

Town of Whitby Staff Report

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Report Title: CAO 14-23 Streamline Development Approval Fund – Final Report

Report to: Committee of the Whole

Date of meeting: May 1, 2023

Report Number: CAO 14-23

Department(s) Responsible:

Office of the Chief Administrative Officer

Submitted by:

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1. Recommendation:

1. That Report CAO 14-23 regarding the Streamline Development Approval Fund be received for information.

2. Highlights:

The Town of Whitby received a \$1 million grant from the Province under the Streamline Development Approval Fund (SDAF) to modernize, streamline, and accelerate processes related to development. These funds have been utilized to support nine (9) projects directly related to the purpose of this grant funding. These projects resulted in new permitting portals, software, and hardware solutions for the Town. Training on Lean and Change Management concepts was completed with the assistance of this funding by staff across the organization. The SDAF was also used to support the Town's development processes by covering some contract work. These projects have had a large impact on improving accessibility to the customer and streamlining processes and providing modern tools to staff.

All nine projects are now complete and have created a foundation for continued growth and transformation.

3. Background:

In March 2022, the Province provided the Town with a \$1 million grant under the SDAF. The purpose of the grant was to financially facilitate modernizing, streamlining, and accelerating processes for managing and approving development applications. By-law 7868-22 authorized staff to enter into a Transfer Payment Agreement with the Province of Ontario related to the SDAF grant.

On April 14, 2022, a Memorandum to Council was provided to summarize the projects identified and initial project budgets. On November 4, 2022, a further Memorandum to Council was provided to update Council on the initial projects and to provide a brief overview of the additional initiatives along with updated budget numbers for each project. Early in 2023, the Province offered an extension to the original deadline of February 28, 2023. On February 28, 2023, an Amendment Agreement came into effect, extending the reporting deadline to November 1, 2023. In light of the status of completion of the SDAF projects and given that no new additional funding was provided along with the deadline extension, the Town targeted to complete all projects by April 30, 2023, and report to the Province by the end of May. This was communicated to Council through a Memorandum on February 17, 2023.

Final reporting to the Province will occur before May 31, 2023, including a link to this publicly available report in compliance with the terms of the Transfer Payment Agreement with the Province.

4. Discussion:

There were nine projects completed with this grant funding which are outlined below. In addition, the position of a Project Manager was covered under this funding from April 1, 2022 to April 30, 2023 (\$182,700). Discussion of each project includes the summary of the project, how the funds were spent, and measures or actions expected to be achieved. Expenditures shown below have been rounded for the purposes of this report and may be adjusted slightly following receipt and payment of all invoices.

Project 1 - Permitting Portals (\$289,900)

The Permitting Portals project was ultimately composed of a few new software tools and supporting hardware.

My Portal – Random Access

The My Portal tool from Random Access was used to construct a permit portal that is built upon the Town's AMANDA framework. AMANDA is a foundational database used for many of the workflows and processes within the Town, including Planning and Building Services. The portal tool integrates with AMANDA to allow applications

submitted through this web-based portal to provide tracking and status information to applicants. This modern tool replaces paper-based applications and offers online payment options. This online portal is external-facing and required additional Technology infrastructure. Upgrades were made, including purchasing new servers, licenses, and security. In addition, an auditing module was added to AMANDA to support this tool which benefits the overall AMANDA systems and allows the system to monitor the changes to data. Specialty training was completed by technology development staff to further support and develop this tool as it grows.

The My Portal tool was launched on January 31, 2023, with three permit types focused on the Planning department ([Welcome to Town of Whitby's Online Application Portal -https://portal.whitby.ca/](https://portal.whitby.ca/)). The initial permits include Pre-consultation, Heritage Permit, and Sign Bylaw Variance/Amendment. Planning permits will continue to evolve, and Building Services will begin to add permit types to the portal in 2023. Initial work with this tool was supported by the vendor with the hope that further work following SDAF funding can be completed by Town staff.

In addition to digitizing permit processes, Planning staff took the opportunity to consider their processes with a lean mindset and streamlined permit activities where possible. Given the short time since launch, only a limited number of permits have been submitted to date. This volume is expected to increase exponentially as more permit types get built upon the existing framework established under this project.

Municipal 511- Permit - Transnomis

With the assistance of SDAF funding, an additional permitting tool using a one-window platform integrated with the Municipal 511 system has also been launched. The Municipal 511 Permit tool (<https://permits.transnomis.com/>) will be used to accept online permit applications such as the Municipal Consents and Road Occupancy Permit and facilitates a streamlined approach for utility companies and their contractors. A soft launch of this tool and the Work-in-the-Right-of-Way Permit type occurred from January 23, 2023, to March 31, 2023, during which time 75 permits were processed. As of April 1, 2023, all Work-in-the-Right-of-Way Permits will be processed with this tool, anticipating a volume of about 2,000 annually. These approved permits are mapped to the Municipal 511 system (<https://www.municipal511.ca/>) to update GPS mapping tools accurately. Permitted work within the system will update the maps to provide accurate notice of delays when navigating Whitby streets. This one-window system is used by other municipalities, including Durham Region, which helps applicants become familiar with existing tools, further streamlining their processes.

Builterra

To further support inspections, a tool called Builterra is being piloted by the Development Construction team. Builterra launched at the Town in Fall 2022 and will assist with the mobile completion of inspection reports and documentation on site by inspectors eliminating duplicate back-office work. These reports replace the previous paper and pen approach and emailing of photos. Notes, checklists, and photos are stored in a digital format that is centrally located and meaningfully organized. This

provides ease of access for management oversight and real-time access to relevant records to respond to resident and Council inquiries. This tool will be reassessed in Fall 2023 following the first year since acquiring the tool. Over forty reports have been generated using Builterra to date. The launch of this tool has allowed Development Construction staff to modernize their work and provide better service to residents while eliminating duplicate work.

Trax Code

Trax Code, a digital platform that can be used on mobile devices or computers, provides the Ontario Building and Fire Codes. This tool is currently being piloted by Building Services. In addition to the legislation itself, this tool offers advanced search features and other features that may facilitate the inspection and plans review processes. This digital tool replaces large physical paper copies of the Codes previously kept on hand and manually referenced by staff.

Tablets & Accessories

Tablets were purchased and provided to some inspection-based roles to support mobile work in Roads, Development Construction, Building Services, and Fire Prevention allowing them to use the new permitting/inspection tools alongside the Electronic Plans Review tools. In addition to the tablets, cases, keyboards, holders, and Apple Pencils were purchased to support departmental use.

Early reports indicate the tablets are useful tools for Microsoft Teams meetings, the use of corporate software to record notes, and accessing mobile versions of drawings and relevant legislation. Overall, they facilitate a modern approach to onsite work. Building Services is also exploring an inspection tool integrated with AMANDA for 2024 that will further utilize and modernize their inspection work and may have application to other inspection-based roles at the Town.

Project 2 - Electronic Plans Review (\$212,300)

To approach the Electronic Plans Review Project, the Town sought to provide a modern tool, hardware, and training.

Modern Tool

To address the issue of a modern tool, BlueBeam Revu was purchased and rolled out to over a hundred staff. This tool provides modern features of drawing review with custom toolsets and opportunity for collaboration. This digital markup and sharing streamlines the review process. An iOS version was purchased for use on the tablets issued to the inspectors under SDAF to allow them to review and markup drawings in the same fashion. BlueBeam also works well in the hybrid work environment the Town has moved to, where staff are not always in the same location with physical paper assets. Departments that in the past have had difficulty accessing drawings are seeing an increased outreach for comment and credit the adoption of BlueBeam in facilitating that.

Modern Hardware

Modern hardware to facilitate electronic plans review was seen in the demand for larger screens to replace the large physical paper drawings. With existing screens, there was a challenge of zooming and scrolling drawings, ultimately losing some of the context of the overall images. Management completed an assessment to determine the distribution of larger screens to staff to facilitate their work. This modern hardware was rolled out to staff by our Technology and Innovation Service staff. In the largest scale, two 86" touchscreen monitors equipped with Teams computers and audio-visual tools have been installed at Town facilities to facilitate large-scale electronic plans review and collaborative hybrid opportunities.

Feedback on this new hardware has been positive. The benefit of this new hardware is being realized daily, not only by individual employees reviewing plans but by teams working together with the support of this new hardware. Some current use cases include small groups reviewing drawings together around a single larger monitor; room bookings for group reviews using 86" touch screens; hybrid meeting and plan review using Microsoft Teams based technology with larger screens.

Current Training

In terms of current training, five (5) training sessions were offered and provided by the vendor, SolidCAD, with multiple date, format, and content options. Both fundamental and advanced training sessions were recorded and are available on the Town's Learning Management System for staff use. To date, over seventy-five (75) BlueBeam training sessions have been completed either in person, online, or through the recorded sessions.

Project 3 - Whitby Green Standard (\$56,200)

My Portal – Digital Submission Platform

Random Access, the vendor who created the portal outlined in Project 1, built a tool for the Whitby Green Standard (WGS), which launched on April 30, 2023, on the Town of Whitby's Application Portal (<https://portal.whitby.ca/>). This tool uses the permit portal tool along with an AMANDA backend. Creating the WGS in this way was strategic, allowing for potential future integration of the Whitby Green Standard into other planning-related process work on the portal. This structure for the tool will also allow Town staff to assist with future modifications to the Whitby Green Standard.

Although this tool just launched, it is anticipated to foster a learning opportunity for developers who will be better able to see targets, standards, and obtainable tiers. This transparency will simplify the process for Whitby Green Standard submissions providing clear feedback.

Portal features, outlined as well in Project 1, will allow applicants to track the progress of their application and review feedback. The launch of this portal streamlines and simplifies a previously manual process through the submission of a complex Excel-based form.

Development Community Consultation

An external consultant, Ethelo, assisted with consultation with the development community to receive their feedback on the digitization of the WGS. This feedback resulted in minor revisions to the first digital version of the WGS using the portal. Additional commentary and feedback received will be incorporated into future revisions to the portal as well as the next version. Ethelo also used this feedback to help inform the creation of a Whitby Green Standard User Guide. This guide has been made to assist the Development community with their WGS submissions using the new digital tool.

Project 4 - Modernization Initiative (\$5,300)

File Conversion

TIFF format files from MyWhitby File Viewer, an internally developed database, were converted to PDF/A and PDF formats and provided to the Town by the vendor DocuDavit. PDF images are typically smaller in size, easier to transfer, and more universal. The PDF/A format ensures archival access to these files even as technology changes. The change from the TIFF format to PDF ensures these records are properly managed during their record lifecycle as they are incorporated into modern technology systems. A small number of additional development-related physical records were also digitized.

Modernization Initiative – Replacing Legacy Tools

Following the digitization of these records into PDF, they have already been utilized to support a modern solution, currently being developed, aimed at locating property drawings, permits, and plans by our Building Services Department. A Power App from Microsoft will be used to create a MyWhitby File Viewer replacement solution. This will increase accessibility to records by allowing Building Services staff to access records from their Office 365 accounts. This supports mobile work by staff who are frequently working outside the office. Access is based on similar search functionality previously available. MyWhitby File Viewer was a proprietary legacy system. By modernizing toward an off-the-shelf solution, the access to these files will be streamlined. The burden of technical support of this legacy system will also be eased by this transition.

Project 5 - AODA Planning Document Remediation (\$19,100)

The Streamline Development Approval Fund (SDAF) grant has helped the Town become more accessible. Following the website update, some Town records were removed from the website as they were not compliant with the Accessibility for Ontarians with Disabilities Act (AODA). Staff had been working to remediate and repost these records, however, due to workload, this was an ongoing challenge.

As a result of this funding, contract work was obtained to remediate relevant records. Planning staff are now working to re-post them online. Allyant/Common Look, a vendor specializing in document accessibility, converted twenty-three (23)

Development documents to be AODA- compliant. Town staff are now able to complete updates based on legislative changes and make the documents available once again on the website. This will provide quicker access to Planning and Development documents through the Town's website and allows the Town to host large AODA-compliant documents directly online.

Project 6 - Council Chambers AV Upgrade (\$55,000)

To modernize web meeting systems for planning meetings, upgrades were made to the Council Chambers and the Committee Room. These rooms are used to hold statutory public planning meetings. At the Regular Council meeting on April 11, 2022, Council directed staff (Resolution # 93-22) to prepare a memorandum regarding the cost of upgrading the camera equipment in the Council Chambers. Staff responded with a memo outlining the cost and system.

LineTech Audio Visual Technology Group worked to install Council Chambers AV upgrades, which were implemented in January 2023. These upgrades created a production-like experience with follow-the-speaker technology and additional cameras to enhance the hybrid meeting experience. In the Committee Room, a touchscreen monitor with Microsoft Teams computer and audio-visual tools were installed.

These additions modernized meeting options pursuant to the Planning Act as well as other meetings that utilize those spaces.

Project 7 - Parks – Development Plan Review (\$25,300)

The Town has experienced staffing changes and vacancies in areas related to development approvals. The SDAF allowed the Town to utilize the services of an external consultant to review applications and provide feedback related to planning matters. An external consultant, GHD, was engaged by the Parks, Parks Planning & Culture division to help expedite the review of Development Applications. In addition, the vendor provided Bill 23 comments, assisted with the Parks Application Guidelines, assisted with the Brooklin Development Plan, and reviewed draft plans. Hiring the consultant provided over 120 hours of work the Town would not have had the capacity to otherwise address. This was fundamental in helping address and prevent backlogs in the approval process in this area.

Project 8 - SDAF Lean Process Analysis and Change Management (\$90,600)

Identified staff in positions across the organization were invited to complete professional development in Lean Processes and Change Management. Roles selected to participate focused on those that could impact Development related departments/processes. This training will allow the Town to continue to benefit from this grant as staff can carry forward lean and change management tools to future work.

Lean Green Belt Training (Leading Edge Group)

Twelve (12) participants completed Lean Green Belt training through the Leading Edge group. This training consisted of five in-class session days, an exam, and a culminating project. The project was a lean-based initiative directly impacting the work of the Town in moving the needle towards efficiency using learned lean tools and mindsets. Successful achievement of the Lean Green Belt Certification by the twelve (12) participants signifies actions taken to streamline Town work through the SDAF funding.

Change Management Methodologies (PROSCI)

The Project Manager of the SDAF projects became a Change Management Practitioner following a three-day certification course from PROSCI. During this course, Change Management direction was modeled for a current Town project. Tools and techniques related to Change Management and the overall success of the project were discussed and able to be brought back and applied to Town work. For the purposes of training, the Project Manager was able to assess SDAF projects and implement tools and techniques that improved project outcomes.

Delivering Project Results (PROSCI)

Thirteen project leaders, including project managers, senior department staff, and business administrators attended a six-hour session provided by PROSCI entitled Delivering Project Results. Tools were provided to participants to apply to a project they were currently working on. This training had been previously completed by other Town staff working on the WISDOM Project, the Town's incoming ERP solution. Reports of the benefits of the training from the initial group allowed us to expand participation under SDAF funding to other positions that directly impact broader Town projects, with a specific target of development-related impacts.

Train the Trainer – Level 1 (PROSCI)

Two Town staff, who were current Change Management Practitioners, were further trained in Train the Trainer (TTT) PROSCI Level 1. This allows them to provide certified corporate training for different project roles in Change Management. The TTT option positioned the Town to have internal trainers who can provide ongoing opportunities for our staff to grow in the area of Change Management.

eLearning Modules (PROSCI)

Four e-Learning Modules for Change Management were purchased by the Town and deployed to the Town's Learning Management System (LMS) for use. These modules are available to all Town staff regardless of their current position.

These modules include: (1) Introduction to Change Management, (2) Introduction to ADKAR; (3) Introduction to Leading Change; and (4) Introduction to Thriving Through Change. These modules launched on the LMS in late January 2023 and have had over 25 completions at the time of this report. These modules will remain a Town asset that can be continually used as new staff become interested in this area or join the organization.

Project 9 - Report Streamlining and Lean Process Review – eScribe Report Manager Trial (\$63,600)

eScribe's Report Manager software was identified by staff as a LEAN process solution for improving report collaboration and expediting the approval process, including for Development related matters. The subscription fee for this software was applied to the grant funding covering a portion of the costs from January 19, 2022, to April 30, 2023. In addition, the grant funding contributed to the development of the meeting agenda/minutes calendar integration between eScribe and the Town's website (eSolutions). The utilization of eScribe Report Manager has facilitated LEAN process adoption at the Town improving report collaboration and the approval process. This is a key tool in modernizing the processes that relate to Development related reports presented to Council.

5. Financial Considerations:

The up-to \$1 million dollar grant provided to the Town by the Streamline Development Approval Fund was allocated across nine (9) sub-projects in addition to the administrative costs of Project Management. Final reporting and invoices will be provided to the Province by the end of May 2023. As noted previously, the numbers displayed in this report have been rounded and may vary slightly following final invoice processing and allocation.

A summary chart is included below for ease of reference:

Project	
Permitting Portals Project 1 - 10225608	\$289,900
Electronic Plans Review Project 2 - 10225609	\$212,300
Whitby Green Standard Project 3 - 10225610	\$56,200
Modernization Initiative Project 4 – 10225611	\$5,300
AODA Planning Document Remediation Project 5 - 10225612	\$19,100
Council Chambers AV Upgrade Project 6 - 51225602	\$55,000

Contract Staff - Development Plan Review Project 7 - 10225614	\$25,300
SDAF Lean Process Analysis and Change Management Project 8 - 10225615	\$90,600
Report Streamlining and Lean Process Review- eScribe Project 9 - 10225613	\$63,600
Project Management - SDAF - 51225601	\$182,700
TOTAL	\$1,000,000

6. Communication and Public Engagement:

Engagement occurred with the development community with the assistance of an external consultant, Ethelo. An online invitational survey was completed with a 32% response rate. This survey sought feedback on key areas of digitization and modernization with a specific focus on the Whitby Green Standard. In addition, Ethelo hosted a virtual workshop for members of the development community to provide an overview of the digital tool being developed. Feedback was recorded during that session that will be used as we continue to modernize and streamline development-related processes.

7. Input from Departments/Sources:

The projects undertaken under the Streamline Development Approval Fund impacted many areas of the organization. As a result of this, collaboration took place across the organization to achieve successful project outcomes. Main contributing departments to these projects include: the Office of the Town Clerk; Strategic Initiatives; Technology and Innovation Services; Human Resources; Organizational Development; Facilities; Operational Services; Parks, Parks Culture and Planning; Engineering; Planning Development; Zoning; Building Services; Procurement; Financial Services; and Treasury.

8. Strategic Priorities:

The projects detailed in this report support the People aspect of the Corporate Strategic Plan by streamlining processes for staff and attracting talent with modern tools. The Organization is enhanced by the implementation of modern tools and technologies supported by lean analysis and change management. The Customer will see direct benefits from the Streamline Development Approval Fund Projects in an overall enhanced customer experience. Accessibility was addressed through this project with the improvement of AODA compliance for

development-related records. Sustainability was also enhanced with the Whitby Green Standard's upgrade to a digitized platform.

9. Attachments:

Not Applicable