DAP Workflow Tool/Platform

High performing DAP delivery models require a modernized DAP workflow platform to coordinate and streamline the simultaneous processing of multiple applications, including the Post-Draft Plan development engineering phases critical to providing registered lots to address housing supply shortages. The universally recommended functionality/configuration of a DAP workflow platform is set out below.

Figure 3: DAP Workflow Platform



Collingwood has opted for CityView as its end-to-end IT workflow platform for Planning, Engineering, and Building elements of the DAP system. Performance Concepts can independently verify that CityView, when properly/robustly configured, features all of the universally required functionality/configuration for a high performing DAP workflow solution.

1.6 Strong DAP Team with Focus and Desire to Improve

In-depth consultations with Collingwood’s DAP staff team and the local development industry have demonstrated the Town is committed to a streamlined, high performing DAP delivery model. Willingness to implement LEAN-style process improvements,

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modernized technology tools, and “best practice” governance restructuring will put Collingwood in a strong position to navigate the regulatory, servicing capacity, and current DAP workload challenges that will continue over the longer term horizon.

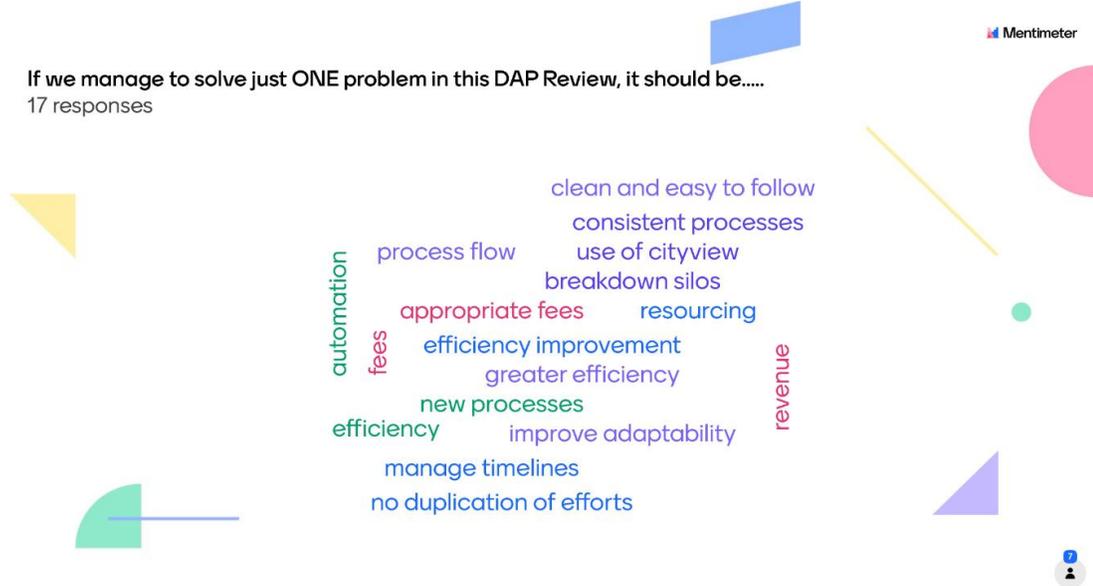
The Word Clouds (**Figure 4 to Figure 6** set out below) were generated during a facilitated DAP performance evaluation exercise held at the beginning of this Review exercise. The DAP staff team’s input covered a range of DAP performance issues in Collingwood. Staff’s answers to 10+ Mentimeter.com polling questions provide insights into the positive characteristics of the staff team and their self-awareness around performance improvement opportunities.

Figure 4: DAP Performance Evaluation Word Cloud



The Collingwood DAP team’s self-diagnosed strengths relate to DAP subject matter expertise, team-wide collaboration, and a willingness to work through adversity/high workload burdens.

Figure 5: Self-Diagnosed Strengths Word Cloud



DAP improvement priorities identified by the Town DAP staff team focus on efficient LEAN processing, robust full-cost DAP fees, and CityView process automation opportunities.

Figure 6: Improvement Priorities Word Cloud



The envisioned Future State DAP model is described as automated, efficient, and streamlined - all key attributes of a high performance, LEAN configured DAP execution model.

1.7 Collingwood Development Industry

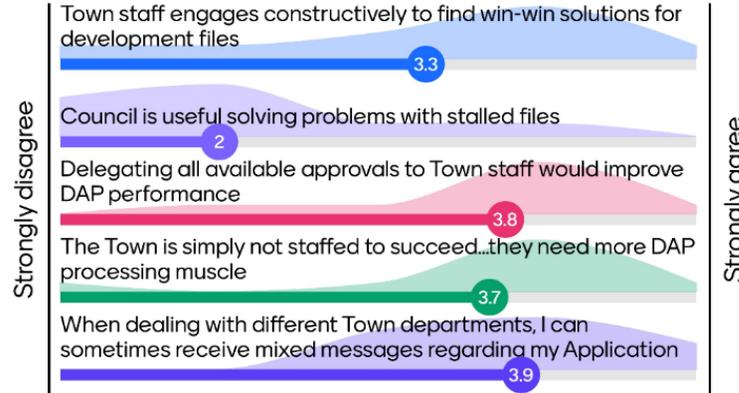
The Performance Concepts/Dillon team facilitated a series of dialogue sessions with members of the Collingwood development industry. The purpose of these sessions was to gain insights into the performance of DAP and the development community also expressed a desire to discuss servicing constraints behind the ICBL and SCAP. The Georgian Triangle Development Institute (GTDI) organized feedback from a diverse group of development industry stakeholders. As was the case with the Town DAP team, input was gathered and analyzed using Mentimeter.com interactive polling. The figure below demonstrates the tone and substance of development industry feedback. The industry is strongly supportive of maximizing delegated approvals to compress decision timeframes and avoid perceived politicization of DAP. The industry confirmed the DAP staff team’s assertions that Collingwood is significantly under-resourced given ambitious Provincial regulatory timeframes and impending Subdivision-driven workload escalation. Finally, development stakeholders advocated for Town process streamlining and “who does what” role clarity.

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Figure 7: Stakeholder Feedback Mentimeter

Development Community Customer Experience



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It is striking how similar the development industry’s vision of “ideal” DAP performance is to the Town DAP staff team’s vision. As documented in the figure below, timely, consistent, and predictable LEAN style “flow” is the desired outcome for Future State DAP.

Figure 8: Development Industry’s Vision of “Ideal” DAP (Word Cloud)



2.0 DAP Review Approach and Methodology

2.1 Overarching Approach: LEAN Principles

Successful DAP Modernization Reviews are rooted in the following two overarching principles:

1. Accountable and innovative DAP teams strive to ensure they are **Doing the Right Things**
2. Accountable and innovative DAP teams strive to ensure they are **Doing Things Right**

Figure 9: Overarching Approach to DAP Reviews



A properly designed and executed DAP Modernization Review will engage Council, the Town’s DAP staff team, and the development community in a **Doing the Right Things** and **Doing Things Right** improvement dialogue.

Clearly defined Council (**Doing the Right Things**) and DAP staff (**Doing Things Right**) perspectives are critical to a successful Collingwood DAP process review and model. Council support for continuous improvement as the foundational principle to transform Collingwood’s DAP model can be a powerful strategic approach re: Doing the Right Things. Using LEAN thinking and LEAN process re-engineering solutions in tandem with DAP workflow tool modernization (to streamline, standardize and measure DAP execution) is practically synonymous with Doing Things Right.

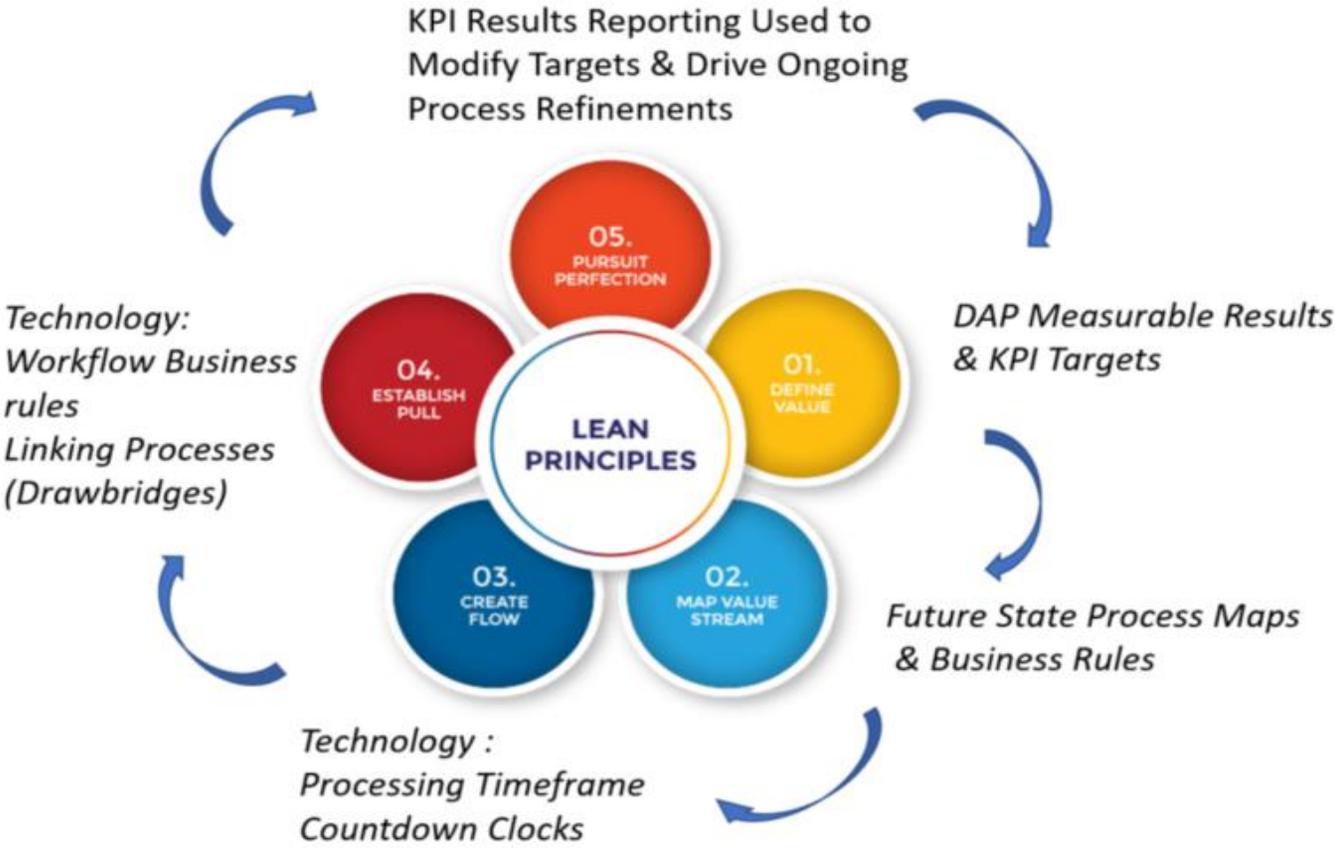
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DAP Reviews that confirm the need to do different things and/or do things differently are not automatically “right” or binding. Recommendations from this DAP Review must pass through the lens of accountable Council governance. Councils and municipal staff teams make real change happen together - not third-party consultant reports. A well-crafted DAP Review is politically astute without being overtly “political”. Successful change/modernization projects must secure implementation and appropriate resourcing support (i.e., staffing hours and \$ budget) from elected Councils, as well as a development community that lives in the real world of commerce and competition.

DAP Reviews and system improvements must combine technical proficiency with technology-driven innovation, and they must also support Council’s accountability contract with its taxpayers, development community stakeholders, and residents.

To **Do the Right Things** and **Do Things Right**, change management discipline and LEAN processing rigour is required. Powerful Insights around successful change management execution can be found in the **4 Disciplines of Execution** - a powerful and proven change resource strongly adopted by the Performance Concepts/Dillon team.

Figure 10: Power of LEAN Thinking to Transform Development Approvals Process



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2.2 DAP Review Methodology

The Performance Concepts/Dillon team has executed numerous evidence-based DAP reviews of the past two decades. The proven approach utilized by our team is set out in the figure below. The key to a successful DAP review is to transition from “As Is” Current State DAP to an envisioned high performing “As Should Be” Future State DAP. Implementation of significant/measurable performance improvement is critically important, and the 3-year Implementation Plan (Roadmap) advanced by Performance Concepts/Dillon is carefully configured to create the right mix of change management project discipline/flexibility moving forward.

Figure 11: 3-Year Implementation Plan (Roadmap)

PROJECT INITIALIZATION



PART 1 – DEVELOPMENT APPROVAL PROCESS REVIEW



PART 2 – FEES REVIEW



2.2.1 Project Kick-off and Data Collection

The Project Kick-off meeting reviewed the interconnected DAP Process Review and the DAP Fees Review. The session focused on methodology confirmation, project critical path, expected deliverables and specific unique challenges facing Collingwood.

Performance Concepts/Dillon worked closely with Collingwood staff to identify an inventory of existing/available DAP data sets, Council Reports, budgets, organizational charts, and other appropriate information sources. This “rapid data transfer” project initialization has informed the subsequent execution of the two-part DAP improvement assignment.

2.2.2 “As Is” Current State DAP – Town GEMBA Walks & External Stakeholder Consultations

Subsequent to project initialization, the Performance Concepts/Dillon team facilitated 20+ engagement sessions with a range of Town business units, members of Council, County and Conservation Authority staff representatives, and local development industry stakeholders such as GTDI. These sessions generated a fundamentally solid understanding of Current State DAP and identified preliminary opportunities for DAP improvement that were subsequently investigated in more detail by the Performance Concepts/Dillon team.

2.2.3 SWOT Evaluation of DAP “As Is” Current State

Using compiled data and insights gleaned from LEAN Gemba Walks and development industry engagement sessions, interactive SWOT working sessions (using the Google Jamboard tool) were executed with the Town’s DAP staff team.

These SWOT working sessions confirmed and expanded the Performance Concepts/Dillon team’s understanding of the Current State DAP model. The SWOT analysis generated an evolving set of DAP improvement opportunities that would inform Future State Findings and Recommendations.

2.2.4 Municipal “Best Practices”

The Performance Concepts/Dillon team carried out an independent review of Ontario municipal sector “best practices” relevant to Collingwood. Bill 109 adaptation emerged as the key issue meriting a detailed scan of evolving approaches across Ontario growth



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municipalities. Innovative approaches to DAP fee re-design plus “front-end DAP” process re-engineering innovations were evaluated for potential deployment in Collingwood. A menu of Bill 109 adaptation options for Collingwood staff and Council to consider were brought forward to a facilitated working session with the Town’s DAP management team. The Town is well positioned to build/implement its own “made in Collingwood” Bill 109 adaptation framework.

2.2.5 “As Should Be” Future State Recommendations

Draft Findings and Recommendations for a high performing Future State Collingwood DAP model have been prepared. Interactive stress testing sessions with the Town’s DAP staff have strengthened and refined the initial draft Recommendations package developed by Performance Concepts/Dillon. Final Recommendations have been categorized in this Final Report as either “Strategic” game changers for Future State DAP or as “Tactical” incremental DAP improvements that will deliver cumulative benefits over time.

Strategic and Tactical Recommendations have been further organized into the following high performing DAP categories/themes:

1. “Who Does What” Role Clarity
2. DAP LEAN Process Improvement
3. Governance and Stakeholder Relations
4. Optimizing DAP Technology
5. Measuring DAP Performance and Setting Target Timeframes
6. Securing Sufficient DAP Resourcing Capacity (also to be addressed in the Development Process and Fees Review Phase 2: Fees Review Final Report - under separate cover)

General Recommendations are also included which are purely administrative in nature.

2.2.6 Final Report and 3-Year DAP Performance Improvement Plan

A 3-year Implementation Roadmap has been prepared to triage the various Strategic and Tactical Recommendations and create a flexible/adaptable change management pathway moving forward. The Implementation Roadmap balances the workload realities of staff’s DAP execution “Day Job” with the need to build change momentum. The need for dedicated resourcing (staff resources and financial resources) to secure necessary

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change management focus/discipline has been addressed to ensure success; side-of-the-desk approaches to change management are always inadequate and pre-ordained failure.

2.2.7 “As Should Be” DAP Process Maps

In addition to a robust package of DAP improvement Findings/Recommendations, the Performance Concepts/Dillon team has constructed a comprehensive set of DAP Future State process maps that encompass Collingwood’s core Planning/Engineering DAP application categories.

The Future State process maps anticipate certain aspects of Bill 109 adaptation supported by Collingwood staff and feature high-level aspirational timelines that could evolve into targets once Collingwood’s DAP resourcing gaps have been addressed. Future State process maps also incorporate process improvement and CityView automation Recommendations put forward in this Report.

Future State process maps will standardize DAP execution moving forward, and optimize the efficient deployment of finite DAP resources, while also addressing regulatory timeframe challenges.

Future State process maps have been provided to the Town of Collingwood under separate cover.

3.0 Exploring the Collingwood DAP “As Is” Current State

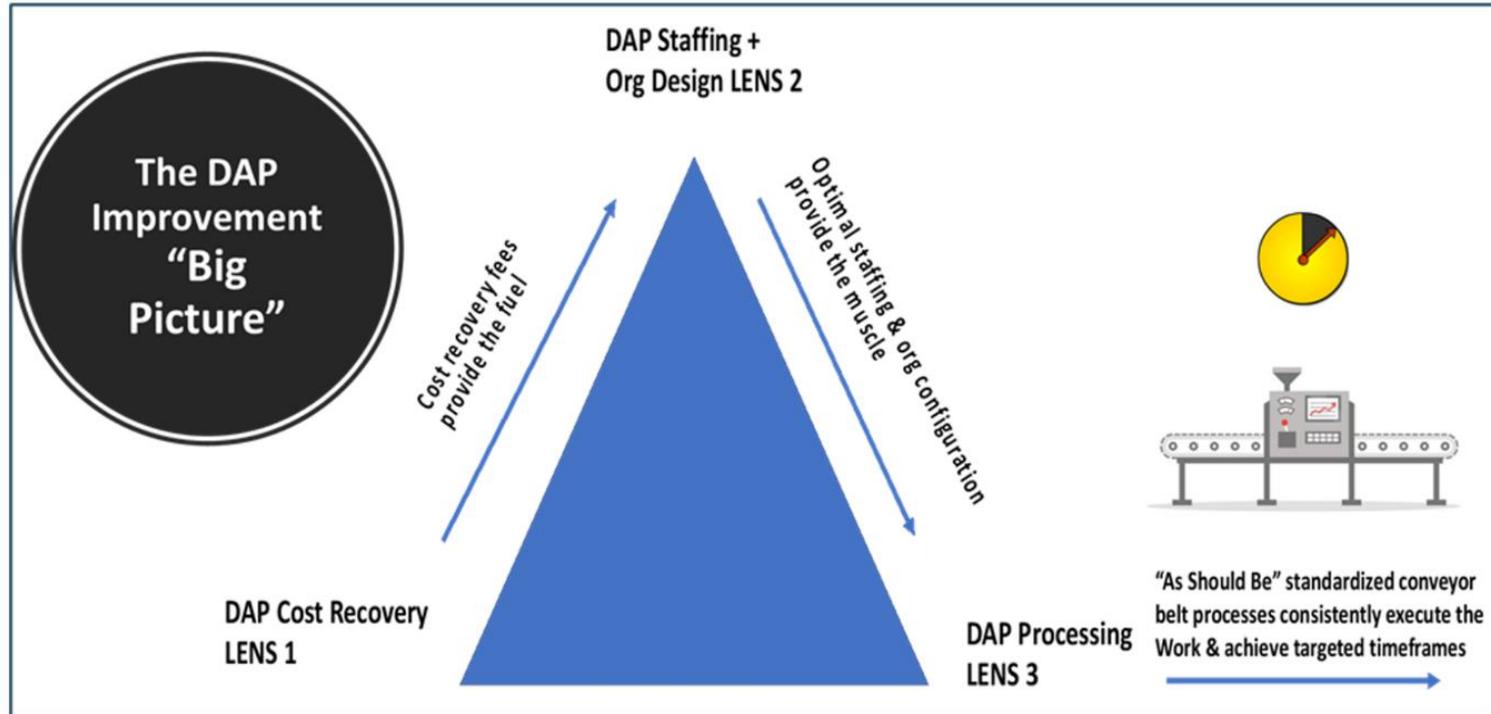
Based on the review of information and materials provided by the Town, together with internal and external stakeholder engagement sessions and the subsequent SWOT analysis, the Performance Concepts/Dillon team compiled key observations on Collingwood’s Current State DAP model. These findings are presented in the following sections.

3.1 DAP Cost Recovery Model

Collingwood has not undertaken a DAP fee review within the past 10 years or longer. As is always the case with Ontario municipalities prior to modernizing their Planning/Engineering DAP fees, Collingwood has not yet secured a “growth pays for growth” cost recovery model. Existing development in Collingwood (i.e., local property taxpayers) is currently subsidizing a major portion of DAP approval processing costs for new development (i.e., subsidizing corporations or individuals receiving significant economic benefit). Improving DAP cost recovery will reduce the property tax impacts of DAP staffing and operations - freeing up already budgeted tax room to deal with other Town priorities. The Development Process and Fees Review Phase 2: Fees Review Final Report (under separate cover) will address Collingwood’s cost-recovery improvement/DAP fee modernization options in considerable technical detail.

The figure below captures the importance of cost recovery fees “providing the fuel” for LEAN DAP execution. Fee revenue streams pay for staff/consultant processing “muscle” that in turn executes LEAN standardized DAP processes.

Figure 12: The DAP Improvement "Big Picture"



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3.2 DAP Organization Design/Resourcing – Who Does What

The figures below document the Town of Collingwood business units and specific staff positions that participate in DAP. Staff from Planning, Building, Engineering, and Environmental Services participate in DAP across a range of DAP application categories/processes. Administrative support is provided by Finance and Clerks staff across a number of DAP application categories/processes. Other Divisions are more peripherally involved in DAP review such as Fire Services and Parks Recreation and Culture.

Figure 13: Planning Staff Roles Involved in Various Planning Approval Processes

		Pre-consultation	Post-Draft Plan Engineering Review	Minor Variance - Regular applications with considerable review	Minor Variance - Checkbox form with minimum review	Consent to Sever	Consent to Sever additional application on same property	Official Plan Amendment:	Secondary Plan Official Plan Amendment	Official Plan Amendment with Zoning By-law:	Draft Plan Review - Subdivision:	Draft Plan Review - Condominium:	Registration of Plan of Subdivision:	Zoning By-law:	Removal of Holding Provision:	Site Plan Control Application:	Part Lot Control By-law:
PLANNING																	
Director																	
Manager Planning																	
Admin Asst Planning																	
Senior Planner 1																	
Senior Planner 2																	
Community Planner 1																	
Community Planner 2																	
Community Planner 3																	
Planning Technician																	

Legend: Dark green indicates the potential for direct involvement in the listed process, as broken down by role. Light green indicates the potential for limited or passive involvement in the listed process.

Figure 14: Engineering and Environmental Services Staff Roles Involved in Various Planning Approval Processes

	Pre-consultation	Post-Draft Plan Engineering Review	Minor Variance - Regular applications with considerable review	Minor Variance - Checkbox form with minimum review	Consent to Sever	Consent to Sever additional application on same property	Official Plan Amendment:	Secondary Plan Official Plan Amendment	Official Plan Amendment with Zoning By-law:	Draft Plan Review - Subdivision:	Draft Plan Review - Condominium:	Registration of Plan of Subdivision:	Zoning By-law:	Removal of Holding Provision:	Site Plan Control Application:	Part Lot Control By-law:
PUBLIC WORKS																
Director																
Manager, Engineering																
Project Engineer																
Engineering Technologist																
Engineering Technologist																
Manager, Env Services																
Backflow Prev Officer																
Proj Mgr, Env Serv																
Proj Coordinator, Env Serv																
Supervisor Water																
PARKS																
Manager, Parks																
FIRE																
Fire Chief																

Legend: Dark blue indicates the potential for direct involvement in the listed process, as broken down by role. Light blue indicates the potential for limited or passive involvement in the listed process. Gold and red represent the potential for involvement of the Manager of Parks and Fire Chief in various processes, respectively.

3.3 DAP Process Execution

Aside from the water servicing capacity challenges that prompted the ICBL and SCAP, Collingwood currently deploys a conventional DAP delivery model. The type and volume of DAP applications is typical of a southern/central Ontario municipality experiencing moderate growth.

The Current State review confirms the absence of target timeframes and service level standards across core Planning application categories. The Current State review has also documented a reporting gap on actual application processing timeframes. Most timeframe tracking is ad hoc and executed manually outside of CityView standardized reports.

Coordination with external agencies, specifically around receiving timely technical review inputs from the County of Simcoe (the “County”), Nottawasaga Valley Conservation Authority, and Grey Sauble Conservation Authority, is a challenge experienced on DAP applications requiring involvement beyond the Town. Simcoe County and the Conservation Authorities (“CAs”) each have their own DAP workflow tools that do not integrate with Collingwood’s CityView workflow tool. The result is uncoordinated/siloed workflow tracking, a duplication of effort documenting progress on shared files, and potential disorganization of file information and data including version tracking problems.

Across the various Gemba Walks and SWOT sessions, Collingwood staff identified opportunities for improvement around application intake, the “Deemed Complete” decision, and the Technical Review Cycles characterized by back-and-forth interaction with applicants/consultants and internal/external commenting agencies.

3.3.1 Pre-Consultation to Deemed Complete Decision

Traditional Pre-Consultation Model

Collingwood operates a fairly typical traditional Pre-consultation model, focused around regularly scheduled monthly meetings with applicants to discuss potential/preliminary development applications for OPA, ZBA, Site Plan, and Draft Plan of Subdivision/Condominium applications. Pre-consultation meetings may precede other DAP applications depending on the complexity of the application, and also may be

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waived at the discretion of senior staff in accordance with the Town’s Pre-consultation By-law.

An applicant is encouraged to submit a Pre-consultation request to Planning’s Administrative Assistant via the CityView portal. Hard copy applications are accepted, although portal applications make up the vast majority of applications received.

Internal application vetting meetings are held to ensure the materials are sufficient to convene a pre-consultation meeting. The Administrative Assistant confirms that the Pre-consultation application form and supporting documentation have been submitted along with the fee prior to the application being reviewed at an upcoming internal vetting meeting. If DAP staff are satisfied that sufficient detail has been provided to review the Pre-consultation application, it is scheduled for an upcoming Development Review Team (DRT) meeting. DRT meetings occur once per month with the schedule posted online annually.

A wider circulation to internal Town departments and external agencies occurs prior to the DRT meeting. Although comments are typically received by the Planner (for the purposes of this Report “Planner” is the term used for the file manager and that may be a Community Planner, Senior Planner, or the Manager of Planning), preliminary comments are not issued to the applicant prior to the meeting. Discussion regarding the development concept and process requirements occur with the applicant at the DRT meeting, and issuance of formal written comments and a list of complete application submission requirements follow the meeting, with no documented service standard but staff attempt to provide the compiled comments package typically within two to three weeks of the DRT meeting. Pre-consultation comments are valid for six months. An applicant must repeat Pre-consultation if a formal Planning application is not made within six months or if more information was requested after the initial pre-consultation meeting, which may impact a future complete application.

For complex applications, the Town has recently been “testing the waters” around a second required Pre-consultation review in order to flush out certain development details. A second Pre-consultation can also be mandated if it is difficult for staff to determine the required future approvals checklist based on site constraints, lack of upfront information, or if an applicant significantly changes their concept plan.

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The Performance Concepts/Dillon team recognizes the steps already taken to modernize the Pre-consultation model in Collingwood and encourages the Town to continue refining their evolving ZBA/Site Plan sequential processing model through the formal adoption of a procedure. Sequential ZBA/Site Plan Pre-consultations and application processing pathways are now unavoidable across Ontario in order to reduce exposure to Bill 109 fee refunds and recognize the misalignment between *Planning Act* review timelines for ZBAs (90 days or 120 days if concurrent with an OPA) and Site Plans (60 days).

Deemed Complete Decision

Following the conclusion of Pre-consultation, Collingwood relies on the Administrative Assistant in consultation with the assigned Planner to support a formal application intake over the CityView portal, and the subsequent “Deemed Complete” decision. A Planner (typically the Planner who managed the Pre-consultation application) executes a piece-count completeness check against the requirements established by Pre-consultation. The statutory Deemed Complete decision is then undertaken by the assigned Planner who is expected to coordinate with other internal service units to ensure submitted materials satisfy the requirements documented at the end of Pre-consultation. The Town typically requires the full 30 calendar day statutory timeframe to arrive at a Deemed Complete decision. Through the various GEMBA Walks it is evident that Collingwood’s execution of early-stage DAP (Pre-consultation to the Deemed Complete decision) is somewhat ad-hoc, and heavily dependent on email communication outside of CityView, which can lead to a lack of organization of communication records.

3.3.2 Technical Review Cycles to Approval

Following the submission of a DAP application (Official Plan Amendment, Zoning By-law Amendment, Site Plan Control, Plan of Subdivision, and others), the assigned Planner oversees application intake and works with the Administrative Assistant to prepare the email circulation to Town technical reviewers and external agencies. The assigned Planner also conducts a limited content review of the submitted material for quality, although the Planner is not always equipped with adequate technical knowledge of studies and/or reports better reviewed by Engineering or staff from other disciplines. Third-party consultant peer reviews are used to provide specialized technical expertise

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where it is not available in-house and/or to free-up staff capacity for other DAP tasks. These consultants are retained in a variety of ways from sole source to a roster. Ensuring there is a consistent and formalized procurement roster or other expedited process to retain them without causing file processing delays would be beneficial.

The notification of review is issued by email to a long distribution list (i.e., Not tailored to the nature of the application), with high-level details about the application and a SharePoint link with the appropriate submission materials. The intent of this SharePoint link is for external reviewers to be able to access file information. Internal Collingwood staff are able to access the same documents through CityView or other internal document storage sites. Collingwood currently lacks a consistent approach to obtaining access to DAP documents (for both internal and external reviewers) in addition to the lack of selectivity in circulation. A wide range of technical reviewers are “default” notified of the need for technical review, even if their input is not required for the application in question.

Following notification to commenters, the Planner assumes administrative custody of the file; receiving all technical review comments, vetting the various comments, and consolidating them into both CityView and TOMRMs. There is a glaring redundancy of effort in DAP document and comment storage across various information management platforms. There is also inefficient deployment of effort by the Planner inputting multiple comments into CityView from various internal business units that already have unimpeded access into CityView. Finally, there is a high degree of sub-optimal manual inputs and reliance on email communication (outside CityView) for commenting or circulations that can be automated. The residual corporate culture of working around CityView is compromising the available efficiencies from working within CityView as the mandatory information backbone of DAP.

Technical Review Cycles are supposed to operate within a three-week timeframe from the date of the initial circulation email, although a complete set of comments are almost never received within three weeks for substantial files. Missing/delayed comments typically come from external agencies, although business units such as Engineering Services are frequently delayed depending on available staff resources, competing demands outside of DAP, and/or other workload priorities within DAP. A comment response matrix is used by the Planner to track comments and guide the technical review, although there are opportunities for increasing standardization of the template

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and providing areas for the applicants or Town service units to respond in real time through CityView.

Following Technical Review, approval decisions are made by Council or by staff on a delegated basis, depending on the type and complexity of the application. Council decisions require the assigned Planner to write a staff recommendation report and require senior staff review/sign-off involving a long lead-time prior to being placed on a Committee and/or Council agenda. Additionally, a Statutory Public Meeting may be required prior to the Committee/Council meetings and prior to the staff recommendation report being completed. In marked contrast, delegated decisions are limited to Site Plans and minor development applications (e.g., condominium approval exemptions, minor adjustments) and staff still prepare recommendation reports, which are posted for Council and public information, even though public meetings or a Council decision are not required. This report is likely unnecessary or could be substantially shortened/streamlined and results in staff effort that could be focused on higher value DAP work. Collingwood’s current application of delegated authority is limited and does not realize the full range of processing efficiencies available to Ontario municipalities as permitted under the *Planning Act*.

3.3.3 Post-Draft Plan Detailed Engineering Review & Conditions Clearance

Following a Draft Plan of Subdivision/Condominium Description approval, applicants initiate a time-sensitive Post-Draft Plan Engineering Review *phase* that culminates in the registration of legally created lots/blocks/units. A Post-Draft Plan phase can encompass all Draft Approved lots, or a portion of these lots. The timing of these phases is variable - they can immediately follow Draft Plan approval or can proceed after a significant amount of time has transpired. The Town provides a baseline 3 years for proponents to undertake the Post-Draft Plan phase in accordance with the *Planning Act*, and extensions may be granted based on approved policy.

Multiple Post-Draft Plan phases per Draft Plan approval are fast becoming become the standard approach in Collingwood due to market conditions and servicing capacity constraints. In fact, each Draft Plan of Subdivision approval moving forward will mandate exactly how many Engineering Review phases are going to be required.

As is the case with Planning DAP applications, Post-Draft Plan Engineering Review phases are initiated by a technical submission from the applicant. These technical

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submissions are required to obtain Town approval of infrastructure design for the Subdivision. For each phase a series of Technical Review Cycles are executed back-and-forth with the applicant’s engineering consultant. Water, wastewater, stormwater, and road infrastructure designs are refined and typically approved by the end of the third review cycle.

A series of related permits, clearances from external agencies, and executed agreements are required of an applicant during a Post-Draft Plan phase.

A Site Alteration Permit is a pertinent example that is being adopted by Ontario growth municipalities. A Collingwood Site Alteration By-law creating a new Permit (replacing the outdated Fill Permit By-law) process (replacing the current outdated Fill Permit By-law) would address the need for rough/early site grading permissions as well as creating a time period “pause” to resolve tree protection/removal issues which are currently dealt with through a Tree Destruction By-law. The Site Alteration Permit process would control the timing of rough grading to ensure Draft Plan conditions around archaeological review, have been properly addressed and cleared before significant site alterations begin. Performance Concepts/Dillon are of the opinion that final preparation and implementation of a Site Alteration By-law/permitting model should proceed expeditiously.

Post-Draft Plan phase agreements typically include an optional Pre-Servicing Agreement and always include a mandatory Development Agreement that establishes a series of legally enforceable conditions the applicant must fulfill before the Town will assume the public infrastructure within a Subdivision. A Development Agreement combined with final infrastructure approvals issued by the Town clears the way for legal lot creation and subsequent Building Permit issuance.

Collingwood Engineering staff largely oversee the Post-Draft Plan phase and related processes as outlined. They are supported by Planning PRC, Finance staff, and outside legal resources.

The Post-Draft Plan stage of DAP is often time-sensitive. Applicants typically are selling housing units “on spec” with legally enforceable closing dates. They must navigate the Post-Draft Plan phase on a predictable timeline, get their lots registered, obtain Building Permits, and secure post-construction Occupancy Permits prior to closing dates agreed to well in advance.

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Collingwood has processed one to two of these Engineering Review phases annually since 2018. Forecasts indicate that four to five of these effort intensive phases will soon come forward annually. This workload spike presents a significant processing capacity challenge for Collingwood. Processing capacity chokepoints for the Post-Draft Plan Engineering Review component of DAP are frequently identified by the Performance Concepts/Dillon team during DAP reviews carried out across Ontario.

3.3.4 Transition from Planning/Engineering DAP to Building DAP

Properly configured transitions from Planning to Engineering and to Building processes are considered a “best practice” across Ontario. Carefully executed transitions and overlaps reduce overall timeframes for applicants to get “shovels in the ground”. Building Permit applications can be submitted and reviewed prior to all “applicable law” complete application requirements being satisfied. Once applicable law requirements are in place (e.g., Site Plan drawings signed-off) Building Permits can then be immediately issued on a “just in time” basis.

Overlapping DAP processes are appropriate for both the Site Plan and Subdivision processing channels in Collingwood. Currently Collingwood uses CityView workflows in only a very limited way to track the progression of Site Plan files to a milestone “trigger-point” that allows Building Permit application submission and Building Permit issuance to proceed. The current Collingwood overlapping DAP process is much more informal and ad-hoc; involving staff-to-staff inquiries and responses using email outside of the CityView workflow tool. This ad-hoc approach is sub-optimal. Ideally a CityView trigger confirming signed Site Plan drawings would prompt acceptance and processing of an overlapping Building application and permit issuance.

It should be noted that Collingwood does not currently make frequent use of existing statutory provisions around issuing Conditional Building Permits. Conditional permits dealing with advance approvals for foundations and/or below-grade servicing connections are often used in Ontario growth municipalities to accelerate construction. They do however pose workload, workflow, and risk management challenges for municipalities.

In the Subdivision driven development channel, advance overlapping submission and review of an applicant’s plans for repeat house models (occurring prior to legal lot creation) is utilized across Ontario. This approach prevents large batches of Building

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Permit applications from subsequently appearing “on the Building Code clock” after Registration and then requiring impossible-to-deliver 10-day permit decisions from the Chief Building Official (CBO).

Collingwood’s Building Department is well versed in the technical details/approaches to properly functioning overlapping DAP processes. The CBO is currently applying appropriate decision-making in coordinating appropriate overlap decisions but would be aided by more robust CityView configurations featuring specific designated milestones in the Site Plan process map to trigger acceptance of Building Permit applications and issuance of Building Permits.

3.3.5 Post-Occupancy Inspections & Securities Release

Following the completion of construction at the conclusion of the Building Permit process an Occupancy Permit is issued. Applicants can then confirm they have satisfied post-construction provisions embedded in Collingwood’s already-executed development agreements.

Collingwood makes use of a “hybrid” approach to clearing these post-occupancy development agreement provisions. Most of these provisions involve the timing of infrastructure completion such as street lighting, curbs, and final asphalt, as well as landscape amenities and final “As Built” grading. Collingwood’s hybrid approach to provision clearance relies primarily on the applicant’s engineering consultant to document clearance via their own inspections, letters of certification and “As Built” confirmations. Town staff also conduct periodic/selective on-site inspections with or without the applicant’s consultants - in other words, limited oversight, and clearance confirmation. These two approaches taken together function as a not uncommon hybrid model for Ontario mid-sized municipalities.

Town staff acknowledge a more robust independent review/oversight role would be ideal - if the existing finite DAP capacity were expanded to support this higher level of due diligence. The current hybrid approach seeks to transfer primary legal liability to the applicant, as opposed to a more effort-intensive municipal verification effort that would guarantee all post-Occupancy development agreement provisions have been robustly satisfied. The hybrid approach, while less than optimal, is not unusual across mid-sized Ontario municipalities. Planning and Engineering staff in Collingwood each review

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distinct agreement conditions that trigger a positive inspection decision that gives the green light to Finance to release securities.

3.3.6

Committee of Adjustment

The initiation of most Committee of Adjustment applications is typically triggered by the lack of ability for a landowner to obtain a Zoning Compliance Certificate or by applications for Building Permits that do not comply with applicable law. Where applicable, Collingwood typically prefers Minor Variance applications to be submitted after an initial Technical Review Cycle for a Site Plan has been completed. This staged approach ensures the initial Building Permit submission is not premature and is consistent with the applicable law aspects of the Site Plan design (e.g., building footprint positioning and coverage). Committee of Adjustment applications are accepted and processed through the CityView portal by the Planning Technician who confirms the completeness of the application (including fee payment) and then circulates the application to the appropriate reviewers. The Planning Technician and/or a Planner will conduct a content adequacy check.

Collingwood’s Committee of Adjustment structure and model of proceedings follows a typical Ontario municipal model, whereby meetings occur on a monthly basis, the Planning Technician prepares and issues the Notice of Public meeting, and the Planning Technician together with the assigned Planner prepares the Committee of Adjustment report and application recommendations. The Committee meetings address both Consent and Minor Variance applications in the same meeting and have a fairly quick turnaround time that meets statutory requirements.

As observed, some challenges with the current Committee of Adjustment structure include delayed response times from external agencies such as Conservation Authorities which can result in the Town issuing condition based approvals until comments are received; a high dependence on email communication which can lead to redundancies and additional workflow for staff; blurred roles and responsibilities for Committee members, staff, and Council involvement in Committee of Adjustment proceedings; and the potential for deferring applications when review comments are not received or due to missing information in application packages.

3.4 Version Control and Document Storage

Throughout the Current State Gemba Walks the Performance Concepts/Dillon team repeatedly documented a fragmented corporate approach to the storage of DAP information and file management. Specifically, there are five existing platforms/approaches that are simultaneously being used for document storage, file sharing, and version control aside from CityView. These disparate solutions include: TOMRMs/S Drive, SharePoint, Microsoft Teams, email, paper/hard copy, and desktop/local copies.

This fragmented approach has a significant negative impact on Current State DAP performance. Inconsistent file management disrupts efficient application processing, generates uncertainty when attempting to report/analyze DAP performance, limits access to files for staff who are not assigned to a specific project or after staff turnover, and hinders information sharing with external agencies. Additionally, this sub-optimal approach may lead to loss of data or documents in the event of a departing staff member solely storing information on local drives. Version control problems within any given file are an ongoing risk.

3.5 CityView DAP Portal/Workflow Tool

Collingwood has selected CityView as its DAP workflow tool. The Town has implemented an online application intake portal, although it has yet to be consistently utilized to its full extent.

There are a number of commercial DAP workflow platforms available to Ontario municipalities. They have similar functionality, and they can be configured to track and timestamp workflow progress across milestones, automate communications with applicants, integrate GIS and drawings markup software, generate data streams for DAP performance reporting, and can feature public facing dashboards. **The key to a successful rollout of a DAP workflow platform is the upfront effort to maximize workflow tool functionality by robustly configuring efficient Future State processes for each DAP application category.**

3.6

Measuring DAP Performance and Setting Targets

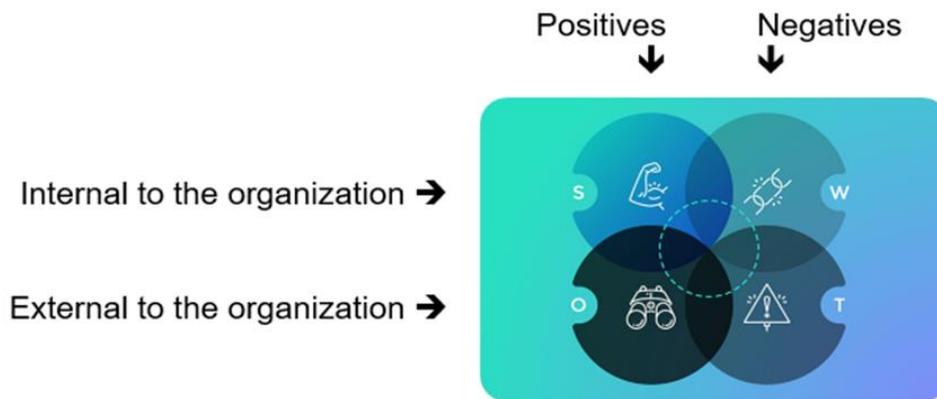
Collingwood does not currently make use of Key Performance Indicators (KPIs) to manage/coordinate DAP service delivery. DAP performance metrics are not proactively rigorously tracked across applications, nor are results transparently reported to Council or shared with development industry stakeholders. While DAP staff refer to aspirational target timeframes for processing applications, actual timeframes are not yet reliably tracked in CityView or any other software tool. Bill 109 refund exposure and SCAP servicing allocation commitment expiry dates have resulted in a renewed effort to generate a refund tracking dashboard or automated refund calculation solution. Much work remains to be done in transforming a “metrics blind” version of DAP into a data-driven, LEAN high performing DAP that features KPIs and performance targets supported by CityView data reports.

4.0

SWOT Evaluation of Collingwood DAP

SWOT is a useful diagnostic tool/framework for understanding the Current State performance of Collingwood’s DAP delivery model. The figure below provides insight into the SWOT based approach to evaluating a municipal DAP model. Internal Strengths (S) and Weaknesses (W) can be explored and documented, as can externally generated Opportunities (O) or Threats (T) impacting overall DAP performance.

Figure 15: SWOT Based Approach



The Performance Concepts/Dillon team facilitated two SWOT working sessions with the Town’s DAP staff team/leadership. These SWOT working sessions explored and evaluated the performance characteristics of Collingwood’s Current State DAP model. The SWOT provided root cause insights around DAP performance challenges, thereby informing this Final Report’s portfolio of Recommendations to achieve a high performing Future State DAP model.

The Performance Concepts/Dillon team introduced specific considerations to give the SWOT sessions greater structure:

- Strengths and Opportunities = positive factors
- Weaknesses and Threats = negative factors

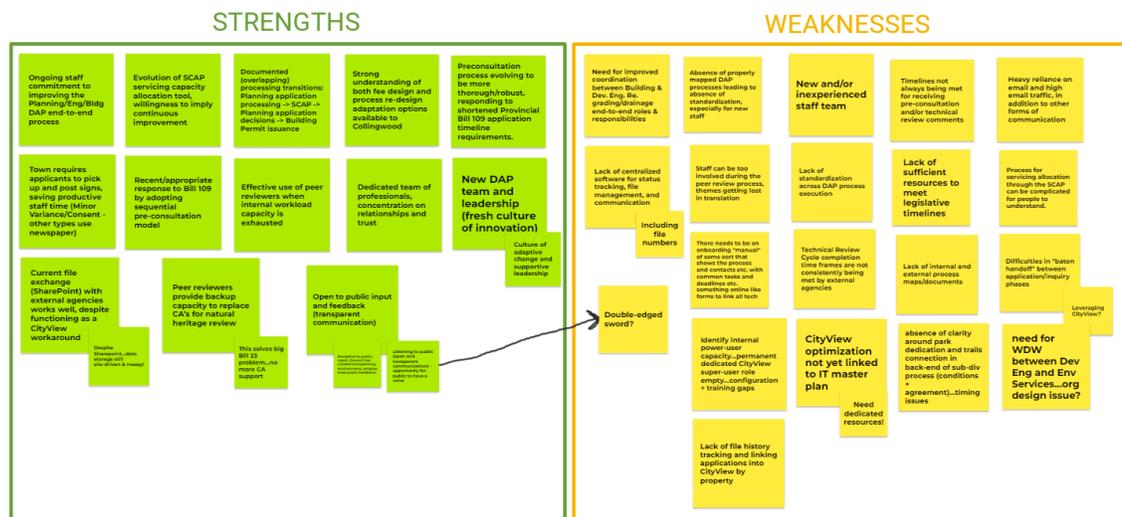
SWOT working sessions utilized pre-populated Google Jamboard slides to capture the complexities and interrelated performance issues within Collingwood’s DAP model.

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These Jamboard screens contained “get started” information, and Collingwood staff were then able to provide real-time feedback and numerous DAP performance insights directly into the Jamboard platform.

For illustrative purposes, a screen capture of one of the Google Jamboard slides used in the facilitated SWOT sessions is presented below.

Figure 16: DAP Process Execution
DAP Process Execution



Based on facilitated dialogue with the DAP staff team, the SWOT analysis identified numerous high-level “DAP issues”, which translate into performance improvement opportunities moving forward. SWOT Weaknesses can be converted into Strengths, and SWOT Threats offer the chance to pivot and capitalize on new Opportunities.

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The SWOT discussions/staff inputs were framed around the following DAP performance themes:

- **Internal Strengths and Weaknesses**
 - Modernizing Technology
 - Process Execution
 - Role Clarity
 - Resourcing
 - Timeframe Targets
 - KPIs and Technology Tools
 - Council Relationship with Staff
- **External Opportunities and Threats**
 - Development Community DAP Improvement Priorities
 - Council Relationship with Development Community
 - Regulatory Changes and Compliance Risk

To kick-off the SWOT working sessions, the Performance Concepts/Dillon team posed the following questions:

Figure 17: Summary of SWOT Meaning

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> • What are the strengths that Collingwood can build upon? 	<ul style="list-style-type: none"> • What are the weaknesses that Collingwood needs to address? 	<ul style="list-style-type: none"> • What are the opportunities that Collingwood should pursue? 	<ul style="list-style-type: none"> • What are the threats that Collingwood needs to mitigate?

SWOT insights documented within the sessions appear in the following Strengths, Weaknesses, Opportunities, and Threats summary tables.

4.1 DAP Strengths

Table 3: DAP Strengths

SWOT Theme	Observation
Modernizing DAP Technology	<ul style="list-style-type: none"> • Properly functioning DAP intake portal in CityView; • Evolving utilization of CityView and ongoing software configuration improvements underway; • Acknowledgement that robust/dedicated project management resourcing by Collingwood is necessary for successful CityView; • Consensus that current CityView configuration for DAP needs significant improvement; • Consensus that CityView should be/will be the sole DAP workflow solution and that all Town staff working in DAP must work within CityView; • Excellent coordination and attendance by multiple Town business units for Pre-consultations meetings; • Close working relationship between Planning and Information Technology teams, allowing for specific Planning needs to be understood and efficiently addressed; and • Established lines of information communication available to the public (CityView My Community Notifications, Engage Collingwood, and the Civic Web portal).
DAP Process Execution	<ul style="list-style-type: none"> • Ongoing Town DAP staff team commitment to improving the end-to-end DAP process; • Evolution of SCAP servicing capacity allocation tool and willingness to apply continuous improvement; • Documented (overlapping) processing transitions: Planning application processing to SCAP, back to Planning application decisions, onwards to Building Permit issuance; • Strong understanding of need for aligned DAP fee design and DAP process redesign, including Bill 109 adaptation options; • Pre-consultation process evolving to be more thorough/robust, responding to Provincial Bill 109 application timeline pressures; • Town now requires applicants to pick up and post Committee of Adjustment Notice signs, saving productive staff time; • Recent/appropriate response to Bill 109 by adopting sequential Pre-consultation model and consecutive ZBA/site plan processing; • Effective use of peer reviewers when internal workload capacity is exhausted or where internal expertise does not exist; • Dedicated staff DAP team of cross-disciplinary professionals focused on relationships and trust between disciplines; • New/evolving DAP team members and leadership (fresh culture of innovation that is adaptable to change and supported by leadership); • DAP team open to public/industry input and feedback (transparent communication).
"Who Does What" Role Clarity	<ul style="list-style-type: none"> • Good working relationship with external agencies. Mutual roles/responsibilities are clearly defined; • Staff willing to break down role uncertainty, but the process is not set up to allow this to happen effectively; and • Clarity on when internal individuals assigned projects, although transparency is not always achieved for tracking/identifying who is assigned other files.
DAP Resourcing	<ul style="list-style-type: none"> • Motivated and dedicated staff willing to cooperate when addressing periodic file processing capacity shortfalls; • DAP Fees Review will generate high quality processing effort data that can be repurposed into a business case for potential staffing enhancements; and • Targeted hiring process leading to qualified candidates.
DAP Timeframe Targets	<ul style="list-style-type: none"> • Staff consensus around value of automated timeframe tracking (reports) generated by properly configured CityView; • Openness to sharing time frame data on file progress with applicants/public via the Portal "viewer"; • Excellent prioritization and rechecking often to know priorities; and • The transition from Council to Committee of the Whole governance provides two rather than one opportunity per month to advance DAP applications, making legislative timelines more manageable.

SWOT Theme	Observation
DAP KPIs and Technology Tool Support	<ul style="list-style-type: none"> • Current DAP review will recommend a portfolio of go-forward KPIs; • KPI rollout will be linked to CityView workflow tool upgraded configuration; • Recognition that CityView configuration improvement will generate time frame measurement capabilities required for KPI measurement and target setting; • Staff team consensus that processing timeframe targets need accountability teeth to ensure compliance; and • Collingwood’s properly functioning DAP portal will provide a “viewer” function for applicants to track file progress against targets, with the ultimate goal of a publicly accessible dashboard showing limited detail about key milestones.
Council Relationship with Staff	<ul style="list-style-type: none"> • Council consensus with DAP staff team around SCAP as a necessary tool to allocate limited capacity in a way that supports good planning and complete communities; and • Professional and respectful relationships.

4.2 DAP Weaknesses

Table 4: DAP Weaknesses

SWOT Theme	Observation
Modernizing Technology	<ul style="list-style-type: none"> • Fragmented approach to data management with six confusing/redundant platforms beyond CityView; • Inconsistent file naming and version management; • Lack of centralized software for status tracking, file management, and communication; • Inadequate CityView configuration not reflecting an optimized Collingwood DAP model; • No auto-generated file processing timeframe reports available to compare actual time frames against target timeframes (i.e., must be done manually); • Absence of clarity regarding CityView implementation, overall project ownership/accountability, resourcing, and unclear timeframes; • CityView is a centralized software which is underutilized; • Limited control over who is making changes to the system where it may affect other users; • No digital versions of old files and agreements; • Lack of CityView “super user” or internal support resources (IT and training); and • BlueBeam not fully utilized.

SWOT Theme	Observation
Process Execution	<ul style="list-style-type: none"> • Absence of properly mapped DAP processes leading to absence of LEAN standardization, especially for new staff; • New and/or early in career staff due to turnover; • Timelines not always being met for receiving pre-consultation and/or technical review comments; • Heavy reliance on email and high email traffic, in addition to other forms of communication; • Not utilizing CityView centralized software for status tracking, file management, file numbers, and communication; • Staff can be too involved during the peer review process, themes getting lost in translation; • Lack of standardization across DAP process execution between staff members; • Process for servicing allocation through the SCAP can be complicated for people to understand; • Absence of documented processes and contacts with common tasks, deadlines, etc.; • Technical Review Cycle completion time frames are not consistently being met by external agencies; • Difficulties in "baton handoff" between application/inquiry phases; • Absence of clarity on park dedication in back-end of subdivision process; and • Lack of file history tracking and linking applications into CityView by property.
Role Clarity	<ul style="list-style-type: none"> • Need for improved coordination between Building and Engineering Services regarding grading/drainage end-to-end roles and responsibilities; • Technical Review Cycles do not clearly assign items requiring comment to specific Town business units or staff which leads to redundancies; • Lack of identification on who the assigned planner is when tasking external agencies; • Roles in Subdivision Agreement and Registration process are not clearly identified; • Town has not optimized respective roles of admin staff versus Planners when it comes to file management and support for CityView; • Back-end processes such as preparation of agreements, monitoring, administration, securities, registration of easements has lots of overlap and lack of role clarity between Planning and Engineering; • Files are assigned to multiple people over their life cycle; and • Lack of clarity regarding the responsibility to ensure that plans submitted as part of Building Permit applications are in general conformity with <i>Planning Act</i> approvals.
Resourcing	<ul style="list-style-type: none"> • High individual workload capacity leading to slower turnaround times; • Fee/Deposits do not yet recover appropriate share of DAP processing effort expended by Town staff; • Questions raised around timeliness/quality of outside legal advice and processing resources for DAP; • Engineering Services staffing capacity is significantly lower than Planning staffing capacity; • Planners often are responsible for non-<i>Planning Act</i> applications (Encroachments, Easements, etc.); • Planning is often assigned unrelated work or there are expectations of Planning beyond their responsibilities from other business units; • Resources do not account for OLT appeals or other legal challenges; • Limited capacity for post draft-plan development engineering review, which may cause delays/bottlenecks if multiple phases come forward at once; • Budgets not always linked to actual work forecasts; • Lack of sufficient resources to meet legislative timelines; and • Lack of DAP workload forecast.

SWOT Theme	Observation
Timeframe Targets	<ul style="list-style-type: none"> • Uneven and inconsistent use of CityView prevents consistent tracking of file progress; • Technical Review Cycle timeframes lack sufficient time to i) provide comments and ii) number of days to consolidate/share comments with applicant; • Absence of fully implemented Bill 109 process adaptations and application decision tracking solution increases risk of fee refund revenue leakage and negative property tax impacts; • Reactive approach to timeframe tracking rather than proactive; and • No obvious CityView super user/data analyst.
KPIs and Technology Tools	<ul style="list-style-type: none"> • No standardized set of DAP KPIs to inform public accountability reporting; • Absence of KPIs measuring actual processing timeframe results makes informed target setting challenging; • Annual budget process used to set DAP staffing/resourcing levels not linked to expected results; and • Absence of DAP fees calculation model makes it difficult to track costs and revenue streams of specific application categories.
Council Relationship with Staff	<ul style="list-style-type: none"> • Council gaps on DAP knowledge and understanding; • Council is not fully persuaded that efficiency of delegated authority approvals is merited; • Council interventions in the technical aspects of DAP may be reducing overall DAP performance; • Historical issues of mistrust between Council and staff with regards to staff recommendations, standard operating procedures, and answering public questions; and • Desire of some Council members to be involved in Committee of Adjustment decision-making can lead to blurred lines of accountability and decision timing.

4.3 DAP Opportunities

Table 5: DAP Opportunities

SWOT Theme	Observation
Development Community Priorities	<ul style="list-style-type: none"> • Development community acknowledges significant improvement in communication with Town under the current DAP leadership team; and • Strong understanding of both fee design and process redesign adaptation options available to Collingwood.
Council Relationship with Development Community	<ul style="list-style-type: none"> • Council consensus on benefits/advantages of providing capacity allocation to those projects with the best community planning outcomes; • Recognition of benefits to be derived from ongoing structured framework for dialogue between Town and industry; • Consensus across Town and Industry that workload pinch points and staffing under-investments are an issue; and • Mutual acknowledgement that full cost DAP fees are not problematic if DAP is high functioning.
Regulatory Changes	<ul style="list-style-type: none"> • Strong understanding of Bill 109 and Bill 23 regulatory challenges to DAP; and • Consideration given to modified DAP framework approach to accommodate Bill 109 timeframes.

4.4 DAP Threats

Table 6: DAP Threats

SWOT Theme	Observation
Development Community Priorities	<ul style="list-style-type: none"> • Absence of technical consensus with development community about extent of servicing capacity shortages, leading to doubts about necessity of SCAP; • Development community reluctance to conditions being imposed via SCAP scoring matrix (e.g., LEED energy efficiency and sustainability scoring); • Dormant files being closed after only four months was flagged as an issue, but after consultation with the Development Community a compromise approach was reached; • Conflicting technical comments between internal departments; • Challenges with external consultants creating uneven timelines - long delays followed by rapid demands for progress; • Extreme pressure on staff to approve but years go by before shovels in the ground (quick to approve, slow to develop); • Outdated zoning policies; • Lack of prescribed list of Pre-consultation study terms of reference or related submission requirements contributing to weak submissions; • Low Pre-consultation fees; • Friction over constrained lands and need for EIS; • Pivots by applicants (fundamental application changes) being driven by market conditions and applicant desires not being recovered by low fees for additional cycles; • Pivots by applicants create risk for No Municipal Decision and OLT appeals; and • Submission timing problems with site plan and minor variance applications due to consecutive approval requirement.
Council Relationship with Development Community	<ul style="list-style-type: none"> • Lack of technical consensus between Town and industry re: water capacity issues; • Limited ongoing structured framework for dialogue and consultation between Town and industry and absence of political leadership; • Perceptions of interventionist Council; • Perceptions of one set of Planning DAP rules and other rules for SCAP; • Absence of objectivity for non-<i>Planning Act</i> SCAP scoring provisions causing trust and credibility issues with industry; • Council involvement in technical aspects of certain files is not consistent with municipal sector “best practices” around delegated approvals and opportunities for reduced Bill 109 decision timeframes; • New Provincial policy framework at odds with Council interventions; • Pressure on staff to enforce SCAP conditions via scoring when <i>Planning Act</i> may not have the leverage to compel them; • SCAP requires significant effort for staff; and • Effort and cost for OLT appeals need to be accounted for during decision making.
Regulatory Changes	<ul style="list-style-type: none"> • The development industry is not supportive of expanded Pre-consultation; • The development industry is not supportive of file closure; and • Friction with the development industry with regards to the refuse or withdraw application approach.

4.5 Key SWOT Findings

The SWOT derived challenges and opportunities faced by Collingwood moving forward are summarized below:

- Strong desire to modernize DAP review capacity as well as willingness to adopt changes by knowledgeable and motivated Collingwood staff but limited available resources to do so;
- Ability to build on the existing positive relationship with the local development industry, although there is a lack of consensus regarding capacity allocation;
- Fragmented approach to data management with various storage platforms beyond CityView, as well as inconsistent file and version control management;
- Uneven and inconsistent use of CityView reflects incomplete rollout and lack of corporation wide training and limits consistent tracking of file progress;
- No standardized set of DAP KPIs to inform public accountability reporting and lack of standardized conditions/agreement provisions that can be applied for conditional approval;
- Lack of written procedures, standard templates, upfront agreements for contingency funds, checklists, etc. limits efficiency and consistency; and
- Reliance on the technical expertise of external partners (e.g., Conservation Authorities for natural heritage comments) has generally worked well in the past; however, this collaboration model is now impacted by recent *Planning Act* regulatory changes.

Collingwood has a promising opportunity to re-configure the “As Is” Current State DAP model into the transformed “As Should Be” high performing Future State DAP model envisioned by the DAP staff team and development community partners at the beginning of this Review.

4.0 SWOT Evaluation of Collingwood DAP 50

As SWOT informs the envisioned transformation of DAP in Collingwood, the following questions are posed by the Performance Concepts/Dillon team for consideration:

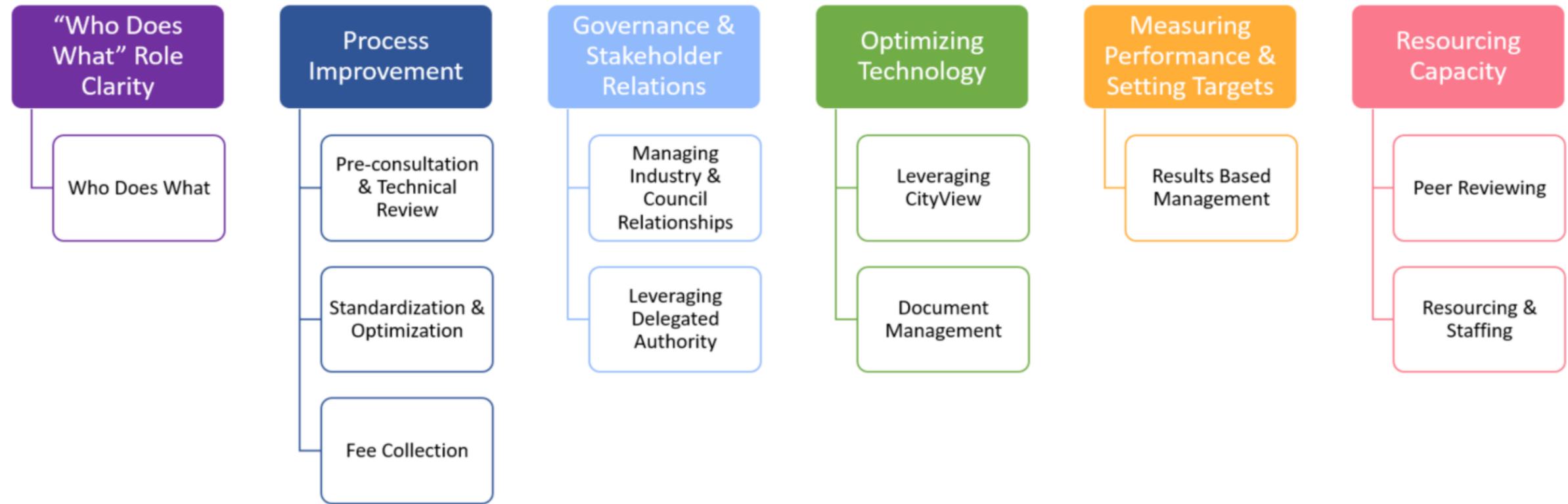
How do we leverage Collingwood’s capacity to transform DAP and is there an overriding LEAN DAP philosophy driving our vision? What are the Wildly Important strategic directions/big moves?

5.0

Collingwood “As Should Be” Future State DAP

Future State Recommendations will create a pathway to a high performing Collingwood DAP delivery model. Future State Recommendations have been informed by the in-depth review of Collingwood’s Current State DAP coupled with the Performance Concepts/Dillon team’s experience and knowledge of best practices and regulatory changes impacting DAP. As illustrated in the figure below, the portfolio of Recommendations is organized into six key themes. Recommendations are also categorized as either Strategic or Tactical. The impacts of Bills 23 and 109 were considered in the formulation of certain DAP improvement Recommendations.

Figure 18: Future State Recommendation Themes



5.1 Secure “Who Does What” Role Clarity

5.1.1 Who Does What

Clarifying roles and responsibilities will reduce redundancies in DAP processes, improve processing consistency and reduce timelines, streamline “hand offs” opportunities between Divisions, promote accountability, and foster stronger collaborative working relationships between DAP business units. Acknowledging opportunities to improve clarity around roles and responsibilities can also provide a safe space for participating Town staff to raise concerns around recurring inefficiencies or expending excessive amounts of staff time/capacity on low-value processes. Resolving these matters collaboratively within the DAP team will contribute to a higher performing DAP model. Not to be confused with a counter-productive airing of grievances, this transparent improvement process is all about creating a forum to engage in productive discussion about the DAP transformation in Collingwood. The following Recommendations align closely with Future State process maps that document the specific Town business unit/staff member responsible for executing a given process execution activity.

5.1.1.1 Post-Occupancy Condition Clearance

Development agreements linked to Site Plan or Subdivision approvals typically contain conditions pertaining to the provision of infrastructure, assets, and amenities by the applicant. These conditions constitute a legal obligation by the applicant. Ontario municipalities, including Collingwood, have a good governance obligation to ensure that these conditions are met and cleared to ensure that posted securities can be returned. Many of these development agreement conditions can only be discharged after construction is completed and the CBO has issued an Occupancy Permit or following an identified guarantee period.

Municipalities across Ontario have adopted a variety of accountability models when it comes to condition clearance regarding infrastructure, assets, and amenities. Some municipalities rely heavily on the applicant’s consultants to confirm that conditions have been met in a technically appropriate fashion. This approach implicitly seeks to transfer accountability and inspection effort, and perhaps even legal liability, back to the applicant. Other municipalities actively engage in their own inspection driven process of confirming conditions have been appropriately satisfied. This approach seeks to



5.0 Collingwood “As Should Be” Future State DAP 54

minimize risk for the municipality by enforcing accountability onto applicants for technically appropriate condition clearance. Hybrids of these two approaches are also common.

Collingwood employs a hybrid model where development agreement condition clearances are dependent on “As Built” confirmations by applicant consultants plus selective inspections by Town staff – typically but not always Engineering field staff. Across Ontario differing combinations of Planning, Engineering and Finance staff are involved in the condition clearance and securities release process. These municipal staff groupings are involved in the technical review and inspection of physical assets or amenities, including the administrative tracking of itemized conditions and the triggering of securities release. There is no standardized set of roles and responsibilities across Ontario municipalities; a reality confirmed by sector-wide peer benchmarking.

Planners are typically involved in the administrative side of condition clearance tracking. Engineering staff can be involved in administrative tracking as well as executing technical inspections and signing-off on consultant generated confirmations. Operational efficiency for Collingwood will be secured by having all field inspection activity executed by one Town business unit (Engineering) while the administrative tracking of development agreement condition clearance is the responsibility of the file Planner. Release of securities by Finance will be triggered by the Planner’s administrative sign-off on the field work executed by Engineering and/or the applicant’s consultants. This approach will provide role clarity for the Town as well as maximizing operational efficiencies secured by Engineering field staff potentially addressing any and all infrastructure, asset, landscape, and amenities on a given field visit to a given site. The clarification of these roles between Planning and Engineering can be discussed in the recommended facilitated "Who Does What" roles and responsibilities working sessions.

5.1.1.2 **Clarifying Roles for Grading and Drainage Review**

Selecting a single Town business unit to oversee grading and drainage matters across DAP is consistent with evolving Ontario municipal sector standard practices. Collingwood DAP will benefit from establishing continuity and consistency of technical review across core Planning and Building delivery channels. The result of establishing



5.0 Collingwood “As Should Be” Future State DAP 55

role clarity will be LEAN execution of DAP when it comes to Subdivision and Site Plan channels.

Public Works, and specifically Development Engineering, is the appropriate business unit to oversee grading and drainage matters across Planning and Building DAP. The Grading and Drainage process diagram below (next page) is instructive when considering the benefits of establishing end-to-end accountability and coordination for DAP grading and drainage matters. The process diagram is focused on Subdivision driven development, but the benefits of clarity, consistency, and accountability will also apply to the Site Plan development channel.

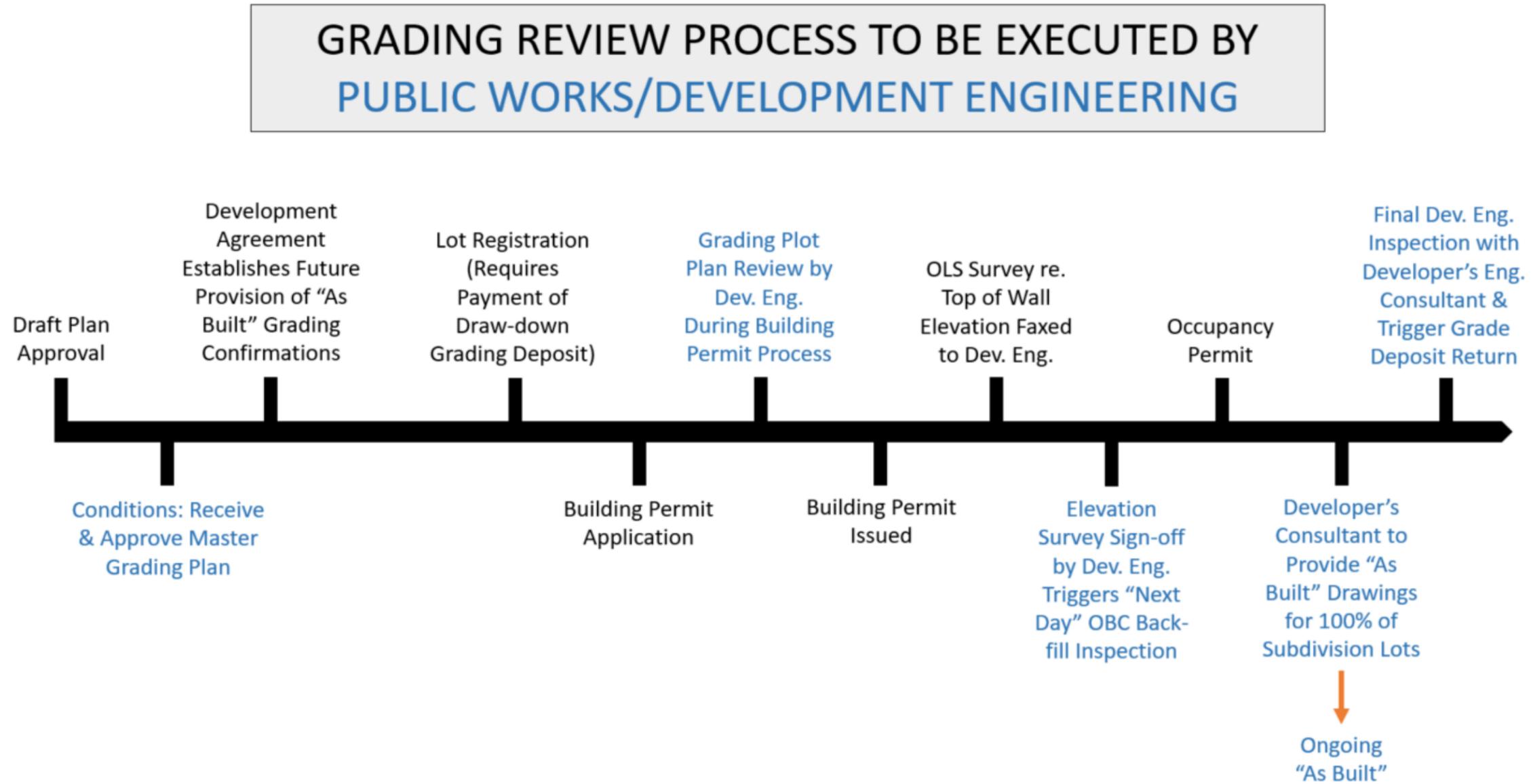
Development Engineering would review and approve the critically important Master Grading Control Plan for each Draft Plan of Subdivision. After lot registration, as individual Building permit applications are received, Development Engineering will review/approve submitted Grading Plot Plans. Lot by lot grading conformity with the Master Grading Plan will be secured by ensuring the same staff that approved the Master Grading Plan also review/approve individual plot plans.

Development Engineering staff will also protect the integrity of the overall grading solution for a Subdivision by ensuring Top-of-Wall elevations for residential foundations are acceptable/within tolerances prior to backfilling and framing proceeding.

After Occupancy has been granted, Development Engineering will secure and evaluate “As Built” confirmation letters/drawings provided by outside engineering consultants. These “As Built” confirmation drawings will be carefully documented by Development Engineering for future reference when the inevitable “grading wars” break out between future neighbours after arbitrary changes to approved grading and drainage occur.

Finally, Development Engineering will conduct the required final walk-through inspections of completely graded sites (along with outside engineering consultants) to ensure the on-the-ground grading solution is in conformity with previous approvals and consistent with submitted As Built drawings. This grading and drainage comprehensive inspection triggers the refund of the remaining Draw-down Grading securities collected at the execution of the Subdivision Agreement.

Figure 19: Grading Review Process as Executed by Development Engineering



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Development Engineering should also assume exclusive responsibility for the review of grading and drainage matters for Building Permit applications/decisions linked to Site Plans where they have already approved the relevant drawings. In this way conformity between the two sets of grading/drainage drawings is guaranteed.

Table 7: Future State Recommendations

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
RC 1	Tactical	Technical review requests are issued to a range of reviewers, including those who do not have interest in particular applications.	Circulate relevant departments and agencies only. The circulation list is determined at the discretion of the Planner or delegated to the Planning Technician, as appropriate.	Reduces redundancies and ensures that only the appropriate/interested agencies are involved in technical review.
RC 2	Tactical	Duplication of effort between business units in technical review, clearance of conditions, and securities release approval.	Use the proposed future state process maps as a guide to clarify departmental roles and responsibilities for the inspection, sign-off and securities release phases.	Improves role clarification and reduces duplication of effort.
RC 3	Strategic	Planning being responsible for a variety of non- <i>Planning Act</i> applications.	Document non- <i>Planning Act</i> processes and assign to the appropriate business unit. For example, easements should be assigned to Engineering Services.	Frees up Planning to focus on <i>Planning Act</i> applications, ensures the appropriate business unit is reviewing applications, and speeds up turnaround times.
RC 4	Strategic	Technical review cycles do not clearly assign input to specific Town business units/staff members and overlap between Administrative and Planning staff.	Utilize a combination of Future State process maps, list of business units, and current staff roles to identify an optimized roles and responsibilities structure. Use the revised structure as a basis for conducting facilitated "Who Does What" roles and responsibilities working sessions for all core DAP application categories. Imbed the results in SOPs and create/circulate an organization chart with a brief description of each role's involvement in the planning approvals process.	Ensures role assignment and tasking is clearly defined.
RC 5	Tactical	Miscommunication of roles and lack of tracking on security issuance and release.	Formalize mechanism for tracking certificate of issuance and clarifying roles of who is responsible for issuing and tracking certificates.	Improve the efficiency of the process and improve the tracking of insurance issuance and expiration.
RC 6	Tactical	Miscommunication of roles and responsibilities regarding condition clearance.	File planners are the file lead for monitoring clearance of conditions and Development Engineering provides technical input to Planning. Planning will provide administrative sign-off, with the Director’s approval, following executed field work by Engineering and/or the applicant. Planning liaises with Finance regarding securities release.	Ensures process efficiency and ensures lack of redundancy in condition clearance and file lead.
RC 7	Tactical	Multiple business units involved in the grading review process across Planning and Building DAP.	Establish role clarity and accountability for Grading and Drainage matters end-to-end across DAP. Development Engineering should be designated as the lead Town business unit to provide technical expertise and consistency across Planning DAP and Building DAP approvals relating to Subdivision and Site Plan driven development.	Ensures efficiency, continuity, and accountability for grading matters across Planning and Building DAP.

5.2 DAP LEAN Process Improvement

5.2.1 Pre-Consultation through Technical Review

With financial penalties being applied to files that do not meet the regulatory timelines, the front-end of the DAP system is recommended to be drastically refined to facilitate higher quality applications and faster turn-around of meaningful comments from Town staff and external partners, where applicable. The Recommendations presented in this section are focused on creating a rigorous Pre-consultation and Technical Review Process.

Going forward the Town will need to take a firm “zero tolerance” position on requiring applicants to complete and submit the necessary technical work that forms the supporting information and materials. It will be necessary to turn away deficient submissions where necessary. By doing so, the quality of applications will improve over time, and staff will have the appropriate resources to complete the technical review. The Recommendations in this section address the need to conduct a robust completeness check at the application intake stage to avoid the risk of deeming applications complete where in-adequate information has been provided, which results in an eventual risk for refund and OLT appeal. Increased clarity regarding expectations, including through the use of guidance documentation, results in streamlined review and approval processes (e.g., limits the need for excessive back and forth on technical requirements ‘on the clock’).

In order to achieve mandated processing timelines, set out by the Province, Collingwood should take a different approach to coordinating technical review. Everything that is within the control of the Town must be considered for possible improvement opportunities. Simple adjustments like modernizing agreement templates and internal reporting timelines are suggested. While these are minor tweaks to the system, the cumulative impact of incremental improvements can be significant. It is also important to recognize the investment of staff time required to advance these improvements. It is acknowledged that there are elements of the DAP system that are beyond the control of the Town (e.g., external agency partners) and an approach must be developed and implemented in light of that reality. Despite ongoing critique of the practicality, the onus rests with municipalities across Ontario to facilitate a timely review and approval.

Table 8: Pre-Consultation and Technical Review

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
PI 1	Tactical	Planning is not consistently providing complete information to Technical reviewers.	Develop and implement a template for circulating requests for comment on development applications to internal business units and external agencies. This should include contextual information, associated timeline/deadline for providing comments and contact information of key contacts, including the assigned Planner.	Provides additional clarity in expectations and due dates, as well as effectively convey application details.
PI 2	Tactical	Concern with losing contextual reasoning for pre-consultation requirements if adopting a checklist-based comments approach.	Develop a consistent template for Pre-consultation comments, organized by discipline for ease of use, including a customizable checklist for all possible application submission materials. Develop a list of standardized (typical) comments that can be drawn on for populating the template as well as space for individual (non-standard) comments as applicable. Require that the applicant provide a response to each staff technical comment in the template upon any subsequent re-submission.	Improve the quality of information provided to applicants to ensure studies/plans are completed properly. Ensure that the quality of submissions following pre-con will satisfy the Town's development review standards and address all municipal concerns.
PI 3	Tactical	Consideration of phased pre-consultation process for development applications and site plan.	Update the pre-consultation by-law to reflect the sequential processing model for land use and Site Plan/Subdivision applications. Ensure adequate communication to staff and the public regarding this update through website updates, local news postings, revised application guides/forms, and/or other means of media as applicable.	Formalize sequential model and ensure a better cost return at the front end of the process.
PI 4	Tactical	Lack of comment response matrix requirement from applicants between submissions.	Develop a standardized template for technical review comments, organized by discipline and with an area for the applicant to provide a response, and require the applicant to populate the comment response matrix template upon resubmission. Matrix template re-submissions should identify how and where the Town's technical review comments were addressed by the applicant, including a brief justification if a comment has not been met/addressed.	Ensures accountability on tracking that technical review comments have been implemented into the plans and ensures standardization of comment response matrix framework.
PI 5	Tactical	Lack of standardized terms of references for common submission requirements.	Develop standardized Terms of References for common submission requirements (e.g., Planning Justification Report, Traffic Impact Study, etc.).	Ensures high quality submissions and can be utilized as a tool to deem applications incomplete should the submitted documents not meet all the requirements of the TORs.
PI 6	Strategic	Lack of quality application submissions.	Implement a 2-step application "Deemed Complete" process consisting of a piece-count check (comparing to the Pre-consultation checklist) plus a shallow-dive content adequacy review of targeted submission items. Once implemented, ensure that the piece-count "Deemed Complete" decision notices are automatically issued in CityView, similar to the current Deemed Complete process.	Improves quality of applications.
PI 7	Strategic	Contradicting comments between reviewers can be issued to applications during Pre-consultation and/or technical review.	Develop standardized comments that can be issued as a baseline for various applications and ensure that the assigned Planner reviews the technical review comments as they are received to provide the opportunity to clarify or internally resolve contradictions prior to issuance to the applicant.	Reduced likelihood of issuing contradicting comments to applicants; and time/effort saving from standardized comments than can be applied to straightforward applications.

5.2.2 **Standardization & Optimization of DAP Execution**

In order to achieve an efficient Pre-consultation and Technical Review process, implementing standardization where possible to do so can establish uniform terms of references, ensure consistency in terms of internal templates for technical review and issuance of standardized comments or conditions, and frees staff from having to constantly draft conditions or create templates. Standardization can also apply to revised comment response matrices, application guides and forms, and standard operating procedures for staff to define and stick to set roles and responsibilities, which will together contribute to an efficient and optimized DAP process.

5.2.2.1 **Coordination of Planning and Building Permit Processes**

Many Ontario municipalities still employ a sequential processing model where Building Permit applications are not encouraged prior to Site Plan agreement execution or Subdivision lot registration. The sequential model typically triggers aggressive *Building Code Act* timeframes for a Building Permit decision by the municipality - since applicable law is typically in place and a complete Building Permit application has been submitted. A growing number of Ontario municipalities have opted for an overlapping processing model.

Once a Site Plan application has been deemed complete and has progressed to a certain point of technical review (e.g., first circulation comments) then a Building Permit application can be accepted, thus turning off the Building Permit statutory timeframe clock. The Building Permit plans examination process can begin in parallel with the Site Plan approval (i.e., signed drawings) and the execution of the Site Plan agreement. Once the Site Plan approval is secured and the Site Plan Agreement executed, the Building permit can be immediately delivered given that applicable law requirements are satisfied. From the applicant’s perspective, the overall timeframes for the overlapping Site Plan and Building Permit model are significantly shorter than a traditional sequential approvals model. The Building Permit issuance timeframe may take longer than the OBC timeframe standard, but the overall DAP timeframe for the applicant is shorter.

Rather than rely on ad-hoc communication between Planning and Building staff to coordinate the desired handoff timing, the municipal sector best practice is to use a DAP

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workflow technology solution. The DAP workflow tool solution works in the following manner for Site Plan overlap:

1. Establish a Site Plan process milestone that acts as the trigger for receipt of a complete Building Permit application;
2. Create a progress “check-mark” in the DAP workflow tool for the above-selected trigger point. If that trigger is not check-marked in the DAP workflow tool, the workflow tool will not initiate/accept a new Building Permit application for the project in question;
3. Once the trigger point has been check-marked, Building Department staff proceed with their application review, and they arrive at a permit issuance decision; and
4. The DAP workflow tool is pre-programmed to prevent the issuance of a Building Permit (once the Permit decision milestone has been reached) unless a second Site Plan processing trigger has been check-marked; Conditional Site Plan approval culminating in the Agreement execution. Once that second trigger has been satisfied, the DAP workflow tool will allow Building Permit issuance.

This best practice is best expressed **as carefully calibrated overlap managed/overseen with a DAP workflow tool functioning as a process coordination drawbridge.**

5.2.2.2

Subdivision Hand-off to Building

The overlapping DAP processing model can also apply for Subdivision. Building Permit applications and/or model home Building Code review pre-approvals can be initiated concurrently with the drafting of the Development Agreement, following various technical review cycles and prior to lots being legally created. Once lots have been legally created, pre-approved models can be positioned on lots, and the necessary Zoning and Grading reviews can be quickly executed for limited tranches of lots “on the Building Code clock” if necessary. These overlapping approaches enable Collingwood to deal with manageable sized tranches of Building Permit applications in compressed timeframes following the Registration of lots at the end of the Detailed Engineering Approvals Phase of the Subdivision channel.

Table 9: Standardization and Optimization

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
PI 8	Strategic	Bill 109 strategy has not yet been adopted to mitigate the financial risk of compressed processing timelines.	Implement a "made-in-Collingwood" Bill 109 Adaptation Strategy that is informed by a mix of potential DAP process refinements and/or DAP fee and cost recovery re-design decisions. The "made-in-Collingwood" DAP Adaptation Strategy should include a two-stage Pre-consultation model whereby the first stage is mandatory and is reflective of the current Pre-consultation process, resulting in comments and a list of required studies. The second stage should be optional and reserved for complex applications. In this stage, the applicant should be required to indicate how comments from the first Pre-consultation stage has been considered in the revised submission materials. This stage will result in a more detailed internal review and, depending on the complexity of the application, may involve peer review with the goal of ensuring subsequent applications are one-and-done. The "made-in-Collingwood" approach can also include components such as an Optional Extended Pre-Consultation Technical Review, a Bill 109 Refund Waiver, a One-and-Not-Done application refusal model, and a Fees Refund Application Process.	Ensures Collingwood has considered a range of municipal sector adaptation options/tools in crafting a flexible/risk informed Bill 109 approach that is appropriate given the evolving, fast-changing DAP regulatory regime.
PI 9	Tactical	High dependency on emails and undocumented forms of communication outside of CityView.	Establish a DAP SOP requiring utilization of CityView interactive platform/notification functions. Discourage/prohibit inefficient undocumented workarounds outside the CityView platform. Make full use of automated notification features within CityView following Optimization Project completion. Provide staff training to support success.	SOP will push back against DAP fragmented documentation and decision-making. Will provide necessary focus on CityView platform as the core DAP information management platform.
PI 10	Tactical	Lack of contextual DAP SOPs "manual" for Town staff and applicants.	Create a DAP Manual(s) informed by the "Future State" process maps. Formalize SOPs to facilitate operating consistency for new and existing staff.	Improves staff onboarding and training. Ensures consistent approaches between Town staff members.
PI 11	Tactical	Changing application details between circulations.	Develop standardized internal guidance regarding what type of (substantive) change to a proposal may warrant an additional pre-consultation and/or would constitute a new application being required. Focus on the metrics not the measurement, as this will be at the discretion of the Planner/Manager.	Improving delegated authority and streamline applications that require pre-consultation or new applications.
PI 12	Tactical	Lack of standardization for site plan and draft plan conditions and provisions within development agreements.	Document historical conditions and establish a template of standardized provisions/conditions for Draft Plan of Subdivision and Site Plan approval. Specific conditions to be identified by Town staff given unique challenges of SCAP. Undertake the same process for development agreements. Ensure templates are regularly updated.	Streamlined data sets for production of conditions and provisions to be imbedded in development agreements, and subsequently cleared by Town after required field inspections.

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
PI 13	Strategic	Redundancy in permits.	Integrate the requirement for Tree Clearance Permits and Fill/Site Alteration Permits and clearly determine criteria for requiring a Site Alteration permit for consistency during the Post-Draft Plan subdivision phases.	Reduces the amount of required application forms for applicants to submit and staff to review, ultimately reducing the number of required forms while still obtaining the same information. Improves clarity as the reasoning for requiring the permit and ensures that all appropriate applications are received/permits issued.
PI 14	Tactical	Insufficient information on application forms and lack of pre-consultation comment response matrix.	Replace current application forms to include fields for all required technical information, user friendly/AODA compliant design, and standardized format across application types and combined applications where possible. Also require the applicant to submit a comment response matrix detailing how each technical comment has been addressed.	Improves quality of applications.
PI 15	Strategic	Delays between Statutory Public Meetings and bringing Decision Reports to Council create Bill 109 fee refund risk.	Adopt SOP where application Decision Reports are typically presented to the next scheduled Committee meeting immediately after a Statutory Public Meeting has been held. To fully implement this approach, a heavier reliance on conditional approvals will be required as there is limited time to update technical information and Council buy-in will be critical.	Expedited OPA/ZBA application decision making will reduce the negative fee refund impacts of Bill 109 by eliminating delays associated with current redundant public input opportunities.
PI 16	Tactical	Lack of timelines for condition clearance and execution of development agreement once an upfront conditional approval has been granted.	Implement a "sunset" deadline for clearing conditions/executing development agreements associated with upfront Site Plan conditional approval (e.g., 12 to 18 months).	Improve timeline for condition clearance associated with conditional site plan approval.
PI 17	Strategic	Historical lack of conditional approvals does not set precedent for Bill 109 approach	Where applicable and where certain criteria of an application are met (e.g., secured site plan agreement, third technical review cycle of subdivision, etc.), utilize conditional approval or Holds to permit the applicant to begin other processes, such as submitting a Building Permit application, concurrently to the back-end approval.	Turns off the Bill 109 approval clock, expedites the start of development, and establishes trust between the Town and applicant.
PI 18	Tactical	Sequential models of Site Plan and Building Permit & Subdivision and Building Permit leading to lengthy approval timeframes.	Adopt a concurrent model for accepting Building Permit applications during both the Site Plan Control and Subdivision processes, once the application hits a certain milestone (e.g., completion of 1 st technical review cycle for Site Plan and 3 rd cycle for Subdivision).	Expedites final Building Permit approval timeframes.

5.2.3

DAP Fees Collection

Municipalities have traditionally accepted fees, as appropriate, on behalf of their external partners, such as an upper tier municipality or a Conservation Authority. To avoid inconsistent or inefficient processing of development applications, Town staff should require that the applicant submit pertinent fees to the requesting agency and Collingwood should not deem the application completed until all the necessary review fees have been submitted. This business rule can be automated using technology tools to remove the need for staff to expend effort on the low-value exercise of confirming required fee payments.

From time to time, Peer Review is required from external consultants for certain Town-required studies where internal expertise does not exist or where internal resources are limited. Such studies may include Peer Review of Environmental Impact, Noise, Environmental Site Assessment, Urban Design, Heritage Impact, and Traffic Studies or other matters considered necessary for Town approvals. Given the changes resulting from Bill 109 and the Town’s recommended modified Pre-consultation process, fees for such studies should be paid by the applicant/owner at the Pre-consultation stage. This allows the Peer Reviewer to be engaged to provide feedback early in the process and will help facilitate a timely review and approval process.

Table 10: Fee Collection

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
PI 19	Strategic	External agency review contingency fee/deposit not collected at Pre-consultation.	Restructure the deposit model to enable drawdown as work is completed on peer reviews and Initiate a Deposit Agreement detailing what is being paid and how the funds are being used. Deposit to be provided at Pre-consultation stage, as applicable.	Supports option for additional cost recovery and ability to have a more robust review.
PI 20	Tactical	Inefficient/inconsistent fee recovery on behalf of external partners.	Require applicants to pay any required fees directly to the Conservation Authority or any other external agency with a fee structure as part of a complete application	Ensures a formalized cost recovery model between agencies is in place.
PI 21	Strategic	Contingency funds applied on a case-by-case basis.	Develop a standardized agreement for contingency funds – amounts, how they will be spent, when they need additional funds, when they are refunded, dispute resolution, etc.	Minimizes staff effort in developing a contingency fund agreement and leads to quicker approvals.



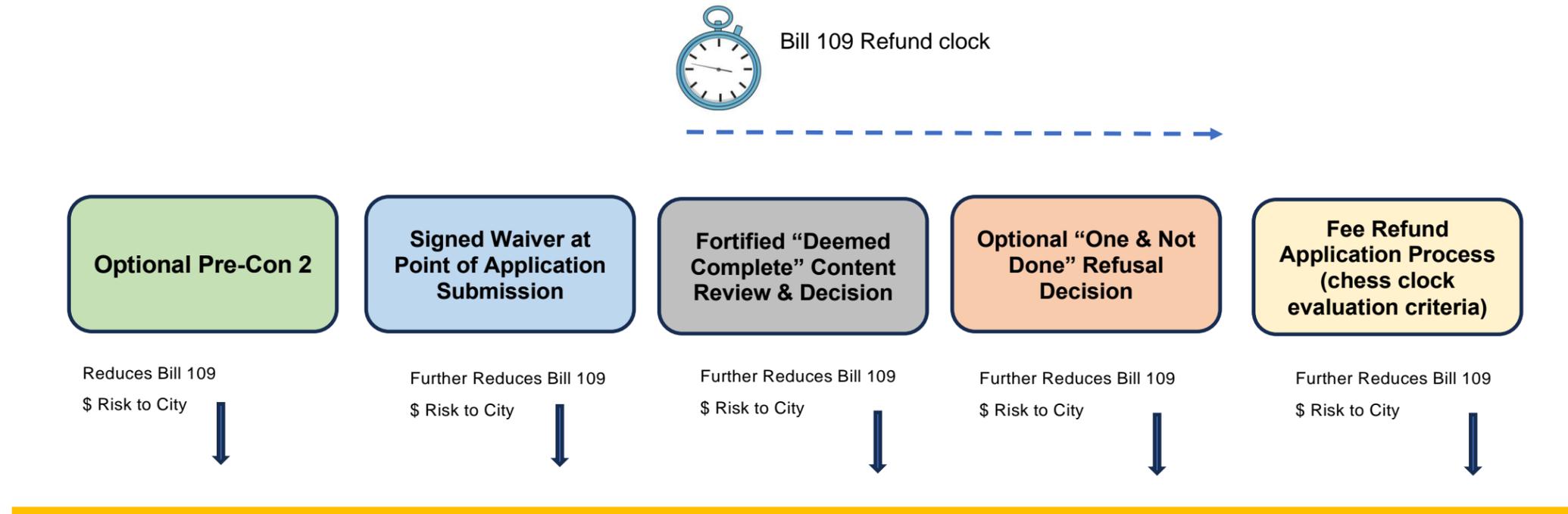
Bill 109 Adaptation

As already noted, Bill 109 has created potential implications for application fee refunds should Ontario municipalities not achieve the new compressed OPA, ZBA, or Site Plan decisions timeframes. The new Bill 109 refund timeframes are measured in calendar days and does not specify who is responsible of an application at any given time. DAP execution is materially impacted by the need for Ontario municipalities to mitigate the financial risks created by Bill 109 fee refunds.

The Performance Concepts/Dillon team does not provide legal advice to clients regarding Bill 109 compliance; however, our team is well versed regarding DAP process execution adaptations that have been or are currently being implemented in various Ontario municipalities. Understanding Bill 109 process adaptations adopted elsewhere in Ontario will be useful to Collingwood staff and Council as the Town refines its own approach to Bill 109.

The figure below illustrates a series of DAP adaptation components being implemented across the municipal sector. The adaptation components include an Optional Pre-Consultation 2 technical circulation prior to application submission to replicate a technical review cycle, a Bill 109 Waiver that can be signed by an applicant, a fortified “Deemed Complete” review, a “One and Not Done” Refusal Decision when added technical reviews are necessary due to application gaps/shortcomings, and a Bill 109 Refund Application process. Taken together, this range of adaptation components present Collingwood with flexible options worthy of consideration by Town staff and Council.

Figure 20: Bill 109 Adaptation Summary & Set of Risk Management Tools



5.3 Governance & Stakeholder Relations

5.3.1 Managing the Development Industry/Town of Collingwood Relationship

A high performing DAP model is by nature collaborative. High quality applicant submissions are a must for outcomes in the public interest. Timely, predictable, municipal process execution is also a must. A shared commitment to a pragmatic DAP culture focused on “getting to yes” for quality development is necessary – without compromising on good planning/servicing outcomes. Collingwood has an opportunity to restructure its governance model, regularize stakeholder relationships, and establish a technical meeting-of-the-minds with the development industry around servicing capacity - all in the interests of creating a high performance DAP model that will facilitate growth, expand the housing supply, and build a more robust local tax base.

Table 11: Managing Industry Relationship

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
GS 1	Strategic	Limited ongoing DAP improvement dialogue, concern with Council involvement in DAP processes, and lack of transparency between Town and development industry re: ICBL and SCAP.	Create a formal "Develop Collingwood" Liaison Group to address the ongoing need for a DAP improvement dialogue, consensus building, and problem solving. Consult with GTDI regarding representation, process matters, and strategic agenda items; Improve communication between staff and the applicant during the planning process to support a mutual relationship.	Strengthens the relationship between the Town and applicants, leading to positive experiences for both parties, ensuring staff can obtain all relevant application material easier, and attracting future development projects to Collingwood.
GS 2	Strategic	Lack of transparency/consensus between Town and development industry on potential application of SCAP to wastewater servicing.	Establish a Town-Industry Technical Working Group to address capacity constraint challenges at the wastewater treatment plant with the goal of establishing a consensus path for moving forward to optimizing servicing capacity. Mandate to be advisory given the Town's primary role in securing regulatory approvals and finalizing final servicing capacity data sets that will determine a SCAP needed/not needed decision. Report and manage the Technical Working Group activities/ recommendations through the oversight of the "Develop Collingwood" Liaison Group.	Foster collaboration with development industry stakeholders to address future servicing capacity challenges.

5.3.2 Leveraging Delegated Approvals Authority to Compress DAP Timeframes

The Province is clearly in support of maximizing delegated approvals across DAP. Site Plan delegated approvals are now mandatory. Bill 13 created a host of additional delegated approvals including Holding Symbol removal and Minor ZBAs. Delegation of Draft Plan of Subdivision and/or Draft Plan of Condominium approvals is already permitted, including Part Lot Control. A diverse collection of Ontario municipalities has adopted delegated approvals in order to reduce application processing timeframes and accelerate the approvals pathway to Building Permits and Occupancy permits for housing in the midst of a housing supply crisis in Ontario. In essence **elected Councils are indicating a willingness to trade control for measurable results when they opt for delegation**. Performance Concepts/Dillon consistently recommends maximizing delegated approvals as a DAP “best practice” that mitigates OLT appeals risk and shortens the timeframes for getting shovels in the ground to build housing and contribute to the municipal tax base.

Table 12: Leveraging Delegated Authority

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
GS 3	Strategic	Delegation of Authority to Planning Director or their designate is not fully maximized.	Implement expanded use of delegated approvals, consistent with municipal sector "better practices". Priority should be given to delegating approval to the Planning Director (e.g., Draft Plan of Subdivision, Part Lot Control, Hold Removal, etc.) to avoid potential "no municipal decision" appeals to the OLT. Collingwood should include a discretionary Council bump-up option for overriding the delegated approval “default” approach. Collingwood should optimize all additional delegation opportunities permitted by Bill 13.	Improves approval timelines.
GS 4	Strategic	Opportunity to streamline approval process for Post-Draft Plan engineering review process by delegating approval/execution of Early Servicing Agreements.	Delegate authority to the Director of Engineering Services or their designate to approve/execute Early Servicing Agreements as part of the Post-Draft Plan of Subdivision "Future State" mapped process included in this Report.	Benefit to the developer and Town staff to have delegated authority since it has already undergone the public review process.
GS 5	Strategic	Opportunity to streamline the Subdivision Agreement process through director delegation.	Delegate authority to the Director of Planning to execute Development Agreements (e.g., Subdivision Agreements) including final approval and registration.	Benefit to the developer and Town staff to have delegated authority since it has already undergone the public review process.

5.4 Optimize the DAP Technology Platform

5.4.1 Leveraging “All In” CityView to Streamline DAP Execution

It is critically important for Collingwood to fully commit to a robust configuration of CityView as the exclusive software platform for managing DAP process execution - including circulation of documents, automated updates regarding upcoming file/permit processing deadlines, tracking actual timeframes for back-and-forth technical interactions, and documenting technical communication with applicants/consultants across the life of a file/permit.

Executing DAP processes outside of CityView is inefficient from a LEAN processing perspective and leads to sub-optimal organization of files and redundant staff processing and reporting effort, combined with the risk of misplaced documents and version control issues. Outside-of-CityView processing also erodes the accuracy of timeframe reporting data that is critical to protecting Collingwood’s economic development interests and mitigating financial and/or reputational risk.

DAP workflow tool implementation approaches vary significantly across Ontario municipalities. For instance, Municipality ‘A’ may opt for a robust workflow configuration that depends on frequent/ongoing staff manual entries into CityView to document processing milestone achievement/status changes across a given file. Municipality ‘B’ may decide to double down on robust CityView functionality by configuring automatic milestone achievement/status change “timestamping” across that same file. The Performance Concepts/Dillon team is advocating for a high functionality-high automation CityView configuration in Collingwood. Low functionality-low automation CityView configurations may be less effort-intensive, but they are pennywise and pound foolish – delivering a lower DAP modernization return-on-investment for Collingwood. Up-front commitment/resourcing for a robust CityView configuration will yield significant DAP improvements around LEAN application processing and KPI-informed target setting and results reporting.

To date, Collingwood’s rollout of CityView has been a “side-of-the-desk” initiative – competing for project management attention/capacity from the already overburdened IT, DAP and Finance subject matter expert(s). This under-resourced approach to rolling out CityView has not and will not succeed. A CityView configuration “surge” delivered

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via an Optimization Project that deploys dedicated/robust internal and external expertise and rigorous project management discipline is required. Investment in a timely modernized rollout of CityView reflective of the DAP improvement recommendations and Future State process maps generated by this Review is essential moving forward. CityView workflow configurations and reporting capabilities require significant improvement over the current sub-optimal deployment of the platform. Time is limited since a spike in forecast DAP workload is coming.

Table 13: Leveraging CityView

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
OT 1	Strategic	Sub-optimal networks of communication between business units.	Utilize CityView functionality to measure processing timelines and automate staff interactions to improve efficiency and economize effort. Applicable to Pre-consultation and beyond. Implement milestone notifications to appropriate individuals to ensure tracking of application status and transitions between business units. Require DAP staff to update file progression status changes in CityView on a frequent/timely basis to ensure integrity of reported data. Apply end-to-end across Planning, Engineering and Building DAP components.	Improves direction and quality of comments issued to applicants.
OT 2	Strategic	CityView configuration gap - absence of CityView management and DAP workflows not yet fully integrated into CityView.	Initiate robustly funded/resourced CityView Optimization Project to ensure consistent implementation across business units involved in DAP, with the project objective of maximizing functionality/configuration of CityView workflow. This initiative should be coordinated with new "DAP Performs" KPI Working Group.	Effective/modernized/widely utilized DAP workflow tool essential to establishing/meeting timeframe performance targets and mitigating Bill 109 risk.
OT 3	Tactical	Absence of property-centric DAP reporting linking multiple Planning files to multiple Building Permit files on same property/site	Develop/integrate an internal CityView DAP performance dashboard that delivers property-based reporting – including previous DAP decisions, ongoing progress/status of DAP files, and other relevant information. Ensure property centric "click and view" search capability to reduce applicant meetings with DAP staff team and/or Council. Ultimately, a public version of the dashboard with appropriate content should be made available for the community to gain a better understanding of development and construction projects in Town.	DAP coordination improved by creating property-centric organization of data and reducing DAP staff and Council low value-added involvement.

5.4.2 Document Management Solution for DAP

Efficient document management via a single all-encompassing solution, to replace the use of multiple document storage platforms, is imperative for a high performance DAP model in Collingwood. CityView should be the hub of this solution in order to ensure consistent document access across Town business units, allow for version control, reduce the probability of misplaced files and staff effort tracking down these files, provide automatic receipt data (i.e., date and time received), and improve searchability and historical references for future Town staff.

Table 14: Document Management

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
OT 4	Tactical	Fragmented corporate approach to DAP information management and multiple data storage platforms beyond CityView.	Create a single consolidated document management/storage solution that maximizes DAP performance. Coordinate rollout within the CityView Optimization project. Ensure CityView is the primary “hub” component of this solution and position a supporting bolt-on document management software tool (e.g., DigEPlan).	Consolidation/rationalization of DAP Document Management a key requirement for modernizing DAP execution. Current approach is both unsustainable and deeply inefficient.
OT 5	Tactical	Lack of filtering of who can edit file folders.	Ensure that certain features/file information is locked to all users except for the assigned planner and admin.	Ensures improved organization and completeness of files.
OT 6	Tactical	Inefficient and unfriendly user interface of current application portal.	Develop an internal and external CityView user guide for applicants to assist with actions/activities within the portal and provide guidance re. navigating CityView.	Provides technical support to applicants and reduces the amount of staff inquiries for technical matters.

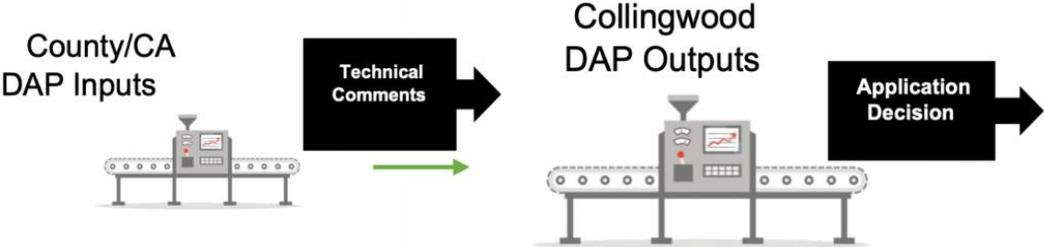
5.5 Measuring DAP Performance and Setting Timeframe Targets

5.5.1 Towards Results Based Management of DAP

High performing DAP is by its nature a LEAN-oriented service delivery model. It can be properly understood using the Toyota-pioneered approach of “flow” based manufacturing processes. As noted in the figure below, DAP can best be understood as a LEAN industrial assembly line where application “black boxes” move forward for municipal approvals according to standardized velocities and levels of quality control.

Figure 21: DAP Process as an “Industrial” Assembly Line

- Velocity of the DAP assembly line
- Assembly line quality control (addressing completeness/ quality of DAP submissions for review)
- Consistency of the DAP assembly line (velocity + quality control) as it processes a high volume of Application Decision outputs



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In its efforts to create a high performing DAP model, it will be necessary for Collingwood to establish aspirational timeframe targets when processing files across the core DAP application categories like Site Plans, ZBAs and Subdivisions and associated permits. Timeframe targets are indicative of an accountability-driven service delivery model (including a results based/pro-measurement culture) when executing DAP. Collingwood’s aspirational DAP processing timeframe targets can/should be informed by the rigorous measurement of actual processing timeframes - with performance data tracked and reported via the CityView workflow platform.

The days involved in the Technical Review Cycles are the core countable unit of DAP output produced by Collingwood. Differing numbers of these effort-intensive review cycles are required across the Town’s assortment of DAP applications. Multiple Technical Review Cycles per file are generated across OPAs, ZBAs, Site Plans, Draft Plans of Subdivision, and Post-Draft Plan Engineering Review phases. Required staff processing effort often varies across an initial review cycle (more effort required) versus subsequent review cycles.

Table 15: Core DAP Processing Outputs

Core DAP Processing Outputs	
<ol style="list-style-type: none"> 1. Pre-Consultations executed and documented in a Pre-Con Understanding 2. Technical Review Cycles executed prior to official application submissions 3. Technical Review Cycles executed after an application has been received and Deemed Complete/Incomplete 4. Post Draft Plan Approval Technical Review Cycles 	<p>These core DAP processing outputs are countable and measurable:</p> <ul style="list-style-type: none"> • # Pre-Con Understandings generated annually • # Technical Review Cycles generated annually (before Applications) • # Technical Review Cycles generated annually (after Applications)

Measuring actual DAP timeframes requires “chess clock” measurement capabilities using CityView. Chess clock reporting can/should focus on municipally controllable processing days versus applicant-controlled processing days. Each DAP file’s total processing timeframe (total days) consists of these back-and-forth “chess clock” file custody hand-offs. Only when the municipal and applicant components are both



considered can insights around real world DAP performance be used to establish municipal + applicant timeframe targets for Technical Review Cycles.

Figure 22: DAP Toolkit

DAP Performance Measurement Workflow Tool “Must Have” Functionality	Toolkit requirements: <ol style="list-style-type: none"> 1. DAP file tracking and reporting of actual versus targeted timeframes 2. Countdown clocks based on municipal controllable file processing days 3. Additional countdown clock reporting on applicant controllable file processing days
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A common problem with setting municipal DAP timeframe targets is the inability of any given municipality to consistently track its timeframe **actuals** against its targets using reports generated by a properly configured DAP workflow tool. When a municipality’s DAP processing time actuals are rigorously tracked by a properly configured workflow tool like CityView, they invariably do not meet the previously established “blind” aspirational DAP timeframe targets.

DAP targets informed by actual municipal performance can/should be set according to a targeted zone of performance featuring a high-end/low-end range of controllable file processing days. These target ranges can/should be differentiated based on a given application or permit’s effort-intensive first review cycle versus more streamlined less-intensive subsequent review cycles.

The default four-week timeframe targets for Technical Review Cycles (20 controllable processing days) common across the Ontario municipal sector are rarely/never consistently achieved by Golden Horseshoe growth municipalities – or historically by mid-sized municipalities like Collingwood for that matter. Realistic timeframe targets for first review cycles in Collingwood could range between 40 to 50 controllable file processing days. Post-approval Engineering Review phases will require longer targets to reflect actual processing timeframes to approve infrastructure design – in the range of 65 to 80 controllable file processing days per review cycle.

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Finally, setting aspirational DAP processing timeframe targets for Collingwood - prior to implementing this Report’s LEAN DAP process improvement, role clarity, and CityView modernization recommendations - would be ill-advised and premature. Eventually setting an initial set of aspirational DAP timeframe targets can/should be considered in coordination with this Report’s recommendations around securing sufficient DAP Resourcing Capacity. Once CityView is properly configured to capture “chess clock” timeframe performance actuals, then future-oriented DAP targets (informed by actuals) should follow.

A multi-year technical work plan that integrates an improved CityView rollout with the identification of specific DAP KPIs will be necessary. A KPI technical working group will be required to support KPI rollout.

When considering the detailed design of specific DAP KPIs, Collingwood should adopt two key design concepts. Average processing times should be adopted to track DAP processing velocity. Review cycle “batting averages” for meeting timeframe targets should be used to reflect processing consistency/dependability.

Table 16: KPI Design Concepts

Technical Review Timeframes	Technical Review Cycle-Counts
<ul style="list-style-type: none"> • Percentile “batting average” approach (e.g., 8 out of 10 Site Plan Technical Review Cycles executed in 20 controllable file days or less) • Average (actual) timeframes versus Average (target) timeframes 	<ul style="list-style-type: none"> • Percentile approach (6 out of 10 Site Plans executed in less than 3 Review Cycles) • Average actual number of Review Cycles versus average target number of Review Cycles

Beyond processing timeframes per Review Cycle, the Town should also track the absolute number of Technical Review Cycle “chess clock” exchanges with the applicant required per application. The number of Review Cycles required per file is the main driver of overall application decision timeframes across any DAP file processing assembly line.



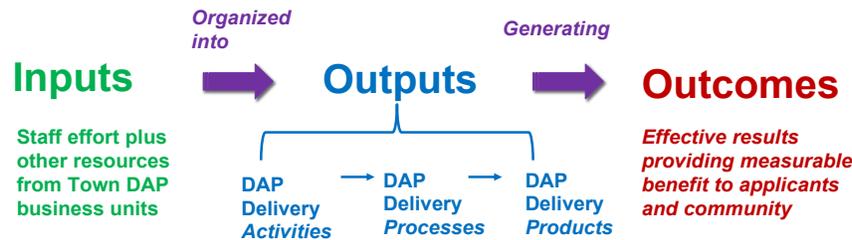
Table 17: Effectiveness KPIs

Effectiveness (Quality) KPIs	
<p>Technical Review Cycles (Before or After formal Application/Permit Submission)</p>	<ul style="list-style-type: none"> • Average number of controllable file processing days for a First Technical Review cycle (sorted by DAP application categories) • Average number of controllable file processing days for subsequent Technical Review Cycles to be executed (sorted by DAP application categories) • Average number of Technical review Cycles required to generate a decision on a given application or permit (sorted by DAP application categories) • Percent planning application or Building Permit First Technical Review cycles completed in ‘X’ controllable file processing days or less (sorted by DAP application categories) • Percent planning application or Building Permit subsequent Technical Review Cycles completed in ‘X’ controllable file processing days or less (sorted by DAP application categories) • Percent post-approval Detailed Engineering Review Cycles completed in ‘X’ file processing days or less

Peter Drucker, perhaps the most highly regarded management thought leader of the 20th century, often noted that “...you can’t manage what you can’t measure”. Results focused KPIs will promote a culture of accountability within any municipal DAP team. KPI performance targets and data will inform the DAP staff team’s ongoing decisions about which DAP files to work on at any given point in time. KPIs can also address the processing challenges related to Bill 108 “No Decision” timeframes, Bill 109 fee refund timeframes, or customer service timeframe standards established by Council.

Figure 23: Key to Results Based Management

Understanding DAP as a Service Delivery System



Setting DAP performance targets is an iterative process. Prior to tracking actual controllable processing days in the initial rollout of a modernized DAP workflow tool, a municipality can set “soft” targets that are not informed by actual tracked timeframes. Once reliable timeframe tracking data is available from an adopted DAP workflow tool solution, initial soft targets can be firmed up and annual actual DAP processing timeframes can be evaluated against annual planned DAP timeframes.

If DAP actual results fail to meet targets, then process or staffing/resourcing adjustments may be required to close the gap. The ultimate destination is an annual **Plan-Do-Check-Act** cycle of measurement-driven continuous improvement – a Managing for Results **Plan/Do/Check/Act** cycle leading to a transformation of organizational culture for DAP (see table below).

Table 18: Build Key Performance Indicators

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
MP 1	Strategic	Lack of consistently tracked/enforced DAP processing timeframe targets and KPIs.	Create a "DAP Performs" KPI working group to identify a core portfolio of KPIs, establish transparent performance targets and design a reporting framework tied to the annual budget cycle. Include a development industry representative as an expert official member of the "DAP Performs" KPI working group. Coordinate with CityView Optimization Project.	Will create a results based, accountable DAP culture. KPI derived tools will drive DAP improvement, foster shared objectives with development industry, and mitigate regulatory framework risks.

5.6 Securing Sufficient DAP Resourcing Capacity

5.6.1 Peer Review Resourcing

When Collingwood staff are at or near workload capacity and/or there is no internal subject matter expertise (e.g., for natural heritage, natural hazard, noise, etc.), transferring components of the DAP technical review to third-party peer reviewers is a valuable option to meet target review timeframes as well as free up staff resources and time. Developing a standardized peer review procurement document(s) and pre-qualified peer reviewers on retainer for as-needed review will build upon the existing peer-review process underway in Collingwood in order to have more efficient access to a peer review roster. Such standardized procurement will assist Collingwood in consistently meeting approval timelines since time will not be allocated to developing a peer review contract and the technical review can begin almost immediately.

Table 19: Peer Reviewing

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
RE 1	Tactical	Lack of approved peer review roster procurement process.	Implement a standardized Peer Review procurement process and pre-qualify peer reviewer(s) on retainer for rapid deployment on an as-needed basis.	Timely execution of necessary peer reviews (no delays for purchasing red tape) will improve DAP timeframes and reduce regulatory risk.

5.6.2 DAP Resourcing/Staffing Capacity

The Collingwood DAP staff team has compiled detailed/granular application processing effort estimates to inform the DAP Fees Review being carried out by Performance Concepts. These “per application” staff processing effort estimates can also be used to forecast necessary resourcing in the face of escalating DAP volumes and workload. The upcoming analysis dealing with full-cost DAP fees will comprehensively address workload capacity forecasting across both Planning and Engineering teams. The discussion below focuses on the mission-critical DAP resourcing choke-point that exists at the back-end of the Subdivision process. This choke-point can/has been identified across numerous Ontario growth municipalities.

Table 20: Staffing

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
RE 2	Strategic	Existing DAP capacity is insufficient to meet the workflow associated with Post-Draft Plan Engineering Review phases.	Implement the multi-year DAP resourcing strategy set out in this Report, with initial emphasis on closing the Development Engineering capacity gap that will erode Collingwood's ability to process post-Draft Plan infrastructure design phase that delivers registered lots. Ensure required additional Engineering staff and/or consultant resources are fully cost-recovered via an updated/modernized "percentage of construction value" fee collected at the point of Development Agreement execution.	Mitigate upcoming Post-Draft Plan workload spike and processing chokepoint associated with multiple Subdivision phases that will proceed when servicing capacity is confirmed.
RE 3	Strategic	Lack of internalized staff CityView "super user".	CityView Optimization Project should specifically address the ongoing need for "super user" capacity to support workflow configuration, results reporting, and training priorities. Town to hire a minimum of one new full time "super user" to provide support around analytics reporting and user training. The super user position should be funded from DAP fee revenue streams in order to avoid property tax budget impacts.	Ensures CityView Optimization Project will be effective in building ongoing, sustainable pathway to success in modernizing DAP.



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A high-risk DAP workload spike in the coming years is linked to Subdivision generated residential housing applications. From 2018 until 2022 Collingwood processed a moderate-but-steady stream of Draft Plan of Subdivision applications. These Draft Plan of Subdivision approvals generated subsequent Engineering Review phases at an average rate of one phase per year. The Town’s Engineering Services Division was able to absorb this Post-Draft Plan average workload of a phase per year within its existing staffing capacity. It should be noted that Collingwood’s Engineering staff are only partly allocated to DAP. These staff also oversee the design and construction work associated with executing the Town’s ongoing stream of capital budget projects.

Collingwood is currently working on five Draft Plan of Subdivision files that will generate a forecast 10 Post-Draft Plan Engineering Review phases over the next few years. An additional six Draft Plan of Subdivision files are poised to move forward imminently (after servicing capacity is verified) and they will generate an estimated 11 additional Engineering Review phases (estimated at 200 units per phase) after Draft Plan approval is secured. In total an estimated 21 Engineering Review phases will need to be processed by Collingwood across a five to seven upcoming probable time horizon. **This volume forecast of Post-Draft Plan phases represents a potential quadrupling of the annual processing effort deployed by Engineering across 2018 to 2022.** The Engineering resourcing capacity required to process this Post-Draft Plan spike in workload and required engineering staff capacity may not be available unless non-DAP work on Capital Budget related design and construction is deferred or contracted-out to engineering consultants. Specific Subdivision generated phases are set out in the tables below. The pending five to seven year Post-Draft Plan phases are forecast to contain an average of 200 units per phase; a significant workload for Engineering staff.

Table 21: Current/Imminent Post-Draft Plan Phases

Current/Imminent Post-Draft Plan Phases	# Phases
452 Raglan	1
Panorama North	5
Regional Commercial District	2
50 Saunders Street	1
Trails of Collingwood	1



Table 22: Pending 5 to 7 Year Post-Draft Plan Phases

Pending 5-7 Year Post-Draft Plan Phases	# Phases
Huntingwood Trails (West Lands)	1
Bridgewater/Consulate	2
High Street & Campbell Lots	1
Linksview	3
Red Maple Subdivision	2
Mair Mills Subdivision	2

On a positive note, the Town’s existing Development Engineering % of Construction Value Fee, collected at the point of Development Agreement execution, will be updated if required to fund any required additional Engineering resourcing capacity with no negative property tax impact. The primary challenge for Collingwood will be attracting and retaining qualified/credentialed Engineering Technologists or securing a readily available supply of engineering consulting capacity (billable hours) on an as-needed basis. Pre-purchased consulting billable hours may serve as a bridging strategy for Collingwood if it proves difficult to attract and retain qualified Town Engineering Technologists.

The upcoming DAP Fees Report will expand the above resourcing capacity analysis to include Planning and Building staff. That upcoming Report will contain specific/granular processing capacity data sets that will confirm specific justifiable staffing capacity adjustments required to meet the upcoming Subdivision driven workload spike in Collingwood - for both the Planning and Engineering staff teams.

5.7 General Recommendations

In addition to the above-mentioned Recommendations, the Performance Concepts/Dillon team identified some Recommendations that expand across the previously described themes. These Recommendations can be adopted in the near future to set the framework for improving consistency and efficiency for internal DAP workflows.



Table 23: General

No.	Strategic/ Tactical	As Is Finding	Recommendation	Expected Benefit
GE 1	Tactical	Inconsistent file naming conventions and version control management.	Develop a standardized naming and versioning convention to be used by all Collingwood staff and applicants.	Ensures consistency and organization so current and future staff can easily access the application documents.
GE 2	Strategic	Delayed responses from external agencies can delay applications.	Host workshop with external agency partners to discuss Collingwood's improved DAP model. Rely more heavily on conditional approvals to ensure that technical details are dealt with in fulfilling the conditions.	Ensures all relevant external agencies are aware of DAP changes
GE 3	Tactical	Members of the public can sometimes overpower public meetings.	Improve the training of Chairs to strengthen their role and responsibilities.	Having defined roles during public meetings, ensuring order during public meetings, and ongoing support for planning processes.
GE4	Strategic	Building implementation support.	Execute a new DAP change management reserve with an initial \$100k to \$150K contribution staged across the 2024 and 2025 budget cycles. The CAO and Directors involved in DAP should be responsible for deploying this change management funding envelope as appropriate throughout the 3-year Implementation Roadmap.	Ensure adequate funding and management for the 3-year Implementation Roadmap.

6.0 **Implementation Roadmap for DAP Improvement**

6.1 **3-Year Performance Improvement Plan and Implementation Support Tool**

DAP performance improvement is, first and foremost, a change management initiative. Successful change management is all about the three C’s – communication, collaboration, and commitment. The Collingwood DAP team already functions with these attributes front and centre; a very good start for implementing DAP improvement.

Implementing change is about the art of the possible - Collingwood will need to confront the reality of its DAP whirlwind of everyday urgency and busyness. DAP improvement (Important) will need to be staged over a timeframe that creates momentum yet is also respectful of the whirlwind of everyday urgency facing the staff team. The Performance Concepts/Dillon team believes a 3-year Implementation Roadmap strikes an appropriate balance.

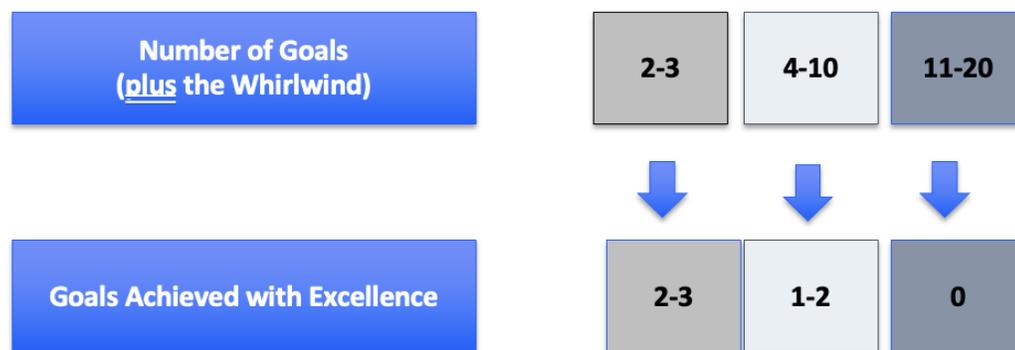
Figure 24: DAP Whirlwind of Management



6.0 Implementation Roadmap for DAP Improvement 92

Executing the Implementation Roadmap will require Collingwood to carefully marshal its available capacity to execute change. The figure below illustrates the hazards of being an inch deep and a mile wide when attempting to meet change driven goals. If Collingwood attempts to simultaneously execute too many of the ambitious/game changing Strategic Recommendations set out in this Report, it may end up failing to execute any of them. Executing clusters of no more than two to three Strategic Recommendations (at any point in time) is an ideal approach to change.

Figure 25: Setting Goals and the Law of Diminishing Returns



The Performance Concepts/Dillon team has prepared a real-time, customized implementation tool for Collingwood in Google Sheets. The tool creates an Implementation Roadmap critical path for each Recommendation set out in this Phase 1 Final Report. Each Recommendation is positioned across the 3-year Roadmap with a start date, a timeframe for completion, and an end date. The figure in **Appendix A** sets out the Performance Concepts/Dillon initial Implementation Roadmap configuration. As Collingwood moves forward to execute the Roadmap, priorities and progress in the Google Sheets tool can be refreshed in real time. The result is a living/evolving Roadmap that supports the ebb and flow of real-world change management by an already busy Collingwood DAP team.

6.2 Investing in Change Management Horsepower

Change is Important and it is always hard – especially when Council and staff must confront the Whirlwind of Everyday Operations. As already noted, the Urgency of the DAP “Day Job” can detract from the Importance of executing Wildly Important Goals to secure transformational DAP change.

Dedicated change management resources improve the probability of successful change and creating high performance DAP. These resources can be funded for DAP improvement without negative property tax impacts. Fully-costed modernized DAP fees can create a stream of revenues to achieve CityView modernization as well as address other implementation priorities facing an already busy DAP team. Building Permit reserve balances can also supply appropriate funding increments. The Performance Concepts/Dillon team believes a new DAP change management reserve with an initial \$100k to \$150k contribution staged across the 2024 and 2025 budget cycles is appropriate, and worthy of consideration by Collingwood Council. It is understood that \$40k has been reserved to date as part of the 2024 budget. The CAO and Directors involved in DAP could be responsible for deploying this change management funding envelope as appropriate throughout the 3-year Implementation Roadmap.

7.0 Moving Forward with Change Management

7.1 Concluding Remarks

The Collingwood DAP Process Review has delivered a robust portfolio of Strategic and Tactical Recommendations to improve overall DAP performance. These Recommendations have been positioned within an adaptable multi-year Implementation Roadmap. Performance Concepts/Dillon has provided an ongoing implementation monitoring tool (configured using an interactive Google tool) where critical path scheduling of change management efforts can be reconfigured/adapted in real time as various Recommendations are achieved or delayed.

The “flow” of the Implementation Roadmap is consistent with other DAP Reviews completed by Performance Concepts/Dillon. The initial focus is on Role Clarity and Process Improvement that will transition the Current State DAP model into a high performing Future State. DAP Technology and Performance Measurement modernization efforts can follow; confident in the knowledge that automation and measurement will reflect Future State LEAN efficiencies.

Governance and development industry relationships can be re-shaped throughout the Implementation Roadmap. Of particular urgency will be a shared consensus with the development industry around future wastewater servicing issues and the requirements/or lack thereof for SCAP extension. While perhaps unavoidable, SCAP continuation represents an obstacle to a LEAN high performing DAP model in Collingwood. It imposes DAP delays and additional costs on the construction of housing in the midst of a nation-wide supply crunch. If it is technically possible to secure wastewater servicing solutions outside of a SCAP model, Collingwood DAP performance will benefit.

By relentlessly focusing on implementing the Recommendations generated during this DAP Review, Collingwood will be well positioned to create a high performing DAP model, and secure successful development outcomes for years to come.

Appendix A

Implementation Roadmap

Town of Collingwood
Development Process and Fees Review
March 2024 – 23-5948



Theme	2024				2025				2026				2027
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
General	GE1 • Standardize naming conventions and implement version control Jan 1 - Apr 1		GE2 • Communicate DAP improvements with external agencies Jul 1 - Oct 1		GE3 • Train committee chairs to strengthen their roles Jan 1 - Oct 1		GE4 • Execute a new DAP change management reserve, managed by CAO and Planning Director Jan 1, 2024 - Jan 1, 2026						
Governance & Stakeholder Relations	GS3 • Expand delegation of authority, beginning with draft plan of subdivision approval and expanding to minor application types Apr 1 - Jun 1		GS4 • Delegate authority to Engineering Services for Early Servicing Agreements Apr 1 - Jun 1		GS5 • Delegate authority to the Director of Planning to execute Development Agreements Apr 1 - Jun 1		GS1 • Create formal "Develop Collingwood" Liaison Group with OTDI input and improve communications with applicant Oct 1, 2024 - Jan 1, 2025		GS2 • Establish Town Industry Technical Working Group regarding wastewater capacity constraint challenges Jan 1 - Apr 1				
Measuring Performance &...							MP1 • Create "DAP Perform" KH working group to select KPIs/establish targets/design reporting framework Apr 1 - Oct 1						
Optimizing Technology			OTS • Optimize information locking of CityView files Apr 1 - Jul 1						OT1 • Optimize CityView for communication, timeline management and process automation Jul 1, 2025 - Jul 1, 2026				
									OT2 • Initiate CityView Optimization Project Apr 1, 2025 - Apr 1, 2026				
									OT3 • Develop an internal CityView dashboard with property-centric reporting to provide DAP data updates and reduce DAP staff and Council low value-added involvement Jul 1, 2025 - Jul 1, 2026				
									OT4 • Create a consolidated document management solution integrated with CityView Jul 1, 2025 - Jul 1, 2026				
									OT5 • Develop CityView users guides for applicants and staff Jul 1, 2025 - Jan 1, 2026				
Process Improvement	PI1 • Implement a template for circulating requests for comment Apr 1 - Jul 1		PI2 • Restructure pre-consultation package with standardized template for comments and responses Apr 1 - Jul 1		PI3 • Update pre-consultation bylaw to reflect sequential model and ensure the update is communicated internally and externally Jan 1 - Apr 1		PI4 • Require the consistent use of a comment response matrix for submissions and resubmissions Apr 1 - Jul 1		PI5 • Develop standardized Terms of References Jul 1 - Oct 1				
	PI6 • Implement a content and quality check for completeness Jan 1 - Apr 1		PI7 • Develop standardized comments that can be issued as a baseline for various applications Apr 1 - Jun 1		PI8 • Implement a Made-In-Collingwood BI 109 Adaptation Strategy Jan 1 - Jul 1		PI9 • Establish SOP for Town-wide commitment to CityView DAP processing solution Jul 1 - Oct 1		PI10 • Develop SOPs from future state process maps and create staff guides Oct 1, 2025 - Apr 1, 2026				
	PI11 • Formalize requirements for what triggers a resubmission or new pre-consultation Jul 1 - Oct 1		PI12 • Create a template for standardized Site Plan and Draft Plan conditions Apr 1 - Jul 1		PI13 • Combine certain permits where applicable and determine criteria for site alteration permit requirement Jan 1 - Apr 1		PI14 • Revise application forms for clarity and to accommodate development engineering information Oct 1, 2024 - Apr 1, 2025		PI15 • Staff Recommendation Reports to go to the next Committee meeting following the Statutory Public Meeting Apr 1 - Jul 1				
	PI16 • Implementing "sunset" deadline for condition clearance of conditional approval Apr 1 - Jul 1		PI17 • Utilize conditional approval or Holds to permit the applicant to begin other processes Apr 1 - Jul 1		PI18 • Adapt a consent model for accepting Building Permit applications during Site Plan Control and Subdivision processes Jan 1 - Apr 1		PI19 • Create an agreement for contingency deposits. Consider collecting a contingency deposit at the Pre-consultation stage. Apr 1 - Jul 1		PI20 • Require applicants to pay CA fees directly to the CA Jan 1 - Apr 1				
	PI21 • Develop a standardized agreement for contingency funds Apr 1 - Jun 1		PI22 • Create a template for standardized Site Plan and Draft Plan conditions Apr 1 - Jul 1		PI23 • Combine certain permits where applicable and determine criteria for site alteration permit requirement Jan 1 - Apr 1		PI24 • Revise application forms for clarity and to accommodate development engineering information Oct 1, 2024 - Apr 1, 2025		PI25 • Staff Recommendation Reports to go to the next Committee meeting following the Statutory Public Meeting Apr 1 - Jul 1				
Resource Capacity	RE1 • Standardize peer review procurement process featuring pre-qualified roster Apr 1 - Jul 1		RE2 • Implement multi-year DAP Resourcing Capacity Analysis (associated with this report) with initial emphasis on Development Engineering capacity gap. Oct 1, 2024 - Jul 1, 2025		RE3 • Create CityView "super user" capacity with no property tax impact. Oct 1, 2024 - Jul 1, 2025								
Role Clarity	RC1 • Leverage technician positions and circulate to technical reviewers on a case-by-case basis. Jan 1 - Apr 1		RC2 • Clarify roles and responsibilities for inspection, sign-off and securities release. Jan 1 - Feb 1		RC3 • Document and assign non-Planning Act processes. Jul 1 - Oct 1		RC4 • Host role clarity session and create role reference document. Jan 1 - Mar 1		RC5 • Formalize a process for tracking insurance certificates Jan 1 - Mar 1				
	RC6 • File planners are the file lead for monitoring clearance of conditions and providing sign-off to Finance, technically supported by Development Engineering Jan 1 - Mar 1		RC7 • Establish role clarity and accountability for Grading and Drainage matters, as lead by Development Engineering Apr 1 - Oct 1										

P2024-09 Appendix B

TOWN OF COLLINGWOOD

Development Process and Fees Review

Phase 2: Development Fees Review

Final Report

March 2024

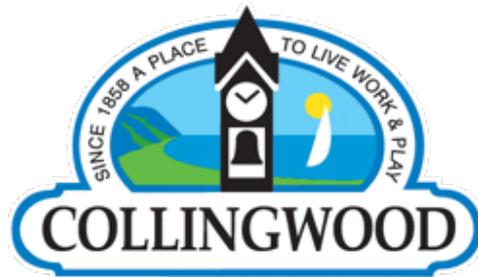


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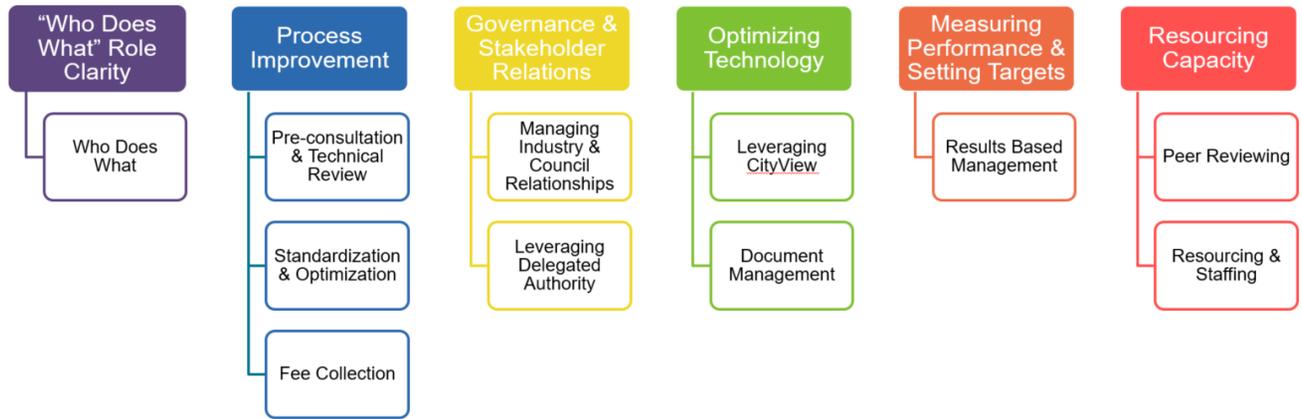
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1.0 Development Process and Fees Review (DAP): Background and Context

Across Q3-Q4 2023 Performance Concepts Consulting Inc. and Dillon Consulting Ltd. completed the Phase 1 DAP Process Review for Collingwood. The Phase 1 DAP Process Review generated a portfolio of Findings/Recommendations organized within a series of performance improvement categories outlined in the Figure below. The objective of the Phase 1 Review was to create a high-performance Future State DAP delivery model for Collingwood to implement over time.



Note: the illustration above sets out Recommendation categories within the Phase 1 DAP Process Review Final Report

Implementing the Phase 1 DAP Process Review’s portfolio of recommendations would be best supported by a modernized set of DAP application fees to generate an appropriate level of “Growth Pays for Growth” cost recovery. This Phase 2 DAP Fees Review Report aligns with the initial DAP Process Review to create a phased pathway towards a sustainable “Growth Pays for Growth” cost recovery model for Collingwood. The alternative to “Growth Pays for Growth” would be a continued reliance by the Town on significant property tax subsidies from existing residents and businesses to fund DAP approvals that generate significant economic benefits to development industry applicants. Collingwood staff were unable to conclusively confirm the last time DAP fees were comprehensively and independently reviewed and updated, although some work appears to have taken place in 2010. Planning DAP fees have been adjusted annually by the consumer price index but have not been rigorously subjected to an evidence-based review in quite some time.

1.1 Mandated Provincial Timeframes for Planning DAP

Properly costed Planning DAP fees will generate the non-tax revenue “fuel” to secure the Town of Collingwood staffing “muscle” required to execute its LEAN streamlined *Future State* DAP processes. Mandated Provincial application processing timeframes are a major driver of DAP system design across Ontario municipalities. These mandated DAP timelines also impact DAP fee design and “Growth Pays for Growth” cost recovery targets. *The proposed Collingwood DAP fees have been calculated/designed with the evolving Ontario DAP regulatory model in mind.*

1.1.1 Bill 108 – DAP Timeframe Compression

Passed in 2019, Bill 108 has significantly compressed the timeframes for Ontario municipalities to issue Planning application decisions. If an Ontario municipality does not meet the “No Municipal Decision” timeframes set out in the figure below, applicants are empowered to make appeals to the Ontario Land Tribunal (formerly known as the LPAT or the OMB). The “No Municipal Decision” Provincial deadlines are measured in calendar days as opposed to business days (i.e., available file processing days). Bill 108 does not distinguish between time periods where the municipality has control of a given planning file versus the time periods where the applicant controls that same file. It’s as if the necessary technical “ping pong” between municipalities and applicants (that eventually leads to an approval decision) does not exist! Bill 108 will impact/shape Collingwood’s approvals model for forecast sub-division driven development across the next 5-7 years.

Bill 108 is a DAP Timeframes Game Changer

	Pre-Bill 139	Bill 139	Bill 108
Official Plan Amendment or OPA/Re-Zoning Combo Pack	180 Days	210 Days	120 Days
Re-Zoning	120 Days	150 Days	90 Days
Subdivision Draft Plan	180 Days	180 Days	120 Days

- Site Plan Section 41 “no municipal decision” trigger for OLT/LPAT is 30 calendar Days

Note: the illustration above sets out Bill 108 changes to OLT appeal timeframes

1.1.2 Bill 109 Fee Claw Backs

Passed into law in 2022, Bill 109 has generated a transformative flurry of DAP process changes across Ontario municipalities. Notably for the purposes of this Report, Bill 109 has created a series of punitive/graduated DAP fee claw backs if municipalities cannot achieve Official Plan Amendment (OPA), Zoning By-law Amendment (ZBA), or Site Plan approvals according to new compressed legislated

Town of Collingwood – 2023 Development Approvals Process (DAP) Fees Review

timeframes. Compressed timeframes for these application fee (i.e. Section 69 of the Planning Act) claw backs are set out in the table below. All Site Plan, ZBA and OPA applications initiated as of July, 2023, are impacted by the fee claw back provisions. Just like Bill 108, the new Bill 109 fee claw back timeframes are measured in calendar days, and there is no recognition of who is actually in control of an application/file at any given time - the applicant or the municipality. Moving forward, DAP fee design is materially impacted by the need for Ontario municipalities to mitigate the financial risks created by Bill 109 fee claw backs.

Application Type	No Refund	50% Refund	75% Refund	100% Refund
Combined OPA & ZBA Application	Decision within 120 days	Decision within 121 and 179 days	Decision within 180 and 239 days	Decision by 240 days or later
ZBA Application	Decision within 90 days	Decision within 91 and 149 days	Decision within 150 and 209 days	Decision by 210 days or later
Site Plan Application	Approval within 60 days	Approval within 61 and 89 days	Approval within 91 and 119 days	Approval by 120 days or later

Note: the table above sets out Bill 109 Fee Refund timeframes

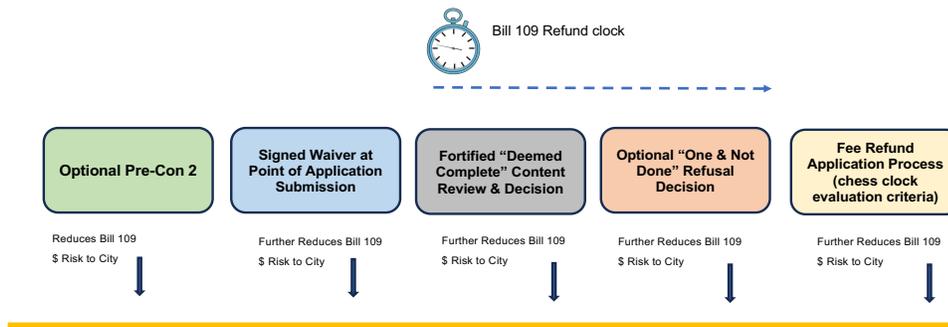
1.2 Bill 109 Front-end Adaptations to DAP Processing Model

Municipal DAP staff teams across Ontario have been urgently implementing alternative service delivery models in order to mitigate the financial risks to municipalities created by Bill 109 fee claw backs. A consensus is emerging among Ontario growth municipalities concerning potential new front-ended DAP processes.

The figure below (next page) illustrates a series of DAP adaptation components being implemented across the municipal sector. The adaptation components include an Optional Second Pre-Consultation technical circulation prior to application submission, a Bill 109 Waiver, a fortified “Deemed Complete” review, a “One and Not Done” Refusal Decision when added technical reviews are necessary due to application gaps/shortcomings, and a Bill 109 Refund Application process. Taken together, this range of Bill 109 adaptation components present Collingwood with flexible options worthy of consideration by Town staff and Council. *The Planning DAP fee calculations in this Phase 2 Report are consistent with Bill 109 adaptation options supported by Town staff and documented in the Phase 1 Report.*

Moving forward, recommended Planning DAP fee design refinements in Collingwood can support a “made in Collingwood” set of Bill 109 process adaptations (see Phase 1 DAP Process Review Report). For example, DAP fees for Site Plans/OPAs/ZBAs can be calculated using processing effort estimates that only include one staff Technical Review Cycle. Additional review cycles reflecting “One and Not Done” submission deficiencies would be recovered via a separate new “Additional Review Cycle” fee. This new standalone Additional Review Cycle fee would be universally applied across a range of DAP application categories. It would reflect a robust staff processing effort forecast in order to incentivize high quality initial submissions by applicants. *Again, for emphasis, the Planning DAP fee calculations in this Phase 2 Report are consistent with Bill 109 adaptation options supported by Town staff and documented in the Phase 1 Report.*

Bill 109 Adaptation Summary: An Aligned Set of \$ Risk Mitigation Tools



Note: the above illustration sets out Bill 109 process adaptation components used across Ontario

1.3 Community Planning Permits Avoid Bill 109 Fee Claw Backs

The figure below (see next page) speaks to the opportunity for Ontario municipalities to embrace Community Planning Permits in order to avoid Bill 109 fee claw backs. Community Planning Permits essentially replace/integrate Zoning By-law Amendments, Site Plans, and Minor Variances. These Permits can embrace an entire municipality or a specified area – for instance, downtown Collingwood.

Community Planning Permits would be enacted by a bylaw that would contain a list of permitted uses and development standards, such as height and density, building coverage, setbacks, etc. but could also include other elements not found in traditional zoning bylaws such as land uses that are permitted subject to certain conditions and other classes of development or uses exempt from requiring a permit. While such a system will speed up development approvals, considerable time and effort is necessary in preparing a Community Planning Permit System (CPPS) to ensure the development standards associated with the permit system are complete and address all the relevant matters.

The accompanying Community Planning Permit fee is not exposed to Bill 109 claw backs of Section 69 Planning fees (at this time). Detailed implementation conditions can be attached to an up-front approval. A number of Ontario growth municipalities are actively considering Bill 109 workaround options using Community Planning permits. Performance Concepts understands that the Town will be reviewing the potential for a CPPS through the upcoming Comprehensive Zoning By-law Review. A transition from the more traditional process to a CPPS, if recommended, would likely be several years away and therefore the balance of this Report focuses on revising the existing DAP fee structure.

Fees Claw Back Workaround? Community Planning Permit Systems



- Requires Town-wide OPA & Permit By-law
- 45-Day application approvals timeframe
- Can attach detailed implementation conditions to 45-Day approvals timeframe

Note: the above illustration explains the various component pieces of Community Planning Permits

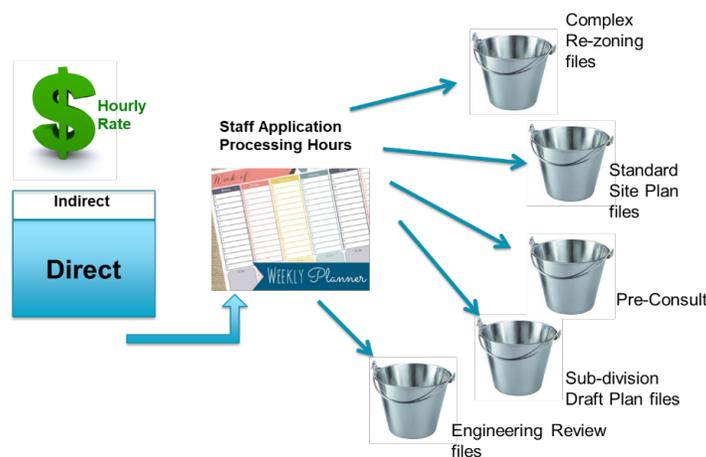
2.0 Full Cost DAP Fees - Approach and Methodology

2.1 DAP Fee Design Using Activity Based Costing (ABC)

Planning and Engineering full-cost fees are calculated within this Report according to an Activity-Based Costing (ABC) methodology; an industry standard approach across Ontario when rationalizing DAP fees. The figure below illustrates the fundamentals of calculating full-cost DAP fees using an ABC approach. Costs are divided into Direct and Indirect categories. *Direct costs* are associated with Town staff members (FTE positions) that participate in DAP file review/processing across any/all involved Town business units. These Town staff may work exclusively or partially on DAP files as part of their jobs. *Indirect support costs* (commonly referred to as overhead costs) of HR, IT, Finance, Clerks etc. are apportioned/stepped forward to the Town staff directly involved in executing DAP. It is helpful to think of these costs as being deposited into an activity-based costing “backpack” worn by each direct DAP participant. This backpack imagery represents the total costs (Direct + Indirect) for each FTE/staffer involved in executing DAP.

In order to document the *relative processing effort* each DAP staff participant expends across various DAP application categories; it is necessary to develop detailed “one time moving through an application” processing effort estimates using activity-based DAP process maps. Evolving *Future State* process maps prepared during the 2023 DAP Process Review have been used for estimating processing effort inputs into Collingwood’s DAP fee calculations. Once relative shares of a given Town staff member’s processing effort have been allocated across various DAP fee buckets, then the same relative share of staff costs (\$) can be attributed to these same buckets. Dollars (\$) costs follow staff’s activity-based effort outputs (processing hours/minutes) into DAP fee categories (buckets).

Fees Derived from Full-Cost “Billable” Hours Mirroring Tracked Staff Effort Across File Buckets



Note: the illustration above explains activity based costing of staff effort across DAP fee buckets

2.2 Section 69 Planning Act Fees and “Growth Pays for Growth” Cost Recovery Design

Section 69 of the Planning Act requires Collingwood to design cost-reflective DAP fees on a rigorous *application category-by-application category* basis. Section 69 Planning fees can/should be calculated according to the Town’s estimated application processing effort/costs. At the time of payment, DAP fees under the Planning Act can be appealed to the OLT by applicants. Each Planning DAP fee must adhere to strict standards for cost recovery; hence, there is no allowance for cross-subsidizing cost recovery efforts across different application categories. Section 69 also requires that a given Planning fee not surpass the estimated full cost recovery for processing that application type.

For purposes of cost recovery transparency, the budgeted costs of delivering Planning DAP (wherever these costs are imbedded across the Town’s organization structure) should be linked to corresponding cost recovery DAP fee revenue streams. The Town’s operating budget should firmly “staple” off-setting DAP revenues to its DAP cost centres; thereby producing a visible/transparent net property tax levy requirement (or not) associated with DAP workload. Indirect support functions like Clerks, HR, Finance, IT, etc. that are consumed by frontline DAP staff teams can/should be offset by DAP full-cost fee revenues.

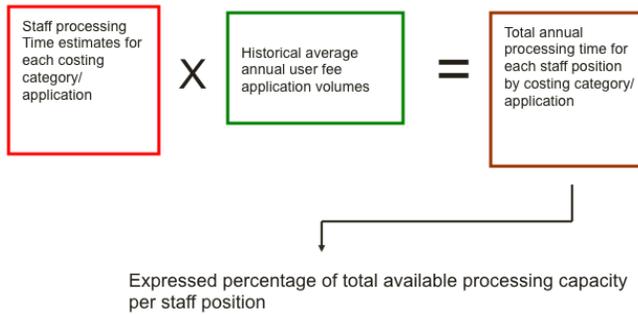
2.3 DAP Fees Mandated by Municipal Act and Building Code Act

Legislated parameters for DAP cost recovery under the Municipal Act and/or the Building Code Act are less rigid than Section 69 Planning Act fees. Municipal Act mandated fees (e.g., Post Approval Engineering Review fees) are not subject to OLT appeal at payment – although rarely occurring Court based appeals are possible. Nor are Municipal Act mandated fees subject to the prescriptive cost recovery approach/restrictions set out for Section 69 Planning fees. Building Code Act Section 7 fee revenues (\$) in total cannot exceed reasonably anticipated total costs for Building Code mandated activities, and therefore they cannot subsidize under-recovering Planning Act fees as they once did prior to legislative changes enacted in 2005. Unlike the Planning Act, cross-subsidization among/across Building Permit fee categories is legally permissible. Fees collected for Building Permit applications may only be applied to administer and enforce the Building Code Act; they should not be applied to other discretionary duties that may be performed by the CBO or the Building Division. Building Code Act fee increases require a statutory public meeting.

2.4 Collingwood Staff Processing Effort for DAP

As already noted, evolving *Future State* process maps prepared during the 2023 Phase 1 DAP Process Review have been used to develop one-time processing effort estimates for all Town staff involved in core DAP processes/application categories. When one-time processing effort is multiplied by historic/forecast DAP application volumes, overall annual DAP processing effort estimates can be translated into fully-costed flat “cost per application” DAP fees (see figure below).

Capacity Analysis



Note: the illustration above explains how staff capacity utilization is calculated

Within the Collingwood DAP fees calculation model built by performance Concepts, estimated one-time processing effort (minutes/hours) is multiplied by average annual application volumes within each Planning/Engineering DAP application category. Multi-year averaged application volumes are used to create estimates of annual expended effort per DAP staff position and for each DAP application category. The total annual *expended* DAP processing effort per staff position (across all application categories) is expressed as a percentage of that same position’s total *available* processing capacity to do any/all DAP work. Town staff effort required to execute SCAP was removed from the calculation of available DAP processing capacity for all Town participants involved in SCAP. Doing so increases the “per minute” cost recovery \$ rate associated with remaining Town staff capacity/availability to execute DAP.

The resulting product is a *DAP Capacity Utilization* calculation per Town position. This capacity utilization analysis provides an important accuracy/quality control step in the overall ABC methodology for calculating DAP fees, by validating the critically important one-time processing effort estimates. For instance, if a Town position generates 80% capacity utilization by DAP, then that result can be considered valid/realistic. However, if a position were to generate 250% capacity utilization, then clearly the one-time processing effort estimates for that position are either not accurate/valid or that position is over-allocated to DAP review (i.e. may be working overtime or undertaking DAP activities at the expense of other duties required by the position). By stress testing Town staff’s processing effort estimates with a capacity utilization analysis (a quality control calculation), the resulting DAP full-cost fees calculated using the one-time processing estimates (derived step-by-step using process maps) can be effectively defended in the event of a future OLT appeal.

2.5 Calculating Full Cost DAP Fees

2.5.1 Direct Costs

Direct costs used for fee calculations include salary/wage and benefit (SWB) information as well as a variety of non-SWB costs. In the case of Building Permit fees, any annual Reserve Fund contributions are

treated as direct operating costs for costing purposes-. Capital cost replacement charges for Town Hall space occupied by DAP participants have not been included in the Collingwood fee calculations, although such costs are technically eligible for recovery.

2.5.2 Indirect Costs

Indirect costs have been stepped forward to all DAP-participant Town positions using an overhead allocation top-up equivalent to 25% of direct SWB costs for each position. The 25% allocation top-up percentage has been validated as appropriate across 20+ municipal DAP fee projects in Ontario conducted by Performance Concepts and/or Watson/Performance Concepts teams. The allocation top-up mirrors traditional cost-driver information sets used to allocate HR, IT, Finance, Clerks staff costs as part of Financial Information Return (FIR) allocations reported annually to the Province.

2.5.3 Building Code Act Reserve Fund Contributions

Annual Reserve Fund contributions are a legitimate cost within the Building DAP “enterprise” model that balances annual costs and Permit fee revenues. Reserve Fund balances ensure highly qualified Building staff can be retained across an economic downturn (reduced Building activity and lower revenue streams). Reserve Fund targets typically range between 2x to 3x annual operational spending. Information technology investments (e.g. DAP workflow software) are also eligible for funding from Building Reserve Funds.

2.5.4 Spreadsheet DAP Fees Calculation Model

A DAP full-cost fees calculation spreadsheet has been constructed for the Town. Fees have been calculated using a detailed salary and wage data set extracted from the Town’s 2023 budget. The DAP fees spreadsheet has security/privacy protection features to maintain confidentiality re. individual employee salary information. The Town will take custody of this model at the conclusion of this project.

2.6 Modernized DAP Fee Design

Municipal practices vary widely when it comes to designing modernized DAP fees. Some DAP fees can take the form of a *flat fee per application* (e.g., Minor Variance). Other DAP fees can feature more complex design features to address significant differences in complexity/expended processing effort between applications that fall within the same application category (e.g., Residential Site Plans vs Commercial Site Plan). DAP fee design options explored within this Report include *flat fees per application* as well as more complex design structures consisting of *Base + Per Unit Escalator* components. This Report will recommend Base + Per Unit fee structures where appropriate, while following the financially conservative practice of recovering a substantial majority of eligible costs within the Base component.

2.6.1 Base Fee Component

Calculated DAP fees in this Report all recover a majority of Town staff input costs within the Base fee component. This modeling decision reflects the reality that most applications (regardless of unit count or square footage differences) consume a high level of fixed processing effort from core DAP staff. The

majority share of application processing costs will always be recovered (regardless of per unit fluctuations) if the Base Fee is set at a high share of the overall full-cost fee calculation.

2.6.2 *Per Unit Escalator Component*

Required staff processing effort does increase (up to a point) when unit counts trend upwards in larger Subdivision Draft Plans or Multi-residential Site Plans. Therefore, an extra cost-recovery burden (up to a point) is created for larger per unit files. However, significant difficult-to-justify shifts in cost recovery from average sized files to larger files should be avoided in the interests of fairness and costing accuracy. Only a prudently calculated/limited share of overall DAP processing costs should be recovered in a per unit escalator portion of any given DAP fee. Per unit escalators are often capped to limit any cost recovery distortions for larger applications. Performance Concepts generally supports the use of per unit escalators in fee design – often as a next-step evolution after a flat full cost fee has been implemented.

2.7 **Comparator Review of Collingwood DAP Fees**

A technically sound comparator review of Collingwood’s DAP fees can provide important insights around the Town’s capacity to properly fund its recommended *Future State* DAP staffing model. The use of comparators serves as a double-check to validate the Town’s internal processing efforts estimates/analysis and enhances the transparency of the Collingwood fee calculations.

The Performance Concepts team has prepared a robust comparators analysis. Eight reasonably “like” municipal comparators were selected for this analysis - four single-tier municipalities and four municipalities situated within 2-tier County systems. DAP fees across the 2-tier municipal comparators have been aggregated to include relatively minor County fees as well as the more robust local municipality fees.

Fee design is never identical across all comparators. In order to execute a credible apples-to-apples analysis, a number of standardized development scenarios have been created, and each peer’s fee schedule has been applied against the various development scenarios. The comparative development scenarios are as follows:

- Two *Draft Plan of Subdivision* scenarios based on differing unit counts (100 units or 200 units) or site area (10 hectares or 15 hectares)
- A Post-Draft Plan *Detailed Engineering Review* scenario where the value of constructed works being reviewed/approved is \$1M
- A multi-residential Site Plan with either 50 units/2-hectares site
- A Non-residential Commercial Site Plan with 2,000 square metres of GFA
- A major Re-zoning for a 100-unit multi-residential project

2.8 “Growth-Pays-for-Growth” Cost Recovery + “Community Benefit” Deduction

It is standard practice for Ontario growth municipalities to acknowledge *existing community benefit* as well as *applicant benefit* in the design of DAP fees. Certain full-cost DAP fees (i.e., 100% cost recovery) paid by new development (applicants) are often discounted to 75%-80% of full-cost recovery in recognition of the benefits conferred on existing development by a high performance DAP model. The resulting 20% - 25% funding gap is then closed using property tax revenues. Based on Ontario-wide trends across growth municipalities, Performance Concepts is confident this modified “Growth Pays for Growth” DAP fee design strikes an appropriate balance by recognizing a primary beneficiary (the applicant) and a secondary beneficiary (existing development aka. the taxpaying community).

Recognizing community benefit when setting DAP fees creates cost recovery fairness for both developers and existing residents; reducing the probability of successful OLT fee challenges.

3.0 Collingwood Staff Processing Effort and Capacity

3.1 Planning/Engineering DAP Application Volumes

The following Collingwood DAP application volumes (6-Year Average) have been used for staff Capacity Utilization and full-cost DAP fee calculations.

Application Type	2018	2019	2020	2021	2022	2023*	Grand Total	6-Year Average (2018-23)
Pre-Consultation Files	22	25	38	40	34	35	194	33
Minor Variance	33	36	19	24	29	23	164	28
Consents	19	7	12	7	11	11	67	12
Official Plan & Zoning By-Law Amendments	2	3	1	1	2	4	13	3
Zoning By-law Amendments (incl. removal of H)***	11	2	2	4	3	7	29	8
Draft Plan of Subdivision	5	0	2	0	1	2	10	2
Extensions of Draft Plan of Subdivision	3	2	3	6	0	0	14	3
Registration of Plan of Subdivision	0	1	1	0	2	0	4	1
New Draft Plan Review of Condominium	0	0	0	1	0	0	1	1
Condominium Exemptions	5	2	4	1	4	2	18	3
Site Plan App - Major	7	8	10	5	5	4	39	7
Site Plan App - Minor under 500 sq m	5	2	4	1	1	2	15	3
Amendment to Site Plan Control Agreement	4	3	0	4	7	6	24	4
Minor Adjustment to Site Plan Control Agreement	3	3	5	2	7	2	22	4
Deeming By-Law	2	2	2	1	1	1	9	2
Part Lot Control	4	8	1	4	2	0	19	4
Post-Draft Engineering Review - Phases**								4
Grand Total	125	106	109	107	113	99	659	126

* 2023 YTD Oct 31, 23 extrapolated to full year

** estimate provided by staff for next three years

*** ZBAs included in combo packs will be included in volumes

3.2 Collingwood Staff Processing Effort and Capacity Utilization

One-time estimated Collingwood staff processing effort required for each Planning/Engineering DAP application category has been mapped and calculated. One-time effort has been applied against average annual application volumes. Estimated processing effort detail has been embedded in the Town’s new DAP fees calculation spreadsheet tool. A Capacity Utilization “stress testing” analysis has been undertaken to ensure full-cost fee calculation credibility. The results for both Planning and Engineering DAP appear in the figure below and specific commentary also follows in 3.2.1 and 3.2.2 below.

Percentage of Role Allocated to DAP by Town Policy	TOTAL DAP CAPACITY (minutes)	Estimated Hands on File Effort (minutes)	Allocated Coaching and Oversight Effort	Total Minutes Consumed by DAP	Percentage of Total DAP Capacity Consumed
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PLANNING, BUILDING AND ECONOMIC DEVELOPMENT

	Percentage of Role Allocated to DAP by Town Policy	TOTAL DAP CAPACITY (minutes)	Estimated Hands on File Effort (minutes)	Allocated Coaching and Oversight Effort	Total Minutes Consumed by DAP	Percentage of Total DAP Capacity Consumed
Director	20%	19,500	8,415	75%	23,040	118%
Manager Planning	60%	58,600	78,300	25%	92,950	159%
Admin Asst Planning	75%	76,700	44,910		44,910	59%
Senior Planner 1	70%	68,400	121,466		121,466	178%
Senior Planner 2	25%	24,400	40,489		40,489	166%
Community Planner 1	70%	68,400	38,445		38,445	56%
Community Planner 2	80%	78,200	38,445		38,445	49%
Community Planner 3	80%	78,200	38,445		38,445	49%
Planning Technician	75%	76,700	28,800		28,800	38%

PUBLIC WORKS

	Percentage of Role Allocated to DAP by Town Policy	TOTAL DAP CAPACITY (minutes)	Estimated Hands on File Effort (minutes)	Allocated Coaching and Oversight Effort	Total Minutes Consumed by DAP	Percentage of Total DAP Capacity Consumed
Director	10%	9,800		10%	980	10%
Manager, Engineering	30%	30,400	45,720	25%	53,320	175%
Project Engineer	50%	50,700	30,000			59%
Engineering Technologist	65%	65,800	33,345			51%
Engineering Technologist	65%	65,800	33,345			51%
Manager, Env Services		97,700	3,150	25%	27,575	28%
Backflow Prev Officer		97,700	5,445			6%
Proj Mgr, Env Serv		97,700	2,520			3%
Proj Coordinator, Env Serv		97,700	7,110			7%
Supervisor Water		102,200	11,520			11%

PARKS

	Percentage of Role Allocated to DAP by Town Policy	TOTAL DAP CAPACITY (minutes)	Estimated Hands on File Effort (minutes)	Allocated Coaching and Oversight Effort	Total Minutes Consumed by DAP	Percentage of Total DAP Capacity Consumed
Director		102,200	-	10%		10%
Manager, Parks		102,200	3,450			3%

FIRE

	Percentage of Role Allocated to DAP by Town Policy	TOTAL DAP CAPACITY (minutes)	Estimated Hands on File Effort (minutes)	Allocated Coaching and Oversight Effort	Total Minutes Consumed by DAP	Percentage of Total DAP Capacity Consumed
Fire Chief		102,200	12,360			12%

3.2.1 Capacity Utilization “Stress Testing” for Planning Act DAP Fees

As a matter of Town policy, Collingwood’s Planners each have a share of their total annual work capacity allocated to DAP (shaded in blue) as per the above capacity utilization figure. These DAP processing targets (shaded blue) are meant to recognize the intent for certain staff to do other important work outside DAP.

Four of the frontline Planners, the Planning Technician, and the Planning Administrative Assistant are all 75% to 80% allocated to DAP in the blue shaded column. Their remaining annual work capacity is presumably intended to be consumed by planning policy and other non-DAP workload.

One of the Senior Planners (Senior Planner 2) is only 25% allocated to DAP – with the remaining 75% of the position’s annual work capacity reserved for planning policy projects.

The Director (20%) and Manager (60%) also have specific shares of their annual work capacity allocated to DAP in the blue shaded column. Remaining annual work capacity is primarily targeted to non-DAP activities such as oversight of other divisions, policy work, corporate projects, and general division/department administration.

These policy-based DAP workload allocations in the blue shaded column can be translated into total available DAP processing effort (minutes) for all involved positions (see green shaded column).

Estimated annual DAP processing effort (hands-on-the-file minutes) for all involved Planning staff has been documented, and then converted into a percentage share of the available DAP processing room. Additional Coaching and Oversight effort (minutes) has been allocated for the Director and Manager – in addition to their hands-on-the-file processing effort. These capacity utilization shares vary significantly across Planning positions and are shaded grey in the above capacity utilization figure. These % shares appear in the grey shaded column at the far right of the figure. The grey shaded % values express the estimated total minutes consumed by DAP as a share of the green shaded target minutes allocated to DAP.

Estimated processing effort underlying the capacity utilization calculations for Planners reflect differing numbers of Technical Review Cycles for various planning application categories. *For Site Plans/OPAs/ZBAs only one Technical Review Cycle per application has been included. This approach for Site Plans/OPAs/ZBAs has resulted in calculated fees that are consistent with a Bill 109 “One and Not Done” process adaptation described in the Phase 1 DAP Review Report.* In order to capture situations requiring staff processing effort beyond a single cycle of technical review, a new generic “Additional Cycle” fee will be required to recover staff processing effort. *Estimating the processing effort consumed by the uncertain number of required additional review cycles moving forward is not technically feasible, but the effort from additional review cycles will significantly boost the real-world Planner capacity utilization % totals well beyond those captured in the above figure.* Planners will end up being busier than the capacity utilization numbers built into the traditional planning application fees.

3.2.2 Capacity Utilization “Stress Testing” for Development Engineering Fees

Engineering staff also have policy-based DAP workload shares carved out of their total annual work capacity (blue shaded column). These DAP shares of total capacity apply to the Director (10%), the Manager of Engineering (30%) and three frontline technical staff (50% to 65%). Remaining annual work capacity is primarily directed to non-DAP capital project design and construction activities. Frontline technical staff are actually being consumed by DAP at levels consistent with their policy-based DAP capacity targets. However, the Engineering Manager is being consumed by DAP at levels far exceeding his annual DAP target of 30% of total work capacity. Both the Director and Manager also exercise Coaching and Oversight roles beyond “hands-on-the-file DAP workload.

3.3 Future DAP Staffing Implications for Collingwood

Beyond providing technical due diligence around the accuracy of calculated/recommended full-cost DAP fees, the Capacity Utilization analysis within this Report can provide important insights around Collingwood’s future staffing investments to process DAP applications on a timely basis. The following observations are noteworthy regarding future potential staffing levels for Collingwood DAP:

Planning DAP

- i. The *Director of Planning* is immersed in DAP well beyond the job description’s prescribed target of 20% of the position’s annual work capacity. This workload reality for the Director position is neither new nor likely to change in the foreseeable future. Therefore, the prescribed DAP capacity target requires re-definition to better reflect on-the-ground reality. A DAP target of at least 50% of total capacity is appropriate.
- ii. The *Manager of Planning* is also immersed in DAP at levels far exceeding the 60% of total capacity target set out in the job description for this position. Realistically, the Manager is immersed almost fulltime on DAP related workload, at the expense of policy matters. This workload reality is neither new nor likely to change in the foreseeable future. A DAP target of 80% is appropriate.
- iii. The Senior Planner position that is primarily responsible for Policy has an allocated DAP capacity of only 25% while in reality generating DAP output that is double that workload capacity target for DAP. Policy work is being crowded out by DAP execution. Ideally this position would transfer DAP workload to the 3 Community Planners; thereby improving their DAP utilization to their policy-approved levels. The Community Planners’ real-world DAP workload will be much higher than the estimated effort for traditional planning application fees. The reason for this is the “one and done” processing effort restriction for technical review cycles. Realistically, lots of “additional review cycles” will be executed and recovered with that new recommended fee.

In summary, Collingwood’s workload share targets for Planning DAP require re-definition to better reflect ongoing operational realities, and actual DAP workload should be re-allocated across the Planning staff team to optimize capacity utilization once all currently vacant positions are filled. A short to mid-term challenge will be that most Community Planners are “underfills” meaning that they did not meet the

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minimum experience requirement of the job description. As more senior positions assist to coach and mentor the junior staff members, there will be a lag time in their ability to pick up a full work load of more experienced planners. In a mature fully staffed model these difficulties will abate.

Also, a concern is that DAP execution will suffer if Planning staff vacancies persist despite enhanced revenue generation to fund them. Difficult-to-forecast numbers of “Additional Review Cycles” will boost overall workload and likely necessitate a targeted increase in overall required Planner hours or a decrease in the expected delivery of projects led or supported by the Planning Services team.

Engineering DAP

Collingwood’s Engineering team is facing a significant increase in DAP workload moving forward. Eleven new Sub-divisions with 21 phases for infrastructure design approval, development agreement execution, and lot registration are either imminent or on the midterm horizon. This DAP workload increase is unprecedented for Collingwood, which typically processed one post-approval subdivision registration per year.

Current/Imminent Post-Draft Plan Phases	Phases
452 Raglan	1
Huntingwood	1
RCD	2
50 Saunders Street	1
Trails of Collingwood	1

Pending 5-7 Year Post-Draft Plan Phases	Phases
Panorama North	5
Bridgewater/Consulate	2
High Street & Campbell Lots	1
Linksview	3
Red Maple Subdivision	2
Mair Mills Subdivision	2

Note: the tables above set out existing/future Post Draft Plan Phases in Collingwood

The same Town Engineering staff also have significant non-DAP workload responsibilities for capital project design and construction oversight – a workload priority that will likely grow in importance moving forward.

Post-approval Engineering Review Phases are the most time-sensitive component of DAP for residential developers in Collingwood. Houses are being sold with firm closing dates in anticipation of these Phases yielding registered lots on a tightly scheduled critical path. Any future delays due to Town staffing capacity problems will have significant adverse consequences. As well, Engineering staff will have to administer a new permit for the Provincially mandated Consolidated Linear Infrastructure Environmental Compliance Approval (CLI-ECA). The CLI-ECA process is a potential resourcing game-changer representing a significant new workload burden that the Town has not yet quantified or considered.

Anticipated Engineering DAP fee revenues will provide adequate \$ fuel to ramp-up additional processing capacity (staff or consultant muscle) to meet this fast-approaching and unavoidable Post-Draft Plan workload crunch. A mix of additional staff and rostered, pre-approved external consulting resources is prudent to match the precise timing of the coming work spike.

4.0 DAP Full-Cost Fee Calculations and Recommended Fees

4.1 DAP Fee Calculations Based on Processing Estimates - Overview

One-time DAP staff processing effort estimates were developed/refined across the following DAP core application categories. Additional supplementary application categories (infrequently occurring and minor in nature) have also been modeled.

Pre-consultation	Minor Variance - Regular Applications with Considerable Review	Consent to Sever	Official Plan Amendment	Zoning By-law:	Draft Plan Review - Subdivision	Extension of Draft Approval:	Registration of Plan of Subdivision:	Draft Plan Review - Condominium	
Condominium Exemptions	Site Plan Control Application - Standard	Site Plan Control Application - Minor	Part Lot Control By-law	Secondary Plan Official Plan Amendment	Official Plan Amendment with Zoning By-law:	Phasing Plan Amendment	Draft Plan Review- Condominium after Site Plan Application:	Removal of Holding Provision:	Revision to Draft Plan of Subdivision

Note: the illustration above identifies DAP application categories where DAP fees have been modeled using processing effort estimates

Specific one-time processing effort (minutes) data sets for each of these core Planning DAP application categories has been documented/refined using detailed step-by-step Future State process maps. The processing effort estimation “detail” is confidentially imbedded in the fees calculation model provided to Town staff. The confidential effort estimation data set is available for the Town to defend Planning DAP fee calculation reasonableness in the event of any OLT appeal. As noted earlier single Technical Review Cycles of processing effort have been applied to Site Plans/OPAs/ZBAs in order to harmonize with potential Bill 109 “One and Done” process adaptations described in the Phase 1 DAP Review Report.

4.2 Full-Cost Planning and Engineering DAP Fee Calculations

The following full-cost Planning DAP and Engineering DAP fees have been calculated based on Town staff’s processing effort estimates. Alternative fees with a 25% “community benefit” discount have also been calculated for consideration. A mixture of full-cost and discounted Planning fees are recommended.

4.2.1 Pre-Consultation

Based on Town processing effort estimates a Pre-consultation fee set at \$4,524 is recommended. Pre-consultation benefits the existing Collingwood community as well as the applicant, so *a community benefit discounted fee is appropriate and is recommended.*

Application Type	Full Cost Fee	Fee with 75% Recovery
Pre-Consultation Files	\$ 6,032	\$ 4,524

Fees highlighted in green are recommended for adoption

4.2.2 Site Plan Fees

Based on Town processing effort estimates the following portfolio of Site Plan fees featuring a 25% community benefit discount are recommended. Site Plan Control benefits the existing Collingwood community as well as the applicant, so *a community benefit discounted fee is appropriate and is recommended.*

Application Type	Full Cost Fee	Fee with 75% Recovery
Site Plan App - Major	\$ 29,456	\$ 22,092
Site Plan App - Minor under 500 sq m	\$ 12,740	\$ 9,555
Amendment to Site Plan Control Agreement	\$ 19,513	\$ 14,635
Minor Adjustment to Site Plan Control Agreement	\$ 9,986	\$ 7,490

Fees highlighted in green are recommended for adoption

If Council opts to implement a Base + Per Unit fee structure for Major Residential Site Plan applications, the following component pricing is recommended:

- Base Fee of \$17,674
- Per Unit fee of \$88.37 up to 200 unit maximum

The Performance Concepts team is “position neutral” on this escalator-or-no-escalator design decision. The revenue impacts are relatively minor for the Town. Development industry feedback can, and should, inform the Town’s eventual design decision around per unit escalators.

4.2.3 Draft Plan of Subdivision and Draft Plan of Condominium

Based on Town processing effort estimates the following portfolio of Full Cost Sub-division and Condominium fees are recommended. A community benefit discount is not recommended – for instance Subdivision development often requires potentially costly right-of-way infrastructure improvements not included in a DAP fee. The full-cost fee is recommended for these application types.

Application Type	Full Cost Fee	Fee with 75% Recovery
Draft Plan of Subdivision	\$ 31,323	\$ 23,492
Extension or Amendment of Draft Plan of Subdivision	\$ 4,252	\$ 3,189
Registration of Plan of Subdivision	\$ 1,173	\$ 880
New Draft Plan Review of Condominium	\$ 9,932	\$ 7,449
Condominium Exemptions	\$ 3,461	\$ 2,596

Fees highlighted in green are recommended for adoption

If Council opts to implement a Base + Per Unit fee structure for Draft Plan of Sub-division applications, the following component pricing is recommended:

- Base Fee of \$25,058
- Per Unit fee of \$62.65 up to 300 unit maximum

The Performance Concepts team is “position neutral” on this design decision. The revenue impacts are relatively minor for the Town. Development industry feedback can, and should, inform the Town’s design decision around per unit escalators.

4.2.4 Post-Draft Plan Phases - Development Engineering Review

No change is recommended to Collingwood’s current Post-Draft Plan Engineering Review fee set at 5% of constructed value of services. The “per phase” full-cost flat fee of 38,321 set out below was intended to answer the question of whether or not the 5% Construction Value fee required adjustment. Using Town staff processing effort estimates, it is clear that the Town’s current 5% of Construction Value rate structure is sufficient. Engineering processing effort associated with Site Plan review has been integrated into the Planning Act fees for Site Plan. This approach is typical across most Ontario growth municipalities.

Application Type	Full Cost Fee	Recommended Rate
Post-Draft Engineering Review - Phases**	\$ 38,321	5%

4.2.5 Zoning By-law Amendments and Official Plan Amendments

Based on Town processing effort estimates the following portfolio of Full Cost OPA and ZBA fees are recommended. *A community benefit discount is recommended for both OPAs and ZBA/H removals.*

Application Type	Full Cost Fee	Fee with 75% Recovery
Official Plan & Zoning By-Law Amendments	\$ 19,145	\$ 14,359
Zoning By-law Amendments (incl. removal of H)**	\$ 26,713	\$ 20,035
Official Plan Amendment with Zoning By-law:	\$ 45,858	\$ 34,394

Fees highlighted in green are recommended for adoption

4.2.6 Committee of Adjustment Applications

Based on Town processing effort estimates the following portfolio of Full Cost C of A fees are recommended. *A 75% community benefit discount is recommended for all Minor Variances. Consents that create new lots should NOT receive a community benefit discount since significant economic value for the landowner is created by the Town’s decision. Consents that do not create new lots should receive a community benefit discount.*

Application Type	Full Cost Fee	Fee with 75% Recovery
Minor Variance	\$ 4,491	\$ 3,368
Consents with no lot created	\$ 3,457	\$ 2,593
Consents with a lot created	\$ 3,457	\$ 2,593
Minor Variance - Checkbox form with minimum review	\$ 1,800	\$ 1,350
Consent to Sever additional application on same property	\$ 1,337	\$ 1,003

Fees highlighted in green are recommended for adoption

4.2.7 A Recommended New “Additional Review Cycle” Fee

For Site Plan/OPA/ZBA applications requiring additional Technical Review Cycles beyond the “One and Done” service delivery standard modeled into those respective DAP fees, a new “Additional Review Cycle” fee should be created and applied. This fee is consistent with the Bill 109 adaptation option put forward in the Phase I report with strong Collingwood staff support. This new “Additional Review Cycle” fee would be based on staff processing effort estimates already used to model Bill 109 impacted DAP fees categories. This new separate fee is not explicitly tied to any Bill 109 fee category - and should not fluctuate in dollar value when applied across Site Plan/OPA/ZBA application categories. The “Additional Review Cycle” fee could also be applied across other Planning DAP applications as appropriate (e.g. Draft Plans of Sub-division or Condominium).

The recommended “Additional Review Cycle” fee is derived from staff processing effort estimates for robust technical review cycle. *The recommended fee is \$4,500 per Cycle, to be applied to Major/Minor Site Plans, OPAs and ZBAs to recover average staff DAP effort beyond the first cycle.*

4.2.8 Cost Recovery for Major Initiatives Prior to Planning Act Applications

Collingwood expends significant staff effort dealing with significant policy/growth management matters prior to Planning applications being submitted. Cost recovery for this expended staff effort is appropriate from a “growth pays for growth” policy perspective and is consistent with the practice of numerous Ontario growth municipalities. The recommended cost recovery approach has two components; an administrative processing fee and a draw-down deposit to secure required technical analysis from staff and/or consultants. A deposit approach is appropriate since actual workload/expended effort across these “applications” can vary significantly. A re-chargeable draw down deposit will provide cost recovery flexibility. Larger more complex undertakings may require multiple re-charges of the \$25k initial amount.

Application Type	Full Cost Fee	Accompanying Draw Down Deposit
Secondary Plan Official Plan Amendment	\$ 1,456	\$ 25,000
Minister's Zoning Order Request	\$ 906	\$ 25,000
Community Infrastructure and Housing Accelerator Request	\$ 958	\$ 25,000
Block Plan	\$ 1,063	\$ 25,000
Block Plan Amendment	\$ 1,028	\$ 25,000

Fees highlighted in green are recommended for adoption

4.2.9 Other Assorted DAP Related Applications

The following schedule of Full Cost DAP fees are all recommended for adoption. These fees are based on one-time end-to-end processing effort estimates provided by Collingwood staff. As some of these application categories have low frequency of actual applications, the revenue implications for the Town are relatively minor.

Application Type	Full Cost Fee
Certificate of Validation - property title	\$ 51
Phasing Plan	\$ 1,642
Phasing Plan Amendment	\$ 1,661
Draft Plan Review- Condominium after Site Plan Application	\$ 1,858
Removal of Holding Provision	\$ 5,760
Temporary Use By-law	\$ 1,627
Parking Exemptions	\$ 837
Revision to Draft Plan of Subdivision	\$ 4,186
Red Line Revision	\$ 2,212
Model Home Application	\$ 987
Deeming By-Law	\$ 4,367
Part Lot Control	\$ 3,514

Fees highlighted in green are recommended for adoption

4.3 Full-Cost and Recommended Building Permit Fee Calculations

Building Code Act services are positioned at the back-end of the overall DAP service delivery channel. Full-costed and recommended Building Permit fees are set out below. Recommended fees are based on Building staff processing effort estimates (samples) were developed by Town staff using high-level Building permit/Inspection/occupancy process maps. Building fees will recover 100% of the “fixed costs” of staffing capacity in the Building Department. While Performance Concepts recognizes that a minor/limited amount of non-OBCA work may be carried out by Collingwood Building staff from time to time, it is standard industry practice among Ontario municipalities to recover all Building staff costs via permit fees - when there is no core municipal service that has been allocated to the CBO beyond the Building Code (e.g. By-law Enforcement). Failing to recover the entirety of Building staff fixed costs expressly linked to the OBCA, simply because occasional/intermittent tasks are accommodated outside the Building Code, is not appropriate from a taxpayer subsidization perspective.

4.3.1 Residential Permit Fees

Recommended residential fees have been re-positioned around the existing “anchor” fee that was fully costed around staff processing effort for the Detached/Semi/Row category.

	Current Fee	Full Effort Costing (\$/sq ft)	Recommended Fee	NOTES
Group C: Residential				
Detached, Semi-detached, Row Houses (average track builder)	\$ 1.17	\$ 1,492.60	\$ 1.17	\$ 1.17 per sq ft
Pre-fabricated Detached Dwelling	\$ 0.88	\$ 989.30	\$ 1.00	\$ 1.00 per sq ft
Multi-Unit Building, Motels, Hotels (review and inspection time based on per floor)	\$ 1.17	\$ 1,619.80	\$ 1.37	\$ 1.37 per sq ft

4.3.2 Assembly Fees

Finished Assembly fees are recommended to increase while Shell fees remain unchanged.

	Current Fee	Full Effort Costing (\$/sq ft)	Recommended Fee	NOTES
Group A: Assembly Buildings (review and inspection time based on per floor)				
Finished	\$ 1.06	\$ 2,052.40	\$ 1.37	\$ 1.37 per sq ft
Shell	\$ 1.00	\$ 1,516.80	\$ 1.01	\$ 1.00 per sq ft

4.3.3 Business + Mercantile Fees

Targeted Permit fee increases (now standardized across Finished categories) are set out below. Shell fees are unchanged.

	Current Fee	Full Effort Costing (\$/sq ft)	Recommended Fee	NOTES
Group D: Business & Personal Service Buildings (review and inspection time based on per floor)				
Finished	\$ 1.17	\$ 2,052.40	\$ 1.37	\$ 1.37 per sq ft
Shell	\$ 1.00	\$ 1,516.80	\$ 1.01	\$ 1.00 per sq ft
Group E: Mercantile Buildings (review and inspection time based on per floor)				
Finished	\$ 1.17	\$ 2,052.40	\$ 1.37	\$ 1.37 per sq ft
Shell	\$ 1.00	\$ 1,516.80	\$ 1.01	\$ 1.00 per sq ft

4.3.4 Industrial Fees

In order to promote industrial land absorption, these Permit fees all remain unchanged.

	Current Fee	Full Effort Costing (\$/sq ft)	Recommended Fee	NOTES
Group F: Industrial Buildings (review and inspection time based on per floor)				
Finished	\$ 0.88	\$ 1,928.80	\$ 1.29	\$ 0.88 per sq ft
Shell	\$ 0.77	\$ 1,424.10	\$ 0.95	\$ 0.77 per sq ft
Underground Parking Garages	\$ 1.47	\$ 1,393.20	\$ 1.55	\$ 1.47 per sq ft

4.3.5 Interior Finishes and Alteration Fees

A targeted Permit fee increase for alterations to previously unfinished areas is recommended.

	Current Fee	Full Effort Costing (\$/sq ft)	Recommended Fee	NOTES
Interior Finishes & Alterations (all classifications)**				
New interior finishes to previously unfinished areas (incl. finishing of residential basements & major renovations e.g. complete interior demolition)	\$ 0.59	\$ 1,218.10	\$ 0.81	\$ 0.71 per sq ft
Alterations and renovations to previously finished areas	\$ 0.59	\$ 769.50	\$ 0.77	\$ 0.59 per sq ft

4.3.6 Care and Treatment + Care Buildings

A targeted increase to the Finished category (a new consistent \$1.37 rate as seen above) is recommended.

	Current Fee	Full Effort Costing (\$/sq ft)		Recommended Fee	NOTES
Group B: Detention, Care & Treatment and Care Building (review and inspection time based on per floor)					
Finished	\$ 1.17	\$ 2,052.40	\$ 1.37	\$ 1.37	per sq ft
Shell	\$ 1.00	\$ 1,516.80	\$ 1.01	\$ 1.00	per sq ft

4.3.7 Assorted Other Permit Fees

A range of flat fee adjustments for specialized/less frequent Permit categories are set out below.

	Current	Full-Cost		Recommended	
Group B: Detention, Care & Treatment and Care Building (review and inspection time based on per floor)					
Finished	\$ 1.17	\$ 2,052.40	\$ 1.37	\$ 1.37	per sq ft
Shell	\$ 1.00	\$ 1,516.80	\$ 1.01	\$ 1.00	per sq ft
Farm Buildings*					
Farm Buildings				\$ 0.50	per sq ft
Miscellaneous Work - Standalone Permits					
Accessory Apartment Building (within existing dwelling)	\$ 588.62	\$ 984.40		\$ 0.71	per sq ft
Detached Accessory Apartment**				\$ 1.17	per sq ft
Accessory Building- Residential (Garage/Shed, etc.)	\$ 147.16	\$ 665.20		\$ 147.16	per bay
Decks/Porches (unenclosed) - Residential	\$ 147.16	\$ 510.50		\$ 147.16	each
Fire Code Retrofit (9.3. OFC)	\$ 588.62	\$ 280.20		\$ 0.59	per sq ft
Fire Code Retrofit (9.8. OFC)	\$ 588.62	\$ 280.20		\$ 0.59	per sq ft
Fire Code Retrofit/Repair - all other	\$ 588.62	\$ 295.00		\$ 0.59	per sq ft
Fireplaces, Wood Burning Stoves	\$ 147.16	\$ 421.60		\$ 147.16	each
Move or Relocate a Building	\$ 147.16	\$ 291.40		\$ 147.16	
Portable Classrooms	\$ 294.31	\$ 564.90		\$ 294.32	each

	Current Fee	Full Effort Costing (\$/sq ft)	Recommended Fee	NOTES
Demolition				
Residential House (or all other buildings up to 2000 sq ft)	\$ 176.58	\$ 261.30	\$ 147.16	
All Other Buildings 1.2.2.3.(1) OBC (over 2000 sq ft)	\$ 353.17	\$ 346.20	\$ 0.05	per sq ft (\$294.32 minimum)
Mechanical and Fire Protection Systems				
Heating, Ventilation, Air Conditioning (non-House category)	\$ 412.04	\$ 537.40	\$ 0.29	per sq ft (\$294.32 minimum)
Fire Alarm System (New or Replacement)	\$ 412.04	\$ 393.20	\$ 441.48	
Fire Sprinkler System (New or Replacement)	\$ 588.62	\$ 413.80	\$ 441.48	
Commercial Cooking Exhaust and Ventilation System	\$ 470.89	\$ 558.00	\$ 441.48	
Spray Booth, Dust Collector System	\$ 412.04	\$ 475.60	\$ 441.48	
Electrical Work				
Fire Alarm System (New or Replacement)	\$ 412.04	\$ 393.20	\$ 441.48	
Fire Alarm Upgrade/Repair	\$ 412.04	\$ 393.20	\$ 294.32	
Plumbing				
Backflow Preventer	\$ 117.73	\$ 144.40	\$ 147.16	
Interceptors (Grease or Oil)	\$ 176.58	\$ 395.60	\$ 147.16	
New or Repair Sanitary Service: Residential	\$ 176.58	\$ 347.40	\$ 147.16	
New or Repair Water Service: Residential	\$ 176.58	\$ 347.40	\$ 147.16	
Plumbing - Internal	\$ 147.16	\$ 509.80	\$ 25.00	per fixture
Rain Water Harvesting System	\$ 58.86	\$ 327.80	\$ 73.58	
Site Servicing: Private Property		\$ 599.20	\$ 0.73	per linear ft (\$294.32 minimum)
Private On-Site Sewage Systems				
New or Replacement Sewage Systems	\$ 588.62	\$ 299.80	\$ 588.62	
Part 11 Performance Level Review for Building Expansion	\$ 412.04	\$ 85.60	\$ 147.16	
Septic Repair	\$ 294.31	\$ 281.60	\$ 294.32	
Septic Tank Decommissioning	\$ 58.86	\$ 144.40	\$ 147.16	
Septic Tank Replacement	\$ 176.58	\$ 203.20	\$ 147.16	
Class 5 Sewage System and Agreement	\$ 588.62	\$ 124.80	\$ 147.16	annual fee
Designated Structures				
Public Pool/Spa	\$ 470.89	\$ 681.60	\$ 470.89	
Retain Wall	\$ 353.17	\$ 508.90	\$ 2.94	per linear ft (\$294.32 minimum)
Signs Regulated by the Building Code	\$ 353.17	\$ 374.70	\$ 294.32	
Solar Collector - Residential	\$ 58.86	\$ 183.60	\$ 147.16	
Solar Collector - Non -Residential	\$ 353.17	\$ 441.30	\$ 294.32	
A Structure Supporting a Wind Turbine >3kW	\$ 588.62	\$ 405.90	\$ 294.32	

Temporary Buildings

Tents and Stages up to 225 m2 (2,232 ft2)	\$ 147.16	\$ 506.50	
Tents and Stages greater than 225 m2 (2,242 ft2)	\$ 235.44	\$ 537.40	

Other Construction

Balcony guard replacements, balcony repairs, canopies, parking garage, etc.		\$ 619.80	\$ 2.94	per linear foot (73.58 minimum)
Balcony guard replacements, balcony repairs, canopies, parking garage, etc.		\$ 619.80	\$ 2.94	per sq foot (\$294.32 minimum)
Elevator, escalator, lift			\$ 294.32	
Exterior ramps (excluding low-rise residential)			\$ 294.32	
Rack storage			\$ 0.59	per sq ft (\$294.32 minimum)
Reclad exterior wall (per square foot)			\$ 0.05	per sq ft (\$294.32 minimum)
Roof structures			\$ 0.05	per sq ft (\$294.32 minimum)
Demising Wall ea.			\$ 294.32	each

4.4 Restructuring DAP Draw-Down Deposits

Collingwood collects and uses applicant financial Deposits to recover costs for a range of specialized peer review services applied to DAP special studies, legal review, additional site visits/meetings, and technical projects that are above and beyond the base application fee. Most of this work is undertaken by outside consultants or legal services hired by the Town. Consultant costs flow through the Town via Invoices. Payments to consultants/legal service providers are approved by DAP staff and then processed by Finance staff. Eventually these additional costs are offset after the fact by financial deposits previously filed by applicants.

Current Town administrative practices around Deposit management are not optimal. Reconciliation of invoices with the balance of available Deposit hours is not timely. Further, invoices eligible for cost recovery often exceed the financial Deposit collected and there is no formal process to “top up” the Deposit, nor is there an agreement to address how the financial Deposit funds are used or refunded, dispute resolution, change of ownership etc. Process improvements are needed in order to better coordinate the costs/timing of work with the available/necessary Deposit revenues.

Performance Concepts recommends the following approach to structuring a Draw-down Deposit model:

- Calculation of an initial draw-down Deposit amount should be based on 100 hours of forecast billable time applied against a standardized/average \$150/hour billing rate.
- Resulting “default” draw-down Deposit level of \$15,000 to be initially collected for each impacted DAP application. Deposit payment should be linked to the “application deemed complete” decision or earlier if the work is to be executed during the Pre-consultation period. Finance staff have verified that majority of projects will not exceed this recommended \$15,000 deposit.
- Finance should execute quarterly reconciliations of billed consultant costs with the available funds in the deposit account of each active application where outside consultant or legal service work has been ongoing.

- At each quarterly reconciliation, require mandatory top-up of draw-down deposits to the initial \$15,000 “default” level for all active/ongoing files that have been drawn-down below 50% of the original “default” \$15,000 level. Applicant top-up to occur within 30 business days of notification by Town. No future invoices processed unless top-up to \$15,000 level has been provided by applicant. This recommendation will eliminate situations where more work has been executed than the initial deposit. Finance staff have identified multiple instances where billings exceeded deposit levels.
- Regular application of a quarterly servicing charge (e.g. \$250 per quarter to address staff effort) by the Town for each active file – to be recovered from the draw-down deposit \$ balance as part of each quarterly reconciliation.
- Preparation and implementation of a draw-down Deposit agreement, to be provided and executed at the time of complete application based on best practice examples provided to the Town by the consulting team.

Given Collingwood’s DAP volumes profile, the administration of this quarterly deposit reconciliation process can be accomplished using a commercial spreadsheet application. General Ledger accounting can then be executed as per the supporting spreadsheet model calculations.

5.0 Understanding Recommended DAP Fee Impacts

5.1 Revised Annual Planning DAP Revenue Impacts

Modernized DAP fees will supply the necessary DAP “fuel” to hire/fund the necessary DAP staffing muscle. The extra DAP staffing muscle will execute streamlined DAP processes that have been implemented to secure faster processing timeframes and mitigate Bill 109 fees claw back risk. The table below sets out a *conservative* annual forecast for DAP fee revenues, based on future volumes and the recommended Planning DAP fees. The forecast is conservative in the sense it only forecasts *Base DAP fee revenues*. It is not possible to accurately forecast revenues generated a potential Per Unit escalator component of DAP fees because application-specific unit count/square footage forecasts are not yet available. As well, no forecast revenues from the recommended new “Additional Review Cycle” fee have been included since volumes are impossible to anticipate. *Therefore, the forecast below generates a floor level of \$863k in Planning DAP revenues and a \$533k reduction in existing property tax subsidies. The \$533k in additional revenue should be used to fund DAP positions where resource shortfalls have been identified. Right sized resourcing will increase the Town’s ability to meet legislative timelines and produce savings in staffing, consultant, and legal costs required to participate in OLT-related activities.*

Application Type	Est. Volume	Current Fee	Current Annual Revenue	Recommended Fee	New Annual Revenue	Net Revenue Increase
Pre-Consultation Files	33	\$ 645	\$ 21,285	\$ 4,524	\$ 149,292	\$ 128,007
Minor Variance	28	\$ 1,900	\$ 53,200	\$ 3,368	\$ 94,311	\$ 41,111
Consents	12	\$ 2,985	\$ 35,820	\$ 2,593	\$ 31,113	-\$ 4,707
Official Plan Amendments	3	\$ 9,425	\$ 28,275	\$ 14,359	\$ 43,076	\$ 14,801
Zoning By-law Amendments (incl. removal of H)***	8	\$ 3,845	\$ 30,760	\$ 20,035	\$ 160,278	\$ 129,518
Draft Plan of Subdivision	2	\$ 19,220	\$ 38,440	\$ 31,323	\$ 62,646	\$ 24,206
Extensions of Draft Plan of Subdivision	3	\$ 3,040	\$ 9,120	\$ 4,252	\$ 12,756	\$ 3,636
Registration of Plan of Subdivision	1	\$ 4,960	\$ 4,960	\$ 1,173	\$ 1,173	-\$ 3,787
New Draft Plan Review of Condominium	1	\$ 12,400	\$ 12,400	\$ 9,932	\$ 9,932	-\$ 2,468
Condominium Exemptions	3	\$ 2,265	\$ 6,795	\$ 3,461	\$ 10,383	\$ 3,588
Site Plan App - Major	7	\$ 6,815	\$ 47,705	\$ 22,092	\$ 154,644	\$ 106,939
Site Plan App - Minor under 500 sq m	3	\$ 4,350	\$ 13,050	\$ 9,555	\$ 28,665	\$ 15,615
Amendment to Site Plan Control Agreement	4	\$ 3,720	\$ 14,880	\$ 14,635	\$ 58,539	\$ 43,659
Minor Adjustment to Site Plan Control Agreement	4	\$ 625	\$ 2,500	\$ 7,490	\$ 29,958	\$ 27,458
Deeming By-Law	2	\$ 1,290	\$ 2,580	\$ 3,275	\$ 6,551	\$ 3,971
Part Lot Control	4	\$ 2,250	\$ 9,000	\$ 2,636	\$ 10,542	\$ 1,542
Grand Total	126	\$ 330,770	\$ 330,770	\$ 863,859	\$ 863,859	\$ 533,089

5.2 Peer Municipal Comparisons

The following analysis of Peer municipal fees has informed the recommended Planning/Engineering DAP fee adjustments. Performance Concepts and Town staff worked in collaboration to select the portfolio of Peer comparators. Comparators within and beyond Simcoe County (Grey plus Northumberland) were selected based on demographic and growth criteria. Fee impacts were assembled based on 7 distinct development scenarios to ensure apples to apples comparability across diverse fee schedules.

Collingwood’s current fees reflect a high degree of taxpayer subsidization compared to the Peers. Full-Costed fees and discounted 75% Community Benefit fees for Collingwood represent generally comparable impacts across the Peers.

	Collingwood Current Fee	Collingwood Full Cost Recovery Fee	Collingwood 75% Recovery Fee	Orillia*	Wasaga Beach	New Tecumseth	Cobourg	Blue Mountains	Peers Average
Subdivision									
Units over two phases	100	\$31,323	\$23,492	\$49,844	\$67,500	\$49,925	\$21,400	\$21,532	\$42,040
Hectares	10	\$19,220	\$31,323	\$49,844	\$750	\$750	\$1,000	\$21,532	\$833
Subdivision									
Units over three phase	200	\$31,323	\$23,492	\$62,744	\$97,500	\$73,825	\$27,400	\$21,532	\$56,600
Hectares	15	\$19,220	\$31,323	\$62,744	\$750	\$750	\$1,000	\$21,532	\$833
Sub-div Eng. Review									
Construction Value	\$ 1,000,000	5%				\$51,136		\$16,395	\$33,766
	\$50,000	\$50,000		\$0	\$0	\$51,136	\$52,500	\$40,000	\$46,250
									\$32,006
Multi-Res Site Plan									
Units	50	\$29,456	\$22,092	\$15,785	\$24,750	\$18,526	\$8,500	\$31,950	\$19,902
Hectares	2	\$6,815	\$29,456	\$15,785	\$24,750	\$18,526	\$350	\$31,950	\$350
									\$19,972
Commercial Site Plan									
Square Meters	2000	\$29,456	\$22,092	\$15,785	\$9,000	\$18,526	\$7,150	\$31,950	\$16,482
		\$6,815	\$29,456	\$15,785	\$9,000	\$18,526	\$350	\$31,950	\$350
									\$16,552
Major Re-zoning									
Units	100	\$26,713	\$20,035	\$7,075	\$6,750	\$8,195	\$9,900	\$23,303	\$11,045
		\$3,845	\$26,713	\$7,075	\$6,750	\$8,195	\$750	\$23,303	\$750
									\$11,195
Standard Condo									
Units	50	\$9,932	\$7,449	\$24,922	\$36,375	\$18,160	\$18,400	\$37,927	\$27,157
Hectares	2	\$12,400	\$9,932	\$24,922	\$36,375	\$18,160	\$750	\$37,927	\$750
									\$27,307

Simcoe
Northumberland
Grey

Fees highlighted in green are recommended for adoption

5.3 Full-Cost DAP Fees - Impact on the Cost of New Housing Units

DAP Fees a Minor Input Cost for New Housing



Note: The above illustrated figure explains the minor impact of DAP fees on housing costs

It should be noted that fully-costed DAP fees represent a small portion of the total input costs for a new housing unit built in Collingwood. For instance, a future \$750,000 housing unit in a 100-unit subdivision development would absorb approximately \$482 in a combined Sub-division + Re-zoning DAP fee burden. The same \$750,000 unit would absorb an estimated \$2,500 to \$3,000 in Development Engineering Review Fees. Estimated Building Permit fees would total \$1,700 to \$2,000.

The approximate “up-side” total of \$5,500 in DAP full-cost fees would constitute less than 1 percent of the \$750,000 purchase price of a future single residential unit.

The cost recovery lesson is clear - housing construction/location decisions made by the development industry in Ontario - including Collingwood - are not materially impacted by the imposition of full-cost Planning/Engineering/Building DAP fees. Municipal Development Charges and estimated Builder profit margins are more significant drivers of housing costs than DAP fees.

5.4 Consultation with GTDI Stakeholder Representatives

Collingwood staff and the Performance Concepts team met with GTDI representatives in early March 2024 to review the DAP fees calculation methodology as well as the various Planning/Engineering and Building fee calculations included in this Report. Emphasis in the consultation session was on Planning and Engineering DAP fees and deposits. Municipal comparator data on DAP fee burdens (for common development scenarios) appearing in this Report was also presented to GTDI. Phasing options for recommended DAP fees and the minor impact of DAP fees on overall housing input costs were also covered. Moving forward GTDI and other industry stakeholders will have opportunity for further dialogue with the Town’s DAP staff as an incremental approach to adoption of updated fees is rolled out.

Town of Collingwood – 2023 Development Approvals Process (DAP) Fees Review

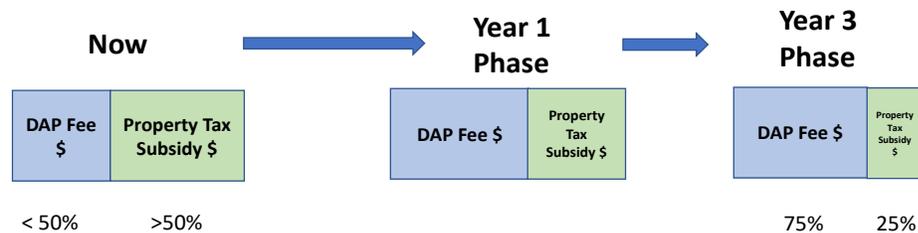
6.0 Implementation of Recommended “Growth Pays for Growth” DAP Fees + Potential Phasing Options

The consulting team has observed the Ontario-wide trend towards a modernized “Growth Pays for Growth” DAP cost recovery model. Historic Planning DAP fee levels in Collingwood have not secured appropriate levels of cost recovery from applicants and therefore the required DAP staffing capacity has not been secured. The staffing deficit associated with artificially low DAP fees is contributing to potential problems with timely application processing, increased risk of appeals of non-decision, and most recently fee refunds, among other matters related to turn-over and burn-out. Property taxpayers have had to make up the cost recovery difference created by artificially low DAP fees. Moving forward, the Town’s property tax subsidy to DAP is forecast to exceed \$500k annually (based on forecast application volumes) unless recommended DAP fee adjustments are adopted. Implementing the recommended slate of full-cost Planning DAP fees will significantly reduce the property tax subsidy paid by existing residents/businesses to Collingwood development industry applicants. The necessary DAP staff processing hours required by the Town can then be secured without negative property tax impacts.

6.1 Phasing Option(s) for Collingwood to Consider

Implementation of the recommended full-cost DAP fees model can be secured immediately during 2024 or required fee adjustments can be phased-in over a finite transition period. If phasing is identified as a preferable option by Collingwood, a three-year 50%/25%/25% transition to the recommended “Growth Pays for Growth” fees is appropriate. Phase-in of recommended DAP fees can commence as early as Q3 2024. Council may choose a longer phased in approach over greater than a 3-year period. It is further recognized that already recommended DAP process streamlining is also required on the part of the Town to optimize the existing system and to provide a higher level of customer service and legislative compliance.

Phasing to Secure Full Cost Recovery



Note: the above illustrated figure explains how 3-year phasing of new DAP fees could occur

7.0 DAP Fee Restructuring Recommendations Consistent with Bill 109 Process Adaptations

7.1 Planning DAP Fee Design Consistent with Bill 109 Adaptation Options

As already noted, Performance Concepts/Dillon held Bill 109 working sessions with Collingwood staff during the 2023 Phase 1 DAP Process Review. These working sessions reviewed the Bill 109 risk profile for Collingwood. The working sessions also explored evolving Bill 109 process adaptation options and strategies currently being implemented by innovative Ontario municipalities. Collingwood staff and Council have an opportunity to produce a “made in Collingwood” Bill 109 adaptive processing model. Examples of Bill 109 adaptive process components adopted in other jurisdictions have been provided by the Performance Concepts/Dillon team.

Full-cost Site Plan/OPA/ZBA fees have been calculated using staff processing effort estimates consistent with a key potential Bill 109 adaptation set out in the Phase 1 Report for Collingwood’s consideration (i.e., “One and Done” Technical Review). A proposed new DAP fee for “Additional Technical Review Cycles” can be seen as consistent with this potential “One and Done” Bill 109 adaptation.

7.2 Optional Extended Pre-Consult 2 Restructuring for Collingwood

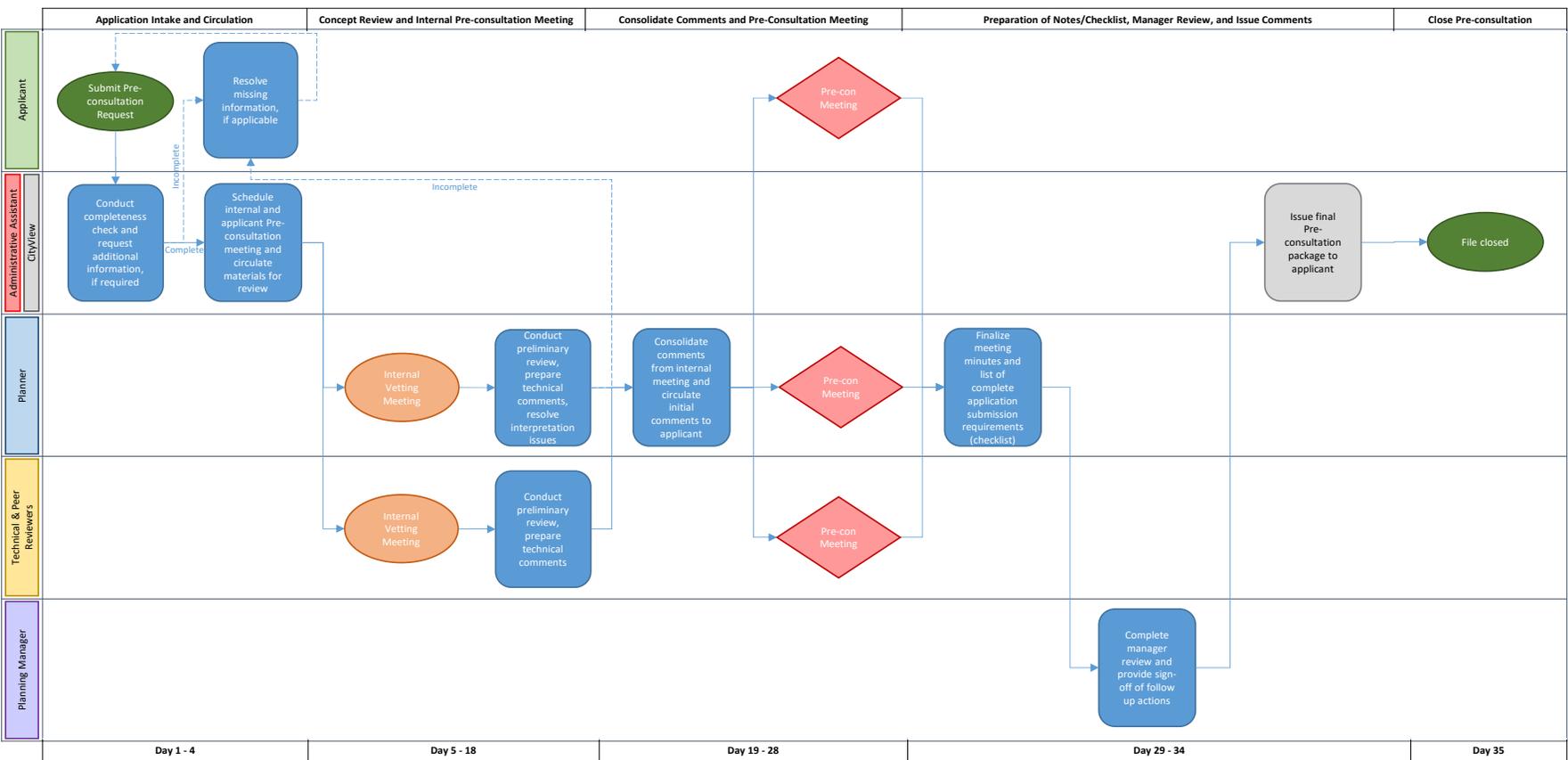
The Pre-consultation process for major development applications is recommended to be expanded from a mandatory communication and coordination platform with applicants into a two-staged approach. The first standard pre-consultation being mandatory and resulting in a list of required studies and early commentary on the proposal. The second stage would be an *optional* early-stage Technical Review/Peer Cycle for supporting documentation. Town signoffs on required studies, approvals, available servicing capacity etc. would avoid delays once the Bill 109 “application deemed complete” clock is turned on and DAP fees for OPA/ZBA and Site Plan are put into potential jeopardy.

Already-documented staff processing effort expended during traditional Technical Review Cycles (after an application is “deemed complete”) can be reallocated into the calculation of an expanded *Optional* Bill 109-adaptive “Pre-consult 2” fee. This Optional Pre-Con 2 fee calculation could easily be programmed into the Town’s new DAP fees calculation model.

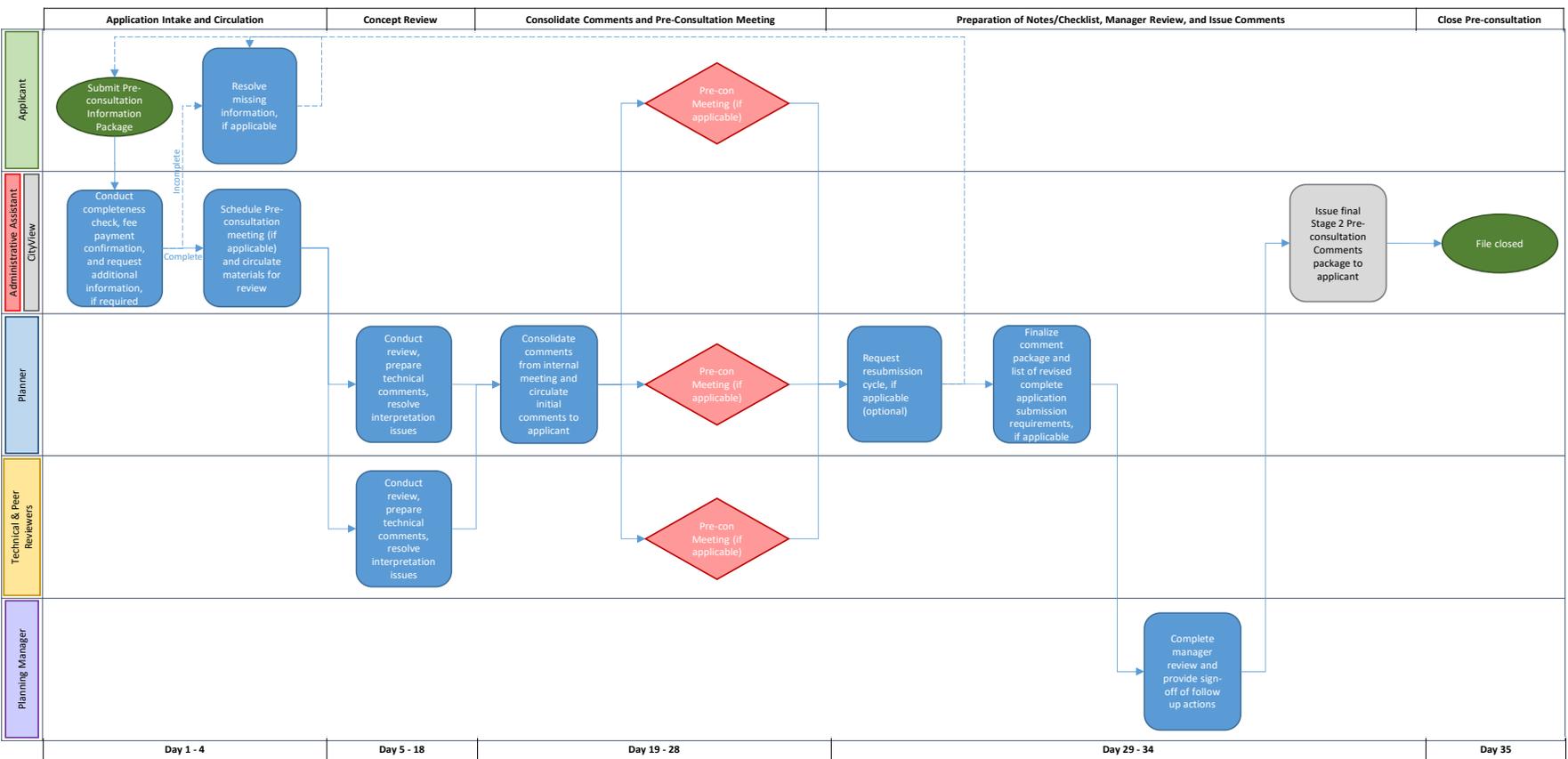
Table of Contents

Symbol	Meaning
	Mandatory flow of process
	Optional/additional flow of process
	Application intake and closure
	Internal meeting
	Action/CityView Action
	Reference to alternate process map
	Meeting and/or Decision (Council or Planning Director)

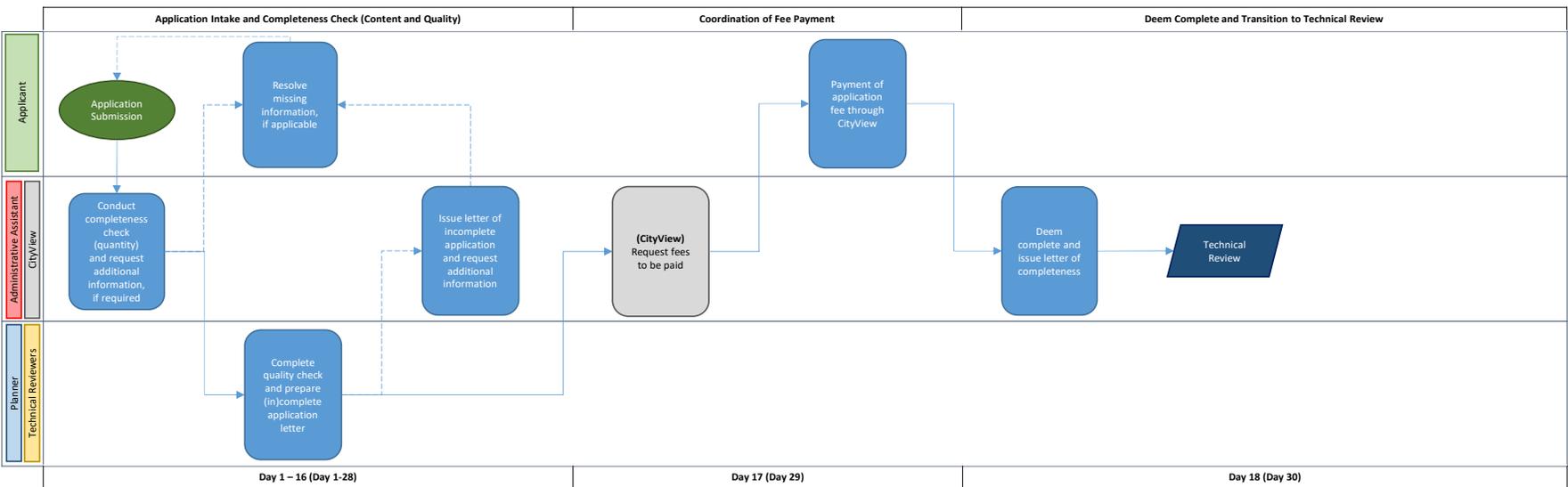
Pre-consultation Stage 1

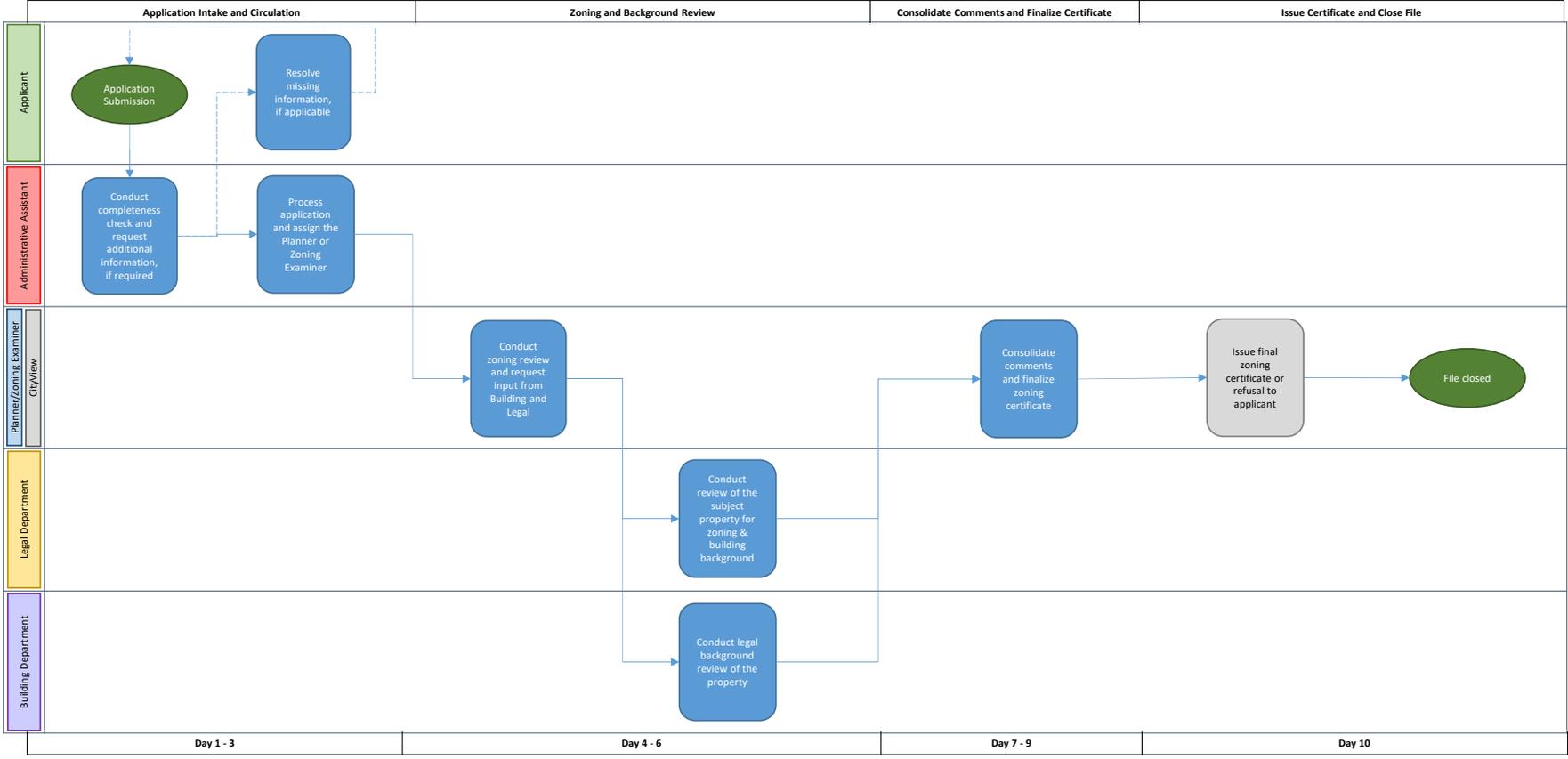


Pre-consultation Stage 2 (Optional for Bill 109 Applications)



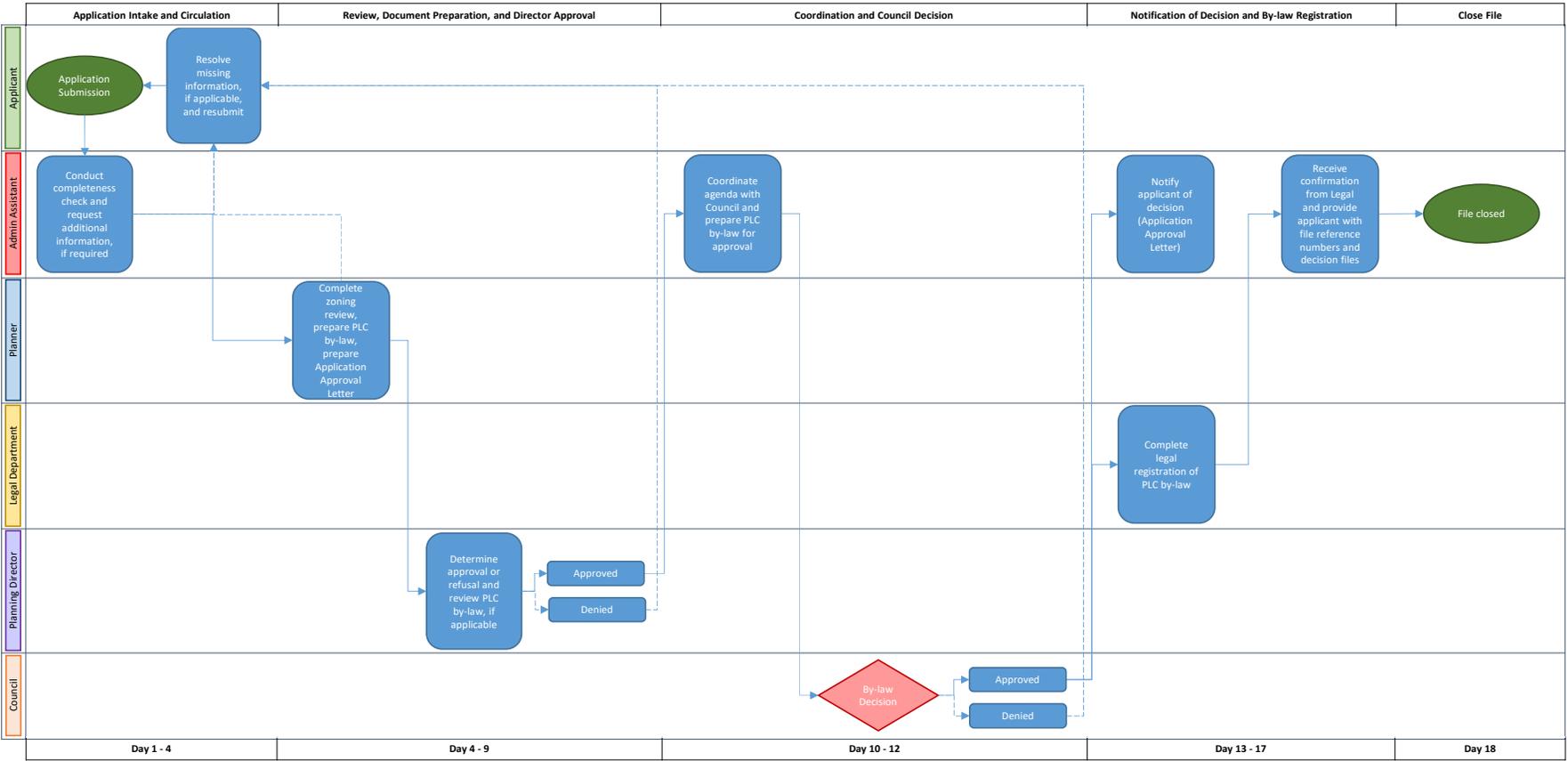
Intake through Deemed Complete

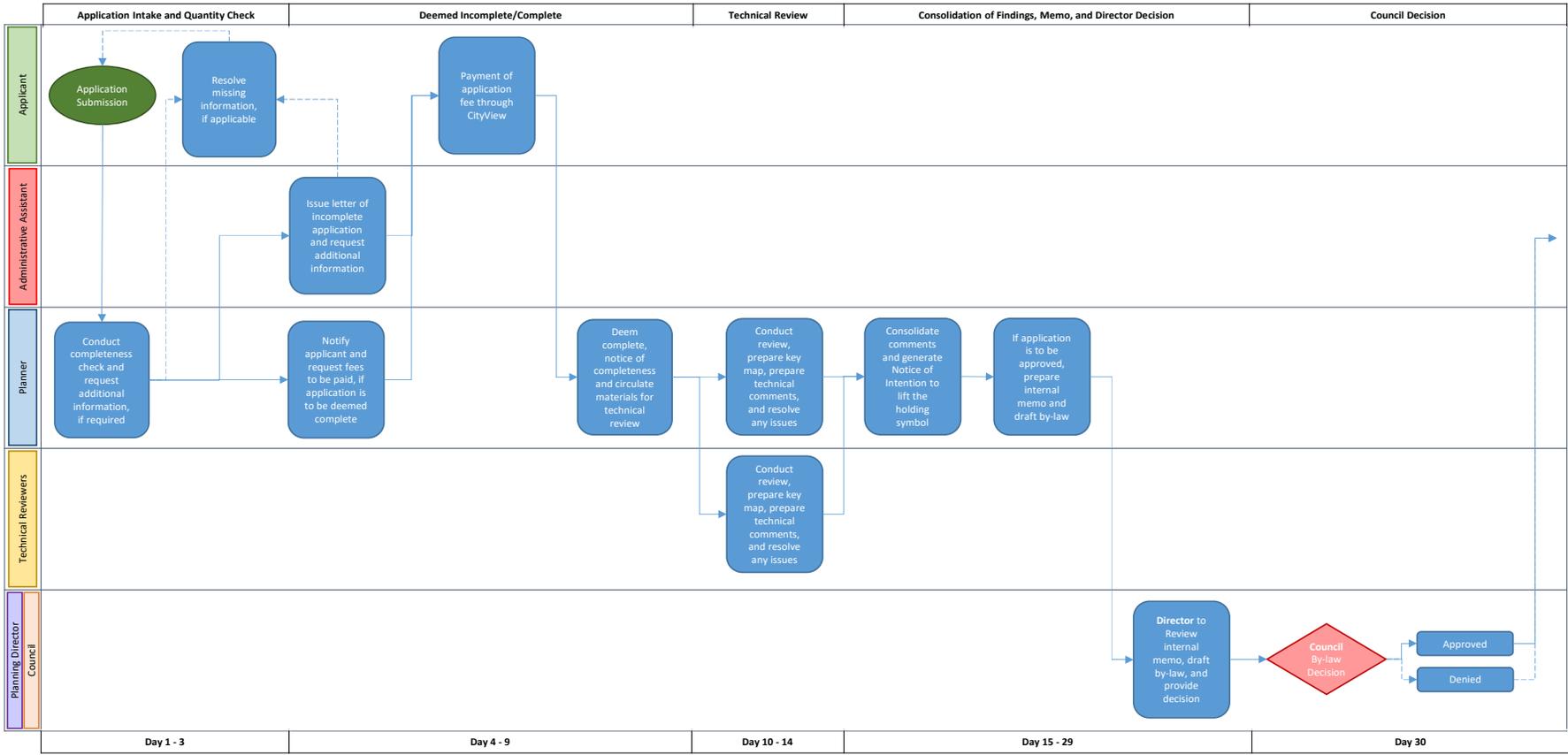




Zoning Certificate

Part Lot Control





Hold Removal (cont.)

Applicant	
Administrative Assistant	<pre> graph LR A[Generate and issue Notice of Decision; execute final and binding after appeal period] --> B[Appeal Period] B --> C((File closed)) </pre>
Planner	
Technical Reviewers	
Planning Director Council	
	Day 31 – 55 (including 20-day appeal period)

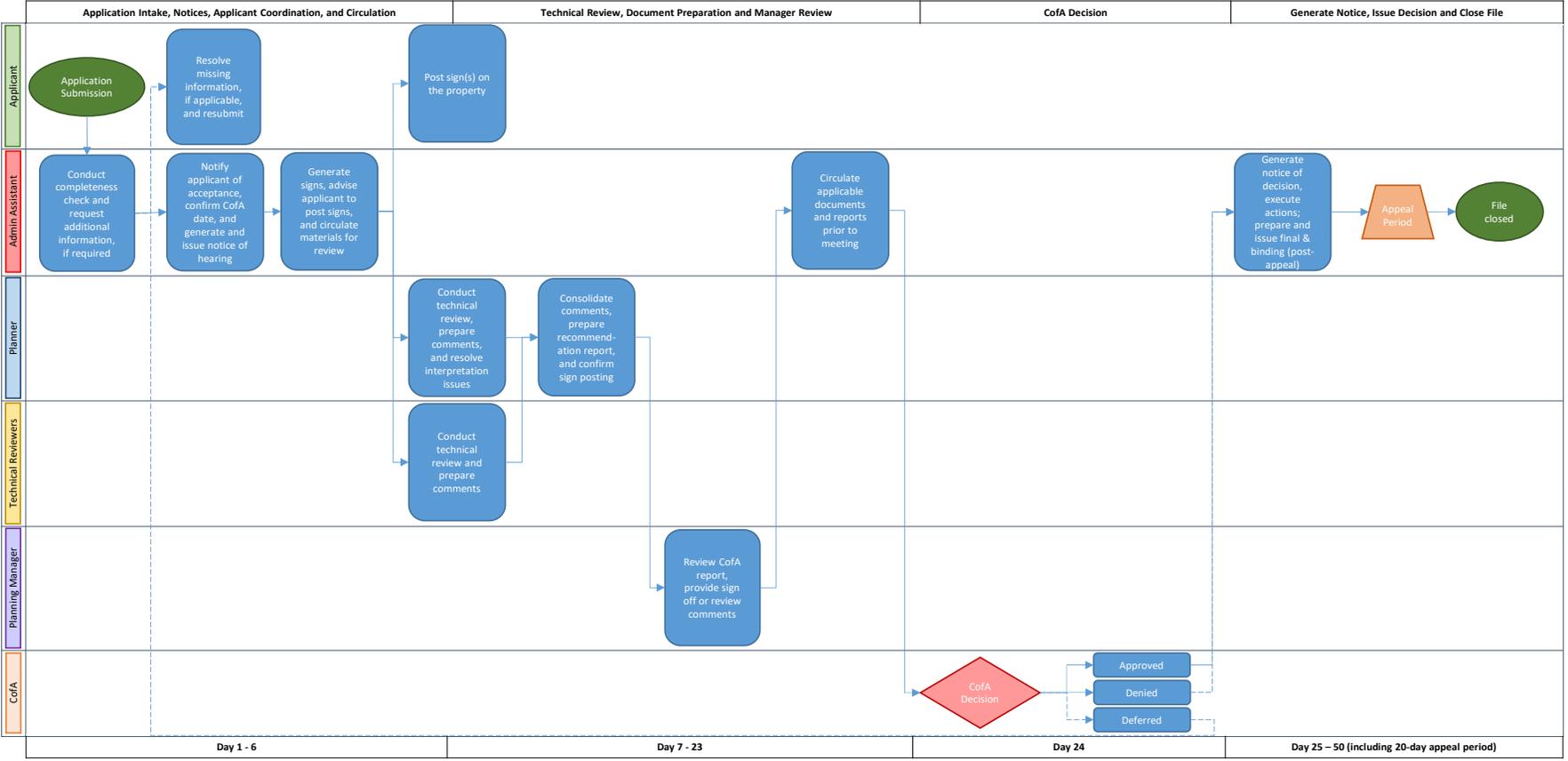
Generate Notice, Appeal Period & File Closure

Generate and issue Notice of Decision; execute final and binding after appeal period

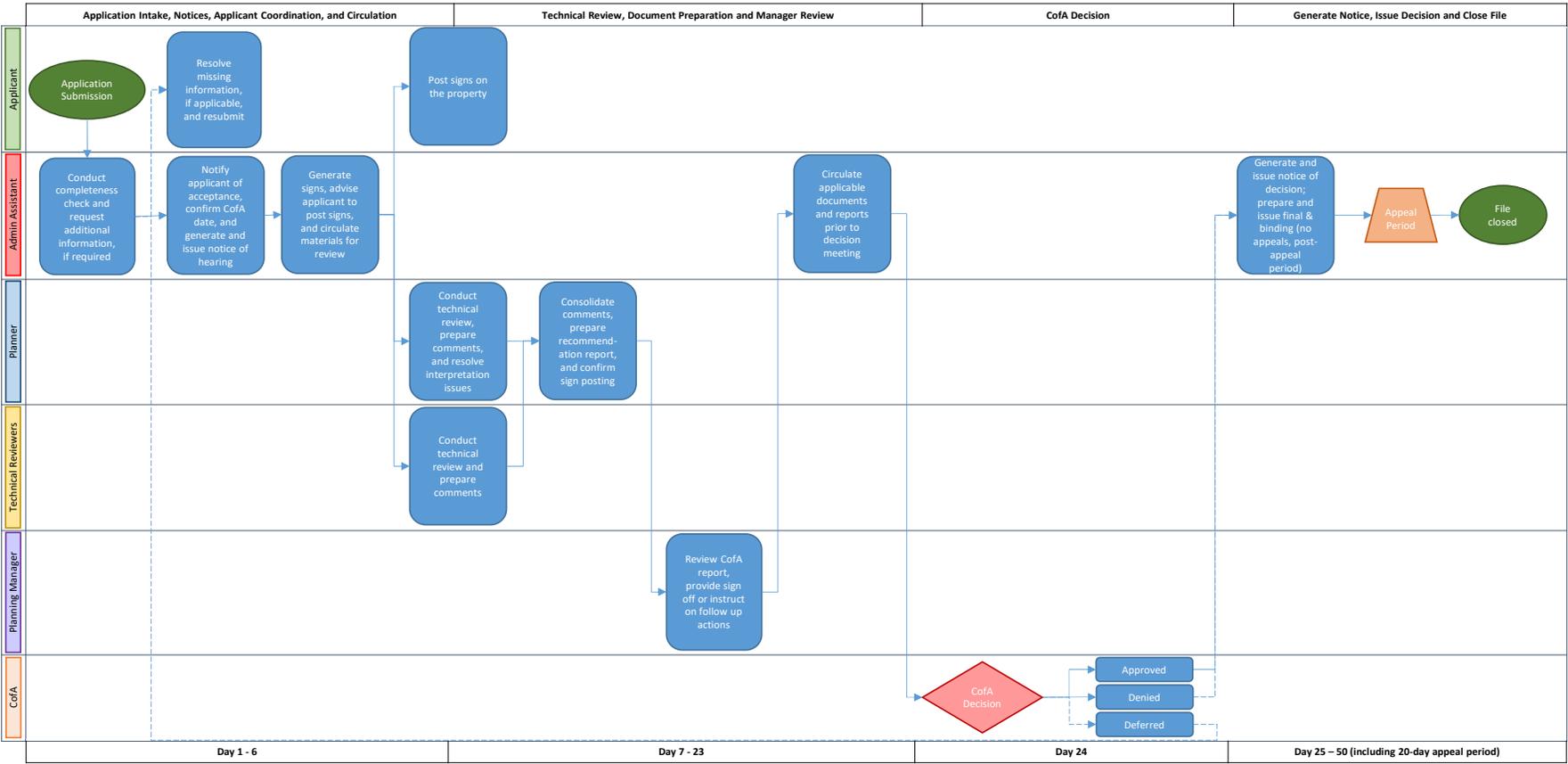
Appeal Period

File closed

Day 31 – 55 (including 20-day appeal period)

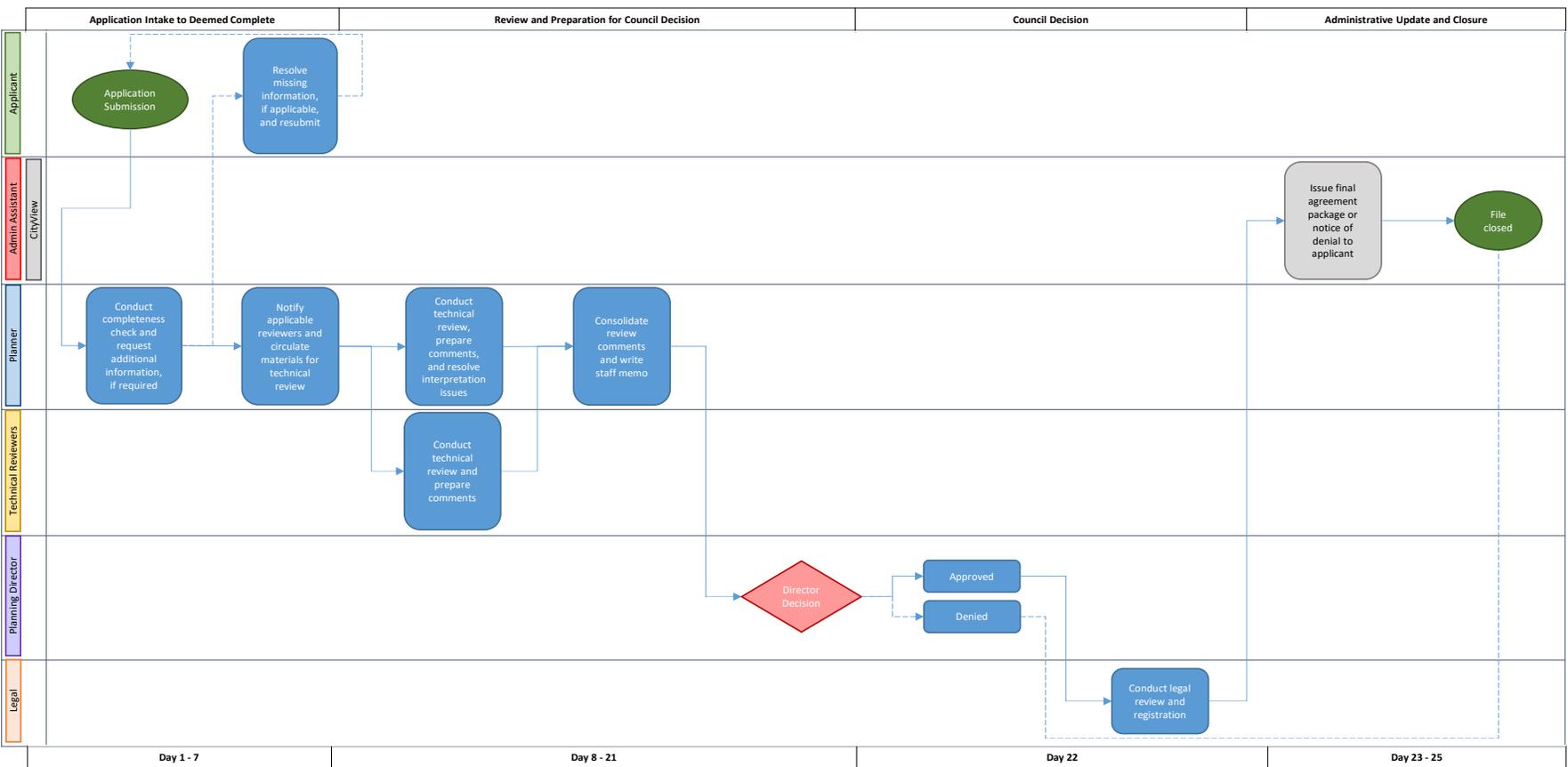


Consent

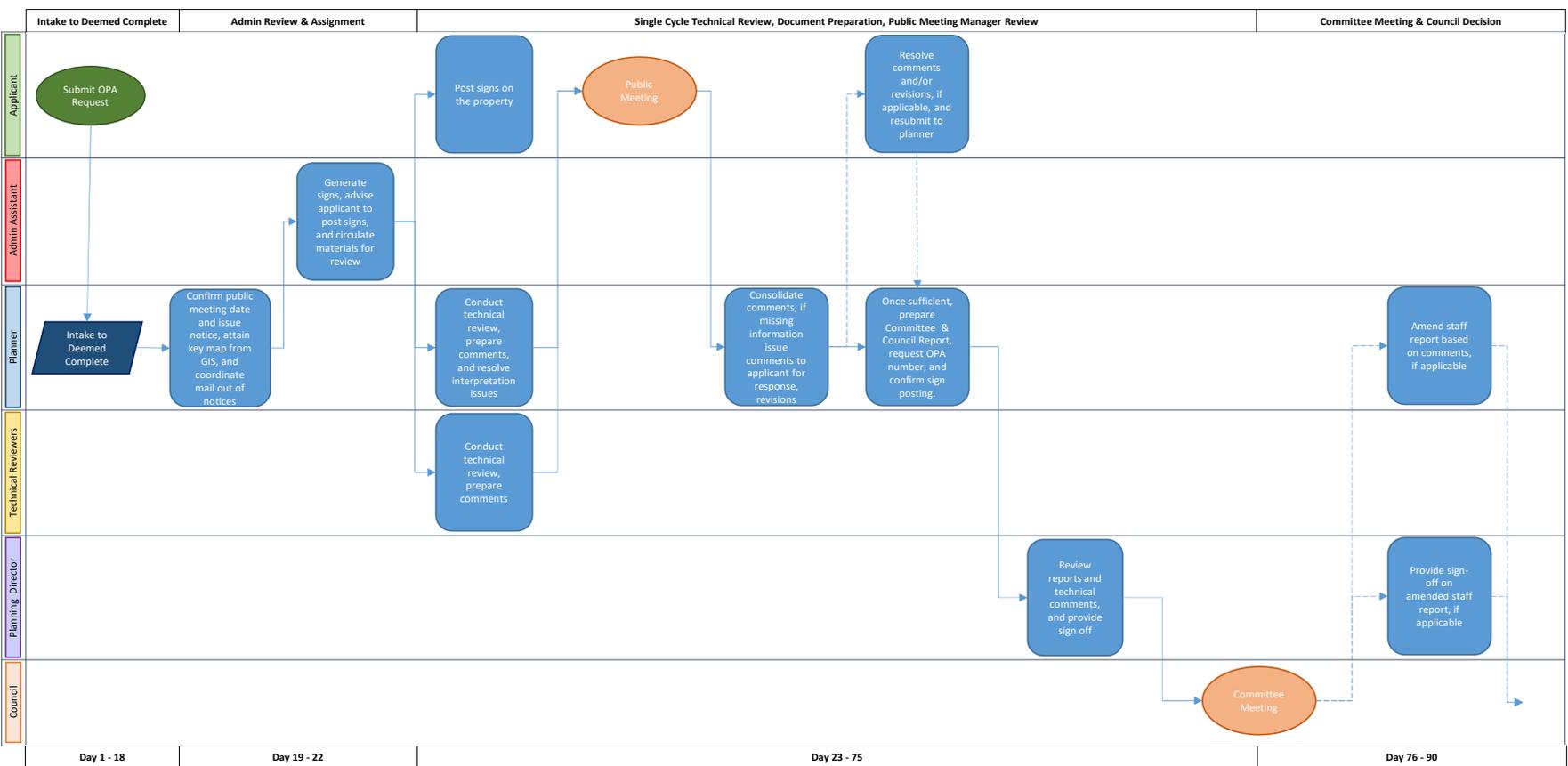


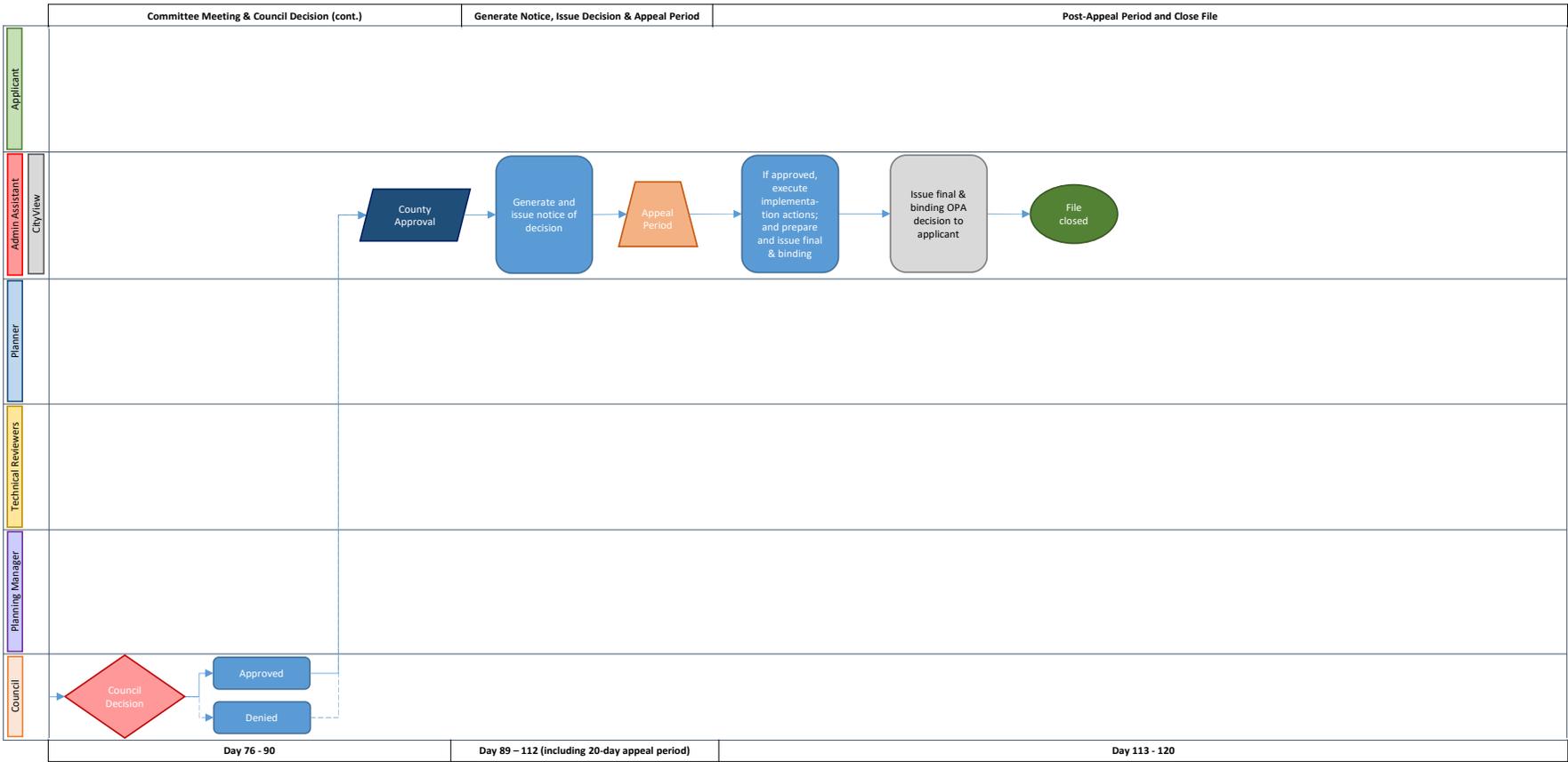
Minor Variance

Easements/Encroachments Outside of the CoFA



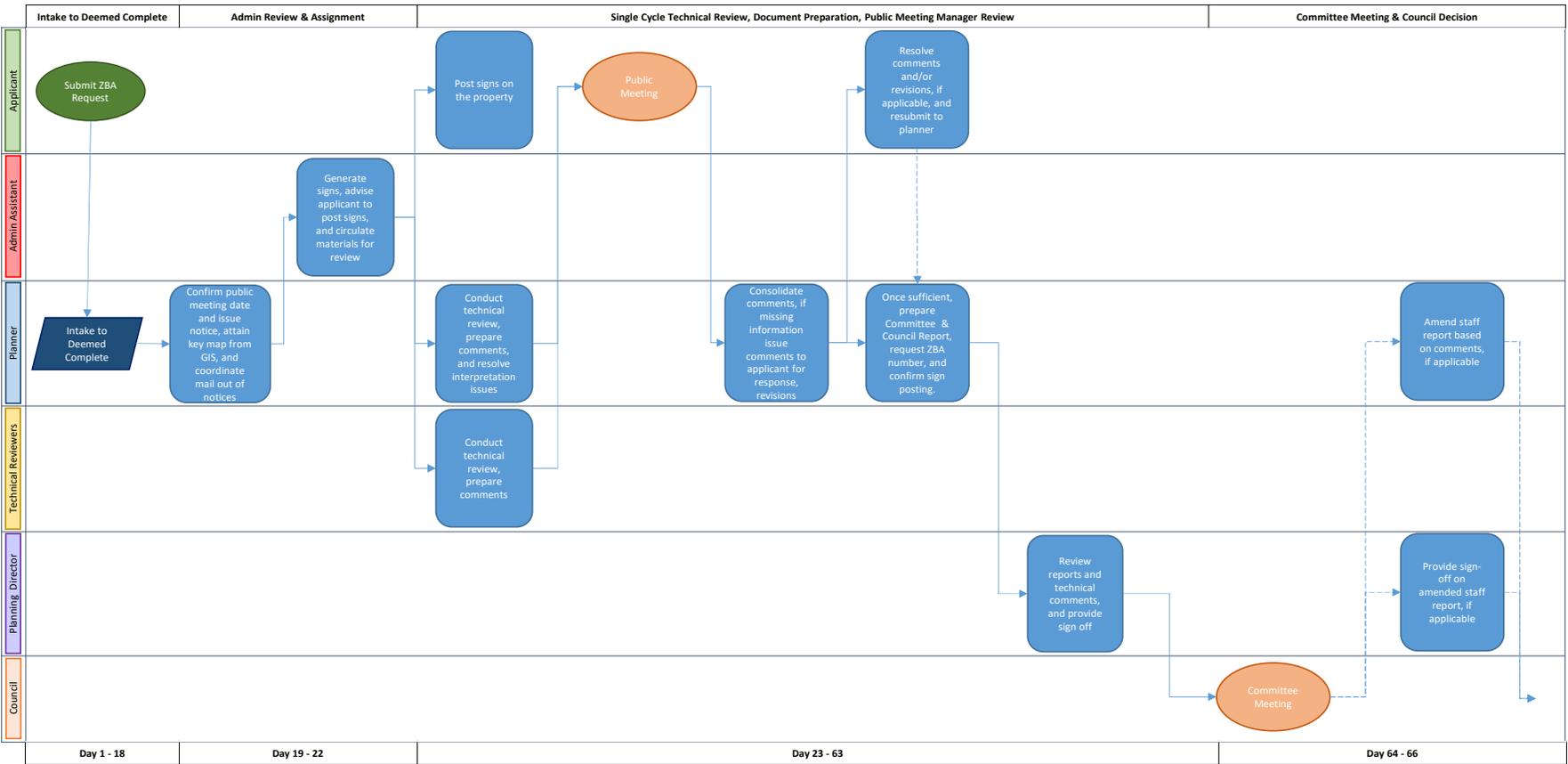
Official Plan Amendment

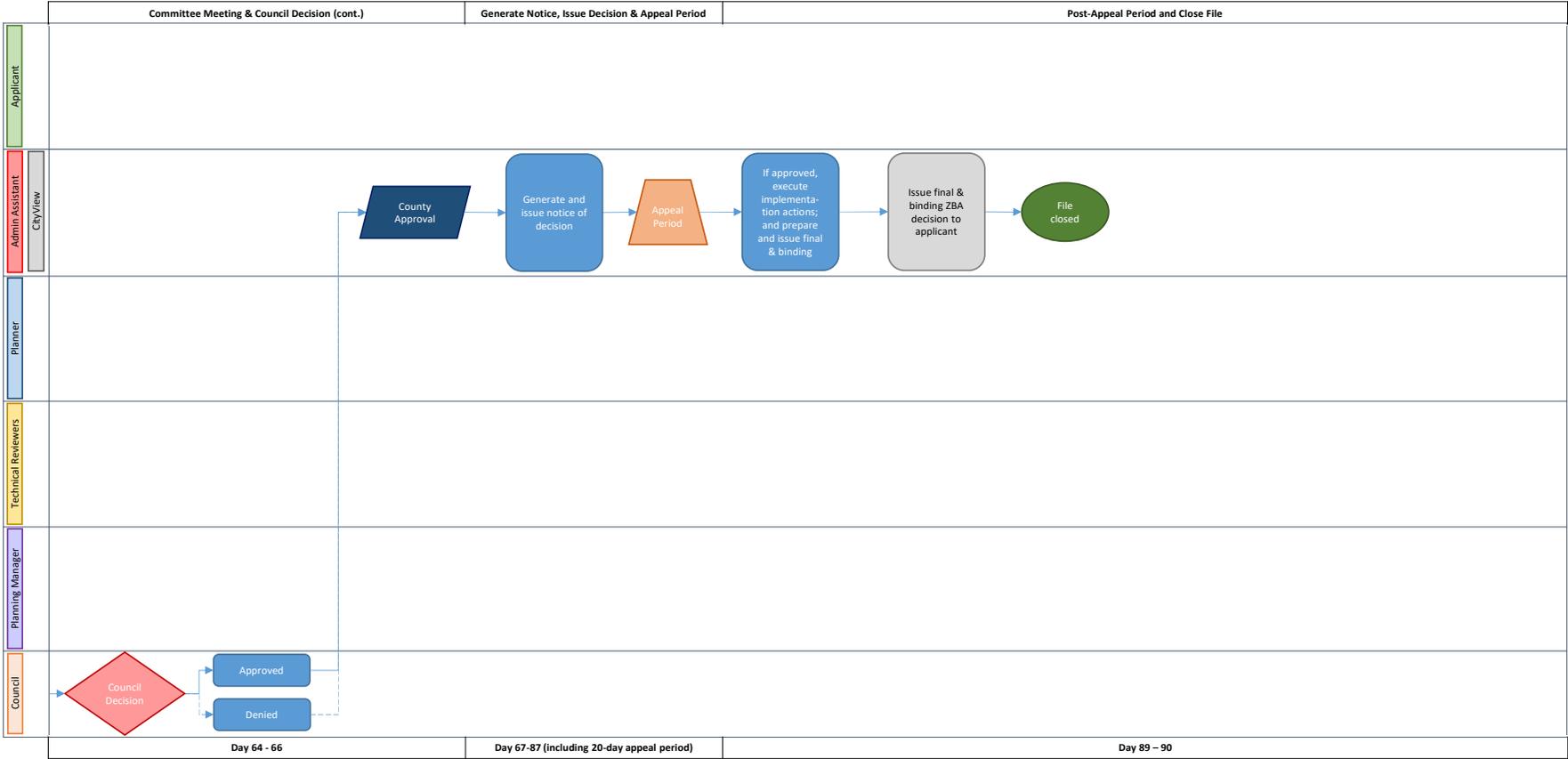




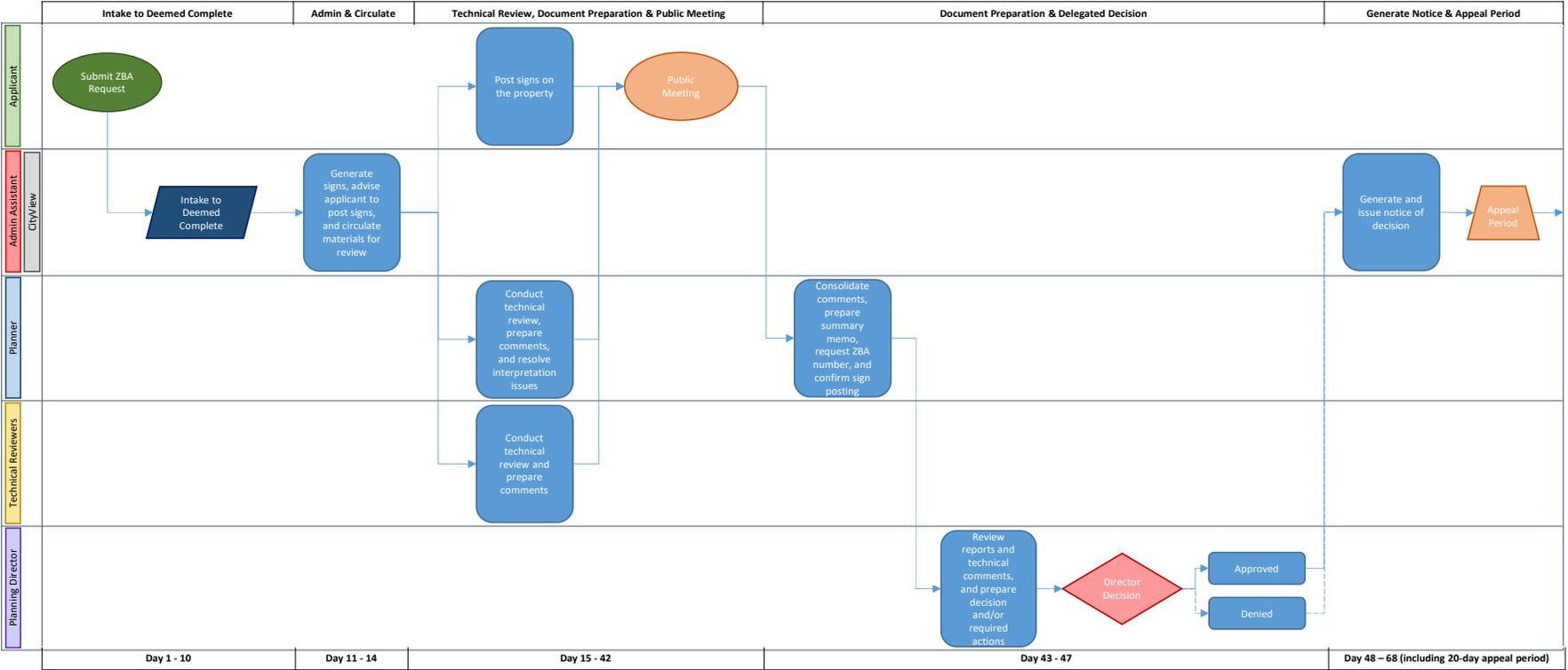
Official Plan Amendment (cont.)

ZBA - Major

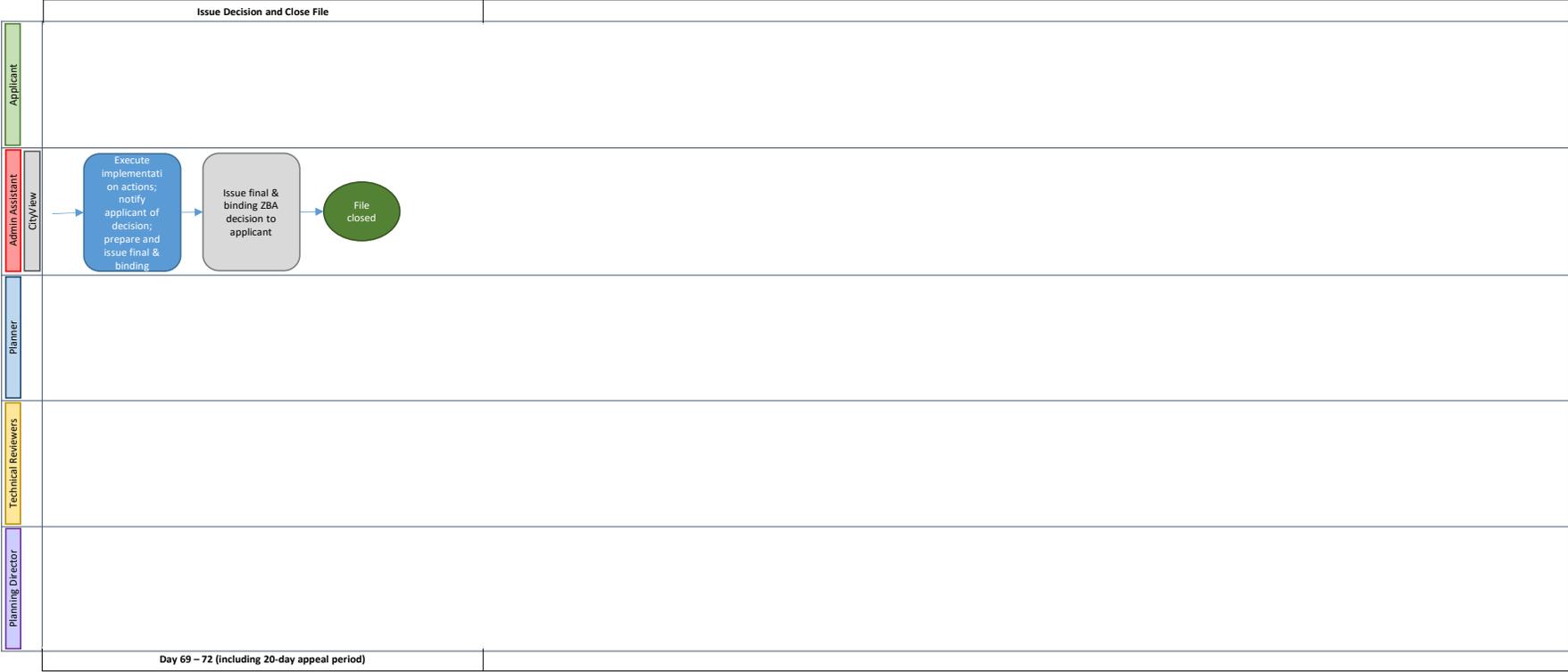


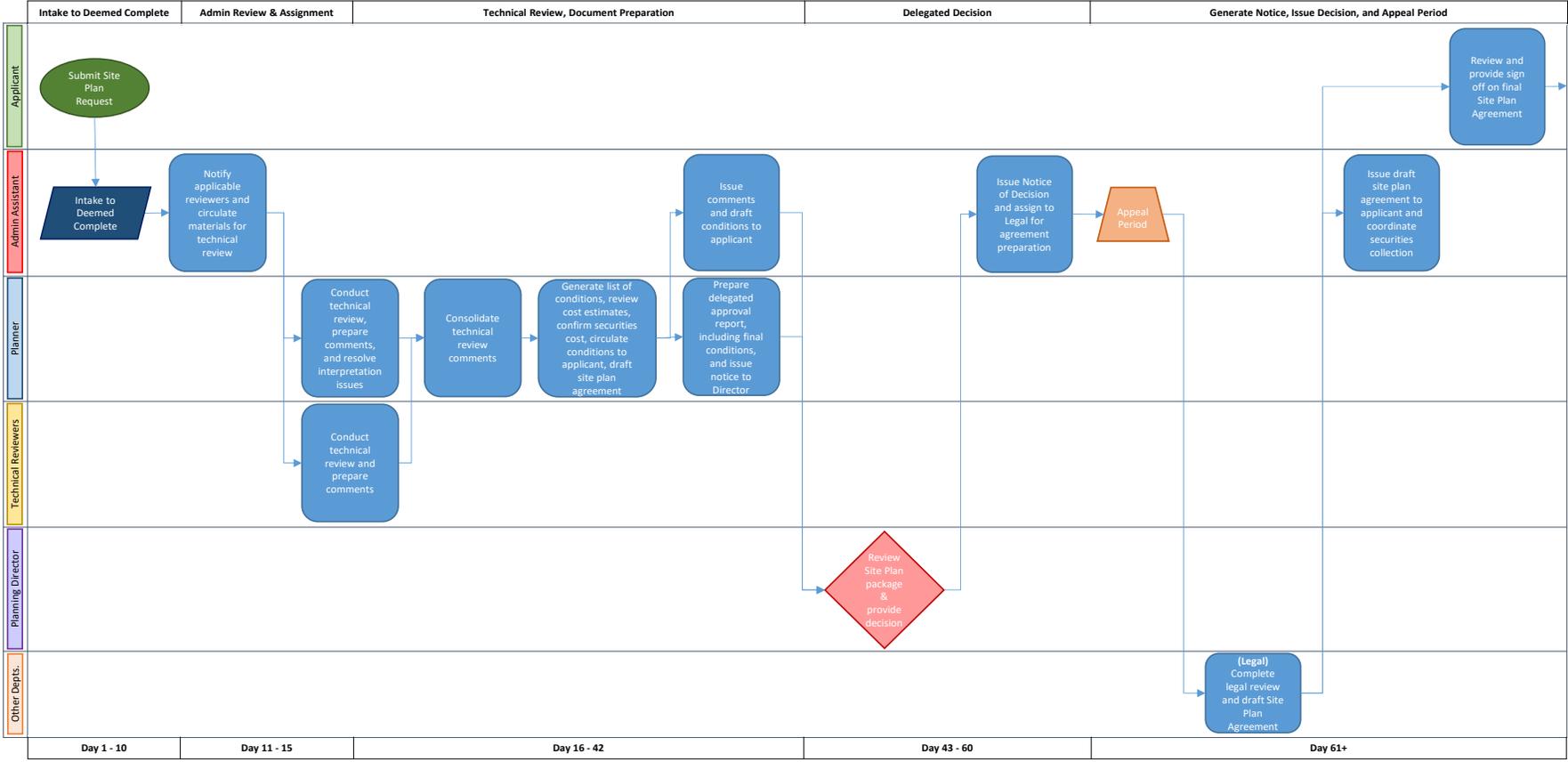


ZBA – Major (Cont.)



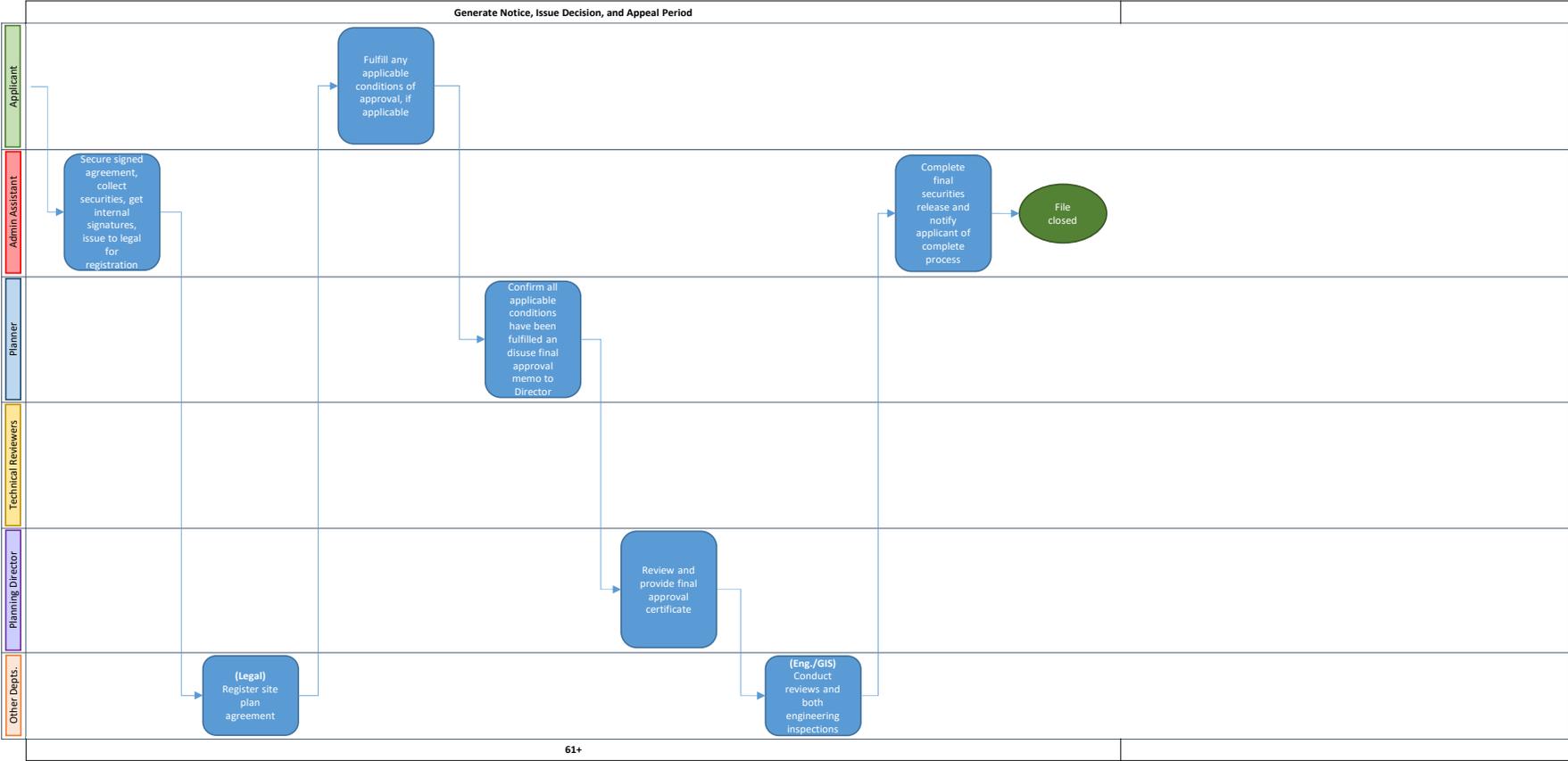
ZBA - Minor

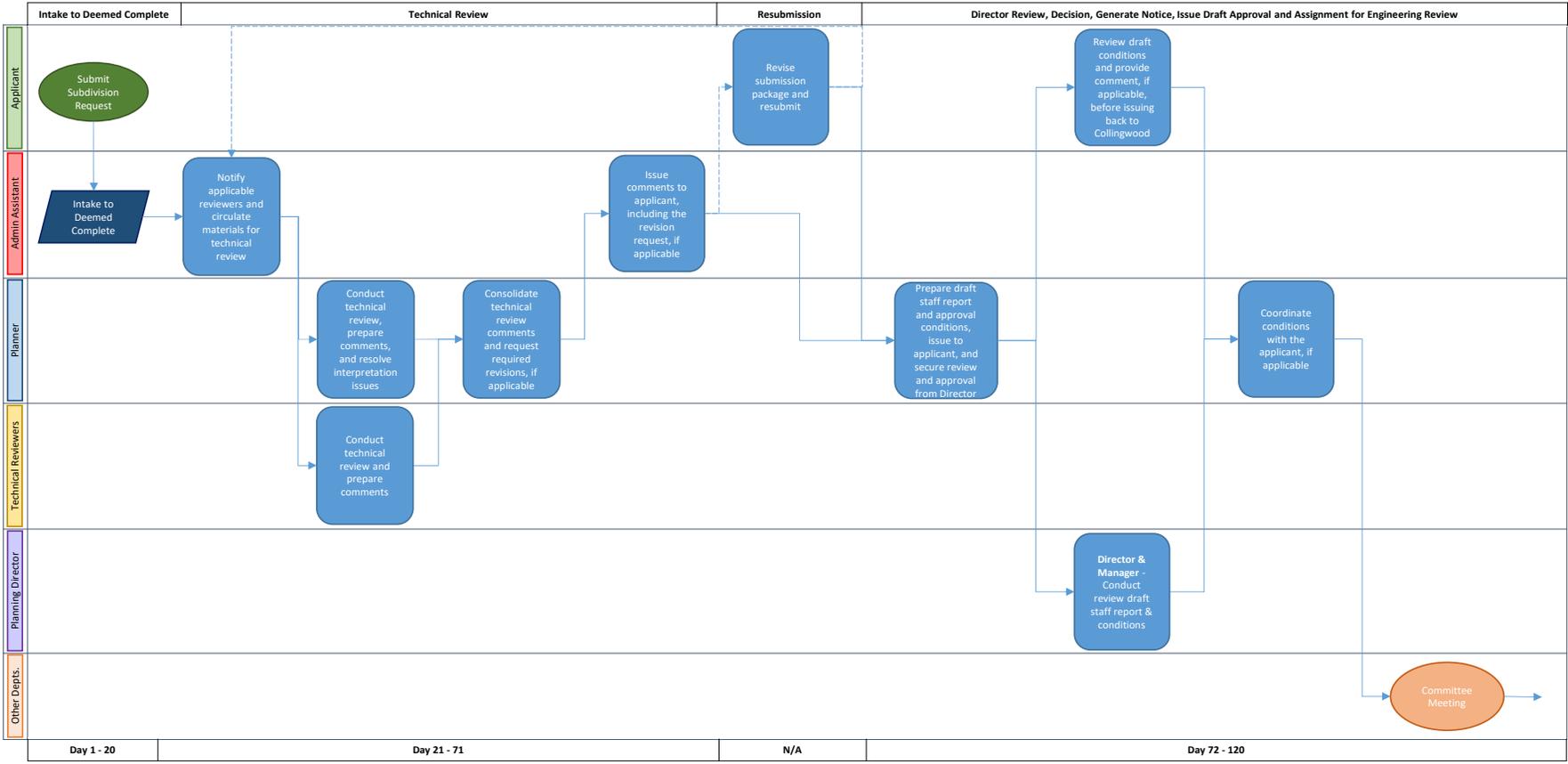




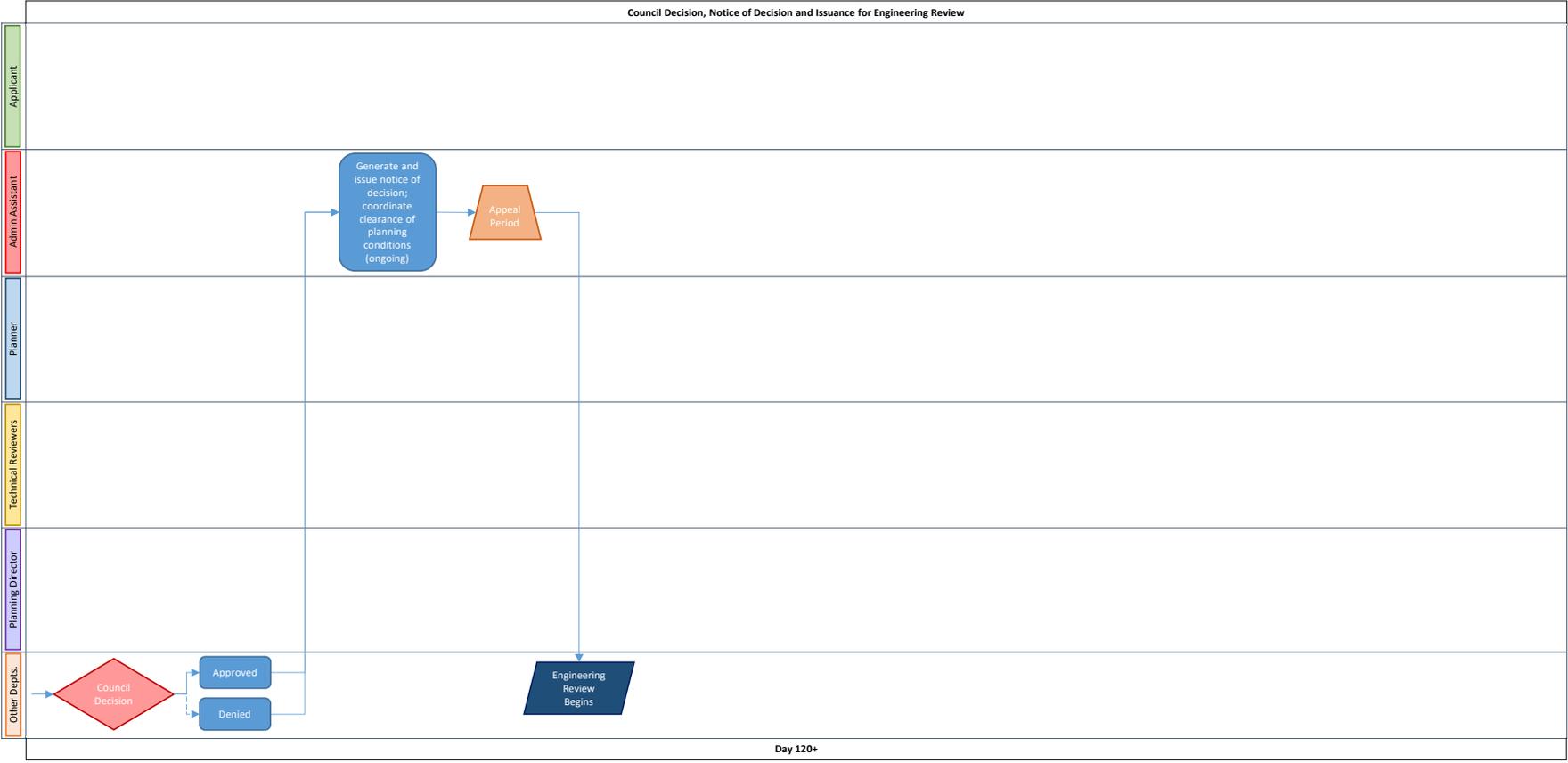
Site Plan Control

Site Plan Control (cont.)



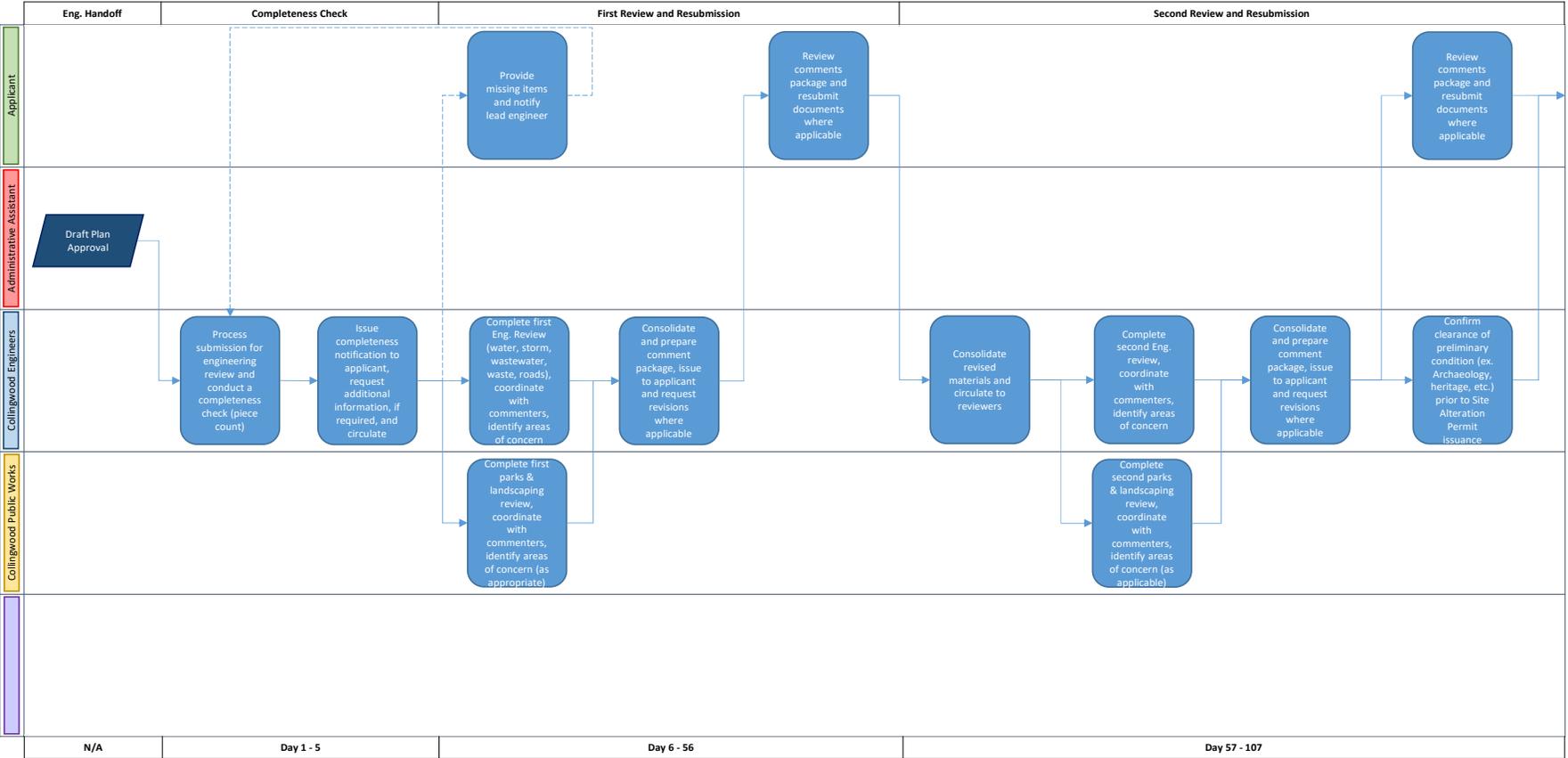


Subdivision

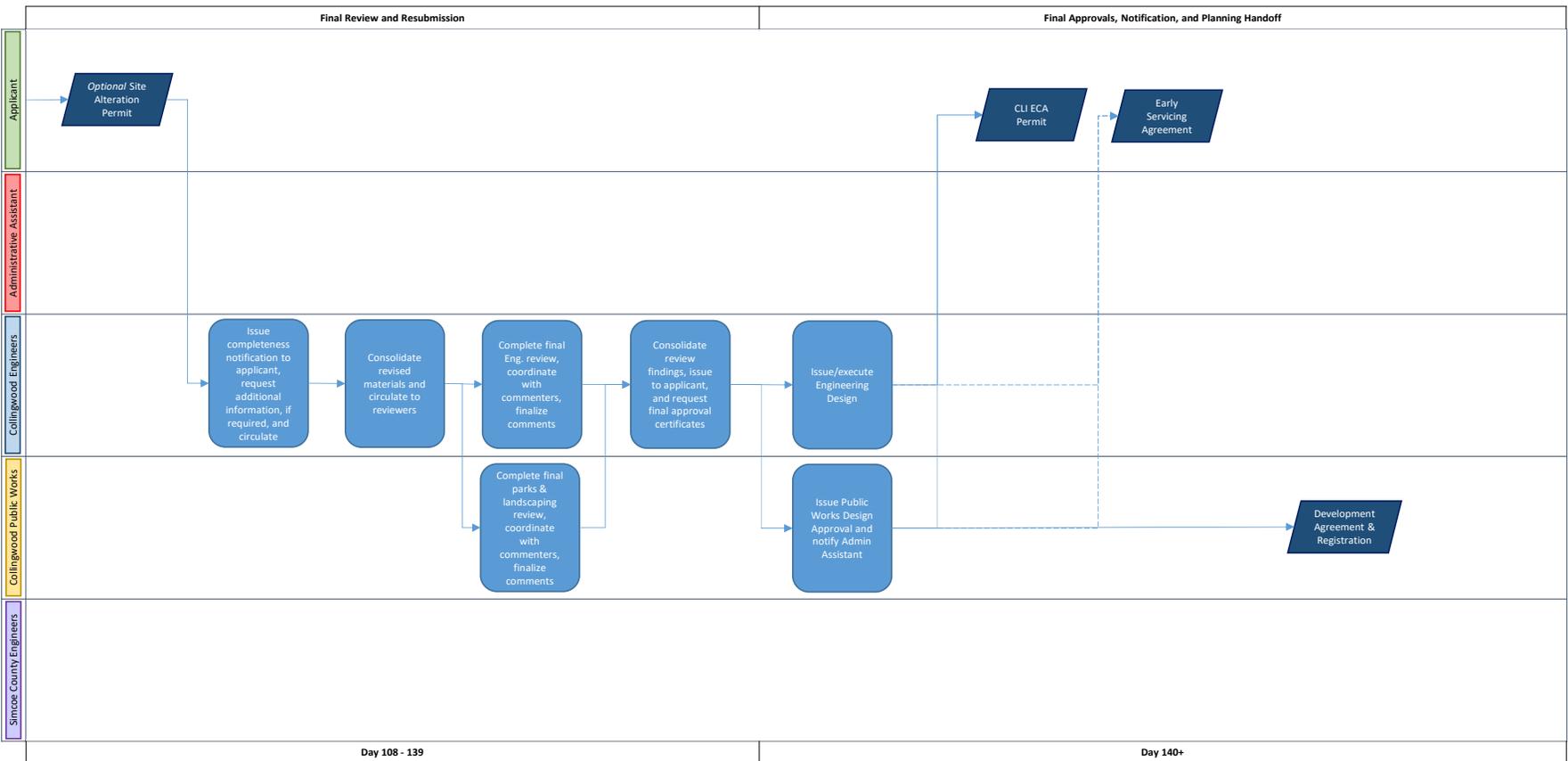


Subdivision

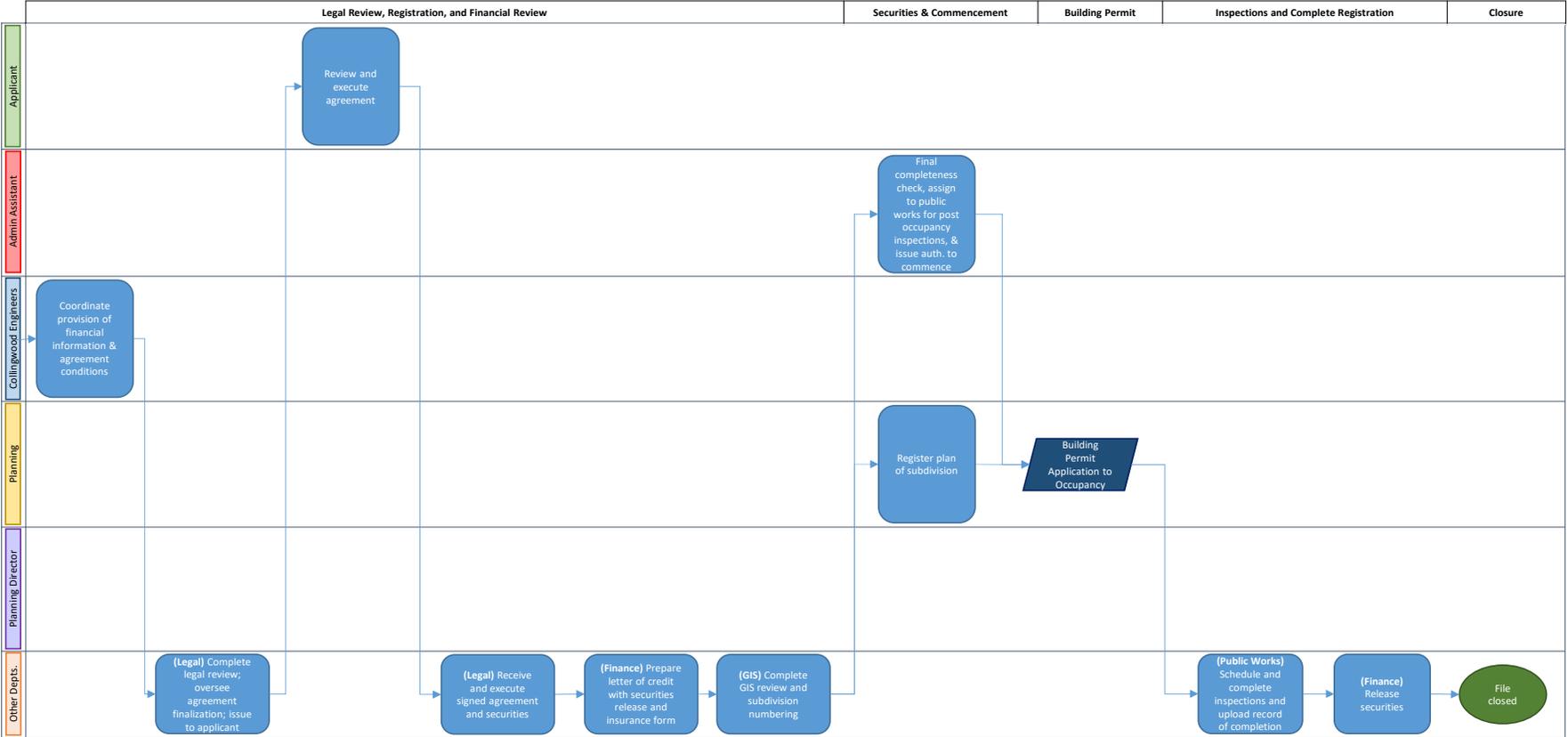
Engineering Review – Subdivision



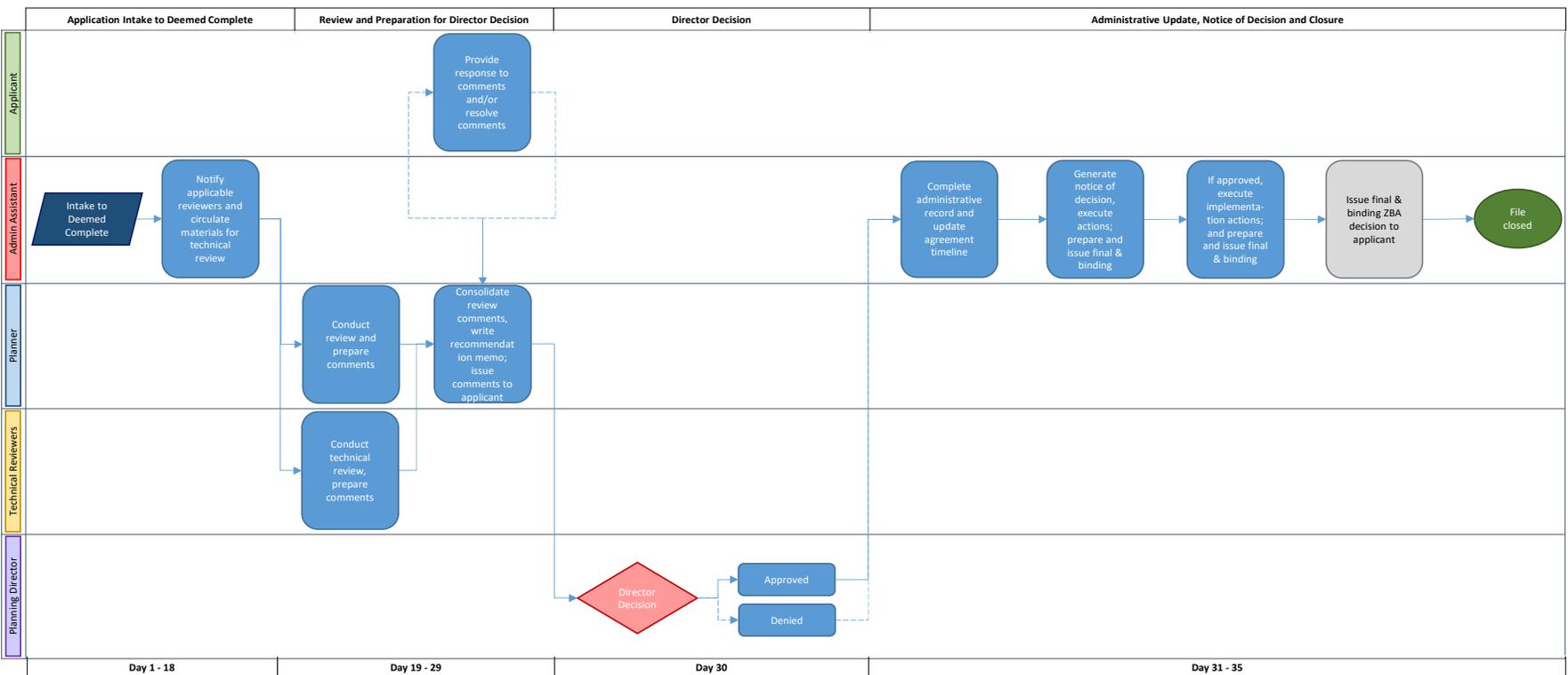
Engineering Review – Subdivision

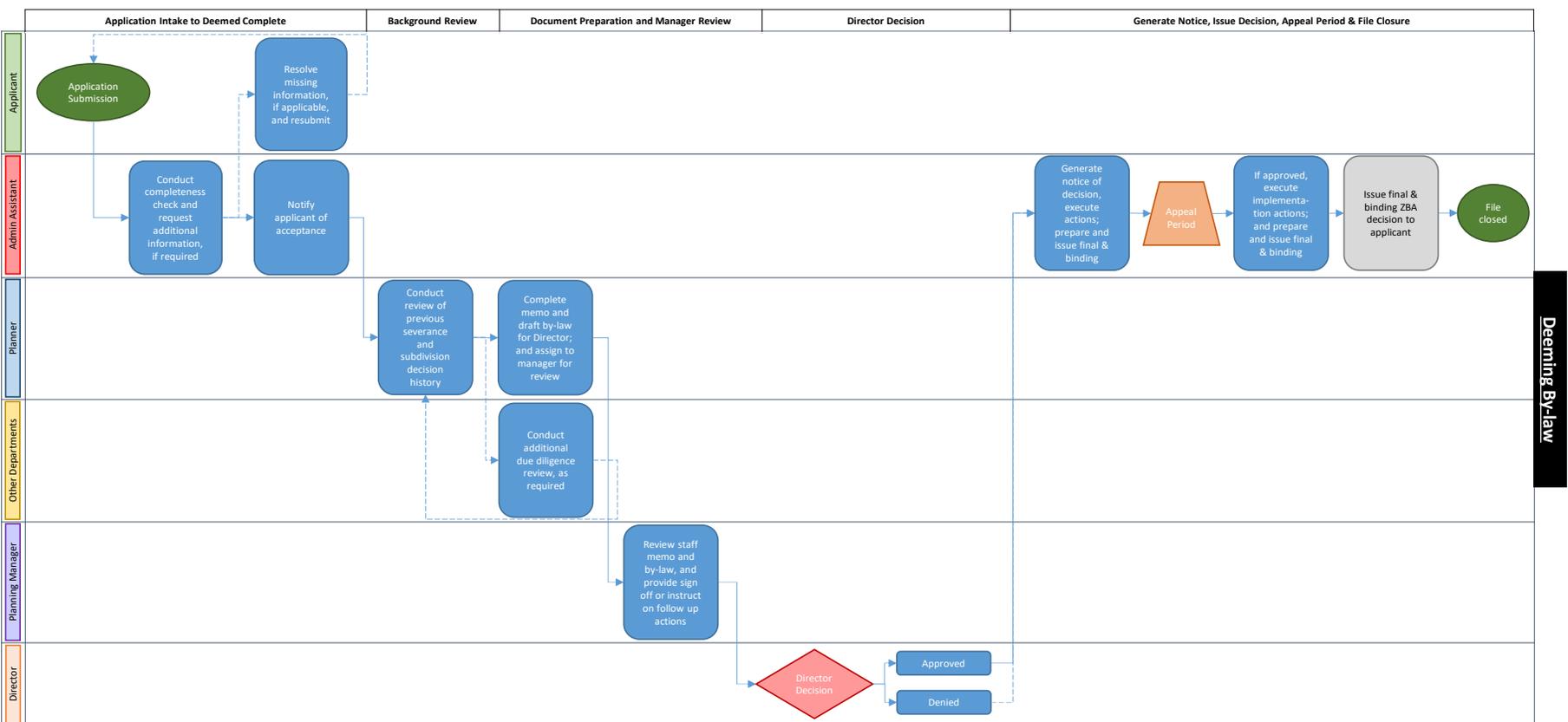


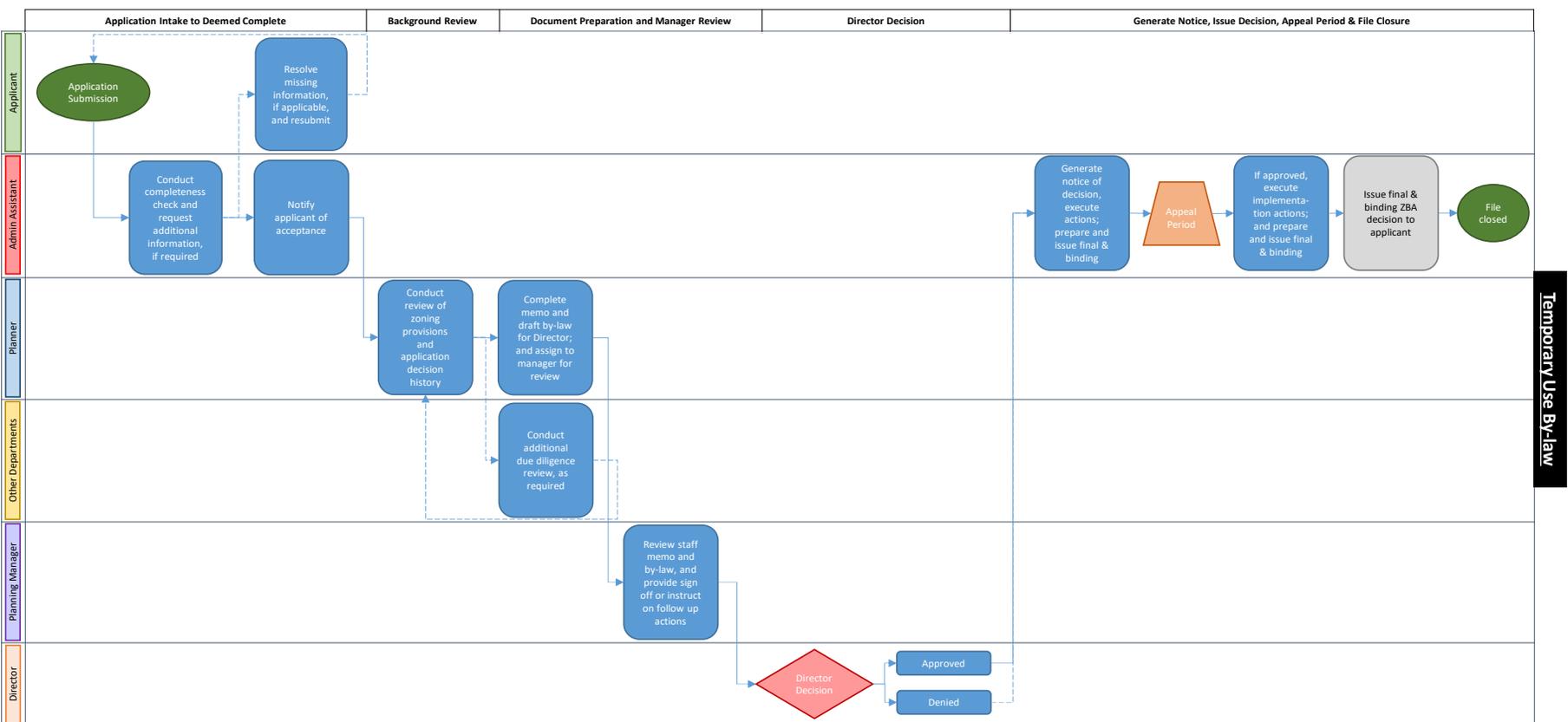
Subdivision – Development Agreement, Registration & Post-Occupancy Inspections



Extension/Amendment to Subdivision Agreement







Condominium Exemption

