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Region of Waterloo

Official Plan and Zoning Bylaw Amendments Application Process: Lean Consultant Support

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Introduction

Within the Region of Waterloo (the Region) there are seven (7) area municipalities including the cities of Cambridge, Kitchener, Waterloo and the townships of Wellesley, Woolwich, Wilmot and North Dumfries. All seven (7) review and make decisions on planning or zoning amendment applications submitted by members of the public and/or developers. The nature and complexity of these applications can vary from simple Zoning By-law amendments (ZBAs) to highly detailed Official Plan amendments (OPAs). Although all the municipalities essentially perform similar functions, the application process can differ substantially across all seven (7), which are then further approved by the Regional office in the case of OPAs.

Leading Edge Group (LEG) has been engaged to work with the Region and all area municipalities to undertake a Lean review and analysis of the processes and develop a more streamlined and standardized future state process flow for all municipalities, taking into account recent legislated changes to the Planning Act. The review and analysis is structured under the DMAIC (Define, Measure, Analyze, Improve and Control) framework and this document is an interim report out of current state review findings established through the Define, Measure and Analyze phases.

Data has been collated from six of the seven municipalities and the Regional office. Given that the largest timeframe differences relating to the Planning Act occur in the cities, we are proposing to initially align those processes into a standardized format as close as possible to the legislated timeframe of 120 days for OPAs and 90 days for ZBAs, which may have to have a staggered implementation given the current performance levels. This will be achieved with input from project team members from all municipalities so that we consider all perspectives when determining new standards for the future state process that can then be adopted by all municipalities, where applicable and practical.

Although we have undertaken a current state exercise for the Region and area municipalities (***please see Appendix 2***), for ease of presentation, this document will provide current state process maps for two (2) cities - Cambridge and Waterloo as a comparison. This comparison will highlight variances in process flow, task time, waiting time between tasks and overall process time for a standard planning application in a city environment. This in turn, will allow us to narrow our focus more clearly on process improvements that can then be standardized and applied to all municipality processes as the improved future state is designed.

A current state process map has also been developed for the regional approval process to show how it interacts with the municipalities' planning activities and to identify any potential improvements that can support the overall initiative (***please see Appendix 2***). The process is mainly controlled by the assigned planner with the main interactions occurring between the planning office, the applicant, council, and outside agencies (e.g. Planning consultants, Regional Office, Environmental and Transport agencies). There are various administrative functions performed throughout the process by administrative personnel, as well as reviews and approvals by process managers, directors, and the senior management team in some municipalities.

Current state review and analysis has been further validated and informed by interviews with key external stakeholders – the results of which are summarized and documented in this report.

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Current State Review Overview

In order to develop a more efficient process and design a future state for all of the municipalities within the Region, it is crucial to properly document how the processes currently operate and identify all wasteful or non-value-adding activities that are occurring and contributing to any delays or inconsistencies.

By describing, mapping, and discussing a current state process (value stream), team members have the opportunity to identify activities that are wasteful. Lean specifies eight (8) categories of waste to facilitate the identification of non-value-adding activities. These are:

- **Transportation** – of staff, files, applications, etc.
- **Over-production** – extra preparation of applications for meetings
- **Unnecessary movement** – of staff to photocopiers or to other areas/buildings for meetings
- **Inventory** – files in a queue, people in a queue, stockpiling of supplies
- **Waiting** – for approvals, signatures, reviews, replies, decisions
- **Over processing** – redundant reviews, excessive approval signoffs
- **Defects** – missing information, inaccurate data entry, unprepared for meetings
- **Underutilized skills** – inappropriate grade of staff carrying out work, not consulting relevant staff on projects

LEG has undertaken a Lean current state review and analysis across the Region and six (6) of the seven (7) municipalities. The township of North Dumfries has not participated yet, as a new planner was not properly familiar with the current state process to make an effective and meaningful contribution. However, this township's contribution will be required moving forward into the future state design stage to comment on and provide feedback on any proposed process changes that may impact the municipality.

In undertaking the current state review and analysis, LEG has been ably supported by a pre-defined project team, as outlined in the project charter. The work commenced with on-site Lean training to familiarize the project team with the methodology, tools and techniques that would be deployed on the engagement. This was followed by a data collection webinar to assist the team in identifying the types of information that would be relevant to properly document and analyze the current state. Interviews were held with the planning teams at each municipality office to record the task timelines of each process and identify value-added (VA), non-value-added (NVA) and necessary non-value-added (NNVA) activities. A stakeholder analysis was also undertaken with key customers and contributors to the process (Developers, Planning Consultants, Environmental Agents) to provide first hand observations of the current process and help develop the Voice Of the Customer (VOC).

For the purposes of this analysis, VA will refer to all those tasks performed that enable the process to move forward; NVA will refer to all waiting time between tasks that is neither local policy nor covered by the Planning Act. Lastly, NNVA will refer to all waiting time that is guided by local policy or outlined in the Planning Act.

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As per the project charter, the overall process has been divided into five (5) stages for the purpose of review:

Stage	Summary
1. Pre-submission	This stage is designed to review any potential ZBA/OPA application to determine requirements before the applicant can proceed with an official application. This is a vital step, as environmental studies or traffic impact studies (TIS) are often required and can take a lengthy time (months) to compile. It is also mandated by OPs that a pre-submission process be completed unless waived by a municipality
2. Official Application	This stage begins when the applicant has completed the requirements of the Pre-submission stage and wishes to launch an official application for a ZBA/OPA.
3. Statutory Public Meeting	The ZBA/OPA is presented to council (or committees of council) with representation from all interested parties and the public as to the appropriateness of the application.
4. Review and Analysis	Once the Public meeting has been completed, the local planner (planning team) and circulated agencies and internal municipal departments review the application in greater detail to prepare it for final council decision. In some municipalities (Cambridge) the review starts as soon as the application is deemed completed, prior to public meeting
5. Application Decision	After consideration of a recommendation report, a decision is made to approve the ZBA and/or adopt the OPA.

Table 1: Five (5) stages for ZBA/OPA application process.

The relevant task times and overall process times for each stage were provided by each of the planning teams based on their personal knowledge and experience and represent the duration of a typical standard planning/zoning application. The overall application process time established during the current state mapping exercise was then validated against historical data relating to all ZBAs and OPAs that were started or are still active in the past 12 months.

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The current performance of each municipality against the Planning Act (120 days for OPAs and 90 days for ZBAs) was analyzed for applications active over the past 12 months. In many cases the applications are still active and can be seen in detail in the Data Validation file (*please see Appendix 1*).

In the case of OPAs, only the township of Wellesley completed an application within the legislated timeframe. Application processing times for all other municipalities/townships that recorded OPAs were significantly longer than this. In the case of the ZBA application process, it can be observed that the cities are still outside the proposed legislated timeframe, while the townships are succeeding in achieving the 90-day goal for completion, with Wellesley and Wilmot achieving 63% and 64% on time completion, respectively. It is also noteworthy that Wilmot is the only municipality whose average ZBA process time conforms to the Planning Act requirement of 90 days.

DATA VALIDATION SHEET	# active OPAs in the application system (last 12 months)	% OPAs processed under 120 days	% OPAs processed over 120 days	Average OPA Process Time	Longest OPA process time
Cambridge	5	0.00%	100.00%	363 Days	547 days
Kitchener	9	0.00%	100.00%	496	891
Waterloo	4	0.00%	100.00%	340	420
Wellesley	2	50.00%	50.00%	260+	260+
Woolwich	4	0.00%	100.00%	337	400
Wilmot	0	0.00%	0.00%	0	0
DATA VALIDATION SHEET	# active ZBAs in the application system (last 12 months)	% ZBAs processed under 90 days	% ZBAs processed over 90 days	Average ZBA Process Time	Longest ZBA process time
Cambridge	30	0.00%	100.00%	256 Days	774 Days
Kitchener	7	0.00%	100.00%	307	415
Waterloo	11	0.00%	100.00%	395	742
Wellesley	9	63.00%	37.00%	101	376
Woolwich	18	21.00%	79.00%	220	486
Wilmot	14	64.00%	36.00%	81	219

Figure 1: Performance of municipalities based upon Planning Act.

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It became apparent during the current state investigation, that the timelines to process an OPA/ZBA application differed significantly between large municipalities (cities) and townships. This is mainly because cities deal with a higher volume of applications, more complex sites with technical issues (because we are dealing with more infilling and intensification projects), as well as less lead time needed for council meetings. Within townships, processes can be controlled by a single planner with less volume and less handoffs/approvals required. As a result, city OPA and ZBA processes contain a higher amount of NVA time and, therefore, present a greater opportunity for overall lead time improvement.

In line with the engagement goal of achieving a harmonized process, the team compared the process timings as noted in the individual process maps (*please see Appendix 2*), across the three (3) cities and townships that have similar volume and structure, and worked towards agreed stage durations. Figure 2. below provides the data. The internal timings reflect process times within municipal offices, while the external times reflect all process times for outside agencies. The data demonstrates that the township processes are more efficient than those of the city. The reason for this is mainly due to smaller organizational structure; less handoffs to staff; less approvals and reviews; less complex council requirements, smaller planning projects and in some instances less complex sites with fewer technical issues because townships are dealing with fewer infilling and intensification projects.

Township					City				
		Wilmot	Woolwich	Wellesley			Cambridge	Kitchener	Waterloo
Pre-submission		Days	Days	Days	Pre-submission		Days	Days	Days
	Internal	5	5	5		Internal	15	15	15
	External	20	20	20		External	15	15	15
Official Application					Official Application				
	Internal	5	5	5		Internal	25	30	25
	External					External	10		21
Public Meeting					Public Meeting				
	Internal	1	1	1		Internal	3	3	3
	External					External	50	37	30
Review & Analyze					Review & Analyze				
	Internal	20	35	20		Internal	45	40	45
	External	30	40	25		External	105	105	90
Approve					Approve				
ZBA	Internal	7	10	5	ZBA	Internal	7	5	5
	External	5	35	5		External	50	40	50
	Internal	10	10	10		Internal	10	10	10
OPA	External	60	60	60	OPA	External	60	60	60
TOTAL INTERNAL ZBA		38	56	36	TOTAL INTERNAL ZBA		95	93	93
TOTAL EXTERNAL ZBA		55	95	50	TOTAL EXTERNAL ZBA		230	197	206
GRAND TOTAL ZBA		93	151	86	GRAND TOTAL ZBA		325	290	299
TOTAL INTERNAL OPA		41	56	41	TOTAL INTERNAL OPA		98	98	98
TOTAL EXTERNAL OPA		110	120	105	TOTAL EXTERNAL OPA		240	217	216
GRAND TOTAL OPA		151	176	146	GRAND TOTAL OPA		338	315	314

Figure 2: Township and city processing times.

Note: Internal = In house Task Times

External = Allowance for agency response/meeting notice

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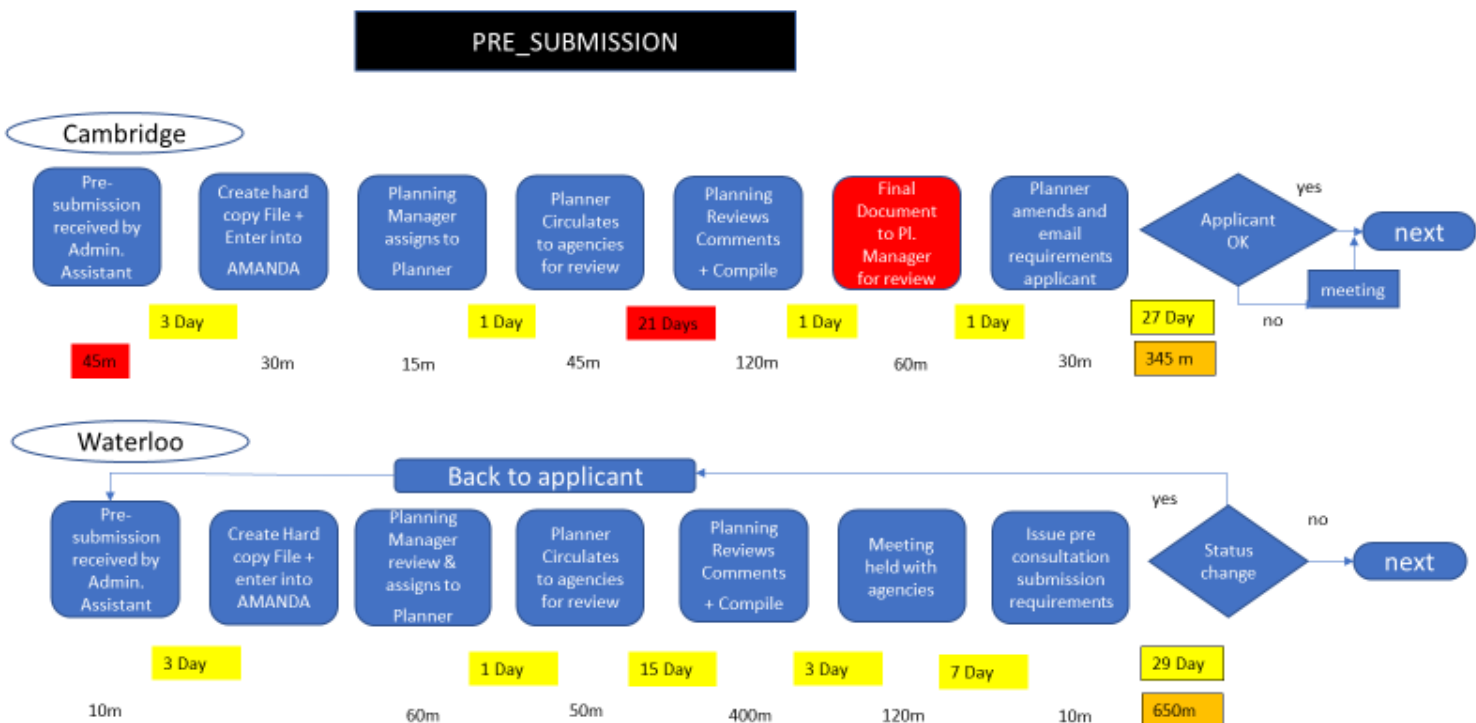
Current State Review and Analysis: Cities of Cambridge and Waterloo Comparison

Current state maps for each of the five (5) process stages have been charted with the respective planning teams of both cities to identify key task times (VA) and waste activities (NVA). Variances between the municipalities and are presented below.

Stage 1: Pre-submission

Start: Application is received by the Administrative Assistant.

Finish: Applicant accepts conditions to meet planning requirements.



Note: m = Minutes

Figure 3: Pre-submission process flow for cities of Cambridge and Waterloo.

Key variances identified:

- Cambridge takes longer for the initial stage of application submission: **45 minutes Vs. 10 minutes**.
- Cambridge allows **21 days** for agency comments Vs. **15 days** for Waterloo.
- The overall non-value-add (NVA) time for Waterloo is **two (2) days** more than that of Cambridge.
- Waterloo task time or value-add (VA) time exceeds Cambridge by **305 minutes**.

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Stage 2: Official Application

Start: Application is received and entered in the AMANDA system.

Finish: Application is forwarded to all 3rd parties for statutory public meeting.

Note: Most municipalities have no time limit between a pre-submission approval and an official application as this is entirely at the applicant's discretion. Cambridge is an exception, where the pre-consultation by-law states that after 2 years passes, the applicant has to resubmit the pre-consultation. Therefore, the Official Application stage becomes the point where the legislated 120 day for process duration begins, when the *complete* application is received by the municipality.

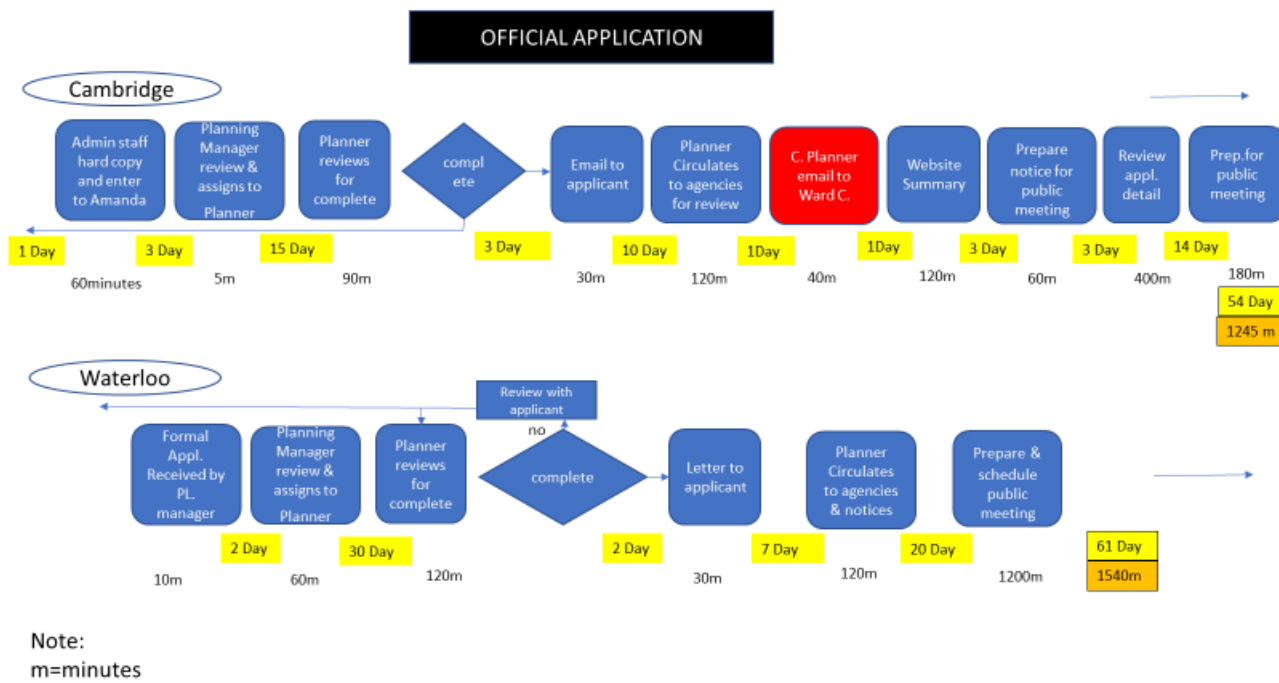


Figure 4: Official Application process flow for cities of Cambridge and Waterloo.

Key variances identified:

- Elapsed time before planner reviews file: Waterloo (30 days) Vs. Cambridge (15 days).
- Communication to applicant: Waterloo (letter) Vs. Cambridge (e-mail).
- VA task time in Waterloo exceeds that of Cambridge by 295 minutes.
- NVA in Waterloo is 61 days Vs. 54 days for Cambridge.
- Cambridge incorporates an extra layer of complexity through chief planner communication with the ward councilor (40 minutes).

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Stage 3: Public Meeting

Start: Planner commences preparation for the public meeting.

Finish: Application is forwarded for review and analysis.

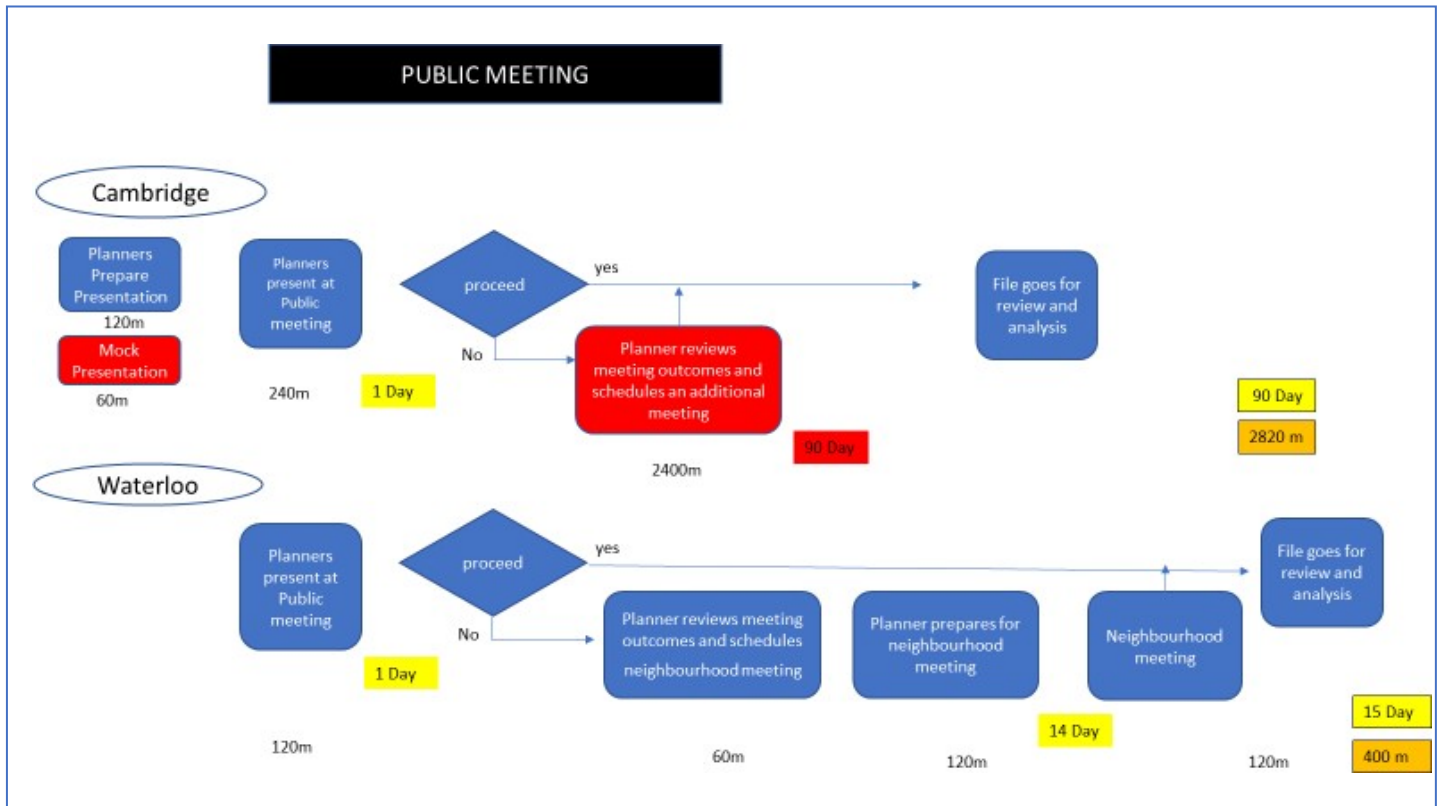


Figure 5: Public Meeting process flow for cities of Cambridge and Waterloo.

Key variances identified:

- VA task time in Cambridge exceeds that of Waterloo by **2,420 minutes**.
- NVA in Cambridge is based on a **90-day** protocol for additional neighborhood meetings for controversial applications (approx. 25% of total applications) Vs. **14 days** in Waterloo.
- Cambridge requires extra steps for meeting preparation.

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Stage 4: Review and Analysis

Start: Planner reviews comments from agencies.

Finish: Application is reviewed by senior management.

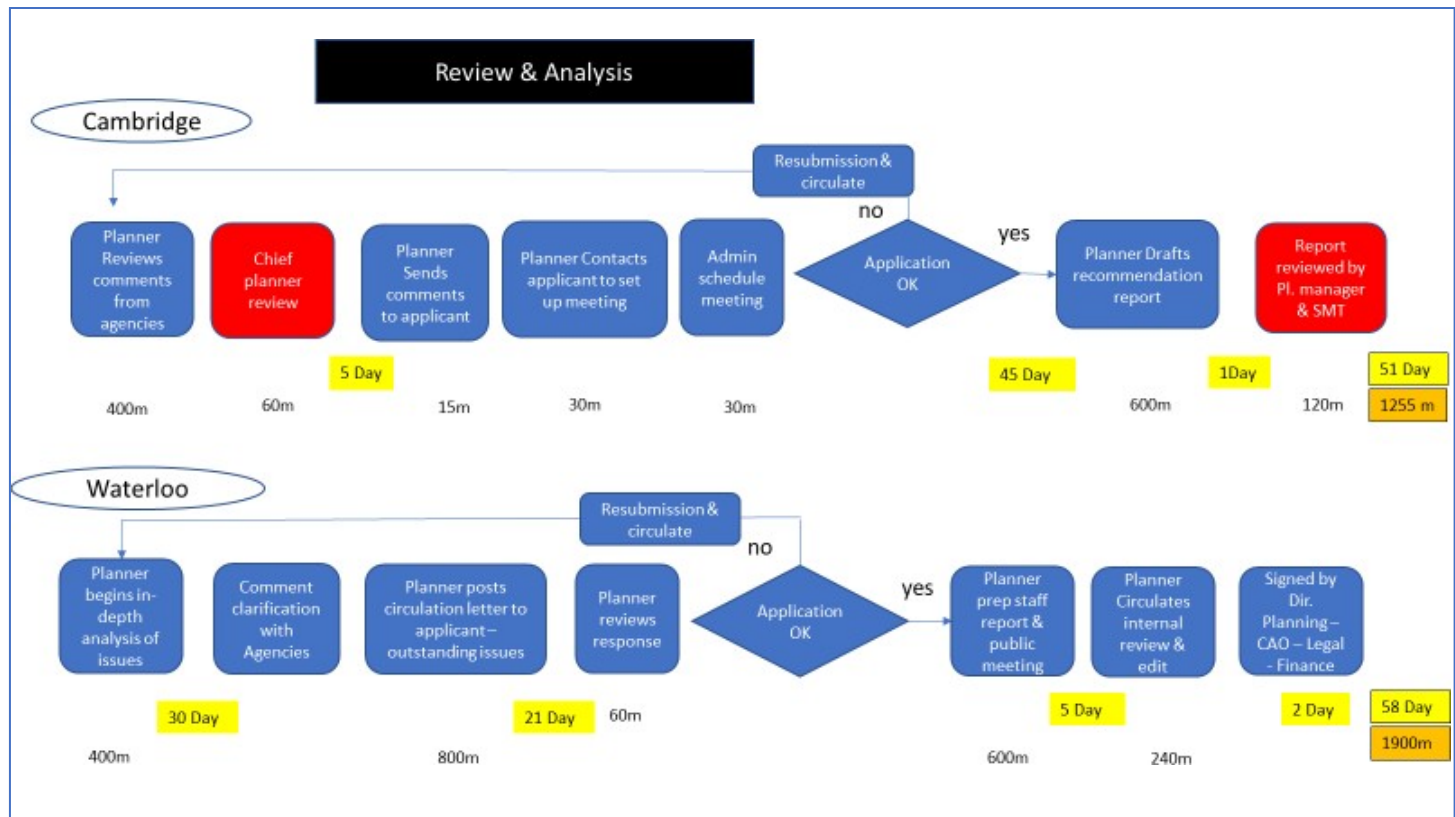


Figure 6: Review and Analysis process flow for cities of Cambridge and Waterloo.

Key variances identified:

- VA task time for Waterloo exceeds Cambridge by **645 minutes (approx. 1.5 days)**.
- NVA time for Waterloo is **58 days** Vs **51 days** for Cambridge.
- Cambridge allows **45 days** for planning analysis *after* the application is deemed OK to proceed.
- Waterloo allows **51 days** for planning analysis *before* the application is deemed OK to proceed.

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Stage 5: Application Decision

Start: Planner prepares for recommendation meeting.

Finish: Regional approval is granted for OPAs / ZBAs are adopted.

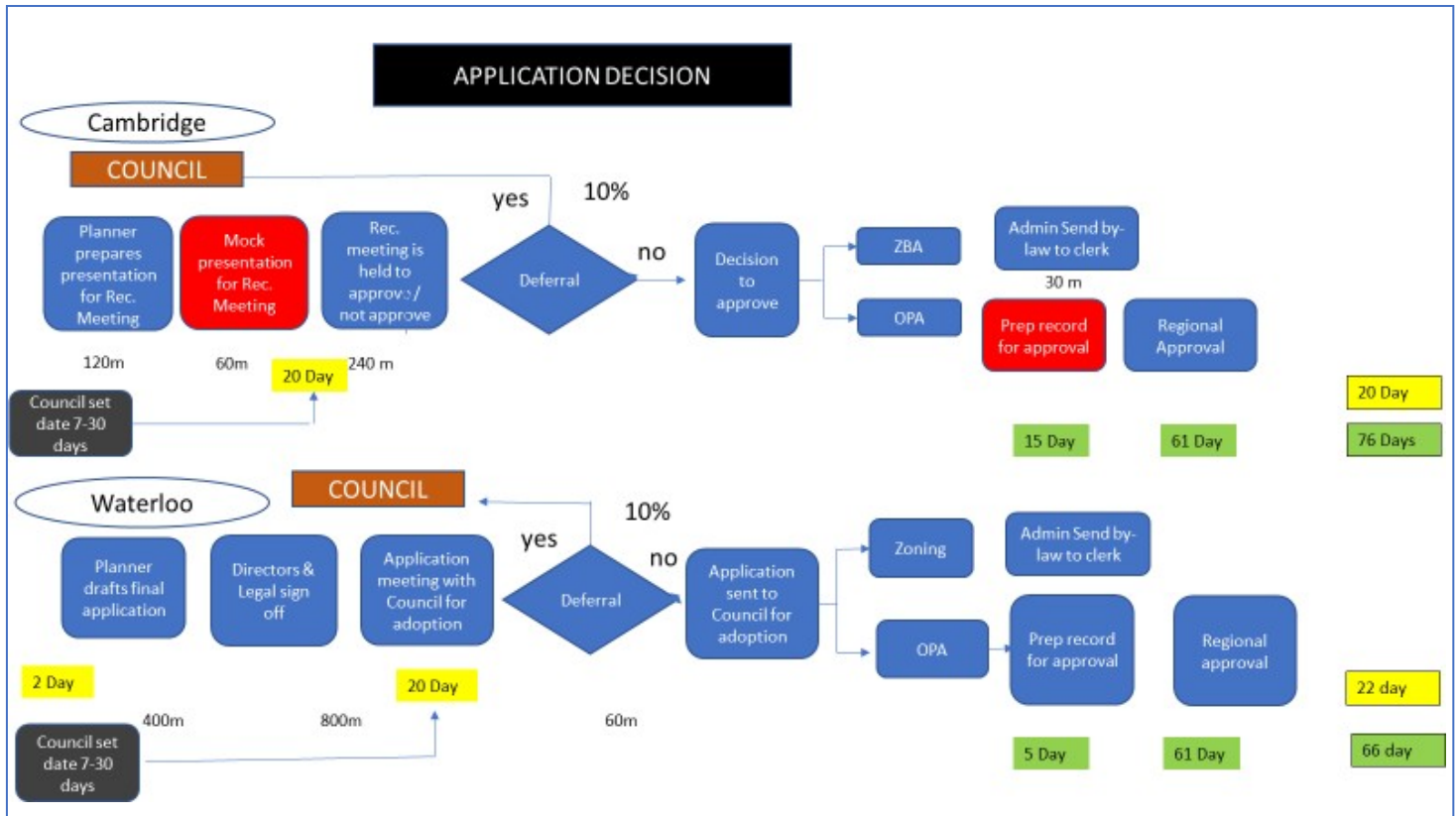


Figure 7: Application Decision process flow for cities of Cambridge and Waterloo.

Key variances identified:

- Cambridge incorporates an additional step of “presentation preparation” that incurs **180 minutes** of extra task processing time.
- Days are accrued in this process for applications to go through the Region’s approval process (*please see Appendix 3*).
- It can take between **7 to 30 days** to schedule a report for a meeting with council, given that it only meets once per month.
- Cambridge takes **15 days** for preparation of record for approval as opposed to **5 days** for Waterloo.

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Waste Analysis

Cities of Cambridge, Kitchener and Waterloo

Data collected on the three (3) cities provided the opportunity to assess the size of process waste activity (NVA and NNVA). The NVA category indicates the amount of time that any file (application) is dormant in the process and is not being worked on. Using the Pareto principle (top 20% of the observations account for 80% of the waste), the graphic below reflects the chief contributors to waste, as established with the planning teams.

Note: % reflects the percentage contribution of total NVA and Cum % is cumulative total

Pareto Breakdown of Waste Analysis (NVA) for Cambridge - Kitchener - Waterloo			
Cambridge	Ttl Min	%	Cum %
File waits for Planner to draft recommendation	18,000	51%	51%
File waits in queue until planner is ready	6,000	17%	68%
File waits for planner to send comments to applicant	2,000	6%	74%
Kitchener	Ttl Min	%	Cum %
10 days to finalize council decision	4,000	16%	16%
File waits for follow-up summary	4000	16%	31%
File waits to be reviewed by Planning Manager	2800	11%	42%
File waits for 5 days for circulation comments to be sent to applicant	2000	8%	50%
File waits for circulation letters to be sent to public /staff/agencies	2000	8%	58%
File waits for sign shop to prepare signage	2000	8%	66%
Files waits for admin to do mailout	2000	8%	73%
Waterloo	Ttl Min	%	Cum %
File waits in queue until planner is ready	12000	47%	47%
File waits for 7 days before issuing consultation sub - requirements	2800	11%	58%
File waits for planner to circulate to agencies	2800	11%	69%
File waits to be circulated for internal review	2000	8%	77%

Figure 8: Pareto breakdown of NVA across the cities of Cambridge, Kitchener and Waterloo.

As the data shows, the bulk of waste in each of the processes is caused by **Waiting**. The activities that have contributed to this waste have evolved over the years and have become standard. These are directly within organizational control and, as such, are candidates for immediate improvement initiatives.

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A second graphic below (Figure 9) highlights and compares all the **NNVA**, which is all the **Waiting** time incurred through legislation or organizational policy. While it is reasonable to accept that a time allowance may be required to gather external agency feedback and provide notice for meetings etc., this should be further examined and standardized. At present there are variances in time allowed for these activities by different municipalities. This is particularly evident at the City of Cambridge where a 90-day delay is incurred as a special protocol for additional neighborhood meetings, along with 2,400 minutes of extra processing time by the planning team. Although legislated times are outside the scope of this engagement, all other policy allowance times are open for future state improvement.

Pareto Breakdown of Waste Analysis (NNVA) for Cambridge - Kitchener - Waterloo			
Cambridge	Ttl Min	%	Cum %
Special protocol for additional meeting	36,000	58%	58%
Municipality allows time for agency response	8,400	13%	71%
Council set date (Monthly)	8,000	13%	84%
Kitchener	Ttl Min	%	Cum %
Municipality allow 35 days	14000	22%	22%
Application may take up to 30 days to deem complete.	12000	19%	42%
Municipality allows 30 Days for agency reply	12000	19%	61%
Municipality allows 21 days	8400	13%	74%
Municipality allow 20 days for pre submission meeting	8000	13%	87%
NNVA - Waterloo	Ttl Min	%	Cum %
Municipality allows 30 days for agency comment	12000	24%	24%
Municipality allows 21 days for response	8400	17%	41%
Municipality allows 20 days for agency comment	8000	16%	58%
Wait for next council meeting	8000	16%	74%

Figure 9: Pareto breakdown of NNVA across the cities of Cambridge, Kitchener and Waterloo.

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Townships of Wellesley, Wilmot and Woolwich

There is a significant difference between NVA and NNVA profile of the three townships and those of the three cities. Processing times are much reduced in the townships, with one possible exception. Woolwich has some of the same process complexities as the city municipalities such as different levels of review and approval. Wellesley and Wilmot demonstrate a lower level of internal waste (NVA) as a result of a simpler continuous flow of activity with one planner completing most of the tasks with a final review by the senior management team.

Key to the successful implementation of a future state process will be the approach to adopting a continuous flow type process and reevaluating all aspects of the hand-off between different parties, ensuring where possible that they are effectively communicated, transferred and monitored so delays can be avoided and waiting periods eliminated or reduced. Much can be learned from the townships.

Note: % reflects the percentage contribution of total NVA and Cum % is cumulative total

Pareto Breakdown of Waste Analysis (NVA) for Wellesley - Wilmot - Woolwich			
Wellesley	Ttl Min	%	Cum %
File waits to be prepared for Public Meeting	2,000	19%	19%
File waits until Planner is ready to work on it	2,000	19%	38%
File waits for planner to circulate	1,600	15%	53%
File waits until Planner is ready to work on it	1,600	15%	68%
Files waits for circulation by planner	1,200	11%	79%
Wilmot	Ttl Min	%	Cum %
File waits until Planner is ready to work on it	1200	27%	27%
File waits for planner to circulate	800	18%	45%
File waits in queue in planners office	400	9%	55%
File waits to be prepared for Public Meeting	400	9%	64%
File waits until Planner is ready to work on it	400	9%	73%
Files waits for circulation by planner	400	9%	82%
Woolwich	Ttl Min	%	Cum %
File waits for planner to prep report	8000	36%	36%
Report waits to be reviewed	5600	25%	61%
File waits for consultation minutes	4000	18%	79%

Figure 10: Pareto breakdown of NVA across the townships of Wellesley, Wilmot and Woolwich.

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Pareto Breakdown of Waste Analysis (NNVA) for Wellesley - Wilmot - Woolwich			
Wellesley	Ttl Min	%	Cum %
Township allows 30 days for comment reply	12,000	42%	42%
Township allows 20 days for agency response	8,000	28%	69%
Township allows 20 days for appeal notice	8,000	28%	97%
Wilmot	Ttl Min	%	Cum %
Township allows 30 days for comment reply	12,000	42%	42%
Township allows 20 days for agency response	8,000	28%	69%
Township allows 20 days for appeal notice	8,000	28%	97%
Wilmot	Ttl Min	%	Cum %
Municipality allows 30 days for agency response	12,000	36%	36%
Allowed time for agency response	8,000	24%	60%
Municipality allows 20 days for appeal period	8,000	24%	83%

Figure 11: Pareto breakdown of NNVA across the townships of Wellesley, Wilmot and Woolwich.

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Resource Analysis

Data collected from the municipalities has also provided a resource profile of activity and time taken by the existing participants. All municipalities have their own process and methods that include varying degrees of review and approval. In each case, the planner is responsible for most of the process tasks, and the time taken can differ significantly between each municipality per application. The table below illustrates the data findings. In developing the improved future state, it would be appropriate to redefine some responsibilities (overall RACI) and ensure where possible that the high value-add activities are completed by the planners. This may need to be determined on a case by case basis as it would need to take into account both the volume of work, the available resources and skill sets of the teams.

Resource Profile	VA minutes	NVA minutes	Grand Total
CAMBRIDGE	6390	540	6930
Admin	980		980
Chief Planner		40	240
Planner	5390	120	5510
Planning Manager	180	20	200
KITCHENER	7990		7990
Admin	680		680
Legal dept.	180		180
Planner	6755		6755
Planning Manager	195		195
Third Party	180		180
WATERLOO	6070	180	6250
Admin	465		465
Planner	4685	180	4865
Planning Manager	120		120
SMT	800		800
WELLESLEY	2515		2515
Admin	10		10
Planner	2505		2505
WILMOT	2460		2460
Admin	15		15
Planner	2445		2445
WOOLWICH	1550		1550
Admin	100		100
Planner	1370		1370
Planning Manager	80		80

Figure 12: Resource profile data.

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Region Approval: Current State Process

All adopted OPAs must go to the Region for final approval, which is allotted 120 days to complete this task, but usually does not take this long. This is a process that has certain touch points with the municipalities as outlined in the graphic below. The process is a major contributor to the overall throughput time for an OPA application as it can add up to 39 days to the overall process lead time. **Appendix 3** provides a more detailed current state process.

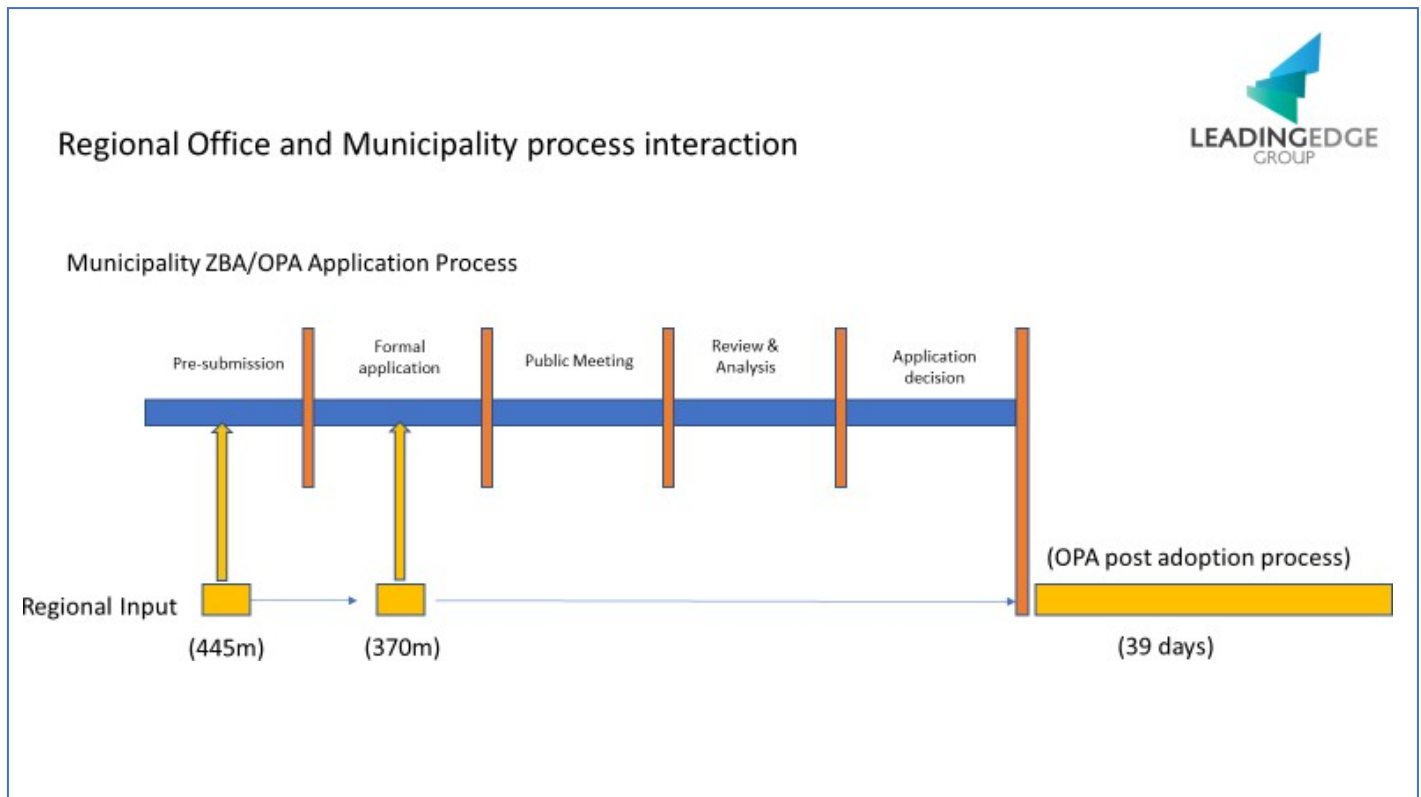


Figure 13: Regional and municipal process interaction.

The Region plays a pivotal role in keeping the various municipal planners apprised of any regional concerns that might impact an open application. As such, the process will be treated as a process in its own right and will be subject to the same rigors of process improvement as the municipalities. Proposed areas would include the following:

- Validating any work backlogs and resource availability e.g. to deal with environmental issues
- Reducing waiting times e.g. reducing waiting period for Senior Management approval
- Preventing delays e.g. by ensuring the Regional Office receives **complete** applications and complete OPA Records as prescribed by the Planning Act
- Ensuring overall alignment with municipalities with regard to planning decisions

The above items will be reviewed by the project team, with a view to providing solutions to mitigate waste.

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Stakeholder Analysis

To ensure that the current state review and analysis is properly informed by the voice of external customer, a number of key stakeholders have been identified by the engagement sponsors for interview. The aim of the interviews is to gain an insight into the stakeholders' current experiences with the ZBA/OPA processes and any areas that they feel could be improved upon.

Stakeholder Name and Position	Title/Role	Organization
s. 10 MFIPPA		

Table 2: External stakeholder list.

The stakeholders who have contributed to date are s. 10 MFIPPA. Each has long-standing experience with all of the municipalities in relation to ZBA/OPA applications. The outstanding two stakeholders will be contacted in the coming weeks and their inputs will be added to the inform the future state design. It is envisaged that we will update and inform the stakeholders of future state improvements as a follow-up to these interviews to maintain engagement and alignment.

Stakeholder feedback is varied based on the specific role of each participant and their particular experience working with the application process. However, some common issues and suggestions have emerged. The complete interview notes are included as an appendix (*please see Appendix 4*) and the key outputs are highlighted below.

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Pre-submission:

- All stakeholders agreed that the Pre-submission stage is vitally important but is only as effective as the level of application and detail communicated to the applicant by the local planning office. Some stakeholders feel deep frustration when items that should have been commented on at this stage in the process are overlooked, only to be introduced later, thereby incurring delays and extra costs.
- Jurisdictional boundaries are not completely clear between the local municipality and the Region, and it is hard to determine who is responsible for the final planning decision and/or who to approach to assist in the resolution of some issues – for example, a decision by the Region on a traffic impact study (TIS) may be later contradicted by the local planning office.

Timeframes:

- Both the planning consultants and the developers had similar expectations for an OPA application timeframe and considered 12 months to be reasonable. Both also agree that it could reasonably take more than 12 months for larger and more complex projects.
- A ZBA application should take about 3-6 months maximum unless it is tied up with an OPA.
- All were more critical of what they perceived as “unnecessary delays” or additional steps in the process at a later stage - for example, requirements for extra environmental studies not identified at Pre-submission. It is important to set the expectations correctly from the outset where possible.

Positive Feedback:

- Some municipalities actively work as a team towards solutions and solving impediments in the process. However, others can get bogged down and result in deadlock.
- Some municipalities are significantly better at communicating than others.
- The City of Kitchener’s pilot project – Site plan application comment template for agencies – should be adopted by all municipalities.
- Cambridge compile comments before the Pre-submission meeting which is extremely beneficial.
- Townships should adopt a formal process like the cities.

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Suggested Improvements:

- Introduce a more detailed and standardized checklist at the Pre-submission stage (Cambridge has already developed a standard checklist)
- Better preparation of planning staff for the Pre-submission meeting so all application details are addressed
- Avoid continually changing scope throughout the process (for example, revising the terms of reference for a TIS)
- The Region does not need to be involved in ZBAs that conform to the official plan
- Municipalities should appoint a liaison officer for large projects to act as intermediary in situations where deadlock has occurred
- Quarterly meetings should be held between all parties to resolve major roadblocks and ensure everyone is aligned
- Planners should apply comments to existing plans and not try to redesign the building
- A collective meeting of regional and municipal agencies (engineering, transportation) should take place before the first set of comments

Many of the issues that the stakeholders have highlighted confirm the findings from the current state review and analysis, specifically the high level of NNVA and NVA as well as opportunities to improve the existing VA activity. The stakeholder analysis offers key insights into customer expectations and frustrations that will be used to inform the design of an improved future state process that delivers increased value and aligns with expectations.

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Current State Improvement Opportunities: Summary

Based on the current state review and analysis undertaken, the following highlights key opportunities for improvement across the five (5) stages:

Pre-submission

- ✓ Standardize agency comment reply duration.
- ✓ Validate the purpose and requirement for each layer of review/approval.
- ✓ Standardize the checklist for the applicant.
- ✓ Standardize a single software package to be used by all parties.
- ✓ Agree on a standard circulation time.
- ✓ Standardized application form, submission requirements, consistent expiration of pre-sub comments (perhaps a shorter timeframe?)

Official Application

- ✓ Standardize to optimize and align task (VA) times.
- ✓ Reduce NVA by establishing standard reply times with agencies and eliminate/minimize batching of work.
- ✓ Improve folder management – for example, an application folder created at the Pre-submission stage should be saved and reactivated if an Official Application is received for the same project.
- ✓ Ascertain the reason and then modify the process to minimize council re-directs and chief planner/ward councilor reviews.
- ✓ Ascertain the appropriate persons to attend meetings (developer-led application meetings).
- ✓ Standardize report preparation.

Public Meeting

- ✓ Standardize the presentation preparation process and provide standard templates for use by all municipalities.
- ✓ Reassess the 90-day Cambridge protocol, including 2,420 minutes of task time, for additional meetings.

Review and Analysis

- ✓ Standardize process for planner analysis.
- ✓ Reduce/eliminate NVA times (for example, reset agency turnaround times).

Application Decision

- ✓ Optimize and standardize the presentation preparation process.

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- ✓ Investigate the need for excessive regional turnaround time.
- ✓ Optimize and standardize the process for preparing “record of approval”

While VA time accounts for only 6-8% of total processing time across all the municipalities, there is an additional step required to examine each of these activities when developing the future state and to standardize them as effectively and efficiently as possible. It becomes more apparent throughout the analysis that each municipality have varying layers of review and approval that increase hand-offs and waiting time. Such variances need to be assessed and standardized.

Whilst the current state processes were designed many years ago and some modifications have been made from time to time, it is clearly evident that the introduction of better and more standardized systems, such as development tracking software, would help better document current state – not all municipalities have same tracking abilities

All of these will need to be reassessed in the future state design, with an open mind to change. All process steps need to be clearly defined with a start and end and then measured so continuous review and improvement can be made over time.

At this stage, much data has been gathered by the team, and it would be prudent that the team agree at the outset if any additional boundaries, parameters or other objectives need to be taken into account in the design of the future state. A clear vision statement and plan should be communicated to all participants so they can join in and support the design.

Only when the future state design has been approved and all parties are comfortable with new process metrics and methods, should key performance indicators (KPIs) be developed around the updated process expectations.

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Next Steps

1. Prioritizing improvement opportunities for immediate quick win, medium and long term and completing outstanding stakeholder interviews where possible.
2. Developing future state process to minimize waste and ensures a harmonized and standard way of working across all municipalities.
3. Developing a phased implementation and control plan to realize and sustain the future state model.

The plan to achieve the next steps is outlined below:

NO.	Task	Completion Date
1.00	Submit interim report on Current State review and analysis	03/07/2020
2.00	Future State team preparation	10/07/2020
2.01	Send list of Future state Design Questions to project team to stimulate thought process	
2.02	Coach project team through Teleconference/email to start engaging creative perspective	
2.03	Review Barriers to Process Harmonization with team through cell/email	
3.00	Future State zoom session 1.	21/07/2020
3.01	Future State methods & objectives	
3.02	Revisit project charter - Objectives	
3.03	Review Stakeholder Comments - develop Voice of the Customer VOC	
3.04	Change Management refresh	
3.05	Team homework - Action Plan	
4.00	Future State zoom session 2.	23/07/2020
4.01	Review and prioritize improvement ideas from stakeholder comments	
4.02	Review and prioritize identified Opportunities listed in the Current State report	
4.03	Brainstorming session - Root cause analysis - Pick Chart	
4.04	Team Homework - Action Plan - Sponsor Update	
5.00	Future State zoom session 3.	TBD
5.01	Begin harmonization city processes and Township processes	
5.02	Identify key barriers to process harmonization - Sponsor Input	
5.03	Develop Future State value stream map	
6.00	Future State zoom session 4.	TBD
6.01	Gap Analysis - Continue process harmonization - Sponsor Input	
7.00	Future State zoom session 5.	TBD
7.01	Process Standardization - Stakeholder Update - Sponsor update	
7.02	Future State process performance metrics	
8.00	Future State zoom session 6.	TBD
8.01	Complete Future State Design - Develop KPIs - Implementation & Control Plan	
9.00	Present Future State Toll Gate Review	8/21/2020 (provisional)
10.00	Prepare Final Project Report	8/25/2020 (provisional)
11.00	Send Final Project Report	8/30/2020 (provisional)

Table 3: Timeline and key tasks for future state design and implementation plan development

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Appendices

Appendix 1: Actual ZBA & OPA Application Turnaround Time

DATA VALIDATION SHEET	# active OPAs in the application system (last 12 months)	% OPAs processed under 120 days	% OPAs processed over 120 days	Average OPA Process Time	Longest OPA process time
Cambridge	5	0.00%	100.00%	363 Days	547 days
Kitchener	9	0.00%	100.00%	496	891
Waterloo	4	0.00%	100.00%	340	420
Wellesley	2	50.00%	50.00%	260+	260+
Woolwich	4	0.00%	100.00%	337	400
Wilmot	0	0.00%	0.00%	0	0
DATA VALIDATION SHEET	# active ZBAs in the application system (last 12 months)	% ZBAs processed under 90 days	% ZBAs processed over 90 days	Average ZBA Process Time	Longest ZBA process time
Cambridge	30	0.00%	100.00%	256 Days	774 Days
Kitchener	7	0.00%	100.00%	307	415
Waterloo	11	0.00%	100.00%	395	742
Wellesley	9	63.00%	37.00%	101	376
Woolwich	18	21.00%	79.00%	220	486
Wilmot	14	64.00%	36.00%	81	219

Waterloo	Region	Type	Start Date	End Date	Total Time	Target Time (Days)	Target Achieved
(deemed of appeal)							
Application Type	Waterloo						
Z-17-09	Waterloo	Z-1	12-Jun-17	24-Jun-19	742	90	no
Z-17-21	Waterloo	Z-1	29-Jan-18	24-Jun-19	511	90	no
Z-18-04	Waterloo	Z-1	26-Mar-18	10-Jun-19	441	90	no
Z-18-05	Waterloo	Z-1	09-Apr-18	28-Oct-19	567	90	no
Z-18-12	Waterloo	Z-1	24-Sep-18	29-Apr-19	217	90	no
Z-18-17 & OPA No.24 & 30T-18401	Waterloo	OPA	14-Jan-19	24-Feb-20	406	120	no
Z-18-18 & OPA No.25	Waterloo	OPA	14-Jan-19	09-Mar-20	420	120	no
Z-18-19	Waterloo	Z-1	14-Jan-19	2020-06-13	516	90	no
Z-19-01	Waterloo	Z-1	25-Mar-19	24-Jun-19	91	90	no
Z-19-02	Waterloo	Z-1	N/A	29-Apr-19	#VALUE!	90	x
Z-19-03 & OPA No. 26	Waterloo	OPA	27-May-19	2020-06-13	383	120	no
Z-19-04	Waterloo	Z-1	10-Jun-19	2020-06-13	369	90	no
Z-19-05	Waterloo	Z-1	N/A	12-Aug-19	#VALUE!	90	?
Z-19-06	Waterloo	Z-1	28-Oct-19	2020-06-13	229	90	no
Z-19-07 & OPA No.28	Waterloo	OPA	13-Jan-20	2020-06-13	152	120	no

ZBA	OPA
742	
511	
441	
567	
217	
	406
	420
516	
91	
365	
	383
369	
300	
229	
	152
395.3	340.3

Average days

Region	Type	Start Date	End Date	Total Time (Current Time elapsed)	Approx BDS	Target Time (Days)	Target Achieved
Kitchener							
Kitchener	OPA	2018-01-04	2020-06-13	891	636.4	120	Still Active
Kitchener	ZBA	2018-05-16	17-Dec	215	153.6	90	no
Kitchener	OPA	2018-06-06	May-19	355	253.6	120	no
Kitchener	OPA	2018-08-08	2019-05-27	292	208.6	120	no
Kitchener	OPA	2018-08-10	2020-06-13	673	480.7	120	Still Active
Kitchener	OPA	2018-08-10	2020-06-13	673	480.7	120	Still Active
Kitchener	ZBA	18-Oct	2019-05-27	221	157.9	90	no
Kitchener	OPA	2018-10-05	2020-06-13	617	440.7	120	Still Active
Kitchener							
Kitchener	OPA	2019-04-16	24-Feb-20	314	224.3	120	no
Kitchener	ZBA	2019-04-25	2020-06-13	415	296.4	90	Still Active
Kitchener	ZBA	2019-05-03	2020-06-13	407	290.7	90	Still Active
Kitchener	OPA	2019-05-28	2020-06-13	382	272.9	120	Still Active
Kitchener	ZBA	2019-05-29	2020-06-13	381	272.1	90	Still Active
Kitchener	ZBA	2019-08-19	2020-06-13	299	213.6	90	Still Active
Kitchener	OPA	2019-09-13	2020-06-13	274	195.7	120	Still Active
Kitchener	ZBA	2019-11-12	2020-06-13	214	152.9	90	Still Active

OPA	ZBA
891	
	215
355	
292	
673	
673	
	221
617	
314	
	415
	407
382	
	381
	299
274	
	214
496.8	307.4

Average application processing days

Cambridge	Start Date	End Date	Outcome	Region	Type	Start Date	End Date	Total Time (Current Time elapsed)	Approx BDS	Target Time (Days)	Target Achieved
	(deemed complete)	(last date of appeal)									
Application Type				Cambridge							
OPA/ZBA	Apr-18	Apr-19		Cambridge	OPA	Apr-18	Apr-19	365	260.7	120	no
OPA/ZBA	Sep-18	Mar-20		Cambridge	OPA	Sep-18	Mar-20	547	390.7	120	no
ZBA	Mar-18	Apr-19		Cambridge	ZBA	Mar-18	Apr-19	396	282.9	90	no
ZBA	Mar-18	Dec-18		Cambridge	ZBA	Mar-18	Dec-18	275	196.4	90	no
ZBA	Mar-18	Dec-18		Cambridge	ZBA	Mar-18	Dec-18	275	196.4	90	no
ZBA (H removal)	Apr-18	Oct-19		Cambridge	ZBA	Apr-18	Oct-19	548	391.4	90	no
ZBA	May-18	?		Cambridge	ZBA	May-18	2020-06-13	774	552.9	90	Still Active
ZBA	Aug-18	Apr-19		Cambridge	ZBA	Aug-18	Apr-19	243	173.6	90	no
ZBA (H removal)	Aug-18	Apr-19		Cambridge	ZBA	Aug-18	Apr-19	243	173.6	90	no
ZBA	Aug-18	Dec-18		Cambridge	ZBA	Aug-18	Dec-18	122	87.1	90	no
ZBA (H removal)	Aug-18	Apr-19		Cambridge	ZBA	Aug-18	Apr-19	243	173.6	90	no
ZBA	Oct-18	Dec-19		Cambridge	ZBA	Oct-18	Dec-19	426	304.3	90	no
ZBA	Oct-18	Apr-19		Cambridge	ZBA	Oct-18	Apr-19	182	130	90	no
ZBA	Nov-18	Ongoing		Cambridge	ZBA	Nov-18	2020-06-13	590	421.4	90	Still Active
ZBA	Nov-18	Sep-19		Cambridge	ZBA	Nov-18	Sep-19	304	217.1	90	no
ZBA (H removal)	?			Cambridge	ZBA						
ZBA	Dec-18	Apr-19		Cambridge	ZBA	Dec-18	Apr-19	121	86.4	90	no
ZBA (H removal)	?	Feb-19		Cambridge	ZBA						
ZBA	Aug-19	Ongoing		Cambridge	ZBA	Aug-19	2020-06-13	317	226.4	90	Still Active
ZBA	May-19	Sep-19		Cambridge	ZBA	May-19	Sep-19	123	87.9	90	no
ZBA	Jul-19	Dec-19		Cambridge	ZBA	Jul-19	Dec-19	153	109.3	90	no
ZBA	Aug-19	Ongoing		Cambridge	ZBA	Aug-19	2020-06-13	317	226.4	90	Still Active
OPA/ZBA	?	Ongoing		Cambridge	OPA						
ZBA	Sep-19	Ongoing		Cambridge	ZBA	Sep-19	2020-06-13	286	204.3	90	Still Active
ZBA	Dec-19	Ongoing		Cambridge	ZBA	Dec-19	2020-06-13	195	139.3	90	Still Active
ZBA	Dec-19	Ongoing		Cambridge	ZBA	Dec-19	2020-06-13	195	139.3	90	Still Active
ZBA	Dec-19	Ongoing		Cambridge	ZBA	Dec-19	2020-06-13	195	139.3	90	Still Active
ZBA	Dec-19	Ongoing		Cambridge	ZBA	Dec-19	2020-06-13	195	139.3	90	Still Active
ZBA	Dec-19	Ongoing		Cambridge	ZBA	Dec-19	2020-06-13	195	139.3	90	Still Active
ZBA	Jan-20	Ongoing		Cambridge	ZBA	Jan-20	2020-06-13	164	117.1	90	Still Active
ZBA	Jan-20	Ongoing		Cambridge	ZBA	Jan-20	2020-06-13	164	117.1	90	Still Active
ZBA (Holding Removal)	Feb-20	Ongoing		Cambridge	ZBA	Feb-20	2020-06-13	133	95	90	Still Active
ZBA	Apr-20	Ongoing		Cambridge	ZBA	Apr-20	2020-06-13	73	52.1	90	Still Active
ZBA	May-20	Ongoing		Cambridge	ZBA	May-20	2020-06-13	43	30.7	90	Still Active
ZBA (H removal)	Feb-20	Ongoing		Cambridge	ZBA	Feb-20	2020-06-13	133	95	90	Still Active
ZBA	Apr-20	Ongoing		Cambridge	ZBA	Apr-20	2020-06-13	73	52.1	90	Still Active
ZBA	May-20	Ongoing		Cambridge	ZBA	May-20	2020-06-13	43	30.7	90	Still Active
Temp Use by-law	May-20			Cambridge	Tem	May-20					
OPA/ZBA	Jul-19	Ongoing		Cambridge	OPA	Jul-19	2020-06-13	348	248.6	120	Still Active
OPA/ZBA	Dec-19	Ongoing		Cambridge	OPA	Dec-19	2020-06-13	195	139.3	120	Still Active
OPA/ZBA	Withdrawn			Cambridge	OPA	Withdrawn					
OPA/ZBA	May-20	Ongoing		Cambridge	OPA	May-20	2020-06-13	43	30.7	120	Still Active

OPA	ZBA
365	
547	
	396
	275
	275
	548
	774
	243
	243
	122
	243
	426
	182
	590
	304
	121
	317
	123
	153
	317
	286
	195
	195
	195
	195
	195
	164
	133
	73
	43
	133
	73
348	
195	
363.8	248.3

Average application processing days

Wilmot	Region	Type	Start Date	End Date	Total Time (Current Time elapsed)	Target Time (Days)	Target Achieved
Application Type	Wilmot						
ZBA-01-19	Wilmot	ZBA	20-Dec-18	11-Feb-19	53	90	Yes
ZBA-02-19	Wilmot	ZBA	24-Dec-19	2020-06-13	172	90	Still Active
ZBA-03-19	Wilmot	ZBA	24-Dec-19	2020-06-13	172	90	Still Active
ZBA-04-19	Wilmot	ZBA	11-Feb-19	04-Mar-19	21	90	Yes
ZBA-05-19	Wilmot	ZBA	15-Feb-19	18-Mar-19	31	90	Yes
ZBA-06-19	Wilmot	ZBA	28-Mar-19	29-Apr-19	32	90	Yes
ZBA-07-19	Wilmot	ZBA	09-Apr-19	27-May-19	48	90	Yes
ZBA-08-19	Wilmot	ZBA	07-May-19	26-Aug-19	111	90	no
ZBA-09-19	Wilmot	ZBA	11-Jun-19	15-Jul-19	34	90	Yes
ZBA-10-19	Wilmot	ZBA	20-Aug-19	23-Sep-19	34	90	Yes
ZBA-11-19	Wilmot	ZBA	07-Nov-19	2020-06-13	219	90	Still Active
ZBA-01-20	Wilmot	ZBA	11-Dec-19	10-Feb-20	61	90	Yes
ZBA-02-20	Wilmot	ZBA	20-Feb-20	2020-06-13	114	90	Still Active
ZBA-03-20	Wilmot	ZBA	29-Apr-20	2020-06-13	45	90	Still Active
					81.9		

Average application processing days

Wellesley	Region	Type	Start Date	End Date	Total Time (Current Time elapsed)	Target Time (Days)	Target Achieved
Application Type	Wellesley						
OPA 1-19/ZBA 07-19	Wellesley	OPA	27-Sep-19	2020-06-13	260	120	no
OPA 2-19/ZBA 09-19	Wellesley	OPA	TBC	07-Jan-19	TBC	120	
ZBA 01-19	Wellesley	ZBA	28-Jan-19	05-Mar-19	36	90	Yes
ZBA 02-19	Wellesley	ZBA	06-Feb-19	09-Jul-19	153	90	no
ZBA 03-19	Wellesley	ZBA	18-Mar-19	30-Apr-19	43	90	Yes
ZBA 04-19	Wellesley	ZBA	23-Apr-19	28-May-19	35	90	Yes
ZBA 05-19	Wellesley	ZBA	28-May-19	25-Jun-19	28	90	Yes
ZBA 06-19	Wellesley	ZBA	03-Jun-19	2020-06-13	376	90	Still Active
ZBA 08-19	Wellesley	ZBA	02-Oct-19	05-Nov-19	34	90	Yes
ZBA 01-20	Wellesley	ZBA	26-Feb-20	2020-06-13	108	90	Still Active
ZBA 02-20	Wellesley	ZBA	05-Mar-20	2020-06-13	100	90	Still Active

ZBA

36
153
43
35
28
376
34
108
100
101.4

Average application processing days

Woolwich Development Applications Received January 2019 to May 2020						
	Type	Start Date	End Date	Total Time (Current Time elapsed)	Target Time (Days)	Target Achieved
Woolwich						
Application Type						
OPA 1/2019 (44 & 46 Church)	OPA	2019-05-10	2020-06-13	400	120	Still Active
OPA 2/2019 (Stockyards)	OPA	2019-05-30	2020-06-13	380	120	Still Active
OPA 3/2019 (Capital Paving)	OPA	2019-06-20	2020-06-13	359	120	Still Active
OPA 4/2019 (Township - Ag Review)	OPA	2019-11-14	2020-06-13	212	120	Still Active
OPA 1/2020 (Breslau Properties)	OPA					
ZBL 1/2019 (Lewis Weber)	ZBA	2019-04-08	2019-07-23	106	90	no
ZBL 2/2019 (Nancy Gingrich)	ZBA	2019-04-08	2019-09-09	154	90	no
ZBL 3/2019 (Jesse Gingrich)	ZBA	2019-04-08	2019-08-09	123	90	no
ZBL 4/2019 (18 Ernst St)	ZBA	2019-04-08	2020-02-24	322	90	no
ZBL 5/2019 (44 & 46 Church)	ZBA	2019-05-10	2020-06-13	400	90	Still Active
ZBL 6/2019 (Willard Martin)	ZBA	2019-04-23	2019-07-23	91	90	no
ZBL 7/2019 (Stockyards)	ZBA	2019-05-30	2020-06-13	380	90	Still Active
ZBL 8/2019 (Alberto Alves)	ZBA	2019-05-22	2019-10-07	138	90	no
ZBL 9/2019 (Capital Paving)	ZBA	2019-06-20	2020-06-13	359	90	Still Active
ZBL 10/2019 (Zinger estate)	ZBA	2019-07-19	2020-02-24	220	90	no
ZBL 11/2019 (Joel Martin)	ZBA	2019-09-03	2019-11-25	83	90	Yes
ZBL 12/2019 (Breadner Trailer)	ZBA	2019-09-30	2020-06-11	255	90	no
ZBL 13/2019 (Anchor Property)	ZBA	2019-10-08	2020-06-11	247	90	no
ZBL 14/2019 (Township - Ag Review)	ZBA	2019-11-14	2020-11-10	362	90	no
ZBL 1/2020 (Robert Shuh)	ZBA	2020-01-03	2020-03-30	87	90	Yes
ZBL 2/2020 (Harvey Sauder)	ZBA	2020-01-03	2020-03-30	87	90	Yes
ZBL 3/2020 (Breslau Properties)	ZBA				90	
ZBL 4/2020 (Gordon Martin)	ZBA	2020-01-20	2020-03-30	70	90	Yes
ZBL 5/2020 (Township General Amendment)	ZBA	2019-02-13	2020-06-13	486	90	Still Active

OPA

400
380
359
212
337.8

ZBA

106
154
123
322
400
91
380
138
359
220
83
255
247
362
87
87
70
486
220.6

Average application processing days

Official Plan and Zoning Bylaw Amendments Application Process: Lean Consultant Support

Appendix 2: Current State Process Maps

Region of Waterloo – By-Law / Zoning Application

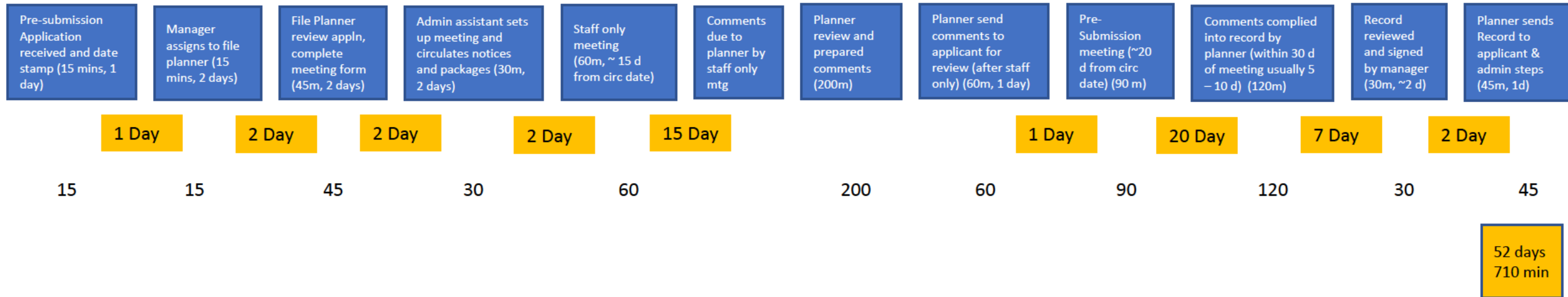
Kitchener

Region of Waterloo – By-Law / Zoning Application

Kitchener

Pre-submission process
(days noted are business days)

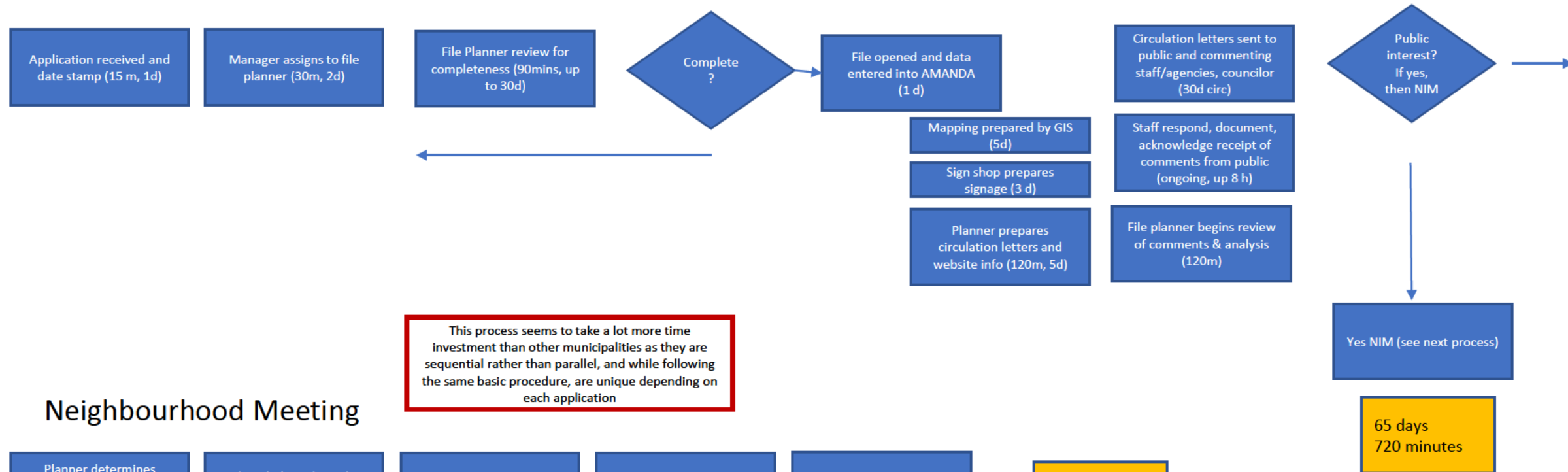
Length of time between circ and staff
only meeting



Region of Waterloo – By-Law / Zoning Application

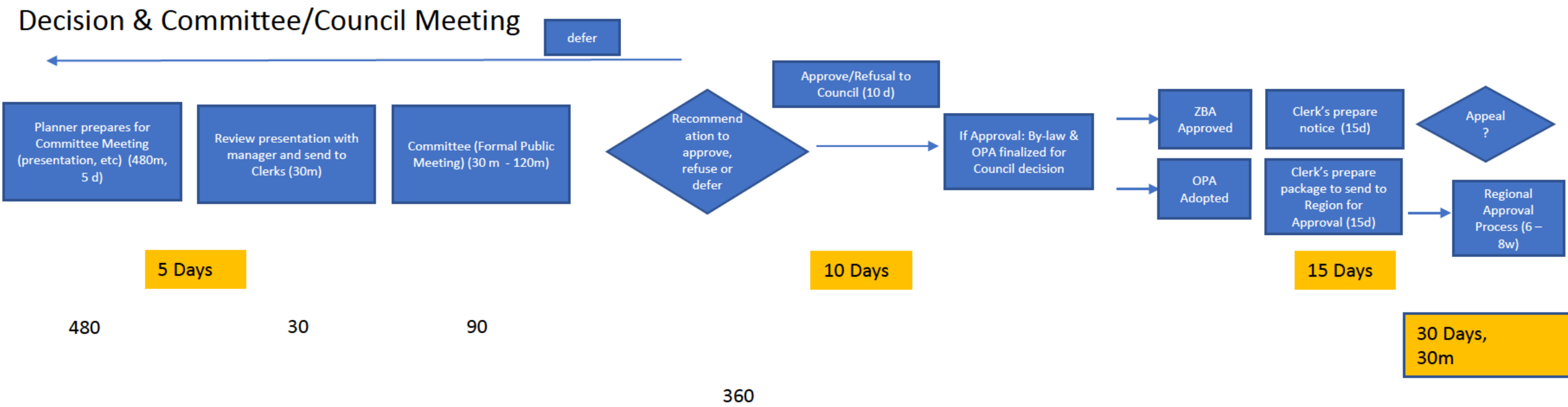
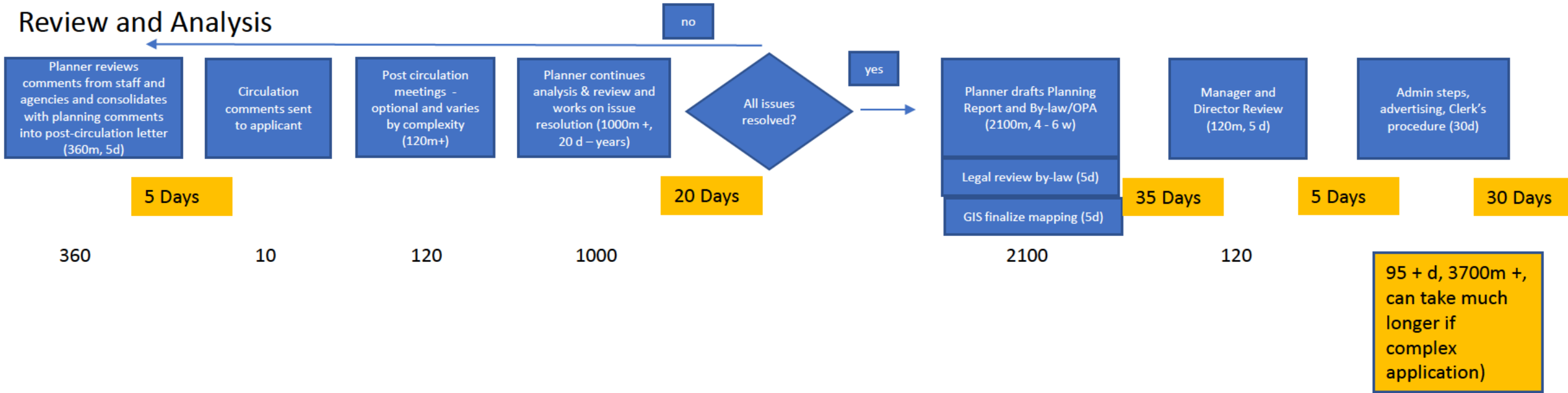
Kitchener

ZBA/OPA Application process



Neighbourhood Meeting





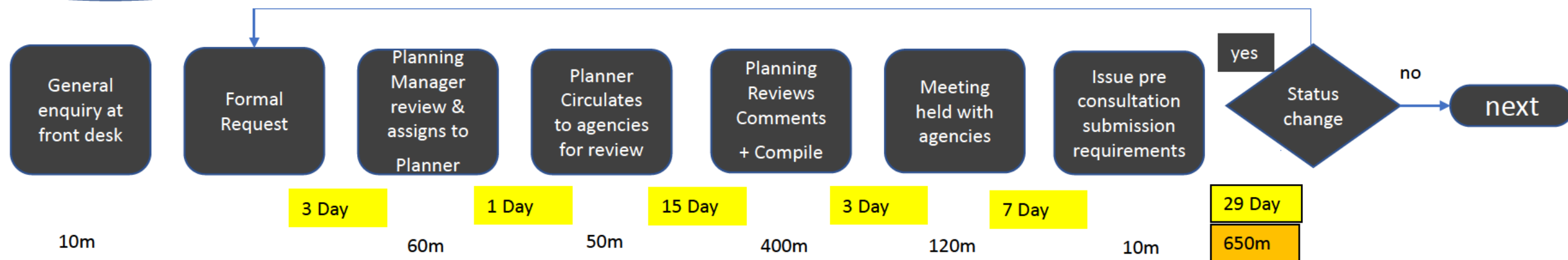
Region of Waterloo – By-Law / Zoning Application

City of Waterloo

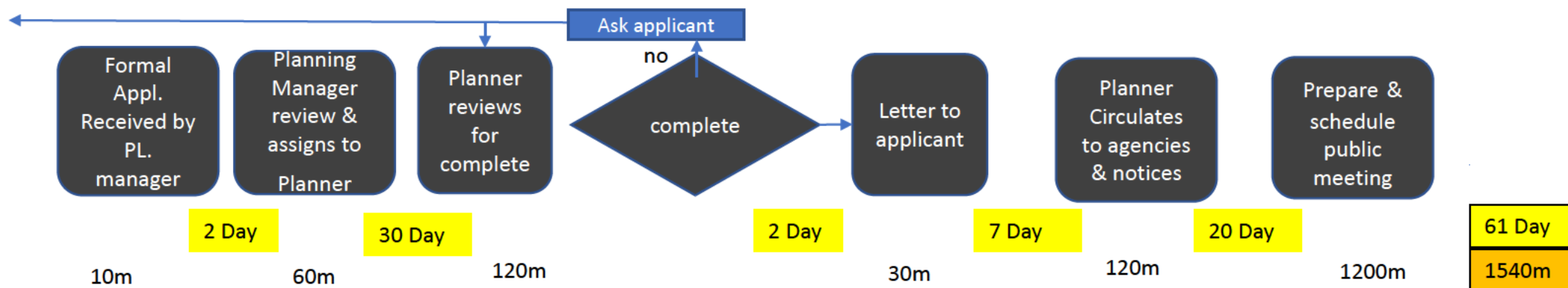
PRE_SUBMISSION

Region of Waterloo – By-Law / Zoning Application

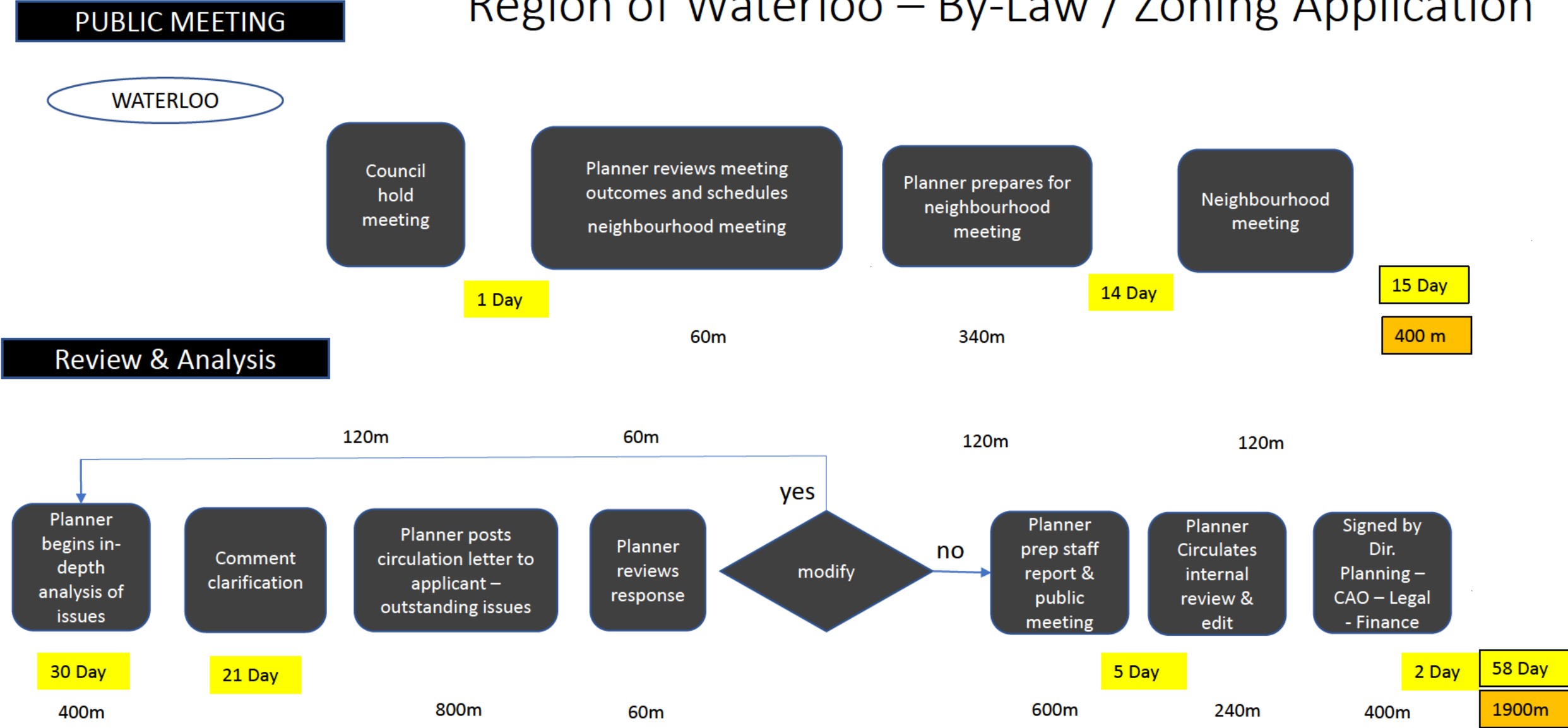
WATERLOO



OFFICIAL APPLICATION



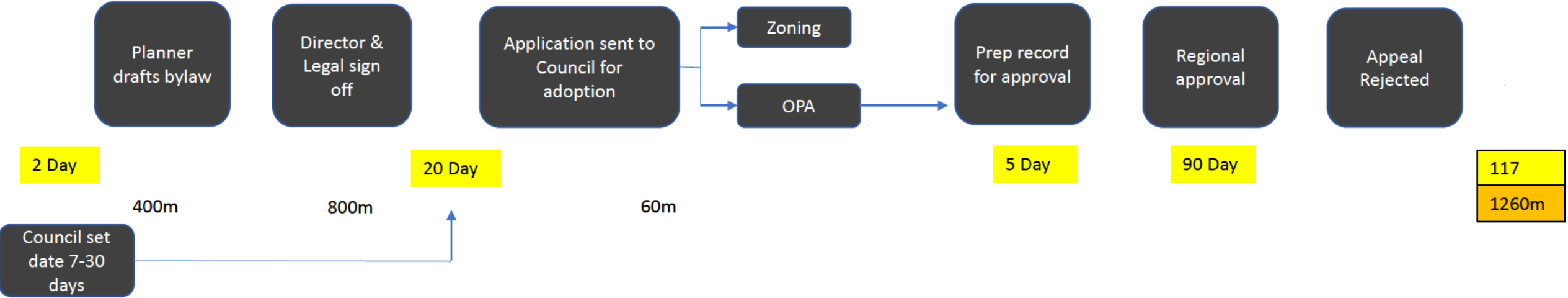
Region of Waterloo – By-Law / Zoning Application



Region of Waterloo – By-Law / Zoning Application

APPLICATION DECISION

WATERLOO



Region of Waterloo – By-Law / Zoning Application

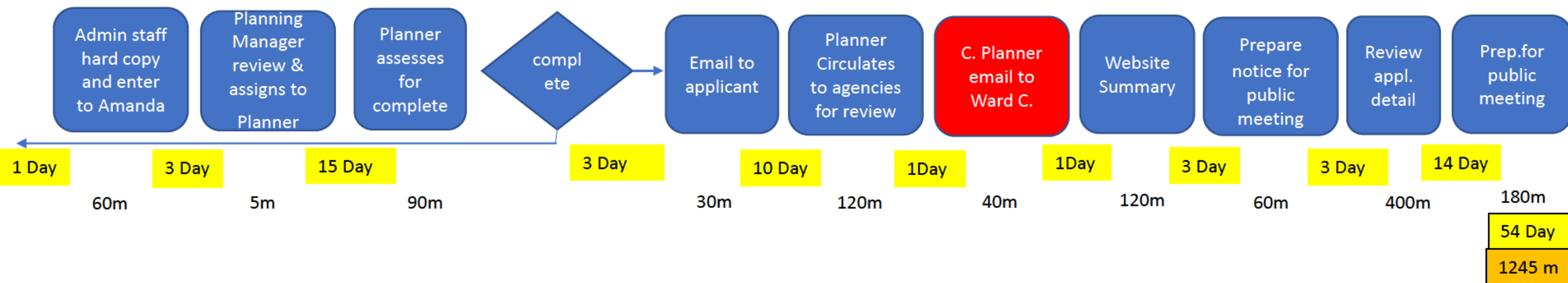
City of Cambridge

PRE_SUBMISSION

CAMBRIDGE



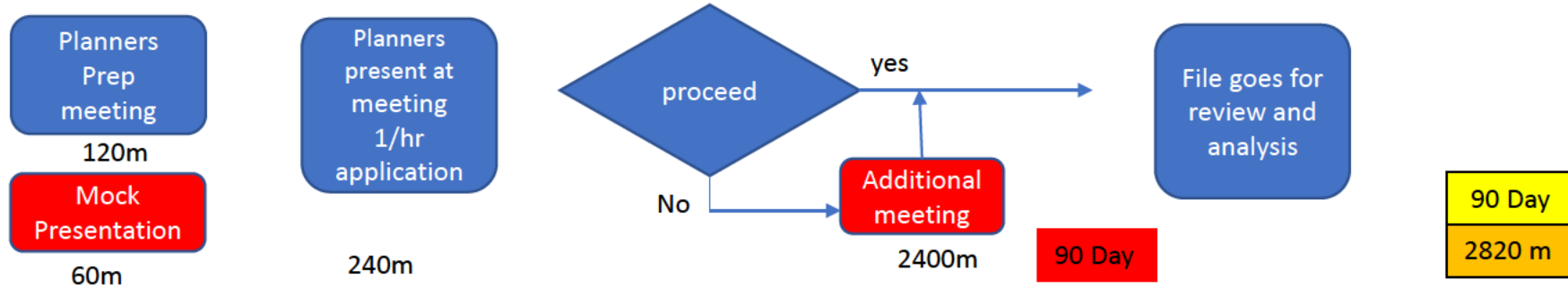
OFFICIAL APPLICATION



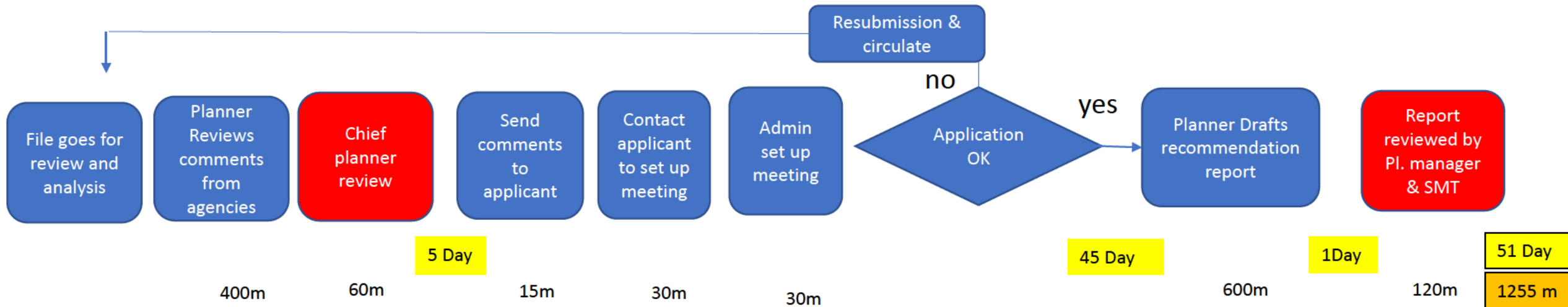
Region of Waterloo – By-Law / Zoning Application

PUBLIC MEETING

CAMBRIDGE

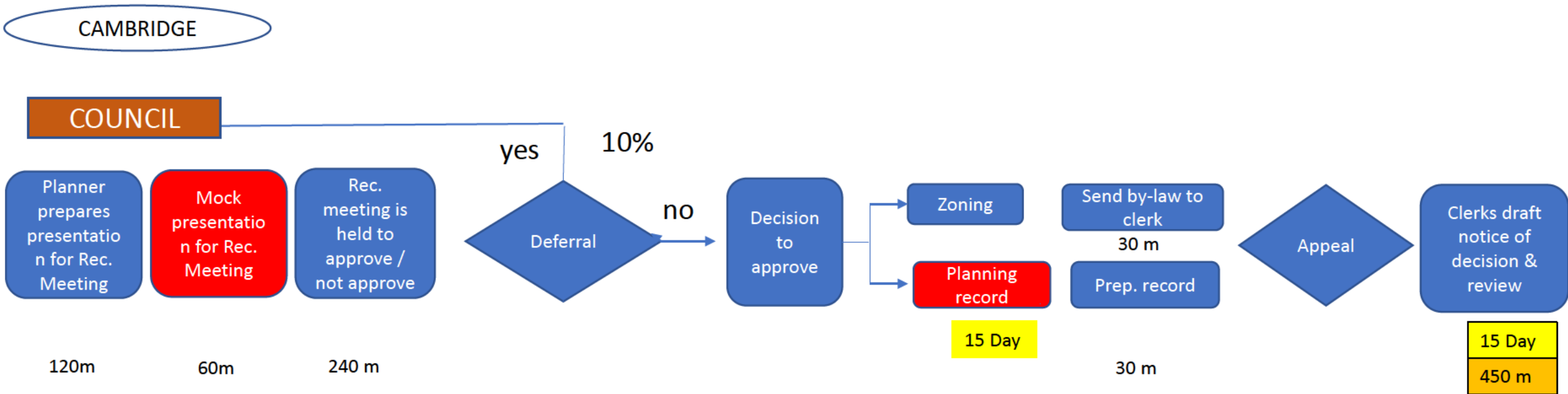


Review & Analysis



Region of Waterloo – By-Law / Zoning Application

APPLICATION DECISION



Region of Waterloo – By-Law / Zoning Application

Township of Wellesley

PRE_SUBMISSION

Region of Waterloo – By-Law / Zoning Application

WELLESLEY

Application
taken at
reception

1.5 Day

Planner creates
folder and scans
receipt to front
desk

30m

Planner Circulates
to agencies &
internal for review

5 Day

60m

Planning Reviews
Comments +
Compile response
letter

20 Day

200m

Complex
Appl.

26.5 Day

290m

yes

Meet with
applicant

120m

end

OFFICIAL APPLICATION

Applicant
submits
formal
application

30m

Planner
reviews for
completeness

4 Day

240m

Complex
Appl.

yes

Request Info

1 Day

60m

Planning
sends out
notice of
complete
application

4 Day

400m

Planner
Circulates to
agencies &
internal for
comment

Planner
reviews reply
from
agencies

30 Day

120m

Planner
preps report
for public
meeting

5 Day

800m

Planner
reviews with
SMT

3 Day

30m

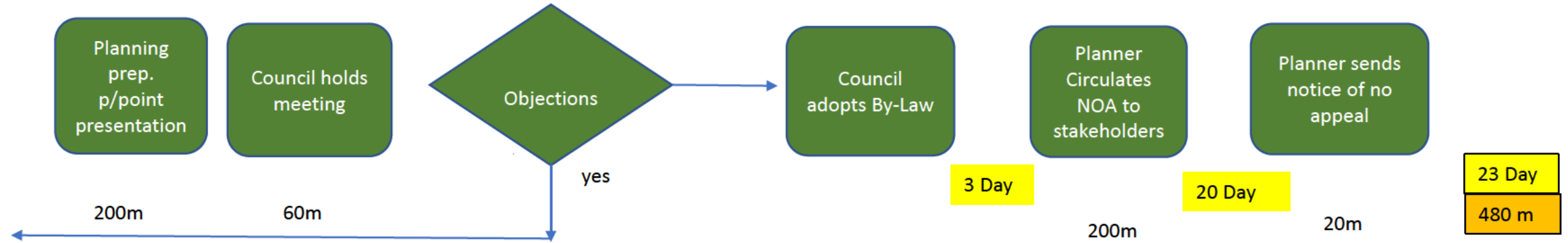
47 Day

1680 m

Region of Waterloo – By-Law / Zoning Application

PUBLIC MEETING

WELLESLEY



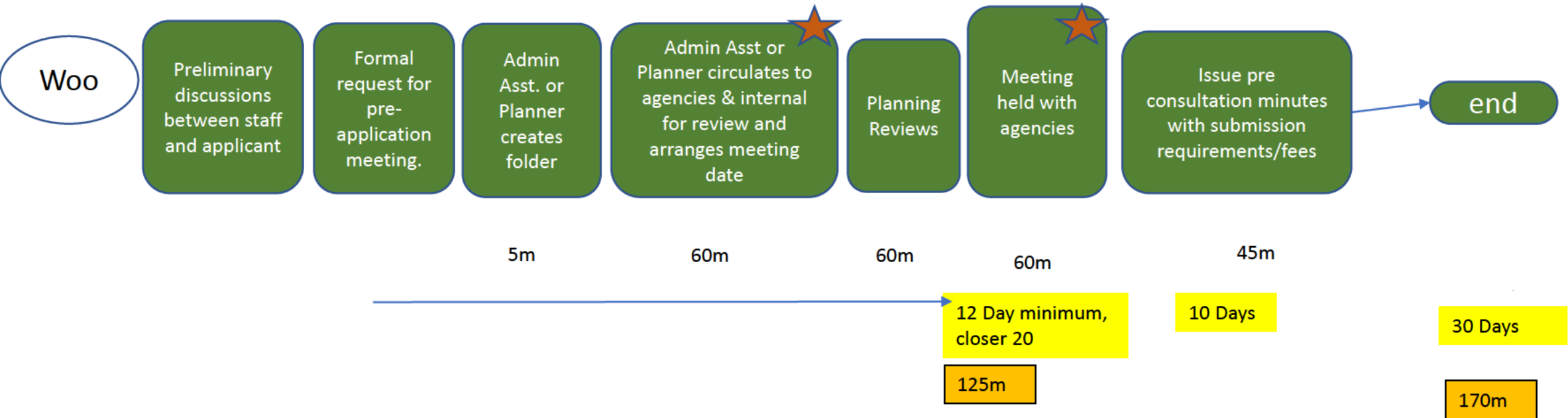
Region of Waterloo – By-Law / Zoning Application

Township of Woolwich

Region of Waterloo – By-Law / Zoning Application

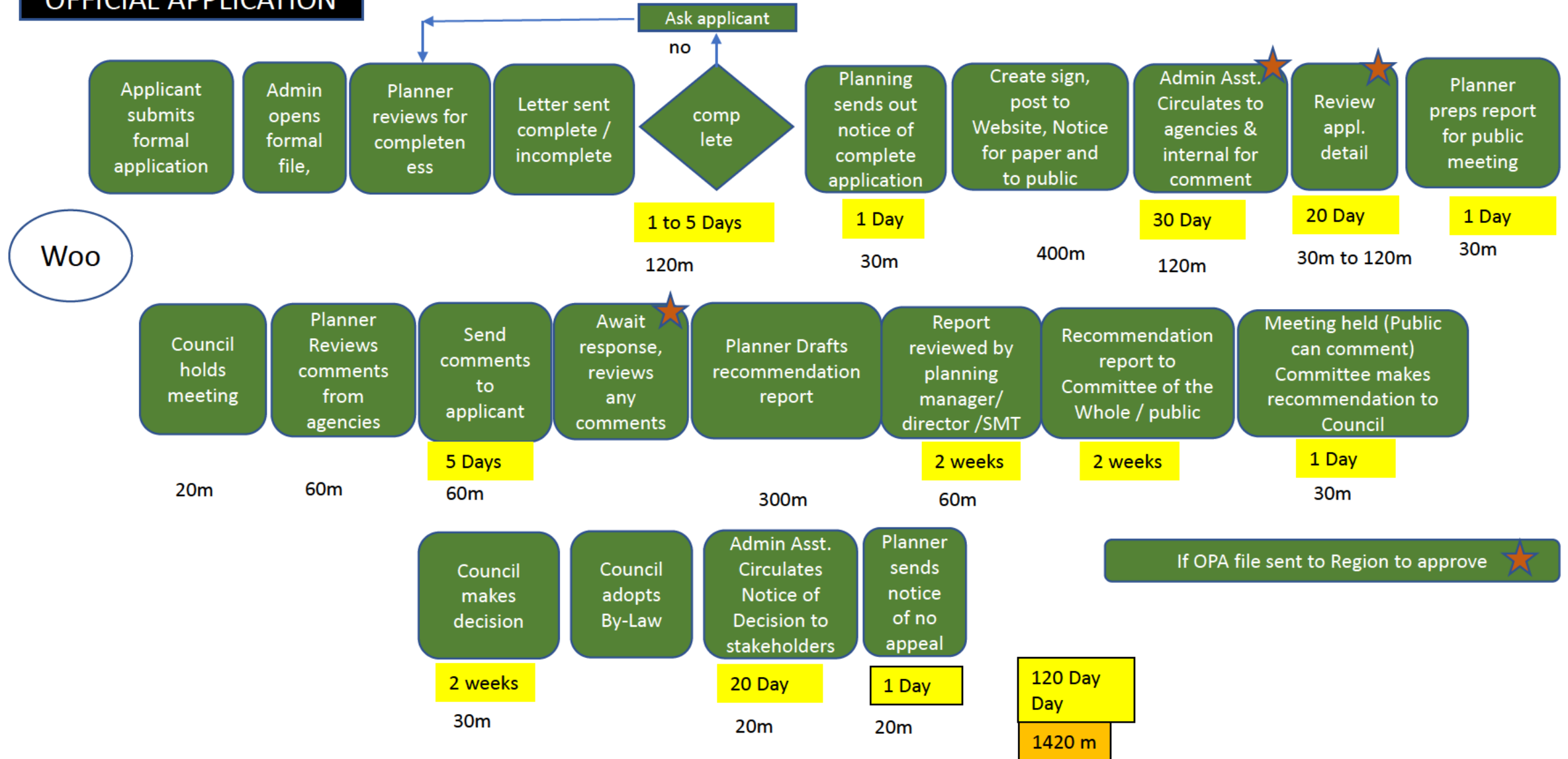
Woolwich

PRE_SUBMISSION



Indicates Regional staff involvement

OFFICIAL APPLICATION



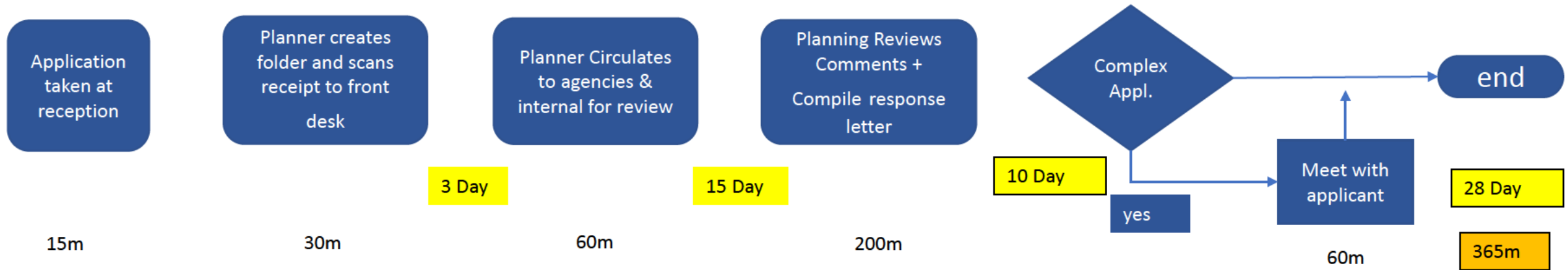
Region of Waterloo – By-Law / Zoning Application

Township of Wilmot

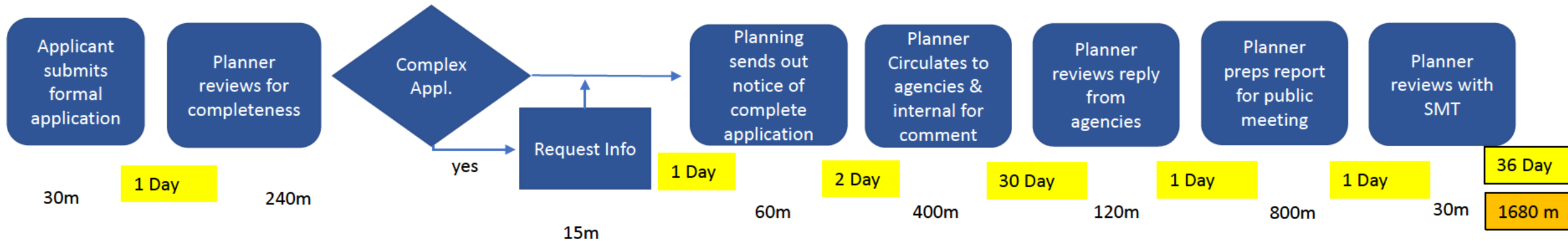
Region of Waterloo – By-Law / Zoning Application

PRE_SUBMISSION

WILMOT



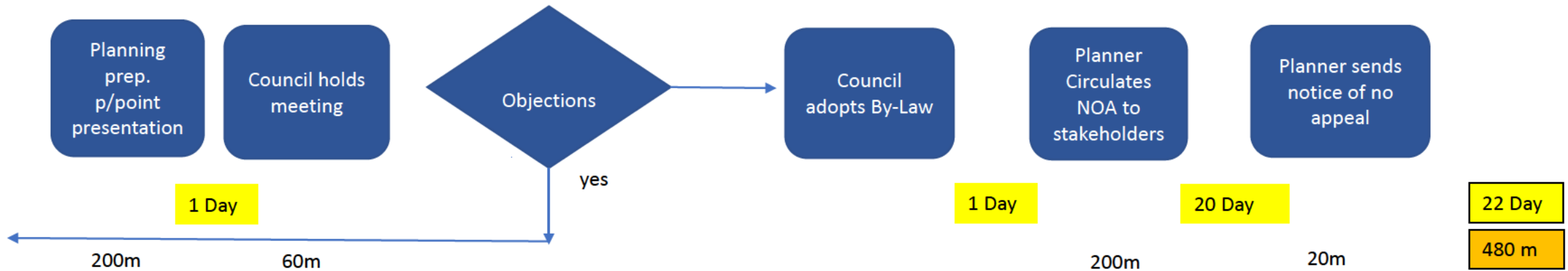
OFFICIAL APPLICATION



Region of Waterloo – By-Law / Zoning Application

PUBLIC MEETING

WILMOT

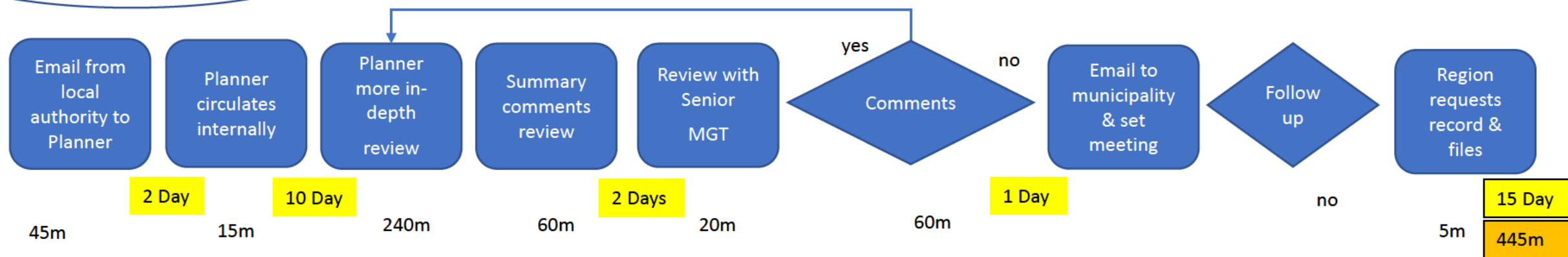


Region of Waterloo – By-Law / Zoning Application

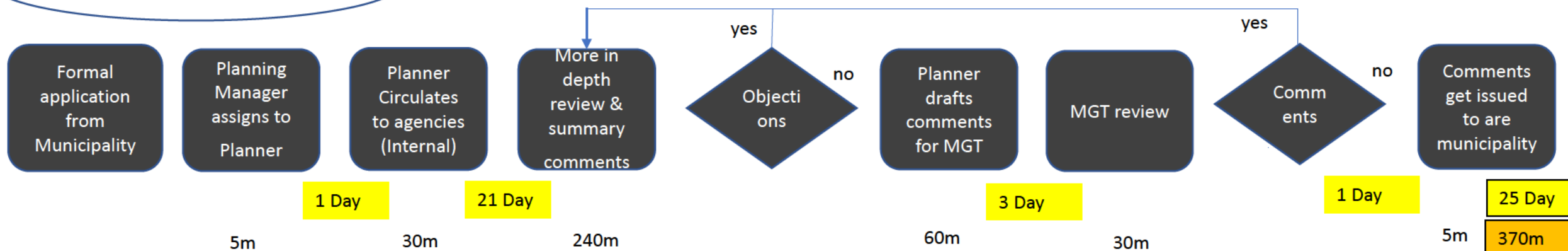
Regional Office

Region of Waterloo – By-Law / Zoning Application

Pre-submission

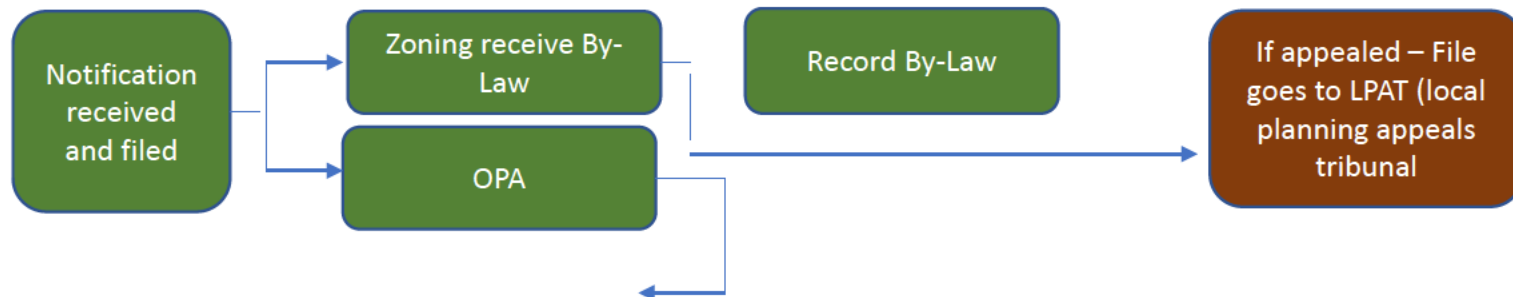


Official Application

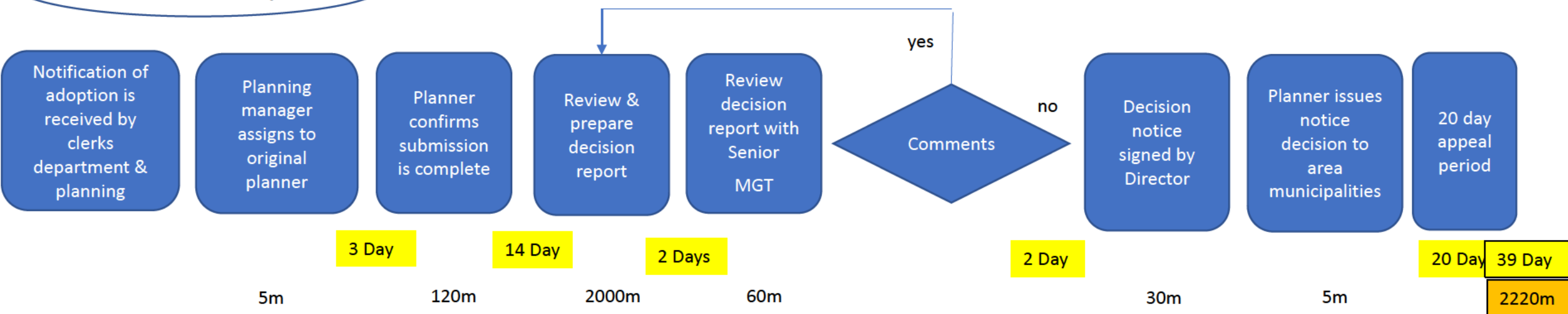


Region of Waterloo – By-Law / Zoning Application

Recommendation Meeting



Review & Analyse



Approve

Official Plan and Zoning Bylaw Amendments Application Process: Lean Consultant Support

Appendix 3: Current State Process Flow Data

Munip.	Process Stage	DEF.	Step No:	Category	Description of the City of CAMBRIDGE process steps	Work Type	Minutes	Days	Time Validated	Team Member
CAM	Stage 1	PS	1.01	Task	Pre-submission received by receptionist	VA	45		DF	Admin
CAM	Stage 1	PS	1.02	Wait	Waiting in queue for application hard file creation and enter into "Amanda" (data base system)	NVA		3	DF	
CAM	Stage 1	PS	1.03	Task	Admin create hard file and enter into "Amanda" (data base system)	VA	30		DF	Admin
CAM	Stage 1	PS	1.04	Task	Planning Manager reviews & assigns to appropriate planner	VA	15		DF	Planning Manager
CAM	Stage 1	PS	1.05	Wait	Waiting in Queue for Planner to review & circulate	NVA		1	DF	
CAM	Stage 1	PS	1.06	Task	Planner circulates file to agencies for comments	VA	45		DF	Planner
CAM	Stage 1	PS	1.07	Wait	Municipality allows time for agency response	NNVA		21	DF	
CAM	Stage 1	PS	1.08	Task	Planner reviews Agency comments and compiles information in file and sends to Planning Manager	VA	120		DF	Planner
CAM	Stage 1	PS	1.09	Wait	File waits in queue to be reviewed by Planning Manager	NVA		1	DF	
CAM	Stage 1	PS	1.10	Task	Planning Manager reviews and returns to Planner with requirements	NVA	60		DF	Planning Manager
CAM	Stage 1	PS	1.11	Wait	File waits in queue to be reviewed by Planner	NVA		1	DF	
CAM	Stage 1	PS	1.12	Task	Planner completes any amendments and e-mails requirements to applicant	VA	30		DF	Planner
CAM	Stage 1	PS	1.13	Task	Applicant complies ///Planner & Applicant meeting	VA	30		DF	Planner
CAM	Stage 2	OA	2.01	Task	Application handed in at reception	VA	15		DF	Admin
CAM	Stage 2	OA	2.02	Wait	Waits in queue until admin create file	NVA		1	DF	
CAM	Stage 2	OA	2.03	Task	Admin staff create hard copy file and enter into "Amanda"	VA	60		DF	Admin
CAM	Stage 2	OA	2.04	Wait	Waits in queue until Planning Manager assigns	NVA		3	DF	
CAM	Stage 2	OA	2.05	Task	Planning Manager reviews and assigns to appropriate Planner	VA	5		DF	Planning Manager
CAM	Stage 2	OA	2.06	Wait	Waits in queue until planner opens file	NVA		15	DF	
CAM	Stage 2	OA	2.07	Task	Planner checks for completeness of application	VA	90		DF	Planner
CAM	Stage 2	OA	2.08	Task	Planner checks with applicant if extra info required	VA			DF	Planner
CAM	Stage 2	OA	2.09	Wait	Application Waits in queue for 3 days after its deemed complete	NVA		3	DF	
CAM	Stage 2	OA	2.10	Task	Planner e-mails applicant to confirm application progress	VA	30		DF	Planner
CAM	Stage 2	OA	2.11	Wait	File waits for planner to circulate to agencies	NNVA		10	DF	
CAM	Stage 2	OA	2.12	Task	Planner circulates application to agencies for comment	VA	120		DF	Planner
CAM	Stage 2	OA	2.13	Wait	File waiting for Chief Planner to email	NVA		1	DF	
CAM	Stage 2	OA	2.14	Task	Chief Planner compose and send email to Ward Councillor	NVA	40		DF	Chief Planner
CAM	Stage 2	OA	2.15	Wait	File in queue for website inclusion	NVA		1	DF	
CAM	Stage 2	OA	2.16	Task	Planner prepares website summary	VA	120		DF	Planner
CAM	Stage 2	OA	2.17	Wait	File waits for planner to prepare public notice	NVA		3	DF	
CAM	Stage 2	OA	2.18	Task	Planner prepares notice for Public meeting	VA	60		DF	Planner
CAM	Stage 2	OA	2.19	Wait	File waits for Planner to do detailed review	NVA		3	DF	
CAM	Stage 2	OA	2.20	Task	Planner reviews the application detail	VA	400		DF	Planner
CAM	Stage 2	OA	2.21	Wait	14 day notice required for Public Notice	NNVA		14	DF	
CAM	Stage 2	OA	2.22	Task	Planner prepares file for Public meeting.	VA	180		DF	Planner
CAM	Stage 3	PM	3.01	Task	Planner prepares presentation for Public meeting	VA	120		DF	Planner
CAM	Stage 3	PM	3.02	Task	Planner performs mock presentation	NVA	60		DF	Planner
CAM	Stage 3	PM	3.03	Task	Planner presents at Public meeting	VA	240		DF	Planner
CAM	Stage 3	PM	3.04	Wait	Waiting on decision to proceed	NNVA		1	DF	
CAM	Stage 3	PM	3.05	Task	Decision to proceed / not proceed	VA			DF	Council
CAM	Stage 3	PM	3.06	Task	Planner reviews meeting outcomes and schedules extra neighbourhood meeting	VA	2400		DF	Planner
CAM	Stage 3	PM	3.07	Wait	Special protocol for additional meeting (approx.25% of applications)	NNVA		90	DF	
CAM	Stage 3	PM	3.08	Task	File goes for review and analysis	VA			DF	Planner
CAM	Stage 4	R&A	4.01	Task	Planner reviews comments from agencies	VA	400		DF	Planner
CAM	Stage 4	R&A	4.02	Task	Chief planner reviews file	NVA	60		DF	Chief Planner
CAM	Stage 4	R&A	4.03	Wait	File waits for planner to send comments to applicant	NVA		5	DF	
CAM	Stage 4	R&A	4.04	Task	Planner sends comments to applicant	VA	15		DF	Planner
CAM	Stage 4	R&A	4.05	Task	Planner contacts applicant to set up meeting	VA	30		DF	Planner
CAM	Stage 4	R&A	4.06	Task	Admin schedule meeting	VA	30		DF	Admin
CAM	Stage 4	R&A	4.07	Task	Application OK	VA			DF	Planner
CAM	Stage 4	R&A	4.08	Wait	File waits for Planner to draft recommendation	NVA		45	DF	
CAM	Stage 4	R&A	4.09	Task	Planner drafts recommendation report	VA	600		DF	Planner
CAM	Stage 4	R&A	4.10	Wait	File waits to be reviewed by Planning Manager and SMT	NVA		1	DF	
CAM	Stage 4	R&A	4.11	Task	Report reviewed by planning manager and SMT	NVA	120		DF	Planning Manager
CAM	Stage 5	AD	5.01	Task	Planner prepares presentation for recommendation meeting	VA	120		DF	Planner
CAM	Stage 5	AD	5.02	Task	Mock presentation for recommendation meeting	NVA	60		DF	Planner
CAM	Stage 6	AD	5.03	Wait	Council set date (Monthly)	NNVA		20	DF	
CAM	Stage 5	AD	5.04	Task	Recommendation meeting is held to approve/not approve	VA	240		DF	Planner
CAM	Stage 5	AD	5.06	Task	Decision made to approve application	VA	60		DF	Council
CAM	Stage 5	AD	5.07	Task	Prepare record for approval	VA	800	13	DF	Admin
CAM	Stage 5	AD	5.08a	Task	Regional approval process	TBD	TBC		DF	Regional Planner
CAM	Stage 5	AD	5.08b	Wait	Regional approval process	TBD	TBC			Regional Planner

Munip.	Process Stage	DEF.	Step No:	Category	Description of the City of WATERLOO process steps	Work Type	Minutes	Days	Time Validated	Team Member
WAT	Stage 1	PS	1 01	Task	Pre-submission received by receptionist	VA	10		NH	Admin
WAT	Stage 1	PS	1 02	Wait	Waiting in queue for application hard file creation and enter into "Amanda" (data base system)	NVA		3	NH	
WAT	Stage 1	PS	1 03	Task	application hard file creation and enter into "Amanda" (data base system)	VA	30		NH	Admin
WAT	Stage 1	PS	1 04	Task	Planning Manager review & assigns to appropriate planner	VA	60		NH	Planning Manager
WAT	Stage 1	PS	1 05	Wait	Waiting in Queue for Planner to review	NVA		1	NH	
WAT	Stage 1	PS	1 06	Task	Planner circulates file to agencies for comments	VA	45		NH	Planner
WAT	Stage 1	PS	1 07	Wait	Municipality allows waiting time for agency response	NNVA		15	NH	
WAT	Stage 1	PS	1 08	Task	Planner reviews comments and compiles information in file	VA	120		NH	Planner
WAT	Stage 1	PS	1 09	Wait	Waiting 3 days notice to meet with agencies	NNVA		3		
WAT	Stage 1	PS	1.10	Task	Meeting held with agencies	VA	120			Planner
WAT	Stage 1	PS	1.11	Wait	File waits for 7 days	NVA		7		
WAT	Stage 1	PS	1.12	Task	Issue pre-consultation submission requirements	VA	10			Planner
WAT	Stage 1	PS	1.13	Task	Application OK	VA				Council
WAT	Stage 2	OA	2 01	Task	Application handed in at reception	VA	15		NH	Admin
WAT	Stage 2	OA	2 02	Wait	Waits in queue until admin create file	NVA		1	NH	
WAT	Stage 2	OA	2 03	Task	Admin staff create hard copy file and enter into "Amanda"	VA	10		NH	Admin
WAT	Stage 2	OA	2 04	Wait	Waits in queue until Planning Manager assigns	NVA		2	NH	
WAT	Stage 2	OA	2 05	Task	Planning Manager reviews and assigns to appropriate Planner	VA	60		NH	Planning Manager
WAT	Stage 2	OA	2 06	Wait	Waits in queue until planner opens file	NVA		30	NH	
WAT	Stage 2	OA	2 07	Task	Planner checks for completeness of application	VA	120		NH	Planner
WAT	Stage 2	OA	2 08	Task	Planner checks with applicant if extra info required	VA	30		NH	Planner
WAT	Stage 2	OA	2 09	Wait	Application Waits in queue for 2 days after its deemed complete	NVA		2	NH	
WAT	Stage 2	OA	2.10	Task	Planner sends letter applicant to confirm application progress	VA	30		NH	Planner
WAT	Stage 2	OA	2.11	Wait	File waits for planner to circulate to agencies	NVA		7	NH	
WAT	Stage 2	OA	2.12	Task	Planner circulates application to agencies for comment	VA	120		NH	Planner
WAT	Stage 2	OA	2.13	Wait	Municipality allows 20 days for agency comment	NNVA		20	NH	
WAT	Stage 2	OA	2.14	Task	Planner prepares and schedules Public meeting	VA	1200		NH	Planner
WAT	Stage 3	PM	3 01	Task	Planner presents at Public meeting	VA	120		NH	Planner
WAT	Stage 3	PM	3 02	Wait	Waiting on decision to proceed	NVA		1	NH	
WAT	Stage 3	PM	3 03	Task	Decision to proceed / not proceed	VA			NH	Council
WAT	Stage 3	PM	3 04	Task	Planner reviews meeting outcomes and schedules extra neighbourhood meeting	NVA	180		NH	Planner
WAT	Stage 3	PM	3 05	Wait	Municipality allows 14 days for meeting notice	NNVA		14	NH	
WAT	Stage 3	PM	3 06	Task	Neighbourhood Meeting held	VA	120			Planner
WAT	Stage 3	PM	3 07	Task	File goes for review and analysis	VA				Planner
WAT	Stage 4	R&A	4 01	Task	Planner begins indept analysis of application file	VA	400		NH	Planner
WAT	Stage 4	R&A	4 02	Wait	Municipality allows 30 days for agency comment	NNVA		30	NH	
WAT	Stage 4	R&A	4 03	Task	Comment clarification with agencies	VA	30		NH	Planner
WAT	Stage 4	R&A	4 04	Task	Planner sends comments to applicant	VA	800		NH	Planner
WAT	Stage 4	R&A	4 05	Wait	Municipality allows 21 days for response	NNVA		21		
WAT	Stage 4	R&A	4 06	Task	Planner reviews applicant response	VA	60		NH	Planner
WAT	Stage 4	R&A	4 07	Task	Application OK	VA			NH	Planner
WAT	Stage 4	R&A	4 08	Task	Planner prepares staff report and arranges public meeting	VA	600		NH	Planner
WAT	Stage 4	R&A	4 09	Wait	File waits to be circulated for internal review	NVA		5	NH	
WAT	Stage 4	R&A	4.10	Task	Planner circulates internal review and edit	VA	240		NH	Planner
WAT	Stage 4	R&A	4.11	Wait	2 day wait for SMT to sign off	NVA		2		
WAT	Stage 4	R&A	4.12	Task	Final Check by senior management	VA	60			Planner
WAT	Stage 5	AD	5 01	Wait	File waits to be completed by planner	NVA		2	NH	
WAT	Stage 5	AD	5 02	Task	Planner drafts final application	VA	400		NH	Planner
WAT	Stage 5	AD	5 03	Task	SMT sign off	VA	800		NH	SMT
WAT	Stage 5	AD	5 04	Wait	must wait for next council meeting (average 20 days)	NNVA		20		
WAT	Stage 5	AD	5 05	Task	Application meeting with council for adoption	VA	60		NH	Planner
WAT	Stage 5	AD	5 06	Task	Decision made to approve application	VA			NH	Council
WAT	Stage 5	AD	5 07	Task	Prepare record for approval	VA	400	5	NH	Admin
WAT	Stage 5	AD	5.08a	Task	Regional approval process	TBD			NH	Regional Planner
WAT	Stage 5	AD	5 08b	WAIT	Regional approval process	TBD			NH	Regional Planner

Munip.	Process Stage	DEF.	Step No:	Category	Description of the City of KITCHENER process steps	Work Type	Minutes	Days	Time Validated	Team Member
KI	Stage 1	PS	1.01	Task	Pre-submission received by receptionist. It is logged and stamped	VA	15		KA	Admin
KI	Stage 1	PS	1.02	Wait	File waiting for Planning Manager to review	NVA		1	KA	
KI	Stage 1	PS	1.03	Task	Planning Manager review & assigns to appropriate planner	VA	15		KA	Planning Manager
KI	Stage 1	PS	1.04	Wait	Waiting in Queue for Planner to review	NVA		1	KA	
KI	Stage 1	PS	1.05	Task	Planner checks for file completeness	VA	45		KA	Planner
KI	Stage 1	PS	1.06	Wait	Waiting in queue for application hard file creation and enter into "Amanda" (data base system)	NVA		1	KA	
KI	Stage 1	PS	1.06a	Task	Entered into Amanda	VA	15			Admin
KI	Stage 1	PS	1.07	Wait	File waits for admin assistant	NVA		2	KA	
KI	Stage 1	PS	1.08	Task	Admin assistant schedules meeting and circulates notices and packages	VA	30		KA	Admin
KI	Stage 1	PS	1.09	Task	Planner receives comments	VA	15		KA	Planner
KI	Stage 1	PS	1.10	Task	Planner reviews agency comments and prepares planning comments	VA	200		KA	Planner
KI	Stage 1	PS	1.11	Task	Staff only meeting	VA	60		KA	Planner
KI	Stage 1	PS	1.12	Task	Planner sends comments to applicant for review	VA	60		KA	Planner
KI	Stage 1	PS	1.13	Task	Pre-submission meeting with applicant	VA	90		KA	Admin
KI	Stage 1	PS	1.14	Wait	Municipality allow 20 days for pre submission meeting (includes steps 1.11 - 1.15)	NNVA		20	KA	
KI	Stage 1	PS	1.15	Task	Comments compiled into file by Planner within 20 days	VA	120		KA	Planner
KI	Stage 1	PS	1.16	Wait	File waits to be reviewed by Planning Manager	NVA		7	KA	
KI	Stage 1	PS	1.17	Task	File reviewed and signed by Planning Manager	VA	30		KA	Planning Manager
KI	Stage 1	PS	1.18	Wait	Files waits for Planner to send to applicant	NVA		2	KA	
KI	Stage 1	PS	1.19	Task	Planner sends Record to applicant and admin	VA	15		KA	Planner
KI	Stage 2	OA	2.01	Task	Application received at reception	VA	15		KA	Admin
KI	Stage 2	OA	2.02	Wait	Waits in queue until Planning Manager assigns	NVA		1	KA	
KI	Stage 2	OA	2.03	Task	Planning Manager reviews and assigns to appropriate Planner	VA	30		KA	Planning Manager
KI	Stage 2	OA	2.04	Task	Planner checks for completeness of application	VA	90		KA	Planner
KI	Stage 2	OA	2.05	Wait	Application may take up to 30 d to deem complete. (may need to consult with other staff/agencies)	NNVA		30	KA	
KI	Stage 2	OA	2.06	Task	Admin staff create hard copy file and enter into "Amanda"	VA	30		KA	Admin
KI	Stage 2	OA	2.07	Wait	File waits for mapping by GIS	NVA		1	KA	
KI	Stage 2	OA	2.08	Task	GIS Mapping completed	VA	60		KA	Third Party
KI	Stage 2	OA	2.09	Wait	File waits for sign shop to prepare signage	NVA		5	KA	
KI	Stage 2	OA	2.10	Task	Sign shop prepares signage	VA	120		KA	Third Party
KI	Stage 2	OA	2.11	Wait	File waits for planner to circulate	NVA		3	KA	
KI	Stage 2	OA	2.12	Task	Planner prepares circulation letters and website info	VA	120		KA	Planner
KI	Stage 2	OA	2.13	Wait	File waits for circulation letters to be sent to public and commenting staff/agencies	NVA		5	KA	
KI	Stage 2	OA	2.14	Task	Circulation letters sent to public and agencies	VA	30		KA	Planner
KI	Stage 2	OA	2.15	Wait	Municipality allows 30 Days for agency reply	NNVA		30	KA	
KI	Stage 2	OA	2.16	Task	Planner reviews comments and analysis	VA	120		KA	Planner
KI	Stage 3	PM	3.01	Task	Planner schedules neighbourhood meeting and prepares notice letters	VA	120		KA	Planner
KI	Stage 3	PM	3.02	Wait	Files waits for admin to do mailout	NVA		5	KA	
KI	Stage 3	PM	3.03	Task	Admin complete mail-out	VA	120		KA	Admin
KI	Stage 3	PM	3.04	Wait	Municipality allows 21 days	NNVA		21	KA	
KI	Stage 3	PM	3.05	Task	Planner prepares for meeting	VA	800		KA	Planner
KI	Stage 3	PM	3.06	Task	Planner and team hold meeting	VA	400		KA	Planner
KI	Stage 3	PM	3.07	Wait	File waits for follow-up summary	NVA		10	KA	
KI	Stage 3	PM	3.08	Task	Follow-up summary after meeting	VA	500		KA	Planner
KI	Stage 4	R&A	4.01	Task	Planner begins indepth analysis of application file	VA	360		KA	Planner
KI	Stage 4	R&A	4.02	Wait	File waits for 5 day sbefore circulation comments are sent to applicant	NVA		5	KA	
KI	Stage 4	R&A	4.03	Task	Circulation comments sent to applicant	VA			KA	Planner
KI	Stage 4	R&A	4.04	Task	Team holds post circulation meeting	VA	120		KA	Planner
KI	Stage 4	R&A	4.05	Task	Planner continues analysis and works on issue resolution	VA	1000		KA	Planner
KI	Stage 4	R&A	4.06	Wait	Municipality allows minimum 20 days	NNVA		20	KA	
KI	Stage 4	R&A	4.07	Task	Planner prepares draft planning report and by-law/OPA	VA	2100		KA	Planner
KI	Stage 4	R&A	4.08	Wait	These two tasks are done concurrently over 5 days	NVA		5	KA	
KI	Stage 4	R&A	4.09	Task	Legal review By-Law	VA	180		KA	Legal dept.
KI	Stage 4	R&A	4.10	Task	GIS finalize mapping	VA	180		KA	Admin
KI	Stage 4	R&A	4.11	Wait	Municipality allow 35 days	NNVA		35	KA	
KI	Stage 4	R&A	4.12	Task	Planning Manager and Director review	VA	120		KA	Planning Manager
KI	Stage 4	R&A	4.13	Task	Admin steps - advertizing - Clerk's procedures	VA			KA	Admin
KI	Stage 5	AD	5.01	Task	Planner prepares for formal council meeting	VA	360		KA	Planner
KI	Stage 5	AD	5.02	Wait	File waits for 5 days before circulation - this is within the 35 days counted above	NVA			KA	
KI	Stage 5	AD	5.03	Task	Planner reviews presentation with Planning Manager and sends to clerks	VA	30		KA	Planner
KI	Stage 5	AD	5.04	Task	Planner presents at public meeting	VA	90		KA	Planner
KI	Stage 5	AD	5.05	Wait	10 days to finalize council decision	NVA		10	KA	
KI	Stage 5	AD	5.06	Task	Admin prepare record for approval	VA	200	15	KA	Admin
KI	Stage 5	AD	5.07a	Task	Regional approval process	TBD			KA	Regional Planner
KI	Stage 5	AD	5.07b	Wait	Regional approval process	TBD			KA	

Munip .	Process Stage	DEF.	Step No:	Category	Description of the Township of Wellesley ZBA process steps	VA-NVA- Unknown	Minutes	Days	Time Validated	Team Member
WS	Stage 1	PS	1.01	Task	Application taken by reception and placed in planners office	VA	10		GV	Admin
WS	Stage 1	PS	1.02	Wait	File waits in queue in planners office	NVA		1.5	GV	
WS	Stage 1	PS	1.03	Task	Planner creates file and scans receipt to reception	VA	30		GV	Planner
WS	Stage 1	PS	1.04	Wait	File waits until Panner is ready to work on it	NVA		5	GV	
WS	Stage 1	PS	1.05	Task	Planner circulates file to agencies for internal review	VA	60		GV	Planner
WS	Stage 1	PS	1.06	Wait	Township allows 20 days for agency response	NNVA		20	GV	
WS	Stage 1	PS	1.07	Task	Planner reviews comments and compiles response letter	VA	200		GV	Planner
WS	Stage 1	PS	1.08	Task	Planner sets up meeting with applicant	VA	10		GV	Planner
WS	Stage 2	PS	1.09	Wait	Notice for meeting	NNVA		1		
WS	Stage 1	PS	1.10	Task	Planner meets with applicant to resolve any issues	VA	120		GV	Planner
WS	Stage 2	OA	2.01	Task	Applicant submits formal application	VA	30		GV	Admin
WS	Stage 2	OA	2.02	Wait	File waits until Planner is ready to work on it	NVA		4	GV	
WS	Stage 2	OA	2.03	Task	Planner logs file and reviews for completeness	VA	240		GV	Planner
WS	Stage 2	OA	2.04	Task	Request Info from applicant	VA	15		GV	Planner
WS	Stage 2	OA	2.05	Wait	Wait for information from applicant	NNVA		1	GV	
WS	Stage 2	OA	2.06	Task	Planning sends out notice of complete application	VA	60		GV	Planner
WS	Stage 2	OA	2.07	Wait	File waits for Planner to circulate	NVA		4	GV	
WS	Stage 2	OA	2.08	Task	Planner Circulates to agencies & internal for comment	VA	400		GV	Planner
WS	Stage 2	OA	2.09	Wait	Township allows 30 days for comment reply	NNVA		30	GV	
WS	Stage 2	OA	2.10	Task	Planner reviews reply from agencies	VA	120		GV	Planner
WS	Stage 2	OA	2.11	Wait	File waits to be prepared for Public Meeting	NVA		5	GV	
WS	Stage 2	OA	2.12	Task	Planner preps report for public meeting	VA	800		GV	Planner
WS	Stage 2	OA	2.13	Wait	Planner waits for meeting with senior management team (SMT)	NVA		3	GV	
WS	Stage 2	OA	2.14	Task	Planner reviews with SMT	VA	30		GV	Planner
WS	Stage 3	PM	3.01	Task	Planner prepares powerpoint presentation	VA	200		GV	Planner
WS	Stage 3	PM	3.02	Wait	Planner waits for meeting	NVA		1	GV	
WS	Stage 3	PM	3.03	Task	Council holds meeting	VA	60		GV	Council
WS	Stage 4	AD	4.01	Task	Council adopts By-Law	VA			GV	Council
WS	Stage 4	AD	4.02	Wait	Files waits for circulation by planner	NVA		3	GV	
WS	Stage 4	AD	4.03	Task	Planner Circulates NOA to stakeholders	VA	200		GV	Planner
WS	Stage 4	AD	4.04	Task	Township allows 20 days for appeal notice	NNVA		20	GV	
WS	Stage 4	AD	4.05	Task	Planner sends notice of no appeal	VA	20		GV	Planner

Munip.	Process Stage	DEF.	Step No:	Category	Description of the Township of Wilmot ZBA process steps	VA-NVA-Unknown	Minutes	Days	Time Validated	Team Member
WIL	Stage 1	PS	1.01	Task	Application taken by reception and placed in planners office	VA	15		AM	Admin
WIL	Stage 1	PS	1.02	Wait	File waits in queue in planners office	NVA		1	AM	
WIL	Stage 1	PS	1.03	Task	Planner creates file and scans receipt to reception	VA	30		AM	Planner
WIL	Stage 1	PS	1.04	Wait	File waits until Planner is ready to work on it	NVA		3	AM	
WIL	Stage 1	PS	1.05	Task	Planner circulates file to agencies for internal review	VA	60		AM	Planner
WIL	Stage 1	PS	1.06	Wait	Township allows 20 days for agency response	NNVA		20	AM	
WIL	Stage 1	PS	1.07	Task	Planner reviews comments and compiles response letter	VA	200		AM	Planner
WIL	Stage 1	PS	1.08	Task	Planner sets up meeting with applicant	VA	10		AM	Planner
WIL	Stage 2	PS	1.09	Wait	Notice for meeting	NNVA		1	AM	
WIL	Stage 1	PS	1.10	Task	Planner meets with applicant to resolve any issues	VA	60		AM	Planner
WIL	Stage 2	OA	2.01	Task	Applicant submits formal application	VA	30		AM	Admin
WIL	Stage 2	OA	2.02	Wait	File waits until Planner is ready to work on it	NVA		1	AM	
WIL	Stage 2	OA	2.03	Task	Planner logs file and reviews for completeness	VA	240		AM	Planner
WIL	Stage 2	OA	2.04	Task	Request Info from applicant	VA	15		AM	Planner
WIL	Stage 2	OA	2.05	Wait	Wait for information from applicant	NNVA		1	AM	
WIL	Stage 2	OA	2.06	Task	Planning sends out notice of complete application	VA	60		AM	Planner
WIL	Stage 2	OA	2.07	Wait	File waits for Planner to circulate	NVA		2	AM	
WIL	Stage 2	OA	2.08	Task	Planner Circulates to agencies & internal for comment	VA	400		AM	Planner
WIL	Stage 2	OA	2.09	Wait	Township allows 30 days for comment reply	NNVA		30	AM	
WIL	Stage 2	OA	2.10	Task	Planner reviews reply from agencies	VA	120		AM	Planner
WIL	Stage 2	OA	2.11	Wait	File waits to be prepared for Public Meeting	NVA		1	AM	
WIL	Stage 2	OA	2.12	Task	Planner preps report for public meeting	VA	800		AM	Planner
WIL	Stage 2	OA	2.13	Wait	Planner waits for meeting with senior management team (SMT)	NVA		1	AM	
WIL	Stage 2	OA	2.14	Task	Planner reviews with SMT	VA	30		AM	Planner
WIL	Stage 3	PM	3.01	Task	Planner prepares powerpoint presentation	VA	200		AM	Planner
WIL	Stage 3	PM	3.02	Wait	Planner waits for meeting	NVA		1	AM	
WIL	Stage 3	PM	3.03	Task	Council holds meeting	VA	60		AM	Council
WIL	Stage 4	AD	4.01	Task	Council adopts By-Law	VA			AM	Council
WIL	Stage 4	AD	4.02	Wait	Files waits for circulation by planner	NVA		1	AM	
WIL	Stage 4	AD	4.03	Task	Planner Circulates NOA to stakeholders	VA	200		AM	Planner
WIL	Stage 4	AD	4.04	WAIT	Township allows 20 days for appeal notice	NNVA		20	AM	
WIL	Stage 4	AD	4.05	Task	Planner sends notice of no appeal	VA	20		AM	Planner

Munip.	Process Stage	DEF.	Step No:	Category	Description of the Township of Woolwich ZBA process steps	VA-NVA-Unknown	Average Time	NVA	Time Validated	Team Member
WOO	Stage 1	PS	1.01	Task	Preliminary discussions between staff and applicant	VA	5		JV	Admin
WOO	Stage 1	PS	1.02	Task	Formal request for pre-application meeting	VA	5		JV	Planner
WOO	Stage 1	PS	1.03	Task	Admin Asst. or Planner creates folder	VA	5		JV	Admin
WOO	Stage 1	PS	1.04	Task	Admin Asst or Planner circulates to agencies & internal for review and arranges meeting date	VA	60		JV	Admin
WOO	Stage 1	PS	1.05	Task	Planning Reviews	VA	60		JV	Planner
WOO	Stage 1	PS	1.06	Wait	Allowed time for agency response	NNVA		20	JV	
WOO	Stage 1	PS	1.07	Task	Meeting held with agencies	VA	60		JV	Planner
WOO	Stage 1	PS	1.08	Wait	File waits for consultation minutes	NVA		10	JV	
WOO	Stage 1	PS	1.09	Task	Issue pre consultation minutes with submission requirements/fees	VA	45		JV	Planner
WOO	Stage 2	OA	2.01	Task	Applicant submits formal application	VA	5		JV	
WOO	Stage 2	OA	2.02	Task	Admin opens formal file,	VA	10		JV	
WOO	Stage 2	OA	2.03	Task	Planner reviews for completeness	VA	60		JV	Planner
WOO	Stage 2	OA	2.04	Task	Letter sent complete / incomplete	VA	15		JV	Planner
WOO	Stage 2	OA	2.05	Wait		NVA		5	JV	
WOO	Stage 2	OA	2.06	Task	Planning sends out notice of complete application	VA	30		JV	Planner
WOO	Stage 2	OA	2.07	Wait	File waits for planner	NVA		1	JV	
WOO	Stage 2	OA	2.08	Task	Create sign, post to Website, Notice for paper and to public	VA	400		JV	Planner
WOO	Stage 2	OA	2.09	Task	Admin Asst. Circulates to agencies & internal for comment	VA	120		JV	Admin
WOO	Stage 2	OA	2.10	Wait	Municipality allows 30 days for agency response	NNVA		30	JV	
WOO	Stage 2	OA	2.11	Task	Review appl. detail	VA	75		JV	Planner
WOO	Stage 2	OA	2.12	Wait	File waits for planner to prep report	NVA		20	JV	
WOO	Stage 2	OA	2.13	Task	Planner preps report for public meeting	VA	30		JV	Planner
WOO	Stage 3	PM	3.01	Task	Planner waits for meeting	NVA		1	JV	Planner
WOO	Stage 3	PM	3.01	Task	Council Holds Meeting	VA	60		JV	Council
WOO	Stage 4	AD	4.01	Task	Planner reviews comments from agencies	VA	60		JV	Planner
WOO	Stage 4	AD	4.02	Task	Planner sends comments to applicant	VA	60		JV	Planner
WOO	Stage 4	AD	4.03	Task	Planner awaits response and reviews comments	NVA		5	JV	Planner
WOO	Stage 4	AD	4.04	Task	Planner drafts recommendation report	VA	300		JV	Planner
WOO	Stage 4	AD	4.05	Wait	Report waits to be reviewed	NVA		14	JV	
WOO	Stage 4	AD	4.06	Task	report reviewed by Planning Manager/Director/SMT	VA	60		JV	Planning manager
WOO	Stage 4	AD	4.08	Task	Recommendation report sent to committee of the whole/public	VA	20		JV	Planning manager
WOO	Stage 4	AD	4.09	Task	Meeting held with Committee / Public + recommendation to council	VA	30		JV	Planner
WOO	Stage 4	AD	4.10a	Wait	Waiting for council decision	NNVA		14	JV	
WOO	Stage 4	AD	4.10	Task	Council makes decision	VA	30		JV	Council
WOO	Stage 4	AD	4.11	Task	Council adopts by-law	VA	10		JV	Council
WOO	Stage 4	AD	4.12	Task	Admin circulates notice of decision to stakeholders	VA	20		JV	Admin
WOO	Stage 4	AD	4.13a	Wait	Municipality allows 20 days for appeal period	NNVA		20	JV	
WOO	Stage 4	AD	4.13	Task	Planner sends notice of no appeal	VA	20		JV	Planner

Munip.	Process Stage	DEF.	Step No:	Category	Detailed Description of REGIONAL APPROVAL process Steps	Work Type	Minutes	Days	Time Validation	Team Member
RW	Stage 1	PS	1.01	Task	Email from local authority to (Regional Planner) RP	VA	45		AK	Local Authority Planner
RW	Stage 1	PS	1.02	Wait	File waits for RP to circulate	NVA		2	AK	
RW	Stage 1	PS	1.03	Task	RP circulates internally	VA	15		AK	Planner
RW	Stage 1	PS	1.04	Wait	Region allows 10 days for comments return	NNVA		10	AK	
RW	Stage 1	PS	1.05	Task	RP completes more in depth review	VA	240		AK	Planner
RW	Stage 1	PS	1.06	Task	Summary comments review by planner	VA	60		AK	Planner
RW	Stage 1	PS	1.07	Wait	File waits for SMT to review	NVA		2	AK	
RW	Stage 1	PS	1.08	Task	Review with senior management team (SMT)	VA	20		AK	SMT
RW	Stage 1	PS	1.09	Task	RP reviews management comments	VA	60		AK	Planner
RW	Stage 2	PS	1.10	Wait	File waits to be emailed	NVA		1	AK	
RW	Stage 1	PS	1.11	Task	Email to municipality and set meeting	VA	20		AK	Planner
RW	Stage 1	PS	1.12	Task	Region requests record and files	VA	5		AK	
RW	Stage 2	OA	2.01	Task	Formal application received from municipality	VA	5		AK	Admin
RW	Stage 2	OA	2.02	Task	Planning manager assigned to planner	VA	5		AK	Planning Manager
RW	Stage 2	OA	2.03	Task	Planner circulates to agencies (Internal)	VA	30		AK	Planner
RW	Stage 2	OA	2.04	Wait	Region allows 21 days for comments from agencies	NNVA		21	AK	
RW	Stage 2	OA	2.05	Task	More indepth review and summary comments by planner	VA	240		AK	Planner
RW	Stage 2	OA	2.06	Task	Planner drafts comments for senior management	VA	60		AK	Planner
RW	Stage 2	OA	2.07	Wait	File waits for senior management review	NNVA		3	AK	
RW	Stage 2	OA	2.08	Task	Senior Management review	VA	30		AK	SMT
RW	Stage 2	OA	2.09	Task	Planner reviews comments	VA	20		AK	Planner
RW	Stage 2	OA	2.10	Wait	File waits for comments to be issued to municipality	NVA		1	AK	
RW	Stage 2	OA	2.11	Task	Comments get issued to municipality	VA	5		AK	Planner
RW	Stage 3	PM	3.01	Task	Notification received and filed by admin clerk	VA	5		AK	Admin
RW	Stage 3	PM	3.02	Task	Zoning receive By-law / OPA go for review and analysis	VA	10		AK	Planner
RW	Stage 3	PM	3.03	Task	Record made of Zoning By-Law amendment	VA	20		AK	Admin
RW	Stage 4	R&A	4.01	Task	Notification of adoption is received by clerks dept. and planning	VA	5		AK	Admin
RW	Stage 4	R&A	4.02	Task	Planning manager assigns to original planner	VA	5		AK	Planning Manager
RW	Stage 4	R&A	4.03	Task	Planner confirms application is complete	VA	120		AK	Planner
RW	Stage 4	R&A	4.04	Wait	File waits for 14 days before review	NVA		14		
RW	Stage 4	R&A	4.05	Task	Review and prepare decision report	VA	2000		AK	Planner
RW	Stage 4	R&A	4.06	Wait	file waits for 3 days for review with senior management	NVA		3	AK	
RW	Stage 4	R&A	4.07	Task	Review decision report with senior management	VA	60		AK	SMT
RW	Stage 4	R&A	4.08	Task	Planner reviews comments from senior management	VA	180		AK	Planner
RW	Stage 4	R&A	4.09	Wait	File waits for 2 days for director signature	NVA		2	AK	
RW	Stage 4	R&A	4.10	Task	Decision notice signed by planning director	VA	30		AK	Planning Director
RW	Stage 4	R&A	4.11	Task	Planner issues notice decision to area municipalities	VA	5		AK	Planner
RW	Stage 4	R&A	4.12	WAIT	Twenty day appeal period	NNVA		20	AK	
RW	Stage 5	AD	4.13	Task	Approve	TBD	20		AK	Planner

Official Plan and Zoning Bylaw Amendments Application Process: Lean Consultant Support

Appendix 4: Stakeholder Feedback

[illegible]

Questionnaire results
1) Approximately how many applications have you submitted in the Region of Waterloo (to the Area Municipalities or the Region) and over what period of time?
2) Which municipalities have you submitted planning applications with?
3) Have you submitted an Official Plan Amendment?
4) Have you submitted a Zoning By-law Amendment?
5) The pre-submission consultation process is designed to identify requirements early in the process to submit a complete application and help streamline the review process. Have you participated in pre-submission consultation with the Region or any of the Area Municipalities?
6) In your opinion was the pre-submission consultation meeting effective? Did the pre-submission process work well to provide you with clear requirements to submit a complete application? If not, why? Do you have any suggestions for improvements?
7) Acknowledging that the Planning Act sets out minimum processing requirements that a municipality must comply with: identify the key process steps you are involved in and the interaction points between you and municipal and regional staff
8) What do you believe to be a reasonable turnaround time for a decision on an Official Plan Amendment?
9) What do you believe to be a reasonable turnaround time for a decision on a Zoning By-law Amendment?
10) In your opinion - What are the two-three most beneficial improvements that can be made to the OPA/ZBA planning process in the coming 12 months? Is there any duplication of effort or non-value add parts of the process that could be eliminated in your view? If so, what are they?
11) Are there any practices or processes that you have experienced in one municipality that would be beneficial to adopt in a consistent manner across the Region of Waterloo? (i.e. something that works well somewhere that isn't being done across the board)

s. 10 MFIPPA

Questionnaire results
1) Approximately how many applications have you submitted in the Region of Waterloo (to the Area Municipalities or the Region) and over what period of time?
2) Which municipalities have you submitted planning applications with?
3) Have you submitted an Official Plan Amendment?
4) Have you submitted a Zoning By-law Amendment?
5) The pre-submission consultation process is designed to identify requirements early in the process to submit a complete application and help streamline the review process. Have you participated in pre-submission consultation with the Region or any of the Area Municipalities?
6) In your opinion was the pre-submission consultation meeting effective? Did the pre-submission process work well to provide you with clear requirements to submit a complete application? If not, why? Do you have any suggestions for improvements?
7) Acknowledging that the Planning Act sets out minimum processing requirements that a municipality must comply with identify the key process steps you are involved in and the interaction points between you and municipal and regional staff
8) What do you believe to be a reasonable turnaround time for a decision on an Official Plan Amendment?
9) What do you believe to be a reasonable turnaround time for a decision on a Zoning By-law Amendment?
10) In your opinion - What are the two-three most beneficial improvements that can be made to the OPA/ZBA planning process in the coming 12 months? Is there any duplication of effort or non-value add parts of the process that could be eliminated in your view? If so, what are they?
11) Are there any practices or processes that you have experienced in one municipality that would be beneficial to adopt in a consistent manner across the Region of Waterloo? (i.e. something that works well somewhere that isn't being done across the board)

s. 10 MFIPPA

Questionnaire results
1) Approximately how many applications have you Reviewed in the Region of Waterloo (to the Area Municipalities or the Region) and over what period of time?
2) Which municipalities have you Reviewed planning applications with?
3) Have you submitted an Official Plan Amendment?
4) Have you submitted a Zoning By-law Amendment?
5) The pre-submission consultation process is designed to identify requirements early in the process to submit a complete application and help streamline the review process. Have you participated in pre-submission consultation with the Region or any of the Area Municipalities?
6) In your opinion was the pre-submission consultation meeting effective? Did the pre-submission process work well to provide you with clear requirements to submit a complete application? If not, why? Do you have any suggestions for improvements?
7) Acknowledging that the Planning Act sets out minimum processing requirements that a municipality must comply with: identify the key process steps you are involved in and the interaction points between you and municipal and regional staff
8) What do you believe to be a reasonable turnaround time for a decision on an Official Planning Amendment
9) What do you believe to be a reasonable turnaround time for a decision on a Zoning By-law Amendment?
10) In your opinion - What are the two-three most beneficial improvements that can be made to the OPA/ZBA planning process in the coming 12 months? Is there any duplication of effort or non-value add parts of the process that could be eliminated in your view? If so, what are they?
11) Are there any practices or processes that you have experienced in one municipality that would be beneficial to adopt in a consistent manner across the Region of Waterloo? (i.e. something that works well somewhere that isn't being done across the board)

s. 10 MFIPPA

Questionnaire results
1) Approximately how many applications have you submitted in the Region of Waterloo (to the Area Municipalities or the Region) and over what period of time?
2) Which municipalities have you submitted planning applications with?
3) Have you submitted an Official Plan Amendment?
4) Have you submitted a Zoning By-law Amendment?
5) The pre-submission consultation process is designed to identify requirements early in the process to submit a complete application and help streamline the review process. Have you participated in pre-submission consultation with the Region or any of the Area Municipalities?
6) In your opinion was the pre-submission consultation meeting effective? Did the pre-submission process work well to provide you with clear requirements to submit a complete application? If not, why? Do you have any suggestions for improvements?
7) Acknowledging that the Planning Act sets out minimum processing requirements that a municipality must comply with: identify the key process steps you are involved in and the interaction points between you and municipal and regional staff
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11) Are there any practices or processes that you have experienced in one municipality that would be beneficial to adopt in a consistent manner across the Region of Waterloo? (i.e. something that works well somewhere that isn't being done across the board)

s. 10 MFIPPA