Development Approvals Process (DAP) 02 Final Report

City of Burnaby

—

September 20, 2023

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KPMG has no present or contemplated interest in the City of Burnaby nor are we an insider or associate of the City of Burnaby. Accordingly, we believe we are independent of the City of Burnaby and are acting objectively.

Limitations

The analysis performed were limited in nature and extent, and the analysis and procedures will not necessarily disclose all matters about the City of Burnaby's functions, policies and operations, or reveal errors in the underlying information. Our procedures consisted of inquiry, observation, comparison and analysis of City-provided data and information. The following findings reflect information limited to what was collected in stakeholder conversations throughout September 2022 to February 2023, as well as review of relevant documentation and data provided by the City. Stakeholder feedback was collected via in-person and virtual engagement sessions through a variety of in-person tactics and virtually by using KPMG's Microsoft Teams, respectively. This analysis reflects a point in time view, and does not take into account ongoing organizational change and evolution. KPMG did not independently verify the accuracy and completeness of information received.

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Acronyms

Term	Definition
BP	Building Permit
Current State	The current state captures how Burnaby's processes are currently implemented. This is not necessarily the way in which processes have been established nor how processes "should be", instead it reflects a general understanding of what is currently happening
DAP/DRP/DARP	Development Approvals Process
DAP Working Group	A team of individuals consisting of staff members from different departments of the City of Burnaby, who work collaboratively with the Project Manager to provide support to three project teams
DAP Project Team	The group responsible for carrying out the work and tasks required to accomplish the project objectives. It is comprised of members from the KPMG, Planning, and IT Teams. They collaborate with the Project Manager to secure the necessary resources and ensure timely delivery of results
DAPSM	Development Approval & Permitting Solution Modernization. An IT-led effort to modernize the City's development permitting application and approvals solutions (EnerGov) to enhance business value, improve internal and external user experience, and improve customer service.
DP	Development Permit
E2E	End-to-End Process. The master application combining the rezoning, subdivision, preliminary plan approval, and commercial building permit processes for mixed-use new construction projects located within Town Centres or Urban Villages.
EnerGov	EnerGov is an Enterprise Permitting & Licensing software currently being used by the City of Burnaby in various permit processes
Future State	The future state is adapted from understanding the current state, where solutions and processes are simplified to be more efficient
KPI	Key Performance Indicator(s)
Lean	Lean is a way of thinking that prioritizes creating value with fewer resources and less waste and requires continuous experimentation
PPA	Preliminary Plan Approval
PSR	Preliminary Servicing Requirements
RACI	Responsible, Accountable, Consulted, Informed

Term	Definition
REDMA	Real Estate Development Marketing Act
SOP	Standard Operating Procedure
SPEA	Streamside Protection and Enhancement Area
SPOD	Suitable Plan of Development
STF	Single and Two Family residential building permit process

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Executive Summary

1 Executive Summary

The City of Burnaby is a fast-growing municipality with bold ambitions to be a class-leader in development services. In September 2021, the City of Burnaby started on a journey to review and implement changes to the City's development approvals processes (see Figure 1 below). DAP 01 refers to the initial Development Approvals Process Review that identified broad transformation requirements (2021/22), which were actioned with early implementation through DAP 02 (2022/23). Further changes and improvements will be required as part of DAP 03 (in 2023/24) to shift to a longer-term operational sustainment model in 2025.

As part of DAP 02, Burnaby engaged KPMG in September 2022 to conduct a lean review of the City's five core approvals processes and support the City on implementing early changes. This report outlines (i) the outcomes of the lean review and early implementation efforts, and (ii) the next steps for DAP 03 building on the foundation for continuous improvement established as part of DAP 02.

KPMG's lean review is part of a broader scope of work for DAP 02 with additional workstreams led by the City of Burnaby. These additional City-led workstreams are outlined in a separate summary document prepared by the City of Burnaby.
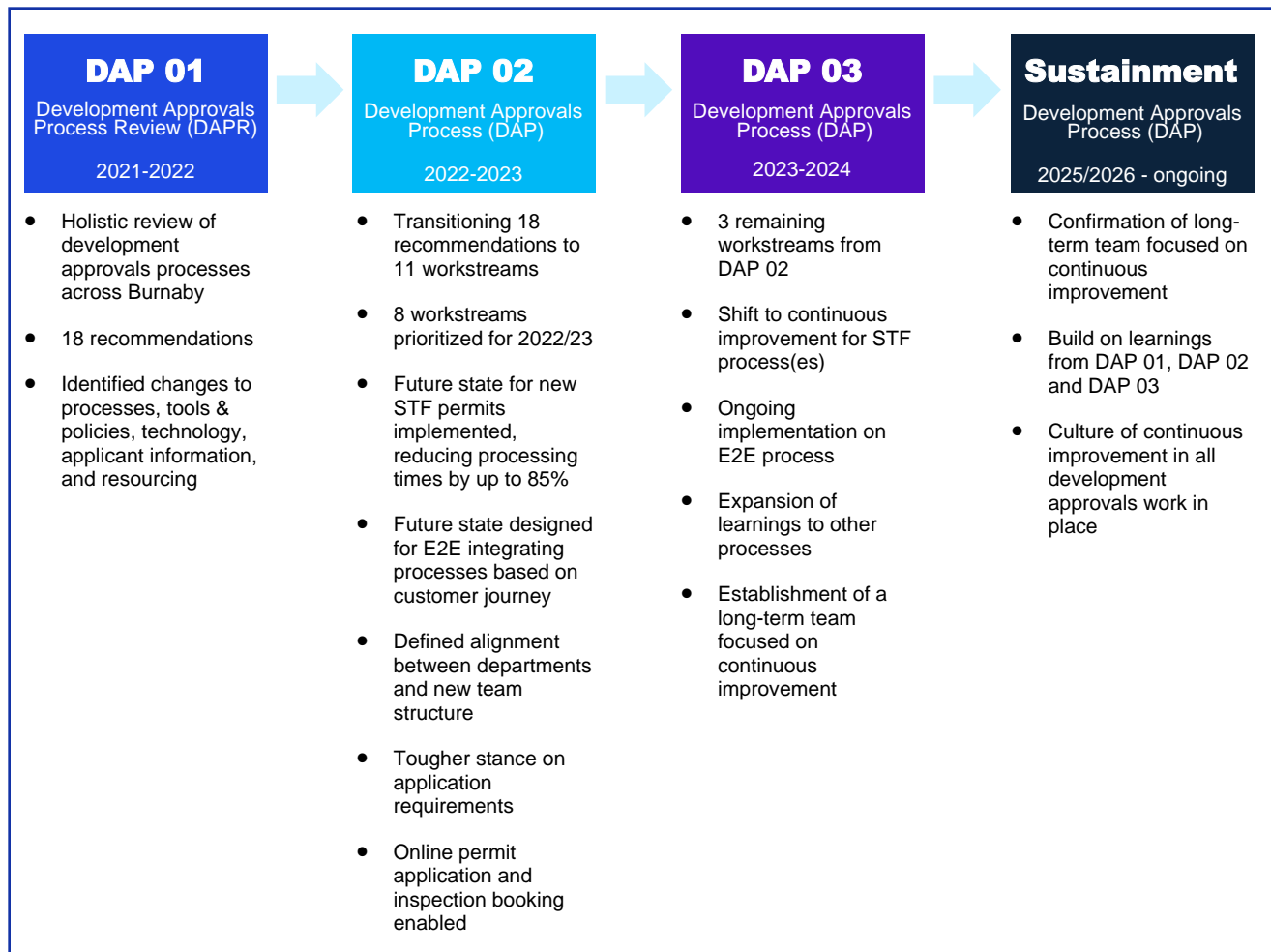
DAP 01 Development Approvals Process Review (DAPR) 2021-2022	**DAP 02** Development Approvals Process (DAP) 2022-2023	**DAP 03** Development Approvals Process (DAP) 2023-2024	**Sustainment** Development Approvals Process (DAP) 2025/2026 - ongoing
• Holistic review of development approvals processes across Burnaby • 18 recommendations • Identified changes to processes, tools & policies, technology, applicant information, and resourcing	• Transitioning 18 recommendations to 11 workstreams • 8 workstreams prioritized for 2022/23 • Future state for new STF permits implemented, reducing processing times by up to 85% • Future state designed for E2E integrating processes based on customer journey • Defined alignment between departments and new team structure • Tougher stance on application requirements • Online permit application and inspection booking enabled	• 3 remaining workstreams from DAP 02 • Shift to continuous improvement for STF process(es) • Ongoing implementation on E2E process • Expansion of learnings to other processes • Establishment of a long-term team focused on continuous improvement	• Confirmation of long-term team focused on continuous improvement • Build on learnings from DAP 01, DAP 02 and DAP 03 • Culture of continuous improvement in all development approvals work in place

Figure 1: Overview of Development Approvals Process Journey

1.1   Burnaby's Development Approval Process Transformation Journey

As part of the lean review, KPMG analysed the City's five core approvals processes: rezoning, subdivision, Preliminary Plan Approval (PPA), commercial building permits and residential building permits, as identified as key priorities form DAP 01. These processes represent (i) high volume applications through the residential building permits process (also known as the single and two-family process, or STF), and (ii) highly complex applications as part of the rezoning, subdivision, PPA, and commercial building permit processes. Through the lean review, the overlap of the rezoning, subdivision, PPA, and commercial building permit processes became known as the End-to-End (E2E) process reflective of the customer journey.
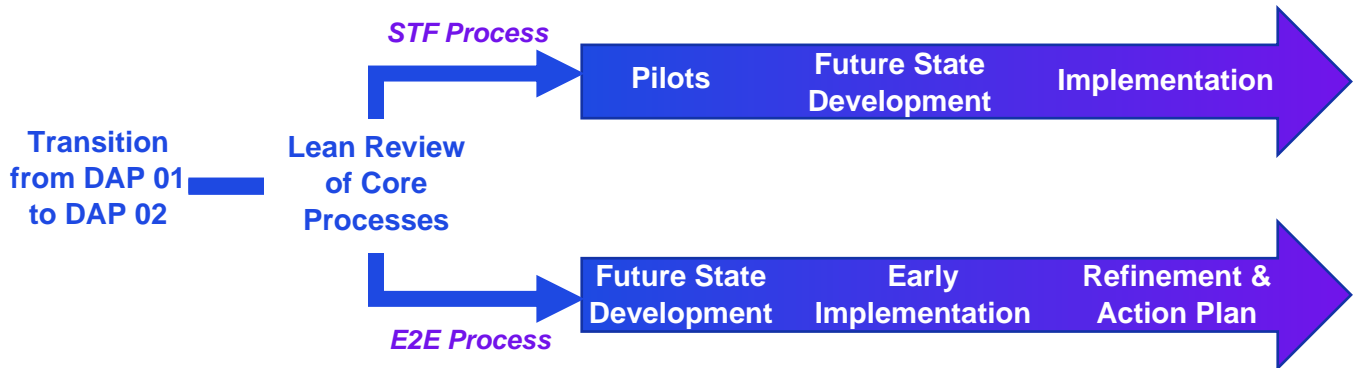

Figure 2: DAP 02 Journey

KPMG worked with staff to identify opportunities, develop a desired future state, and implement changes to the STF and E2E processes. Throughout the duration of DAP 02 and the extensive engagement that occurred, 116 opportunities for improvement were identified (see Appendix A). Of these opportunities, 29 have been fully implemented, an additional 42 are currently underway, and 45 were integrated in the E2E process future state to be implemented as part of DAP 03.

61% of all opportunities identified have been actioned.

The outcomes of the DAP 02 transformation journey include:

1.	Implementation of the Future State for the Residential Building Permit (STF) Process Changes:
a)	A realized a time savings of up to 85% for new residential building permits.
b)	A new engineering pre-application process identifying servicing requirements up front, along with flags for heritage, archaeology, contaminated sites, and public trees.
c)	A decrease in the number of backlog applications by 60% with full elimination anticipated in October/November 2023.
d)	Clear file assignment to Plan Checkers.
e)	A new Team Lead to increase standardization and provide training and mentoring opportunities.
f)	A new weekly team huddle for better team integration, peer-level support, collaboration, and back-up options for application review.
g)	Addressing root causes stemming from examining all organizational touchpoints.
h)	Increased inter-departmental collaboration through a new engineering pre-application process.
i)	Activation of a digital online submission portal for residential building and trade permits.

2.	Development of Future State E2E Process and Early Implementation:
a)	The lean review highlighted a significant shift to the E2E process which defined the future state development and alignment with customer-centric lens.
b)	The establishment of key milestones throughout the E2E process defining markers for alignment and coordination between departments.
c)	The identification of time targets for each milestone with a cumulative target for the full E2E process.
d)	A shift to early and proactive completion of tasks across departments and by applicants to have 80% completion of architectural and civil design for the public hearing and 100% completion of design for third reading.
e)	Design of a new development permit structure within the E2E process to bridge the rezoning and subdivision processes with the commercial building permit process. New development permits will also enable provincial approval processes, such as Site Disclosure Statements, to start early reducing downstream delays.
f)	Streamlining of legal agreements including reducing the total number of overall agreements and standardizing the remaining agreements.
g)	Development of a new construction management permit process to enable early construction planning for large projects separate from the building permit process.
h)	Alignment with provincial legislative changes to the *Real Estate Development and Marketing Act (REDMA)* and overall supporting applicant experiences and reducing bottlenecks.
i)	A new public hearing report structure integrating the Tentative Approval letter requirements and updating the calculations. Includes shifting responsibility for calculations to applicants.
j)	3rd Reading will be the most significant milestone in the process where all departments and tasks come together to form a 100% complete design. All steps in the process after 3rd Reading are designed to implement that design whereas steps prior to 3rd Reading are focused on refining the design.
k)	Confirmation of pre-application process steps and requirements for all departments/divisions.
l)	Shift to digitization across all departments/divisions.
m)	Better integration with finance on payment structure, fee calculations, invoicing, and bonding.
n)	Early transportation assessments to confirm buildable area and integrate with external agency requirements and review processes.
o)	A foundation for on-going and sustained change management and communication.

Throughout DAP 02, we have increasingly heard excitement and readiness to make changes and expressions of ownership over the future state processes.

These improvements are already beginning to yield benefits in terms of better customer service, increased transparency including a tougher stance on application requirements, comprehensive and documented processes, clearer roles and responsibilities, establishing a culture of continuous improvement where staff are actively looking for acting on additional opportunities. These improvements, while centred on the development approvals processes, affect all departments involved in DAP and lay the foundation for future and ongoing improvements.

Changes have resulted in up to an 85% decrease in processing times for new residential building permits.

1.2   Next Steps: Achieving the Ambition

The next phase of activities will form the workplan for DAP 03, anticipated to start in Q4 2023. DAP 03 will continue to improve on the STF process, implement the future state of the E2E process, and expand learnings to other development approval processes. The activities outlined below build on the learnings and achievements from DAP 02 for the STF and E2E processes.

1. **Residential building permit process** (STF process). Significant changes have already been made to this process; however, additional changes, as outlined in Section 3.1, include:

   - EnerGov start/stop feature to track City time versus applicant time and measure the nuances of application lead and cycle time more accurately.
   - Preparing for laneway homes and "missing middle" dwellings arising from the City's Housing Choices Program, which will increase the volume of STF applications while the City is working through the remaining backlog of applications.
   - Extending learnings to other residential building permit process including additions and renovations to enable additional improvements.
   - Further DAPSM integration through EnerGov workflow improvements and additional modules for dashboards.
   - Moving to a continuous improvement model and building on training and mentoring activities ultimately shifting to a level of comfort with change.

2. **End-to-End (E2E) process**. The future state has been defined for this process. Several implementation tasks are necessary to transition to the future state, outlined in Section 3.2, with key changes including:

   - Shifting to a team-based model for each application where one person from each of the planning, subdivision, development services, transportation and legal groups are involved in an application from pre-application through to occupancy.
   - The planner assigned to the application is the case manager responsible for driving the application through from pre-application to occupancy while facilitating various subject matter experts from across the City that will be involved at various stages.
   - Further definition of what each milestone in the process requires for each department to achieve City-wide alignment.
   - Shifting from an approach of customization to one of standardization where the degree of standardization is measured to increase predictability and transparency, specifically through the standardization of legal agreements. Further analysis of risk-based models could identify additional opportunities for streamlining.
   - A new engineering construction permit process will enable applicants to start preparing for construction prior to submitting a commercial building permit application.
   - Transitioning from the PPA process to development permits will similarly enable better alignment between departments and flexibility through DP guidelines to further streamline the process and respond to neighbourhood-level context.
   - Establish a method for ongoing and proactive management of the cumulative impacts of multiple complex applications through geographic teams to manage workloads and provide opportunities for career growth.
   - Conduct a detailed staffing assessment to align resources with future state process tasks.
   - Implementation of performance measures and time targets for each milestone in the process.
   - Development of comprehensive service level targets that build on time targets enabling the City to further align resources, budget considerations, and expectations.
   - Continuation of implementation of opportunities identified as part of DAP 02.

The successful implementation of these recommendations will require continued executive-level support and dedicated project leadership to enable the changes across many departments and continue the momentum established in DAP 02. Coordination of DAP 03 priorities with other City projects will support achievable outcomes and reduce unforeseen impacts on the approvals processes. Further, the extent of the anticipated role changes will require sustained and thorough change management to support staff and applicants through the transition from current to future state.

To help ensure success, we also recommend maintaining the Working Group as a method for continuing interdepartmental collaboration and further empowering these team members as change agents.

1.3   How to Read this Report

This report has four sections including this Executive Summary. Section 2 outlines the project background and approach including the lean process, change management, and stakeholder engagement. Section 3 presents the outcomes of the process redesign for both the STF and E2E processes. The detailed steps undertaken to develop the future state of each process are outlined in Appendices B and C. Section 4 outlines the next steps for each process to continue with implementation tasks for both processes.

In preparing this report, KPMG relied on information and material provided in part by the City of Burnaby and other parties as engaged via stakeholder interviews. Stakeholder engagement was conducted to accommodate multiple perspectives; however, was not intended to be comprehensive. KPMG has not audited nor independently verified any of the information provided to us.

This report should be considered in its entirety. Selection of, or reliance on, specific portions of the report could result in the misinterpretation of our comments and analysis. KPMG will not assume liability in connection with the reliance by any third-party on this document.

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02
Background & Approach

2   Background & Approach

Following the review of the City's development approval processes (DAP 01), the City of Burnaby engaged KPMG to conduct a lean review of the core processes and to begin implementing changes. DAP 02 took place between September 2022 and August 2023 as part of the broader DAP journey to design a desired future state and begin implementing changes. But

This section outlines the following:

1. The purpose of the DAP journey that formed the objectives for the lean review;

2. The lean review approach that was used to evaluate the core processes and develop a desired future state; and

3. The change management and stakeholder engagement that occurred to implement changes.

## 2.1   Purpose and Objectives

The City of Burnaby previously engaged KPMG to review the Rezoning, Subdivision, Preliminary Plan Approval (PPA), Commercial Building Permit and Residential Building Permit application processes to find efficiencies and opportunities to streamline these processes. KPMG's Development Approval Review Final Report (dated June 2022) included 18 prioritized recommendations for improving the City's development approvals processes, tools, policies, and technology. Between September 2022 and August 2023, the City of Burnaby engaged KPMG to conduct a lean review of the City's five core development approvals processes and to implement early improvements. KPMG supported the City in defining future state processes, achieving quick wins, and by helping to build and sustain momentum for continuous improvement.

The key objectives of DAP are:

01 **Customer Experience**
Provide a customer-focused development approvals system that better serves applicants and the community

02 **Transparency**
Simplify the process thereby making it clearer and more transparent, and ultimately more predictable

03 **Efficiency**
Increase efficiencies thereby reducing approval times and reducing the cost of development

Furthermore, as a part of the initial DAP 01 assessment, visioning and alignment workshops were conducted with the City of Burnaby executive team to develop a unified vision for the DAP initiative. To help build and sustain momentum around the project, this vision was further refined to embody the principles of "faster, simpler, better" (see Figure 3). These principles form the core of the City's guiding precept around continuous improvement and are intended to provide strategic, long-term direction for the DAP initiative as it grows into the future.
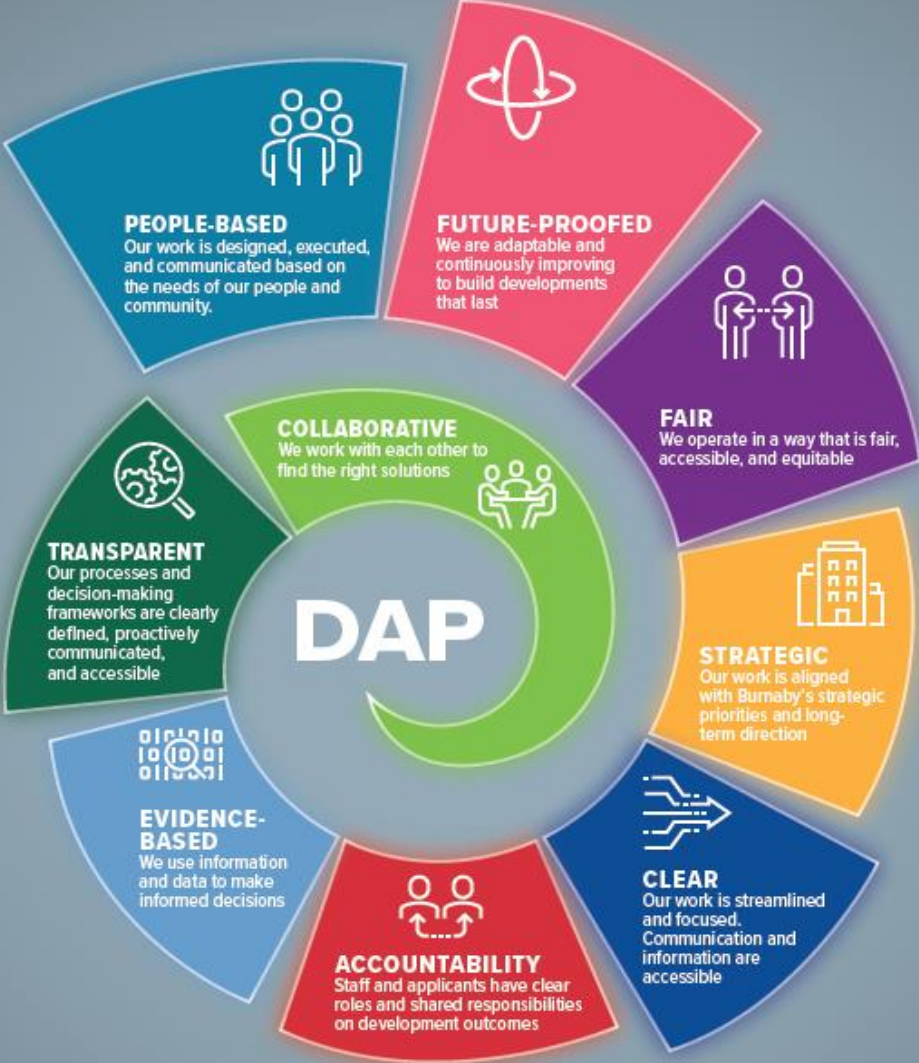
Figure 3: DAP project vision

2.2 Scope of Work and Approach

The KPMG scope of work included two components of the City's overall DAP project:

1. **Process Redesign:** This scope of work was focused on conducting a lean review to ultimately design a future state process for the City's five core application processes including rezoning, subdivision, PPA/DP, residential building permit, and commercial building permit processes. This scope included conducting several co-design workshops with staff and to prepare standard operating procedures, and RACI charts to accompany the future state processes and provide additional clarity for staff on how to complete the new processes.

2. **Change Management:** This scope of work included the development and delivery of a change management and stakeholder engagement program and the provision of operational support during the implementation of future state process changes. This scope included supporting Working Group members as change champions, communicating progress and changes to various staff groups, and supporting on the preparation of reporting information.

Our approach and overview of these scopes of work are outlined in the following sections.

2.2.1 Process Redesign

KPMG's approach was rooted in the continuous improvement methodology known as 'lean'. The lean methodology is a proven, customer-focused style of management that promotes continuous improvement and waste minimization through the piloting, measurement, and refinement of incremental process changes. KPMG leveraged the lean methodology to help identify key opportunities for improvement and to enable the City of Burnaby to fulfil its vision and objectives of the DAP initiative.

The five principles of the Lean methodology were discussed with the working group to ensure their understanding of the approach. These principles include:

1. **Voice of the Customer** – understanding the expectations and needs of stakeholders and determining how they define value in terms of process improvements. Understanding the voice of the customer is essential for discerning the impact of process changes. Giving primacy to the customer voice forms the core of the other four lean principles.

2. **Understand your Process** – having a thorough and complete appreciation for the current state processes to understand which process steps add value. Process mapping provides a clear picture of current state processes and acts as a starting point for incremental improvement. Without it, it is difficult to maintain transparency and to determine where problems lie within the process.

3. **Create Flow** – designing a process to have constant movement. This involves eliminating bottlenecks and reducing significant wait times that draw out task completion timelines.

4. **Establish Pull** – many process tasks are automatically "pushed" or "given" to the next user upon the completion milestones. This can create delays associated with excess inventory and backlogs when intended recipients are not be ready to receive the task. Replacing this "push" system with a "pull" method of task transition means that the process only produces outcomes that match stakeholder expectations in terms of quality and timing.

5. **Pursue Excellence** – Lean thinking is rooted in a philosophy of continuous quality improvement. Lean is not a one-time event but rather a journey to continually improve our processes and always strive to supply the customer with outputs and experiences that they value.

As part of the lean methodology, key concepts of lead time and cycle time are critical to understanding how to identify and define potential improvements to meet the five lean principles. Lead time is the overall time perceived by the customer from when the process starts to when it ends. Cycle time is the time the work takes, often a subset within the overall lead time. This relationship is illustrated below.
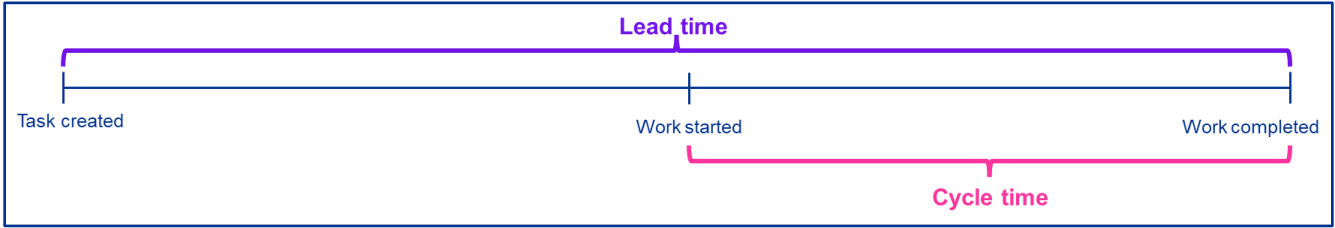
Figure 4: Lean concepts of lead time and cycle time

For the purpose of this project, the following parameters were used to assess processing times for the development approval processes:

Average Application Lead Time:	The time taken on average to review and approve an application.
Average Application Cycle Time:	The time taken on average to complete key review sub-processes.
Variation in Application Lead Time:	The degree to which processing times vary across the full application review as compared to the average.
Variation in Application Cycle Time:	The degree to which processing times vary for key review sub-processes as compared to the average.

The steps identified below outline KPMG's workflow for integrating project components with the City's ongoing DAP workstreams. This approach integrates the lean methodology and change management to co-design future state processes and implement early changes.

Current State

01

Understanding the present reality.

This phase involved documenting the current process workflow, collecting and analysing baseline data, and taking an inventory of all policies, bylaws, and procedures as they pertain to development approvals.

Current state workshops were a crucial step in initial identification of pain points and opportunities. Current state workshops were held for each of the five core development approval processes with front line staff from all departments that touch on the process. These workshops culminated in a detailed list of opportunities that helped to inform our future state redesign efforts and identify pilot projects aimed at securing quick wins.

To complement the current state workshops and identify the root causes of identified pain points, KPMG analysed quantitative data drawn from the City's EnerGov permitting system. The data included timestamped information on development application tasks and key milestone processing times for residential building permits, commercial building permits, rezoning applications, and subdivision applications. For residential building permits, an additional analysis was conducted based on an auxiliary dataset of 44 applications (manually collected, randomly sampled) containing detailed information on application deficiencies and requests for additional content from staff.
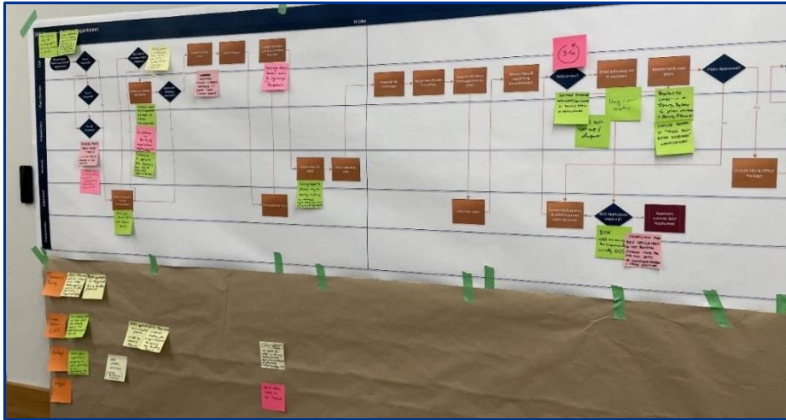
Figure 5: STF current state process mapping workshop

The specific data and scope of information analysed varied across the different application processes included in the analysis. Data ranges were identified to reflect the length of time a typical application takes and historical policy changes that may affect the underlying data generating processes. DAP 01 identified an inconsistent use of EnerGov resulting in several data limitations.

02 Future State

Envisioning the future.

This phase involved leveraging analytical insights to inform the visioning, design, revision, and optimization of existing processes with SOPs and RACIs.

To develop future state processes, workshops were held with staff members and the project working group to solicit input about ways to redesign process flows and milestones. Rooted in a 'blue sky' philosophy that emphasized innovative design and thinking outside the box, our team solicited input through an iterative and participatory stakeholder engagement process. During these workshops, representatives from DAP associated departments suggested and deliberated over individual process improvements until a consensus future state was reached.

Once an initial consensus future state was achieved, each participant was provided with a copy of the redesigned future state process map and asked to identify key problem points or inaccuracies. Changes were then collated and reintegrated into a refined future state map which was then presented for comment during a follow up validation workshop. To ensure the viability and robustness of the redesigned future state, this process was conducted in stages beginning with staff, then with the City's management team, and finally with the larger project working group. Once completed, our team drew on the finalized future state process maps to develop a set of Standard Operating Procedures (SOPs) and Responsible, Accountable, Consulted, and Informed (RACI) charts. A RACI chart is a responsibility assignment chart that lists all stakeholders involved in a process and their level involvement in each task (i.e., functional role). A clear RACI can help address problems commonly associated with complex organizations, such as a lack of clarity around responsibilities for task completion. The definitions used for the City of Burnaby DAP RACI include:

- R (Responsible) = "The Doer": The individual(s) who performs the task, responsible for the action/implementation. "R's" can be shared.

- A (Accountable) = "The Buck Stops Here": The individual who is ultimately accountable, has Yes/No power, as well as power of veto. Only one "A" can be assigned to a process step/activity.

- C (Consulted) = "Get All The Facts": The individual(s) to be consulted prior to an action being taken or a final decision made and encourages two-way communication. "C's" can be shared.

- I (Informed) = "Keep in the Picture": The individual(s) who need to be informed after an action has been taken, or a decision is made. "I's" can be shared.

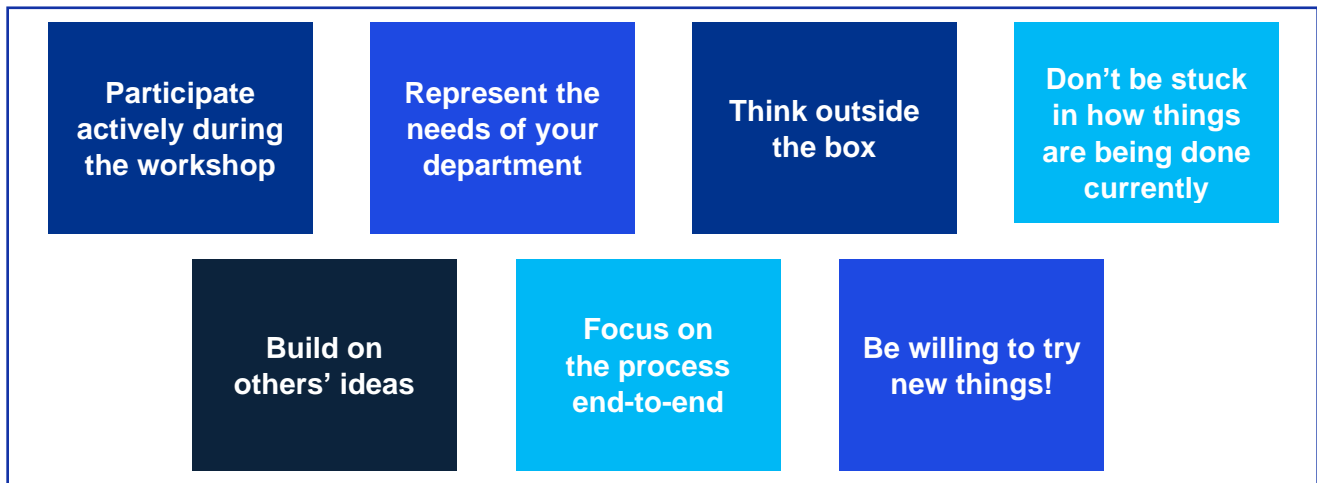|			
Participate actively during the workshop	**Represent the needs of your department**	**Think outside the box**	**Don't be stuck in how things are being done currently**
Build on others' ideas	**Focus on the process end-to-end**	**Be willing to try new things!**	

Figure 6: Future state workshop principles

These documents outline the procedures, reporting requirements, and decision-making responsibilities associated with each step along the process. Together, they represent an authoritative single source of truth that staff can refer to in order to gain a detailed and holistic understanding of the idealized future state process flow.

03 Implementation

Undertaking process improvements

This phase involved the incremental planning, enactment, and refinement of recommended process changes with the aim of creating a measurably improved process.

Implementation activities including actioning 'quick wins' either through 'Just Do It' activities or though defined pilot projects. The intent of these activities was to build momentum and buy-in as well as to train staff on how to assess and implement lasting change.

More substantive changes were then implemented through careful planning, identification of the changes, impacts to roles, proactive communication, and dedicated resourcing throughout both the 'sprint' of the change itself and for continued refinement over time. It is important to be responsive to tweaks or adjustments that arise once the change has occurred and support staff to identify those changes and act as needed.

2.2.2   Change Management & Stakeholder Engagement

An extensive program of stakeholder engagement and communication was developed and implemented to help build and sustain buy-in. Effective and continuous process improvement is based on transparency, awareness, and trust. Change management is based on helping people based on where they fall along a clearly defined and articulated change continuum (see below). For each stakeholder group affected by process changes, a different approach was required to move them along the continuum or to maintain their current comfort level. This was achieved by using targeted change management activities in line with the DAP Change Management Plan. It is important to note that not all stakeholders need to be active advocates for change to be successful.

Stakeholder engagement played a critical role in ensuring successful implementation of the DAP initiative. With a broad range of stakeholders across multiple internal departments and external stakeholder groups and organizations, the level of change support required by each stakeholder differed. To meet these needs, KPMG used known engagement principles including:

1. **Early Buy-In**: Early buy-in from impacted individuals is key. To promote this, we committed to communicating early and involving stakeholders throughout the project, including in the process redesign phase.
2. **Use of Change Champions:** The project Working Group represents all areas involved in the permitting processes. As such, they played an important role in driving change within their teams. Frequent and ongoing engagement with the Working Group represented a key avenue of project support and feedback, as did providing tools and messages to support the working group in their role as change champions.
3. **Tailored Support:** We are dedicated to understanding the needs of each stakeholder group so that we can provide them with the appropriate support and information in an effective and timely fashion.
4. **Measuring our progress:** We developed a baseline understanding of our stakeholders' engagement with the DAP Project, and we committed to tracking our progress over the following 12 months. This helped us to adjust our approach in supporting stakeholders and will link into our broader assessment of the project outcomes and overall impact.
5. **Celebrating Along the Way:** Sustaining effective change is a long and difficult endeavour. To help maintain energy and buy-in throughout the project we took time to reflect on our successes, take note of our progress, and appreciate our gains.

Similarly, communication plays a significant role in supporting stakeholders to move along the change continuum from awareness to advocacy. The following principles were used to guide the development of a variety of communication tools that engaged different stakeholder groups:

1. Tailored: Messaging and delivery were adapted to meet the needs of each stakeholder group.
2. Clear: Plain English was used to communicate project needs and timing requirements.
3. Quick: We committed to providing written communications in a way that would take no more than 30 seconds to read.
4. Two Way: We encouraged feedback from staff to ensure a two-way flow of information that included input from employees spanning across Burnaby's organizational hierarchy.
5. Strategic: We linked DAP changes to the broader context and supported staff by helping them understand the bigger picture.
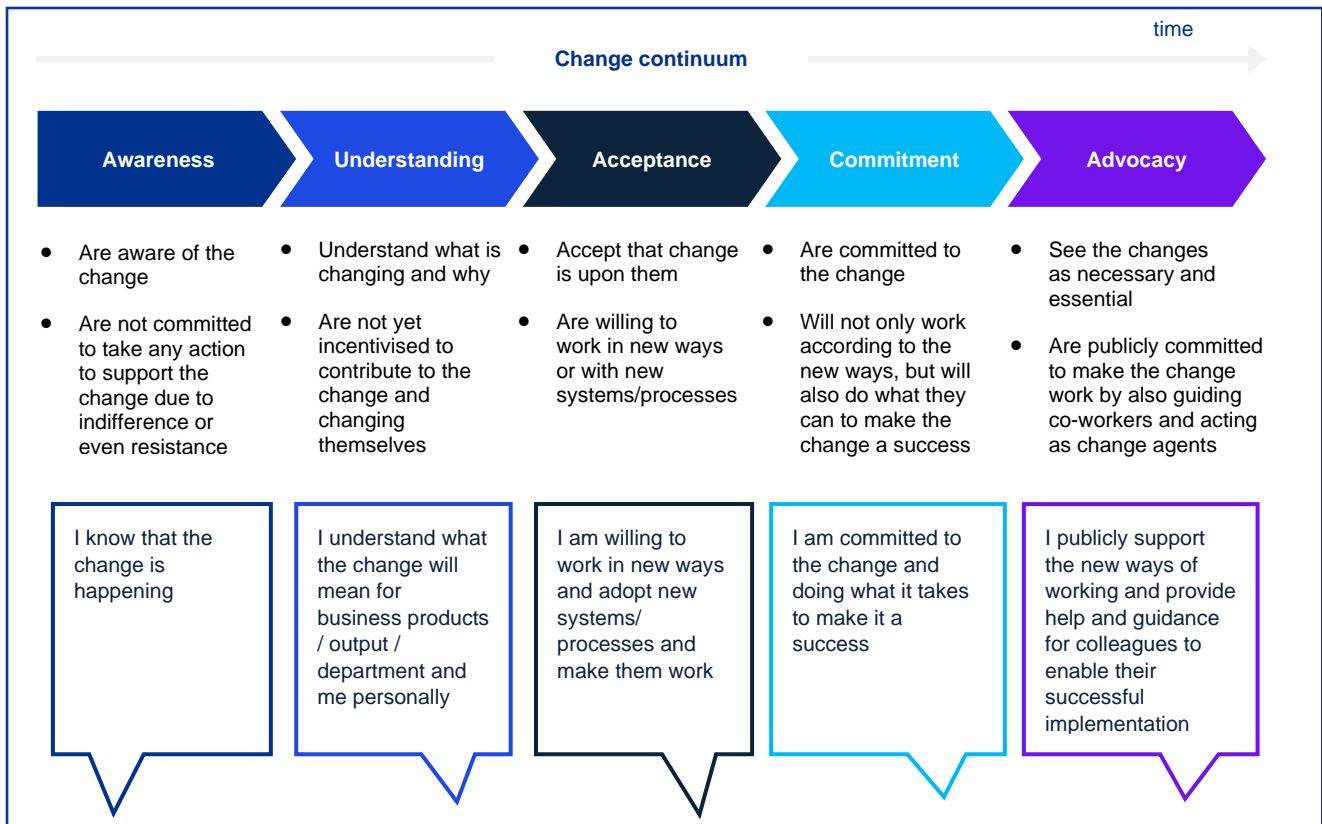
Figure 7: Change continuum used to guide change management and stakeholder engagement activities

Stakeholder Engagement and Consultation Activities

KPMG employed a diversity of stakeholder engagement approaches to help cultivate staff buy-in, build a culture of continuous improvement, and identify key opportunities for process improvement. Together, the DAP project team met with staff and/or stakeholders over 250 times to design, refine, validate, or implement process changes. This engagement included working extensively with the following departments/divisions:

- Community Safety – License
- Corporate Services – Legal and Legislative Services (formerly Clerks)
- Engineering – Development Services and Transportation Services
- Finance
- Fire Prevention Office
- Information Technology
- Lands and Facilities – Property Management and Realty and Lands
- Parks, Recreation and Culture
- People and Culture
- Planning and Development – Building, Community Planning, Climate Action and Energy, and Development and Urban Design

The following outline the types and levels of engagement used:

13 Process Workshops

Workshops held with internal staff to help map out the current state and future state of Burnaby's five core processes.

15 Working Group Meetings

Beginning in October 2022, KPMG convened bi-weekly meetings with Burnaby's core Working Group. The Working Group consisted of representatives from all DAP-departments

34 Targeted Discussions

Conversations with individual department representatives designed to clarify questions that arose throughout the project or to explore specific solutions.

3 External Interviews

Conversations with representatives from comparator jurisdictions designed to provide a sense of how approvals processes and process-related problem solving are done in other local governments.

Communication Activities

KPMG leveraged our communication strategy to keep stakeholders informed of the project approach and provided regular updates on novel project findings, insights, and ideas. These activities included developing and distributing internal newsletters, creating digital content to be displayed on Staff Connect and the City of Burnaby's website, and distributing a survey on information circulation to key staff members.

11 DAP newsletters published
Launched in December 2022, these newsletters provided staff with high-level information on the progress of the DAP project. They also contain key information and FAQs related to the project.

Staff Connect messaging
The Staff Connect communication channel was used to build awareness of the DAP project, and to provide high-level messaging to all City staff.

City of Burnaby Website Updates
Launched in February 2023, a new website design was developed to share development and construction information. Regular communications on DAP project updates were provided on banners with short "City Highlights" articles.

Dedicated DAP Project page
In March 2023, a City of Burnaby internal page went live for members of the public and applicants to view, which has built knowledge of the transition and shared information on new application requirements. https://www.burnaby.ca/our-city/projects/development-approval-process-dap

03
Process Redesign

3 Process Redesign

To develop a desired future state, KPMG conducted a lean review on the City of Burnaby's five core processes: rezoning, subdivision, Preliminary Plan Approval (PPA), commercial building permit and residential building permit (known as the single and two-family, or STF, process). As part of the current state analysis, it became clear that there are two overarching processes from a customer-centric lens (see Figure 2). The STF process was a standalone process, while the rezoning, subdivision, PPA and commercial building permit processes were viewed as part of a single, overarching project. These combined processes evolved into the End-to-End (E2E) process. Together, these processes form the highest volume and/or most complex applications where improvements will have the most impact which could then be applied to improvements of other (less complex or lower volume) processes.

This section summarizes the future state and implementation for both the STF and E2E processes. The detailed tasks to define the future state for each process is outlined in Appendices B and C, respectively.

3.1 Residential Building Permit Process for Single and Two-Family Dwellings (STF)

As part of the overall process redesign, KPMG conducted a lean review of the City's residential building permit process for single and two-family (STF) applications for new homes. KPMG's scope included a review of all organization touchpoints related to this process and builds upon a previous lean review conducted by the City in the Spring of 2022. The City-led lean review focused primarily on opportunities internal to the Building group and did not include a review of how other departments interact with the process. The STF process was further hampered by the legacy of a significant application backlog and obstacles posed by the COVID-19 pandemic and health requirements to isolate paper-based applications. KPMG's review was to conduct a holistic review and work with staff to develop and implement changes to improve cycle times and applicant experiences.

The future state design included the following key principles identified by staff:

01 Early Involvement and Coordination
Identify requirements from all departments/divisions early in the process, proactively communicate with the applicant. Coordinate tasks and referrals across all departments/divisions.

02 Consistency
Standardize and coordinate tasks across individuals and teams. Support with peer-to-peer support and training. Update information provided to applicants to better guide them through the process and requirements.

03 Digitization
Online application acceptance, review, and inspections will further expedite processing times and track application status.
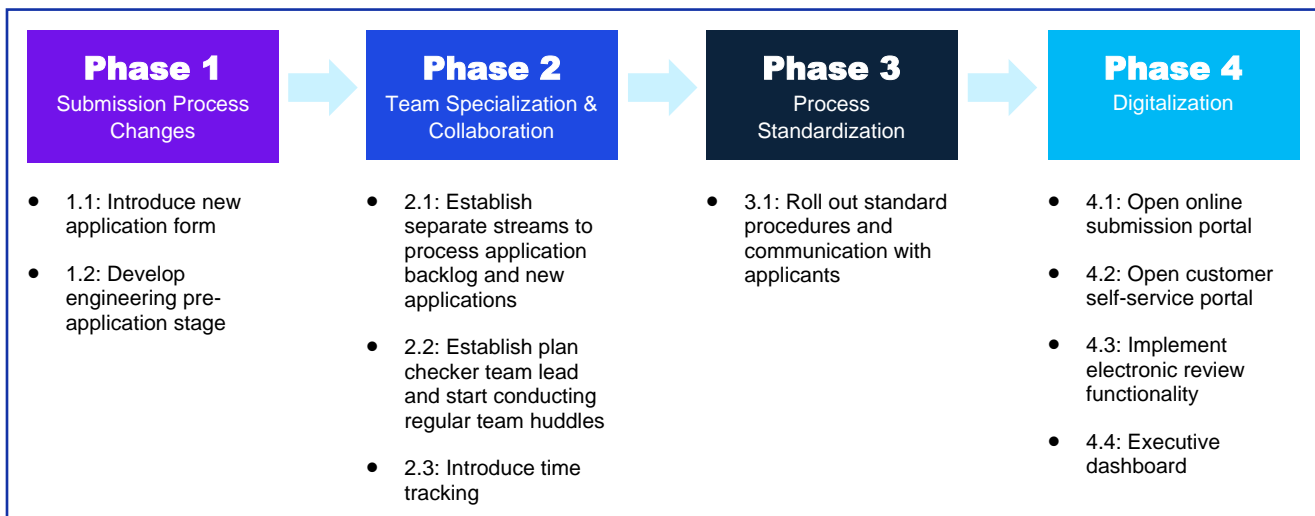
As a result, a future state process for the STF was developed that included:

1 A new pre-engineering process to confirm servicing requirements, driveway locations, public tree protection or remediation, heritage and archaeology considerations, and site contamination impacts.

2 Introduction of time targets and performance measurements.

3 A shift to only accepting complete applications.

4 Immediately assigning building permit applications after acceptance as a complete application.

5 Introduction of a new Team Lead responsible to file assignment, tracking, and training.

6 Standardization of review tasks including communication with applicants, review comments and the approach for the review.

7 Elimination of the backlog so all files are clearly assigned to Plan Checkers.

8 Digitization of the future state process including acceptance of digital submissions, digital reviews, online inspection booking, digital stamps/signatures, and digital file management.

STF Process Implementation

Once the STF future state process map was validated, the KPMG team prepared an implementation roadmap that included key changes from current to future state, changes to roles for various staff, and a timeline for how changes could logically occur. The roadmap included identification of four key phases:

Phase 1 Submission Process Changes	**Phase 2** Team Specialization & Collaboration	**Phase 3** Process Standardization	**Phase 4** Digitalization
• 1.1: Introduce new application form • 1.2: Develop engineering pre-application stage	• 2.1: Establish separate streams to process application backlog and new applications • 2.2: Establish plan checker team lead and start conducting regular team huddles • 2.3: Introduce time tracking	• 3.1: Roll out standard procedures and communication with applicants	• 4.1: Open online submission portal • 4.2: Open customer self-service portal • 4.3: Implement electronic review functionality • 4.4: Executive dashboard

Phase 1: Submission Process Changes (Completed April 2023)

This phase included key changes to how applications were submitted by first requiring applicants to complete a new engineering pre-application stage that identified various department/division requirements related to site-level issues that may affect the viability of building a STF house. The intent was to proactively provide applicants with more information early on so they can make informed decisions prior to engaging with a designer or builder, and to reduce overall surprises that had been occurring during later stages of the building permit referral.

Once the engineering pre-application stage was complete, applicants could then initiate a building permit application, and only complete applications were accepted. To support the submission of complete applications, application forms were updated, complete application requirements were defined, and applications were reviewed at the counter with feedback provided directly to the applicant.

Additionally, a visual user guide was prepared that provided applicants with targeted information on the STF process and what occurs at each stage. This guide included additional reference material, clear requirements, and overall understanding of the steps. This information was incorporated into an updated and refreshed website specifically for STF applications.

Phase 2: Team Specialization & Collaboration (Completed April 2023)

This phase included confirming a new Team Lead role for Plan Checkers. The Team Lead began assigning complete applications and established a weekly team huddle for the Plan Checkers to share information and provide peer-level support. The Team Lead role was also identified to coordinate with stakeholders as needed and assist on complex files. Team huddles provided opportunities for further collaboration between departments with invitations to the engineering, planning and other groups to share information.

To work to eliminate the backlog of files while still accepting complete applications under the new process, two streams of files were created. New files were prioritized to track and measure the effectiveness of the new process; however, older files were being processed at the same time. As implementation occurred, staff identified additional opportunities to manage both streams of files.

Time tracking was introduced for the engineering pre-application and for the building permit processes including lead and cycle time. Weekly reports are prepared tracking all applications. Outlier files are identified and investigated. Further tracking will give the City a baseline for further improvements. Tracking is currently manual. Digitization will occur as part of Phase 4.

Phase 3: Process Standardization (Completed May 2023)

Phase 3 involved standardization of the plan checking review tasks such as comments, communication with applicants, and addressing deficiencies. Reinforced by the team huddles, staff are able to discuss concerns, ask questions, and confirm responses. Forms have been updated so all team members use similar formats with a Burnaby style.

Phase 4: Digitization (Ongoing)

Phase 4 is currently underway in coordination with DAPSM to develop two portals. Led by the city, these efforts are intended to improve the consistency of the user experience with the STF approvals process. These two portals include a digital application submission portal, activated July 31, 2023, and an application information portal that will be available to the general public as part of the next phase of DAPSM activities.

The integration of digital capabilities across the approvals process enables digital application tracking and the reporting of key application KPIs (i.e., processing time, # of applications in process, etc.) through the executive dashboard. This initiative is being led by the City, with pilot launch anticipated in Fall 2023.

Since new applications started being accepted in April 2023 to the time of writing this report in August 2023:

- 49 engineering pre-applications have been submitted with an average processing time of 12 days.

- 27 STF building permit applications have been submitted with an average processing time being reduced by as much 85%.

- 24 new building and trade permits are now accepted online.

3.2   End-to-End (E2E) Process

In addition to the STF process, KPMG also conducted a lean review of the four main processes identified through the initial Development Approvals Process Review conducted in 2022. The four processes are:

1. Rezoning Approvals

2. Subdivision Approvals

3. Commercial Building Permits

4. Preliminary Planning Approvals, ultimately to be transitioned to development permits

Throughout the current state evaluation of the processes, including feedback from staff and data analysis, it became clear that while the residential building permit process (STF) was a standalone process, the remaining four processes (rezoning, subdivision, PPA, and commercial building permits) were all approvals required for a singular, yet complex, project. The review of these four processes was focused on new construction of complex, mixed use applications within Town Centres or Urban Villages requiring comprehensive development rezoning applications but excluding master plan applications. From the customer journey lens, these four processes represented one complete, yet complex, project common for Burnaby.

This diagram illustrates how the four processes overlap for complex, multi-use projects. It outlines the initial concept of the end-to-end process including the early identified milestones with the various application processes and early analysis on processing times.
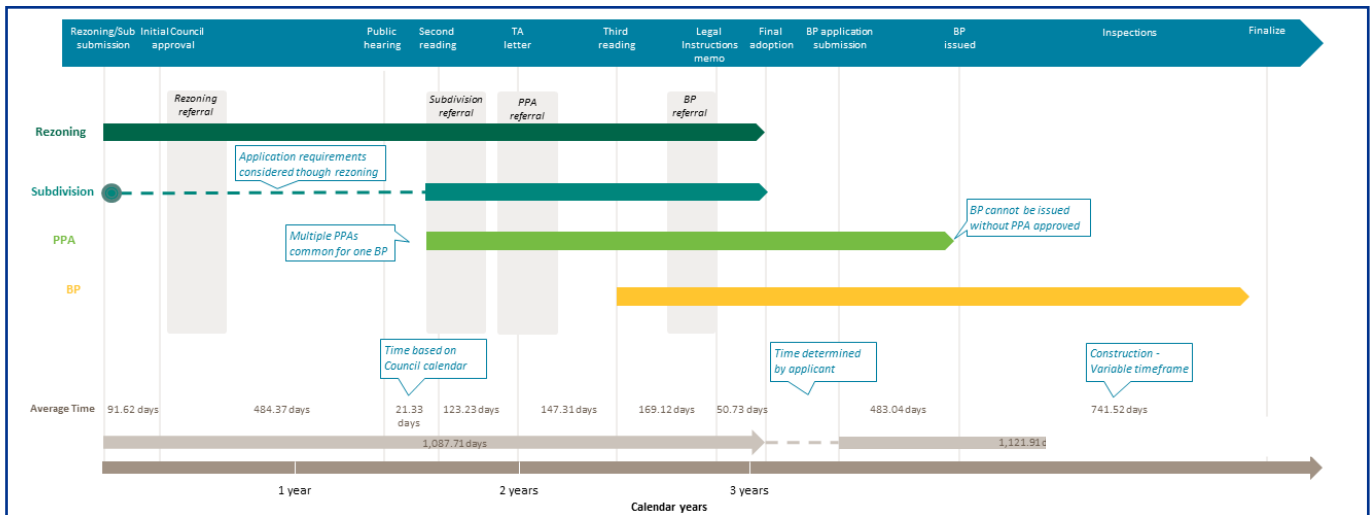

Figure 8: Early concept of the End-to-End (E2E) process[1,2]

The significance of the transition was the conceptual shift from four separate application types to a singular master application type mirroring the customer experience. This shift enabled the City to adopt a new perspective and develop a comprehensive future state that integrates all of the diverse, yet required, technical reviews, coordinate efforts across the City under a single application umbrella, and to align better with applicants.

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[1] Data included in this Figure includes average times for "major" applications between 2012 and 2022. "Major" applications are defined as applications with Comprehensive Development rezoning applications occurring within Town Centres or Urban Villages constituting new construction. The data does not include applications with master plans, applications without construction, and changes of use. As such, this data represents some of the most complex applications for development received by the City of Burnaby.

[2] Air Space Parcel (ASP) subdivision applications were not originally included in the E2E process as they were identified as a non-standard practice. However, these applications will become standard in coming years so ASPs were noted in the future state and identified for further review as part of DAP 03 and Operational Sustainment.

The key benefits of this E2E integration include:

1. Creating a master application process would help to avoid cases where applications would unexpectedly trigger additional review requirements. This would help to prevent unexpected processing delays and mitigate applicant frustration.

2. By identifying and eliminating redundant review requirements, the new end-to-end process would also help to streamline application processing, enable resources to be more efficiently allocated, and improve average application processing times.

3. Alignment between the individual approvals and tasks to achieve them provide both the City and the applicant with a more consistent and predictable process.

E2E Early Implementation

Throughout the workshops and discussion with staff and various teams, additional opportunities would be identified. These were tracked through a Master List of Opportunities. In total, 116 discrete opportunities were identified by staff (see Appendix A for full list of opportunities and implementation status)[3]. To begin to act on the opportunities, each was first categorized as requiring a technology or technology-related solution. The technology-related opportunities were identified for integration in the future state process and provided to the DAPSM team to integrate with DAPSM priorities and scheduling.

Next, the remaining opportunities were classified by the level or type of change based on lean principles. Early opportunities for implementation included the identification of 'Just Do It' opportunities. These opportunities could typically be actioned by one department/division and constituted a relatively easy change.

A second tier of opportunities were then identified which required 2-3 departments/divisions to collaborate on a given change. These opportunities were assigned through the Working Group and are currently underway.

A final tier of opportunities were identified requiring broader change requirements. These were directly designed as part of the E2E future state process. Implementation of these opportunities will be coordinated with DAP 03 and are intended to be led by Working Group members.

E2E Future State Process

As part of the overall process redesign, KPMG conducted a lean review of the City's E2E process for complex projects in Urban Villages or Town Centres requiring comprehensive development rezoning and new construction. KPMG's scope included a review of all organization touchpoints related to these processes. KPMG's review was to conduct a holistic review, to streamline processes such as legal documents, and work with staff to develop and begin to implement changes to improve cycle times and applicant experiences.

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[3] In total 216 opportunities were identified by staff throughout the duration of DAP 02.Many opportunities were duplicate suggestions from different workshops or engagement activities, or were aligned with other City-led DAP workstreams.

The future state design included the following key principles identified by staff:

01 **Early Involvement**
Identify requirements from all departments/divisions early in the process and proactively communicate requirements with the applicant.

02 **Coordination and Alignment**
Standardize and coordinate tasks across divisions and departments. Support with ongoing training. Align with application requirements.

03 **Streamlining Subdivision and Legal Documents**
Specific focus to improve subdivision and legal processes between public hearing and final adoption. Align with recent Legislative changes from REDMA.

04 **Standardization**
Reduce levels of customization and establish time targets to reinforce accountabilities.

Based on these priorities, a future state process for the E2E was developed. These improvements were identified through two rounds of future state workshops due to recent legislative changes to the Real Estate and Marketing Act (REDMA). While the first future state workshop established key milestones, alignment, and standardization, the second future state workshop identified additional opportunities to streamline the subdivision process including how the City incorporates legal agreements. Many of these improvements are already in the process of implementation (see Appendix A for a full breakdown of all opportunities and their implementation status).

The following changes provide an overview of key shifts validated by staff for the E2E process:

1.	The establishment of key milestones throughout the E2E process defining markers for alignment and coordination between departments.
2.	The identification of time targets for each milestone with a cumulative target for the full E2E process.
3.	A shift to early and proactive completion of tasks across departments and by applicants to have 80% completion of architectural and civil design for the public hearing and 100% completion of design for third reading.
4.	Integration of a new development permit structure within the E2E process to bridge the rezoning and subdivision processes with the commercial building permit process. New development permits will also enable provincial approval processes, such as for Site Disclosure Statements, to start early reducing downstream delays.
5.	Streamlining of legal agreements including reducing the total number of overall agreements and standardizing the remaining agreements.
6.	Development of a new construction management permit process to enable early construction planning for large projects separate from the building permit process.
7.	Alignment with provincial legislative changes to the *Real Estate Development and Marketing Act (REDMA)* and overall supporting applicant experiences and reducing bottlenecks.

8.	A new public hearing report structure integrating the Tentative Approval letter requirements and updating the calculations. Includes shifting responsibility for calculations to applicants.
9.	3rd Reading will be the most significant milestone in the process where all departments and tasks come together to form a 100% complete architectural and civil design. All steps in the process after 3rd Reading are designed to implement that design whereas steps prior to 3rd Reading are focused on refining the design.
10.	Confirmation of pre-application process steps and requirements for all departments/divisions.
11.	Shift to digitization across all departments/divisions.
12.	Better integration with finance on payment structure, fee calculations, invoicing, and bonding.
13.	Early transportation assessments to confirm buildable area and integrate with external agency requirements and review processes.
14.	A foundation for on-going and sustained change management and communication.

These changes were integrated in a detailed process map and documented in a Standard Operation Procedure and RACI matrix, provided to the City in separate documents. An overview of the future state process including key milestones, alignment of tasks across all departments, and target processing times is summarized in Figure 9 on the next page.

Figure 9: Future State Process and Interdepartmental Alignment

	Pre-application (3-4 weeks)	Site level DP (3-4 weeks)	Master Application (1 month)	80% completion (3-4 weeks)	Prepare report and bylaw (1 month)	1st and 2nd Reading (1 month)	Notifications	Public Hearing	100% Completion (Legislated 4-5 weeks)	3rd Reading	Legal docs, bonding, BP (5-12 weeks)	Final adoption & DP Issuance (2-3 weeks)	BP Review & staged permits (6-9 months)	BPs Issued (2-3 weeks)	Inspections (10-12 months)	ASP & Title Cleanup	Occupancy	Release of Securities & Bonds (Construction)	Close Out
Applications, permits	Submit conceptual design	Start Development Permit(s)	Submit master application (rezoning, subdivision, DP, road closure, master servicing)	Use & density confirmed	Confirm design				Design substantially complete, BP pre-app		Conditions complete, submit construction management application, full BP application	Approve and Issue DPs, Rezoning and Subdivision complete	Excavation, foundation permits issued	Issue BP and SCS permit	Inspections	Refine & Approve ASP	Occupancy certificate		Application closed
Tree management	Identify requirements			Arborist report submitted, confirm Tree Protection (public and private)															
Environment, SPEA, contaminated sites	Identify requirements	Start DP, submit Site Disclosure Statement, ERC review	Technical review						Acoustic Report and green building plan submitted, approve hazard DP(s)	Receive Ministry Instrument		Receive notification from Ministry to unfreeze application						Receive Certificate of Compliance if applicable	
Heritage	Identify requirements	Submit accurate preliminary concept	Technical review						100% acceptable drawings										
Archeology	Identify requirements		Technical review						100% acceptable drawings										
Architecture, building	Identify requirements (timing different with CP)	Submit accurate preliminary concept		80% confirmed					100% acceptable drawings		Alternative solutions submitted	Code review, alternative solutions accepted				Alternative solutions for ASP			
Landscaping	Identify requirements			80% confirmed					100% acceptable drawings										
Utilities, servicing	Identify requirements	Submit accurate preliminary concept	Preliminary servicing confirmed, solid waste/loading confirmed	80% confirmed					100% acceptable drawings. Construction servicing review				Confirm CIMS, hoarding & shoring, water metering, pre-loading, oil deposits, solid waste, sediment control						
Fire access, addressing	Identify requirements		Technical review	Access, addressing confirmed					Fire truck access plan confirmed			Addressing added to GIS	Sprinkler permit						
Land value negotiations	Identify requirements								Confirm density bonusing, land value for roads										
Housing/TAP	Identify requirements								Prepare Housing Agreement Bylaw			Housing Agreement Bylaw approved							
Geotech	Identify requirements	Technical review									Geotech submitted								
Hydrogeological	Identify requirements	Technical review																	
Floodplain elevation	Identify requirements	Technical review																	
TIA & Geometrics	Identify requirements	Technical review	Draft TIA Work with MOTI/Translink	100% finalized and approved by City/Translink/Moti, geometrics confirmed															
Social planning	Identify requirements																		
Parks	Identify requirements		Technical review																
Road closure	Identify requirements		Technical review						Prepare Road Closure Bylaw	Bring forward Road Closure Bylaw	Road Closure Bylaw advertisements	Road Closure Bylaw approved							
Notification, signage	Identify requirements		Neighbour notification and signage, FN consultation				Neighbour letters, newspaper notification, public notice posting, signage on site, notification to strata, tree notification						Signs removed				Notification of interruption of services		
Subdivision & legal agreements			Technical review	Confirm planning and engineering requirements	Prepare public hearing schedule and draft Prior To letter				Finalize Prior To letter		Prepare legal instructions, legal agreements	Execute and register legal agreements				Title summary and discharge agreements, Finalize master easement agreement			
Air Space Parcels												ASP submitted				ASP Finalized			
Fees	Identify requirements								Confirm fees, DCCs and bonds; update fee schedule			Collect fees	Tree bonds confirmed	Confirm bonds, CBB deferral payment				Remaining bonds returned	
Construction, inspections									Construction management review			Construction management confirmed	Tree inspection and protection, demo complete	Confirm construction plan	Conduct building, plumbing, electrical, and sub-trade inspections	Early FPO, Final inspection			
Additional Tasks		Agent Authorization, confirm contacts			Notify legislative services, prepare PH report, prepare bylaws, confirm agenda	Confirm applicant support		Respond to Council comments	Review BP phasing	Confirm BP Phasing			Confirm DP/BP alignment	Provide inspection timing information to applicant		Survey plans required			

Top annotations: For information only · Application time starts · 50% for submission · Pre-sales begins · Construction to surface level · Transfer of Ownership

04
Next Steps

4   Next Steps

While DAP 02 made substantive changes and has laid a strong foundation, the journey to continue to implement the E2E future state and shift to continuous improvement for the STF process are outlined below. These steps are identified based on feedback from staff through the development of the future state, KPMG's knowledge of process change, as well as outcomes from early implementation activities.

As previously identified, the STF and E2E processes are on different trajectories and have different considerations for DAP 03. The substantive changes have been made to the STF process so next steps are focused on continuous improvement and moving forward with implementing new policy direction and digital tools. These steps are outlined in Section 4.1.1 below.

Comparatively, early changes and 'quick wins' have been implemented as a starting point in the transition to the E2E future state. However, given the complexity and extent of the change that staff identified from what is currently occurring and what is proposed in the future state, a significant part of DAP 03 will be dedicated to implementing the next steps identified in Section 4.1.2 and include the continued implementation of opportunities identified in DAP 02.

4.1.1   STF Next Steps for Continuous Improvement

To continue towards a model of continuous improvement, some additional tasks and or considerations would support the next iteration of the DAP project. These include:

1. **EnerGov start/stop tracker:** As part of Burnaby's digital application tracking procedures, the City has identified a need to track City time versus applicant time through a start/stop function in EnerGov. This feature will enable the City to indicate when applications are being processed by City staff and when applicants are working to complete tasks. This will allow the City to measure the nuances of application lead and cycle time more accurately.
2. **Preparing for laneway homes:** The incoming laneway housing policy is anticipated to increase the application volume for the STF process. As staff are still working through the remaining backlog of applications, the City is looking to track laneways separately to better understand how this new policy will impact processing times, review standards, and overall integration with the future state STF process.
3. **Expanding approvals process:** The review of the STF process was intended to be scalable to other processes. Lessons learned from the new home permitting process are already being applied to additions and renovations. Further review and identification of other opportunities will enable additional improvements.
4. **DAPSM integration:** At the time of writing, the City is in the process of implementing several upgrades to EnerGov for the STF process specifically focused on digital application submission. Further EnerGov enhancements and opportunities identified through the current state findings should be actioned to enhance workflows and overall digitization efforts. Staff training on new initiatives, and integration between DAPSM and DAP will be critical to the future success and improvements the City is looking to achieve.
5. **Moving to a continuous improvement model:** As the City continues to face new and emergent challenges, the ability to build and refine novel process improvements will be important for maintaining the gains delivered through our engagement. By adopting a continuous improvement model (i.e., always looking for and testing process improvements) the City will be able to build on and adapt the wins generated through this process redesign to best suit future needs.

4.1.2   E2E Recommendations for Next Steps

The following actions outline the next steps for implementing the future state of the E2E process. The proposed scheduling presents an ideal implementation roadmap with next steps and timing to be confirmed by the City. Implementation will be dependent on resourcing for both the DAP 03 project team as well as departments/divisions across the City, and continued prioritization of DAP 03 activities in alignment with other City initiatives.

1. **Early involvement and collaboration** through a refinement of the current pre-application will be a key stage of the process to share information and begin the relationship between the City and the applicant. This process in the future state will need to incorporate clear requirements from all departments and is critical to mitigating downstream delays.

Level of Effort:	Medium
Level of Benefit:	High
Scheduling:	Q4 2023/Q1 2024

2. **Establishing an integrated application team** will involve a distinct shift in how applications are managed. A team-based model for each application includes one person from each of the planning, subdivision, development services, transportation and legal groups being involved in an application from pre-application through to occupancy. This approach should be piloted with select applications to test and refine processing tasks, roles, and responsibilities across team members. In person and digital collaboration environments should be refined to support inter-departmental collaboration and further team integration.

Level of Effort:	Low
Level of Benefit:	High
Scheduling:	Q4 2023/Q1 2024

3. **Assignment of an application case manager.** The planner assigned to the application will be the case manager responsible for driving the application through from pre-application to occupancy while facilitating various subject matter experts from across the City will be involved at various stages. This role will take on project management tasks to define and follow up on key tasks. Training and support from the DAP project team will be important to successful implementation. The standardization (#5) and milestone definitions (#4) will be an important foundation.

Level of Effort:	Low
Level of Benefit:	Medium
Scheduling:	Q4 2024

4. **Clear definitions of process milestone requirements** will continue the alignment of City departments throughout the E2E process. Each department will need to confirm and outline their requirements and what is needed for an applicant to proceed to the next milestone. This information will be combined in a single source of truth and communicated to the applicant.

   Priority should be given to the 3rd Reading milestone where all departments and tasks come together to form a 100% complete design. All steps in the process after 3rd Reading are designed to implement that design whereas steps prior to 3rd Reading are focused on refining the design. This task will require all departments to identify what 100% complete design means in practice and the requirements needed to achieve that goal.

   Training for staff on these requirements will reinforce activities occurring with #5.

Level of Effort:	High
Level of Benefit:	High
Scheduling:	Ongoing through a phased approach starting in Q1 2025

5. **Shift to a culture of standardization** through the refinement of forms, checklists and documents used throughout the E2E process with a specific focus on standardization of legal agreements. Training for staff on the use and interpretation will be critical for success and should be coupled with measures that track and reinforce standardization. Similarly, it will be important to clarify what situations warrant a custom solution or tool as well as any approval processes that may be necessary to deviate from the norm. Further analysis of risk-based models could identify additional opportunities for standardization and streamlining.

   Ongoing updates to EnerGov workflows will be required to increase standardization. Further collaboration with DAPSM to identify priorities and required changes will support implementation. Clearly defined resources and transparent processes to support continuous and on-going communication between IT and various business units will further empower staff to identify and review potential updates.

Level of Effort:	High
Level of Benefit:	High
Scheduling:	Q4 2023 – Q4 2024

6. **Creation of a new construction permit process** within the E2E process to provide applicants with an early opportunity to plan for construction management separate from the building permit. This task will include working closely with Development Services to incorporate existing standards and requirements into a new process, mapping out the details of that process, and creating a new EnerGov case type with the required linkages.

Level of Effort:	High
Level of Benefit:	Medium
Scheduling:	Q2/Q3 2024

7. **Establishing development permits and replacing the PPA process.** The E2E future state was designed for development permits, which will require clear alignment between departments on DP areas and guidelines, as well as implementation considerations to incrementally shift from the current PPA to DP structure. A detailed implementation roadmap is outlined in Appendix D It is recommended that the Approving Officer be the signatory for development permits unless an exceptional case requires Council adoption. Early options include establishing DPs for areas requiring site disclosure statements where early applications would allow applicants to start provincial approval processes sooner.

Level of Effort:	Medium
Level of Benefit:	High
Scheduling:	Ongoing through a phased approach with defined DPs

8. **City-wide team structure** to establish a method for ongoing and proactive management of multiple complex applications through geographic teams to balance workloads, provide a high level of customer service, and enhance collaboration between departments.

Level of Effort:	Medium
Level of Benefit:	Medium
Scheduling:	Q3 2024

9. **Conduct a detailed staffing assessment** on the future state process to identify resourcing requirements needed to achieve the desired future state. This assessment can be compared to current staffing levels to identify where changes are required. This task is aligned with a DAP 02 workstream that was identified as a future priority to be actioned following the complete process redesign.

Level of Effort:	Low
Level of Benefit:	High
Scheduling:	Q1/Q2 2024

10. **Implementation of performance measures.** Time targets were identified as part of the future state milestones. Measures to track and monitor changes to the E2E process will help to guide overall implementation efforts and provide a greater level of understanding through a comprehensive baseline of data. This task aligns an ongoing DAP workstream. While time targets are an important first step in performance measures, time is considered a lagging indicator that cannot provide proactive insight into future activities. It is recommended that performance measures be expanded as part of future efforts to define and implement leading indicators that the City can use to predict outcomes.

Level of Effort:	Medium
Level of Benefit:	High
Scheduling:	Q4 2023 with leading indicators in Q4 2024

11. **Development of comprehensive service level targets** can build on time targets enabling the City to further align resources, budget considerations, and expectations. This task would benefit from a more comprehensive baseline data and staffing assessment.

Level of Effort:	Medium
Level of Benefit:	Medium
Scheduling:	Q4 2024

12. **Ongoing staff training and mentoring.** Ongoing training and mentoring for staff will support implementation efforts as well as long-term continuous improvement. With the development of SOPs and RACIs, these should be transitioned to training modules for staff. Role changes will also potentially require development of new skillsets, such as project management for overall ownership and coordination of the E2E process. Mentorship will empower staff with broad positive impacts for continuous improvement.

Level of Effort:	Medium
Level of Benefit:	Medium
Scheduling:	Ongoing

13. **Continue implementation of DAP 02 opportunities.** Throughout DAP 02, several opportunities identified in the workshops and discussions were initiated, are underway, or have been integrated in the E2E future state process design. The continuation of these activities will support an incremental transition to the E2E future state, complementing items #1 through #12 above. These activities are outlined in Appendix A.

Review of the Air Space Parcel subdivision process is warranted. While this process was considered a non-standard step and thus not part of the DAP 02 review, it will become more common into the future. Finally, an analysis of the role of, or timelines associated with, Council and bylaw approval requirements, including report submission deadlines, should be considered, as these have a bearing on overall processing times.

Level of Effort:	High
Level of Benefit:	Medium
Scheduling:	Ongoing

4.1.3   Operational Sustainment

Operational sustainment is the long-term objective of the overall DAP journey. At this stage, Burnaby is building a dedicated process improvement team to support with project management and data management activities. Two new positions are recommended, including:

1. **Business Process Improvement Specialist** to support ongoing process documentation and optimization. As implementation of the future state E2E process occurs, additional improvements will be identified and will need to be tracked and managed. A dedicated role will enable the various departments/divisions to have a single point-of-contact to support changes and standardization.

2. **Business Data Analyst** to support data development, refinement, and analysis. A key learning from DAP 02 was the inconsistency of and gaps within the current data the City relies on. As part of the implementation of DAP 02, standardization in the use of EnerGov will increase the consistency and reliability of the City's data. This in turn will inform the development of KPIs and continuous improvement. A dedicated role to support the standardization and analysis of data across departments/divisions will play a key role in shifting to operational sustainment.

This team is intended to have oversight on the City's development approvals processes and to support City departments with implementing on-going changes. Given the inter-departmental nature of the development approvals processes, this team may benefit from a similar cross-departmental structure or hierarchy within the City.

05
Appendices

Appendix A:
Opportunities and Implementation Summary

Table A.1: Opportunities Addressed through DAP 02

#	Opportunity	Implementation Status
1	Consider whether pre-application meetings should be required.	Complete. Determined pre-application meetings will be encouraged, but not mandatory.
2	Consider formalizing process for pre-application inquiry.	Integrated in E2E future state process. Pre-application outlined in future state.
3	Re-evaluate initial report to Council.	Complete. Report was eliminated.
4	Consider providing memo to council to inform whether application meets policy.	Integrated in E2E future state process. Council memo updated to include policy evaluation.
5	Consider using EnerGov for pre-application inquiry function to keep track of documents, communications and interactions.	Integrated in E2E future state process. Pre-application will be integrated into EnerGov.
6	Use preliminary circulation to determine commenting parties required for receiving comments.	Integrated in E2E future state process. Comment tracking to be used throughout E2E process.
7	Planner to take lead and ensure all comments are captured and followed up during the internal staff meeting.	Integrated in E2E future state process. Planner to act as project manager for E2E process.
8	Require applicant to prepare the Transportation Impact Assessment study and report before pre-application.	Integrated in E2E future state process. Study terms of reference to be provided as part of pre-application with study provided with master application submission.
9	EnerGov to allow application to capture transportation requests.	Integrated in E2E future state process. EnerGov to be updated to include transportation requests.
10	Fire Prevention Office to be involved early in the pre-application stage. Conflicts within the rezoning application to be resolved in the internal rezoning meeting.	Complete. Fire Prevention Office defined early requirements to be provided to applicant and involved in early discussions where appropriate.
11	Planner to be the lead contact for the application and project management and ensure all items are followed up on from internal rezoning meeting.	Integrated in E2E future state process. Planner identified to have project management role.
12	Align servicing requirements with public hearing requirements.	Integrated in E2E future state process. Servicing requirements identified early and confirmed prior to public hearing.
13	Standardize the planner SPOD requirements from the applicant.	Ongoing. SPOD milestone requirements and public hearing reporting in process of being updated.
14	Establish consistent procedures for responding to referrals/comments.	Ongoing. Standardization for referrals and comments in process for the four key referral steps.
15	Each department to ensure that all the directly discussed issues with the reports are captured in Energov.	Integrated in E2E future state process. Comment tracking to be used throughout E2E process.

#	Opportunity	Implementation Status
16	Ensure to grant viewing rights in EnerGov to all users.	Ongoing. User rights changed for some departments/divisions. Additional review of EnerGov access to be evaluated.
17	Review number of sign-offs required at key steps and reports.	Ongoing. Report review requirements under review.
18	Digitize Council version of public hearing report.	Ongoing. Review of digitization options in process.
19	Engage other departments early in the application process if requirement is identified.	Integrated in E2E future state process. Pre-application requirements identified for all departments/divisions.
20	Consider pre-inquiry role for heritage applications.	Complete. Heritage integrated in pre-engineering application for STF.
21	Integrate early referrals to Community Planning.	Complete. Community Planning integrated in pre-engineering application for STF.
22	Add additional items to documentation checklist, requiring the applicant to make an inquiry with city to confirm SPEA, archaeology, heritage, oil tanks, or contamination issues.	Complete. All flags integrated in pre-engineering application for STF.
23	Provide better information to applicants to be able to determine if a permit is required.	Complete. Website and application information updated. Pre-engineering application provides additional information.
24	Improve information on website for STF.	Complete. Website updated.
25	Clarify application requirements and standardize use.	Complete. Clarified application requirements, updated application forms, and only accepting complete applications for STF.
26	Switch to a locked database approach to prevent write errors.	Integrated with STF and E2E future state process. EnerGov to be updated.
27	Provide driveway design and location information to applicants early.	Complete. Part of pre-engineering application for STF.
28	Need digital system for file storage and maintenance; ideally integrated with EnerGov.	Complete. Digital submission, file storage and maintenance for residential building permits enabled with citizen self-service portal.
29	Role of digital and physical copy of drawing needs to be reversed. Digital primary for review and physical at end for inspection.	Ongoing. Digital submissions enabled. Digital review, digital inspection booking forthcoming. iPads for digital inspections updated.
30	Reduce rounds of comments/deficiencies.	Complete. Rounds of comments/deficiencies decreased for STF through standardization of comments, confirmation of levels of review, team lead role, and team huddles.
31	Communication challenges between applicant and owner can cause delays / confusion for staff.	Complete. Both designer and applicant provided with same communication.
32	Provide information on all application fees at the application outset.	Complete. All department/division fees are incorporated in application information and communicated to applicants.
33	Confirm zoning requirements for STF.	Complete. Zoning requirements confirmed. Collaboration between Plan Checkers and Zoning Planners established. Further opportunity to digitize zoning compliance under review.

#	Opportunity	Implementation Status
34	Clarify all application requirements from all departments/divisions for STF.	Complete. Application information from all departments/divisions confirmed and implemented.
35	Better integrate Forestry requirements and inspections into STF process.	Complete. Forestry integrated in pre-engineering application for STF and tracked for consistency.
36	Clarify when PPA requirements are communicated to applicants.	Ongoing. PPA requirements in process for clarification.
37	Integrate Heritage in inspections.	Complete. Heritage now collaborating with inspections for STF process.
38	Book inspections online.	Ongoing. Online inspection booking forthcoming.
39	Integrate feedback from inspections back to Plan Checkers to notify of a deviation.	Complete. Feedback and learnings shared with Plan Checkers. Further changes to EnerGov.
40	Involve ERC Landscape inspection prior to occupancy.	Ongoing. ERC involvement with inspections in process.
41	Automate the notification of the occupancy permit process.	Ongoing. EnerGov update required.
42	Review refund process for engineering damage deposit.	Ongoing. Process under review.
43	Establish a single point of contact so applicants know who to call.	Integrated with E2E future state process. Planners confirmed to act as project managers and be primary contact for applicants.
44	Limited information-sharing across departments mean that once an application moves from one function to another, there is no formal accountability.	Integrated with E2E future state process. Alignment across all departments/divisions, including roles and responsibilities, incorporated in future state design.
45	Accept e-signatures or digital stamps for all application documents that involve an owner or professional.	Ongoing. Digital signatures and stamps accepted for STF. City-wide policy under development.
46	Review what the fire prevention office needs to sign-off on.	Complete. Roles and responsibilities for E2E and STF confirmed.
47	Reduce number of emails for staff to focus on file review.	Ongoing. Standardization of EnerGov, additional or updated EnerGov tools, and clarification on communication requirements are reducing emails. Consideration for additional support part of implementation.
48	Review invoicing and billing process(es).	Ongoing. Detailed review of invoicing and billing requirements under review for E2E process.
49	Align timing of legal requirements for all departments/divisions.	Integrated with E2E future state process. All departments/divisions requirements confirmed.
50	Better integrate Planning and Finance systems.	Ongoing. Training, coordination, and streamlining activities underway.
51	Clarify documentation requirements for bonding.	Ongoing. Review of bonding requirements underway.
52	Consider gates in process.	Integrated with E2E future state process. Use of milestones key concept for E2E process with standardized requirements defined for each milestone.
53	Confirm PPA review requirements with other departments.	Ongoing. Review requirements being reviewed.
54	Update agent authorization form to capture contact changes if required.	Complete. Form updated.
55	Confirm site contamination requirements for PPA.	Complete. Requirements confirmed.

#	Opportunity	Implementation Status
56	Confirm complete applications requirements for PPA.	Ongoing. Requirements under review.
57	Standardize use of EnerGov for referrals.	Complete. EnerGov usage standardized by confirming a referral will not be marked 'complete' unless all requirements have been accepted. Notes will be added to referral item and will remain as 'pending'.
58	Confirm how other departments/divisions communicate with the applicant.	Ongoing. Applicant communication protocols established for STF and integrated in E2E future state.
59	Confirm alignment between PPA and BP processes.	Ongoing. Review and coordination of requirements underway.
60	Standardization of usage of note function in EnerGov.	Ongoing. City-wide protocols in development to confirm how notes are used in EnerGov.
61	Review of legal requirements that may impact PPA process.	Ongoing. Legal requirements under review.
62	Reduction of number of legal agreements.	Ongoing. All legal documents identified and triaged. First stage underway to eliminate legal agreements and incorporate requirements through other tools/processes.
63	Streamlining legal agreements.	Ongoing. Alignment between departments/divisions confirmed with time targets.
64	Confirm which department/division is responsible for acoustics.	Complete. Community Planning confirmed to be responsible.
65	Review comments provided to applicants.	Ongoing. Review of comments underway to standardize and identify common comments. Further implementation will be to communicate common deficiencies to applicants early on.
66	Integrate engineering requirements early on and communicate to applicant.	Integrated with E2E future state process. Engineering and servicing requirements aligned with other departments/divisions based on milestone.
67	Apply re-circulation process used by PPA to other processes.	Ongoing. Staff identified PPA steps to be efficient. Currently being applied to other processes.
68	Identify a fees/DCC expert to be a common go-to person.	Integrated with E2E future state process. Alternative solution identified to streamline fees and have better alignment with Finance.
69	Confirm when density bonusing is calculated.	Integrated with E2E future state process. Calculation for density bonusing identified. Additional option to standardize density bonusing to eliminate calculation to be developed.
70	Eliminate paper files for PPA.	Ongoing. Review of digital requirements and transition underway including digital signatures.
71	Develop master permit structure and numbering.	Integrated with E2E future state process. Master application structure required for alignment between rezoning, subdivision, PPA/DP and building permit processes.
72	Identify a master permit numbering system for commercial BPs.	Integrated with E2E future state process. Coordination of multiple commercial BP permits part of future state.
73	Update EnerGov to be flexible with how commercial BPs are organized.	Integrated with E2E future state process. Flexibility for commercial BP organization identified.

#	Opportunity	Implementation Status
74	Standardize case type linkages in EnerGov.	Integrated with E2E future state process. EnerGov update requirements identified.
75	Increase quality of application information provided to applicants.	Integrated with E2E future state process. Commercial BP application information and website to be updated. Enhance education to focus on quality and completeness.
76	Standardize when applications transition to commercial BP.	Integrated with E2E future state process. Confirmed application will be transitioned to commercial BP after final adoption with new Construction Management Permit after 3rd Reading to enable construction planning prior to commercial BP.
77	Educate applicants on why requirements are needed for commercial BP.	Ongoing. Education opportunities occurring with information being updated.
78	Share process information with applicants.	Ongoing. Application guide developed for STF. Similar tools to be developed for E2E process.
79	Create separate workstream for supportive/non-market rental housing.	Integrated with E2E future state process. Identified to have unique process requirements and time tracking different from standard applications.
80	Review how hard copy files are managed for commercial BP.	Ongoing. Digitization opportunities are being explored.
81	Reduce internal and external status requests.	Integrated with E2E future state process. Single owner confirmed and identified with EnerGov. Roles and responsibilities confirmed. Review of status options and standardization of use to be confirmed.
82	Review fees for PPA resubmission when commercial BP drawings do not align with PPA approved drawings.	Integrated with E2E future state process. PPA requirements better communicated to applicant including potential impacts if there is a misalignment. Integration between zoning and commercial BP part of DP structure.
83	Use EnerGov for emails so documentation in EnerGov.	Integrated with E2E future state process. EnerGov updates to integrate with emails.
84	Add trigger for sediment control permit in commercial BP.	Integrated with E2E future state process. Trigger for sediment control permit confirmed.
85	Reduce number of commercial BP reviews.	Integrated with E2E future state process. New construction management permit designed to streamline commercial BP process.
86	Confirm communication of sediment control from Engineering to Building.	Integrated with E2E future state process. Timing and requirements for sediment control confirmed.
87	Confirm solid waste referral for commercial BP.	Complete. Item review for solid waste added to EnerGov.
88	Confirm how best to share sub-sets of drawings with specific groups for the commercial BP process.	Integrated with E2E future state process. Digitization opportunities identified. Case types to be added to EnerGov to align with referral drawings requirements.
89	Coordinate communication of deficiencies to applicants through single file manager.	Integrated with E2E future state process. Communication requirements confirmed.

#	Opportunity	Implementation Status
90	Establish consistent re-submission requirements across departments.	Ongoing. Re-submission requirements confirmed for STF. Review and coordination between departments required for E2E process. Standardize tracking of re-submissions in EnerGov.
91	Streamline other department/division requirements for commercial BP.	Integrated with E2E future state process. New construction management permit to streamline process.
92	Review occupancy requirements from other departments/divisions.	Integrated with E2E future state process. Alignment between departments/divisions identified by milestone to reduce/streamline occupancy requirements and communication protocols.
93	Add capability in EnerGov for other departments/divisions to sign off on occupancy requirements.	Ongoing. Occupancy requirements being reviewed. EnerGov updates forthcoming.
94	Identify how to better link historical addresses.	Complete. Process to link historical addresses confirmed. Incorporate with sub-trades.
95	Incorporate all securities in EnerGov.	Integrated with E2E future state process. All securities to be added and protocols for review established.
96	Confirm geometrics early in process.	Integrated with E2E future state process. Part of transportation requirements.
97	Rename planning and engineering SPOD to reduce confusion.	Complete. Engineering SPOD renamed.
98	Engineering to confirm preliminary servicing requirements earlier in process.	Integrated with E2E future state process. Engineering and servicing requirements confirmed with milestones.
99	Establish accountabilities for referral timelines.	Integrated with E2E future state process. Referral time targets established.
100	Standardize TA letter.	Ongoing. Renamed to 'Prior To' letter with requirements being standardized. Aligned with updated public hearing reporting and communication with applicant.
101	Reduce delay in issuing TA letter.	Integration of TA letter with updated public hearing report shifts preparation prior to public hearing. All departmental/division requirements for TA letter confirmed.
102	Establish an interdepartmental review on TA requirements.	Integrated with E2E future state process. Team-based model confirmed with standard review requirements.
103	Confirm fee schedule requirements.	Ongoing. Alignment between departments/divisions confirmed.
104	Review invoicing procedures.	Ongoing. Invoicing requirements and further streamlining underway including clarification of roles and responsibilities.
105	Reduce length of TA letter.	Ongoing. TA letter requirements standardized across departments/divisions and integrated with new public hearing report structure/steps.
106	Review legal memo requirements and process steps.	Integrated with E2E future state process. Legal memo process streamlined with time expectations. Further review of risk-based processes will enhance streamlining opportunities.
107	Standardize timelines for subdivision and legal document requirements.	Integrated with E2E future state process. Timelines generally confirmed. Each application will need to confirm timelines based on complexity.

#	Opportunity	Implementation Status
108	Reduction of number of legal memo revisions.	Integrated with E2E future state process. Standard number of revisions confirmed. Additional revisions would be reviewed to understand the reason for deviation to process.
109	Eliminate landscaping memo.	Complete. Memo eliminated.
110	Add checklist for all legal documents in EnerGov.	Integrated with E2E future state process. Legal documents currently under review. To be added to EnerGov.
111	Develop a standard look and feel for comments to applicant.	Ongoing. Forms currently being developed and implemented across processes.
112	Develop a standard submission review checklist of things that the reviewer can look for when evaluating a submission.	Ongoing. Review checklist underway.
113	Develop a standardized report review template and circulation process.	Complete. Report template developed.
114	Develop a standardized template that can be used for Correspondence Emails/Letters.	Ongoing. Template development underway.
115	Develop a standardized process/document to request legal documents.	Ongoing. Review of legal documents underway.
116	Add disclaimer to application forms and early communications with applicants to advise of variable timelines where Schedule 2 uses are applicable.	Ongoing. Forms being updated to include disclaimer.

Table A.2: Additional Opportunities Identified for Consideration

#	Opportunity	Rationale
1	Consider pre-application fee(s).	Consideration for DAP 03 implementation as pre-applications are implemented.
2	Expand Bluebeam licenses and integrate with EnerGov.	Consideration for DAP 03 implementation as new EnerGov modules are updated.
3	Send automated email reminders to applicants.	Consideration for DAP 03 to integrate automated reminders and/or push notifications at select steps where delays are common and/or where delays will have significant downstream impacts.
4	Review Board of Variance process.	Consideration for DAP 03 to review Board of Variance processes, triggers, and to clarify information for both staff and applicants.
5	Consider removing change of use rezonings on CD zoned properties that have clear permitted uses.	Consideration for DAP 03 to streamline rezoning applications, potentially as part of the Zoning Bylaw review.
6	Coordinated communication to staff on how Council priorities affect application review.	Consideration for DAP 03 to develop communication protocols for Council priorities and impacts for application review to align across departments/divisions.
7	Review access levels for users in EnerGov.	Consideration for DAP 03 to confirm user security requirements for EnerGov following role change implementation.

#	Opportunity	Rationale
8	Review direct payment access, training, and process requirements.	Consideration for DAP 03 to review access for direct payments and/or opportunities for better alignment with other department/division needs.
9	Large screens for commercial BP review.	Consideration for DAP 03 to provide TV-sized screens for large drawings required for commercial BP plan review. Specific focus on how hardware requirements will impact digital transition.
10	Ongoing training for users on EnerGov.	Consideration for DAP 03 to establish ongoing training opportunities and enhanced communication on EnerGov.
11	Only accept electronic forms of payment.	Consideration for DAP 03 to review impacts of shifting to only accepting electronic forms of payment.
12	Consider appointment of additional Approving Officers.	Consideration for DAP 03 to identify additional Approving Officers.

Table A.3: Opportunities Aligned with Other DAP 02 City-led Workstream and/or non-DAP projects

#	Opportunity	Rationale
1	Consider charging different fees based on the type of application. Fees should increase with the complexity of the application.	Part of DAP 02 City-led workstreams. To be continued through DAP 03.
2	Improve the available information on the website to provide specific enough information to applicants.	Part of DAP 02 City-led workstreams. To be continued through DAP 03.
3	Create formal document management and retention process.	Part of City-wide document management and retention review. Specific focus on naming in EnerGov and digital/paper files.
4	Better manage contacts across the E2E process as contacts can change throughout the process.	Part of City-wide documentation review. Specific focus on user access to input contacts, standardization of naming, and clean-up of old contacts. Could consider contact registration and staff training on recognizing and removing duplicates.
5	Better track multiple payments made by a single contact.	Finance is working on building a dashboard that shows the linkages of multiple payments by a contact.

Appendix B:
STF Process Redesign Future State Development

The following outline the current state and future state actions that were undertaken for the STF process.

STF Current State

As part of this phase, KPMG followed three key steps:

1. Current state workshops building on the City-led process review.
2. Prioritization and pilot projects to implement 'quick wins'.
3. Data analysis to identify further insights to staff identification of pain points and opportunities.
4. Based on these activities, key findings were identified, which established the foundation for the future state redesign.

These steps are described below.

1   Current state workshops

In November 2022, KPMG kicked off the process redesign with a current state workshop for the STF process to identify additional pain points and opportunities for improvement. This workshop was attended by front line staff from each department involved in the STF process including Building, Planning, and Development Services, and was based on the process map developed through the City-led lean Review process. Focused solely on new development applications (i.e., no renovations, extensions, etc.) and grounded in the lean methodology (see Section 2) outlined in the previous section, these workshops were used to build out a more comprehensive process map that captured a wider view of opportunities for the STF process.

2   Prioritization and Pilots

Drawing on the outcomes of the current state workshop, an opportunity prioritization workshop with participants from the current state workshop was held to identify which opportunities could be quickly implemented (see Table 1 for a list of opportunities). These 'quick wins' would be prioritized and implemented as pilot projects, with the purpose being to demonstrate success early on and to generate buy in and momentum for the wider process redesign initiative. This workshop resulted in the identification of two process improvement priorities (see Figure A.1 for prioritization matrix):

a) Creating an application checklist outlining application completion and technical design requirements (a combination of #3 and #4 from Table A.1).

b) Enabling the digital submission of STF development permit applications prior to the launch of the EnerGov self-service portal.

Any opportunities related to IT would need to be delayed due to the at the time pending HTML5 upgrade to EnerGov, which are shown in pink below. These opportunities were provided to the IT department to be integrated with future DAPSM priorities.

Further workshops were held with key staff to define, test and measure the pilots. By continuing with the lean methodology, a structure for each pilot was prepared with staff, which included defining the purpose of the pilot, the tasks and roles to complete the pilot, preparing a schedule and workplan, and defining data sources to test and measure success. Over the course of five workshops with staff, the pilots were designed, however, challenges arose over ease of implementation and ability to test or measure the pilot.

For the application checklist, staff reviewed and updated several of the application materials, which were reviewed and confirmed by management. As the implementation of the checklists required notification to applicants that requirements were changing and a potential opportunity to shift to accepting only complete applications, City staff decided to integrate the pilot into the future state discussions.

Similarly, the option of early digital submission was met with two key considerations with broader implications: (i) the use of digital signatures and seals, and (ii) the ability to enable an interim FTP site to allow for digital submissions of application documents prior to the EnerGov self-service portal becoming available. City staff decided to proceed with a City-wide policy for digital signatures and seals and an interim FTP site was not advanced due to potential conflicts with DAPSM priorities for the EnerGov portal.

By the time these decisions were made, the overall process redesign and future state workshops were occurring so both pilots were integrated into the wider STF process redesign initiative.

Table B.1: STF List of opportunities from current state workshop

Opportunity #	Key Opportunity
1	Notify the public of all the new information available on public-facing GIS tool so they can include it in their plans before submitting.
2	Require applicants to inquire about archeology, SPEA, and servicing requirements prior to submission.
3	Create a checklist outlining all technical drawing standards required for an application to pass the preliminary review.
4	Create a checklist of all documents required for document submission.
5	Combine application deficiency review with preliminary plan review.
6	Create a video explaining the application process including the documents required for a complete application.
7	Improve the quality and clarity of information found on the City's website (5S the website).
8	Provide a draft invoice of all fees (not just application fees).
9	Turn away incomplete applications.
10	Consolidate department deficiencies list for each review round.
11	Automate the generations of building permits so that they can be created immediately after approval.

12	Create an application extension fee.
13	Create a bank of high-quality application examples for applicants to use when revising their drawings.
14	Use EnerGov to automatically notify plan checkers when other groups have cleared their review.
15	Enable online application submissions.
16	Create a system of automated email reminders for applicants.
17	Link ERC case number and building permit in EnerGov
18	Link ERC cases to BP cases in EnerGov.
19	Link Building permit cases to Engineering cases in EnerGov.
20	Enable inspections to be booked online.
21	Divide and rationalize Engineering workflow based on review subject matter (i.e., trees, development, infrastructure, etc.).
22	Enable applicants submit plans using Blue Beam.
23	Maximize document management functionality in EnerGov.
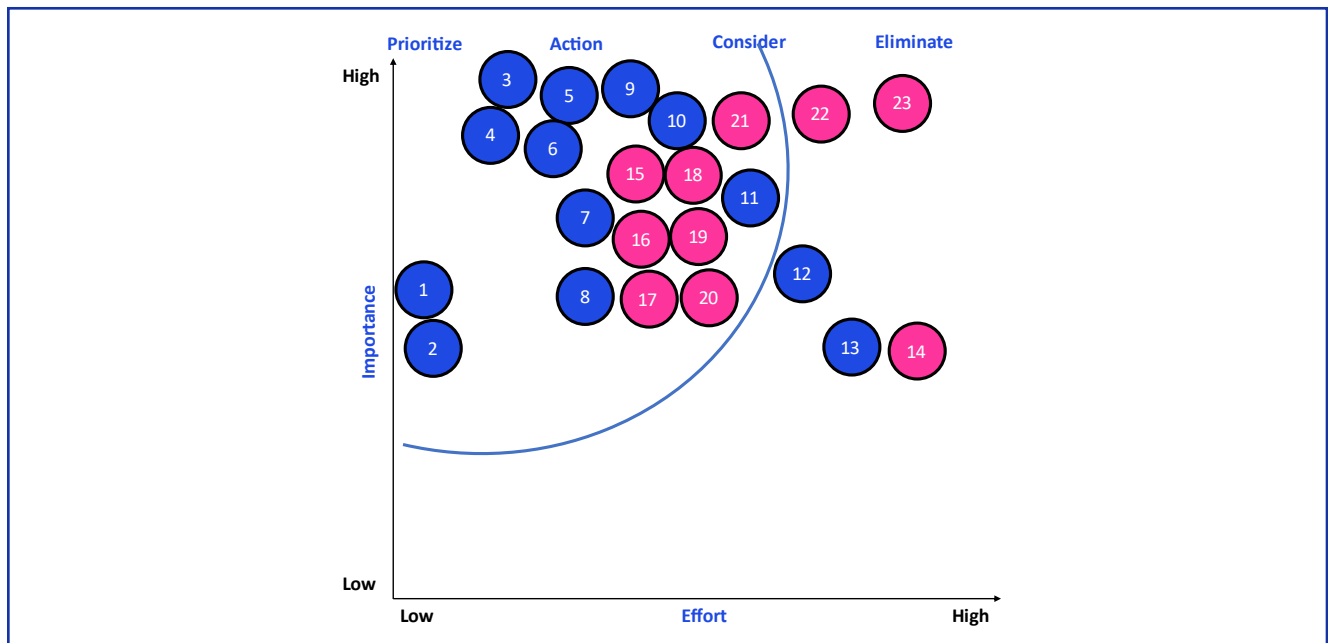
Figure B.1: STF prioritization based on level of effort and level of benefit

3   Data Analysis

During the same timeframe as the pilots were occurring, the KPMG team conducted an additional review of the permit data on STF applications. The data was provided by the City from the City's permitting workflows system, EnerGov, and included information on overall permitting times in days as well as time to get to select milestones in the process. The KPMG organized the data based on the lean concepts of cycle time and lead time (see Section 2.3.1 for information on cycle time and lead time) to establish a current state baseline of processing times.

Additional information was gathered to assess the quality of applications. Based on a random sample of 44 applications selected from the last 5 years (the required minimum number to have a statistically significant sample), City staff manually collected information of the deficiencies staff identified to applicants that needed to be addressed prior to approving a permit. This data was provided to KPMG to identify trends and patterns that could provide additional insights into both challenges and opportunities.

Based on the two datasets several insights were identified, including:

- Variation in wait times presents an opportunity for standardization to help reduce processing times.

- Addressing common deficiencies can reduce wait times and contribute to a reduction of unnecessary delays that can be addressed through proactive communication.

4   Key Findings

Based on the current state workshops, the pilot projects, and data analysis, the following key findings were identified:

- The proportion of time spent on City-related tasks and applicant-related tasks is unclear and requires additional data. The time required for applicant-related tasks impacts overall cycle time and is outside of the City's control. Tracking this information will help with expectations and communication.

- The level of variation in processing times reflects the differences in how applications are processed and lack of clarity on tasks and/or expectations. Standardization, training, and mentoring could all contribute to reducing variation and increasing predictability.

- Early opportunities for review of servicing, heritage, archaeology, public trees, and site contamination could reduce processing times and increase applicant satisfaction.

- The approach to assigning applications and the backlog of applications is contributing to overall processing times. Elimination of the backlog and proactive assignment of files can reduce processing times as well as proactively manage staff workloads.

Together, these finding were the principles that guided the future state redesign.

STF Future State

Two key steps were used to define the future state and confirm a realistic and possible future state process that could be implemented. These steps included:

1. Future state workshops to design an ideal process including all relevant organizational touchpoints.

2. Validation and refinement of the future state process.

These steps are described below.

1   Future State Workshops

The purpose of this phase was to draw on the key findings to develop a comprehensive future state process map that could be implemented. As a first step, front-line staff participated in a ½ day co-design workshop to map out an idealized future state process in February 2023. Key outcomes from this workshop included:

- The addition of pre-application steps to provide early insight to applicants and early collaboration across departments.
- A central point of contact for applicants so they know who to contact for questions and updates.
- Standardized process steps with shared understanding of expectations.
- Assignment of applications directly to staff after they have been accepted by the City.
- Collaboration between departments and clarity on who does what and when.
- Differentiation between City tasks and applicant tasks, which require increased collaboration, so all City tasks are not overlapping with applicant tasks.

2   Future State Validation and Refinement

The KPMG team digitized the draft map prepared by staff and worked with staff, Working Group members, and management of relevant departments throughout March to refine and confirm the future state process map. Through this review process, the proposed future state was vetted through an iterative review process where City staff provided detailed input to help refine and validate the process map into an actionable and realistic form while still addressing the key findings from the current state phase. This refinement and validation process included the following steps:

Staff Validation

Two follow up sessions were held with staff who participated in the future state design to validate the draft process and identify where any changes would reflect their vision. After the first session, staff were provided with the draft map for additional comments or questions, where they were discussed and confirmed at a second session. This process resulted in a refined future state process map representative of their ideal STF process.

Working Group Validation

The refined process map was presented to the project Working Group for further review and comment to provide an opportunity for departments not involved in the future state design to provide their own insights and/or comments. This step was also important to confirm alignment with DAP goals and to empower the Working Group to support implementation as the change agents for the project.

Management Validation

Finally, the draft future state was vetted through the management team for the relevant departments most affected by the STF process specifically Building and Engineering. Further discussions were held with select teams, such as Urban Forestry and Community Planning to confirm changes that would affect their groups. The feedback from these groups informed the implementation roadmap and final changes to the future state process map to reflect realistic considerations for implementation.

The most significant change to the draft map included the refinement of the pre-application stage to an 'engineering pre-application process' which became a separate process to address site-level issues including servicing, heritage, archaeology, public trees, and site contamination. City staff determined this process would be administered by Engineering with flags to the other relevant departments, would leverage the City's GIS data to identify potential issues, and would issue an approval that all site-level issues have been addressed prior to the applicant proceeding with a STF application. The addition of this new Engineering-led process would provide applicants with early information that could affect the location and design of their building prior

to starting their design process and would focus the building permit application process on building code review. In essence, the STF application process became a two-stage process designed around applicant needs and expectations that also could decrease processing times and provide staff with increased clarity on tasks and roles.
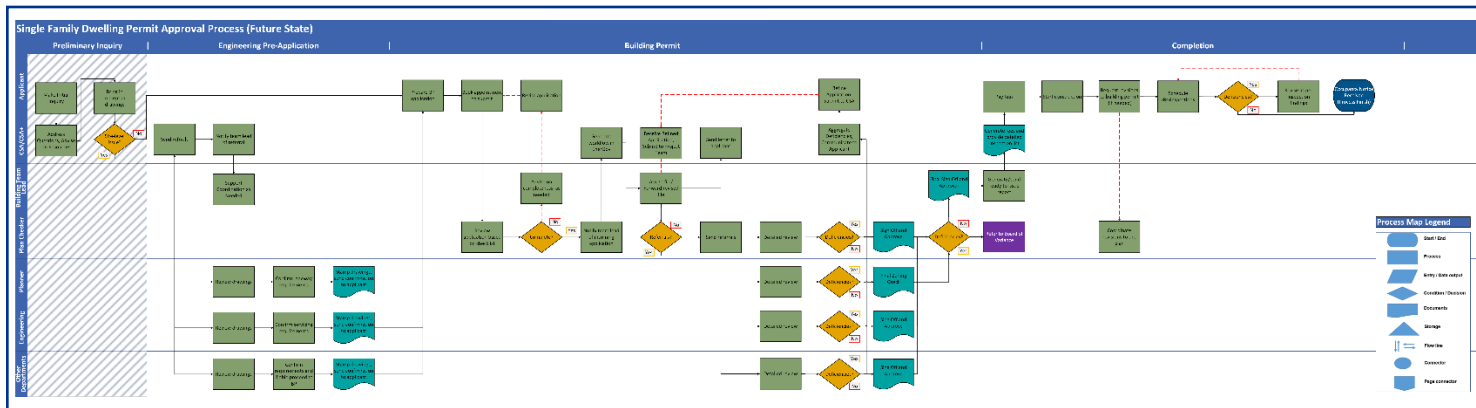

Figure B.2: Single and Two-Family (STF) future state building permit process

Appendix C: E2E Process Redesign Future State Development

The following outline the current state and future state actions that were undertaken for the E2E process.

E2E Current State

As part of this phase, KPMG followed three key steps:

1. Current state workshops building on the City-led process review of the residential building permit process.
2. Data analysis to identify further insights to staff identification of pain points and opportunities.
3. Based on these activities, key findings were identified, which established the foundation for the future state redesign.

These steps are described below.

1   Current State Workshops

Current state workshops were held for each of the four processes. Early on it was identified that rezoning and subdivision should be assessed together as the tasks for the subdivision process occur within the rezoning process. Two workshops were held to map the current state and identify pain points and opportunities. An additional workshop for the commercial building permit mapped the process applicants proceed with after Final Adoption.

Finally, a workshop on the preliminary plan approval (PPA) was held to identify opportunities for improvements while the transition to a development permit process is implemented. Recognizing the transition would take time due to required Zoning Bylaw and Official Community Plan amendments, the current state assessment of the PPA was to identify potential quick wins and help to improve process efficiency in the interim. The results of this review showed the same overlap of application types that was found between the rezoning, subdivision, and commercial BP applications. As a result, the project team decided to integrate the PPA/DP transition into the end-to-end future state process redesign, thereby reducing the number of planned future state workshops from the original four down to two.

Unique to the City of Burnaby, the PPA process was implemented to provide initial zoning check for applications. As part of the previous DAP report, the City identified an opportunity to transition to the DP process to provide additional opportunities for development conditions and to enable additional flexibility throughout the application approvals processes.

Our current state assessments identified a list of opportunities for process improvement. The three tables below outline the findings and opportunities and each of the approvals processes respectively. These opportunities formed the basis for the future state redesign.

Table C.1: Key Opportunities identified at Rezoning and Subdivision Workshops

Summary of Pain Points	Summary of Opportunities
Invoicing and billing is onerous requiring a lot of time to process invoices.	Increase coordination with Finance and provide additional support/training on invoicing.
Subdivision receives a 2nd engineering PSR for the TA letter.	Refine PSR to prepare TA letter so it captures final changes.
Standardizing TA letter has been challenging in the past as unclear how to integrate site specific requirements.	Identify and sort TA components and confirm which can be standardized.
Delays in circulating TA letter.	Address upstream challenges to preparing TA and measure circulation timing to confirm TA is issued as close after 2rd Reading as possible.
Need confirmations and communication from other departments sooner.	Round table review with all departments to agree on TA letter requirements.
Currently dozens of types of legal agreements exist for various types of development.	List the legal agreements and identify which can be eliminated, streamlined, and standardized.
No standard documentation for fees.	Create a standard document with each type of application and the fee required for each.
Replacements in legal agreements and other documents at the time of occupancy cause additional delays.	Confirm documentation required at occupancy and final information required, and integrate in communications and checklists.

Table C.2: Key Opportunities identified at Commercial Building Permit Workshop

Summary of Pain Points	Summary of Opportunities
Planner needs to give sign off to building inspector in EnerGov.	Add capability in EnerGov for planners and inspectors to notify each other of sign offs.
Re-submission tracking not clear in EnerGov.	Add functionality in EnerGov to track re-submissions.
Solid waste item review needs to be confirmed through standard communication from engineering.	Create an EnerGov item review for solid waste.
Climate action requests holds on occupancy for specific issues, which is too late in the process.	Integrate Climate Action in referral process.
Planners send applications prior to PPA/3rd reading.	Standardize when applications can be made to building and integrate with subdivision and new DP processes.
Exemptions on specific applications lead to inconsistency in processing and reviews.	Priorities should be clearly identified (i.e., supportive housing) and integrated into the overall file management.

Summary of Pain Points	Summary of Opportunities
High levels of inquiries on new building requirements.	Create an information guide for new building construction and changes that occur in future.
No formal trigger for sediment control permit.	Add item review for sediment control.
Building coordinates two item reviews with engineering now instead of one in the past.	Support engineering development managers to manage engineering referrals; track review times and whether referrals are bypassing the engineering development manager.
Some referrals are occurring that may not need to be.	Review referrals based on information that is needed and confirm when referrals are sent and for what reason comments are requested.
Re-submission contacts often change.	Add option in EnerGov to confirm and update contacts. Integrate process with City's contact management project.

Table C.3: Key Opportunities identified at PPA Workshop

Summary of Pain Points	Summary of Opportunities
Confirm how to manage contacts and specifically the Agent Authorization Form.	Provide training to staff on contact management and Agent Authorization Form.
Roof mechanical equipment review occurring, but not relevant to PPA.	Confirm if a PPA is required for mechanical equipment of roofs.
Some groups have clear checklists for referrals that clarifies when and how referrals are needed.	Expand practices to all groups and confirm referral requirements.
Not clear where site contamination is in the overall process.	Confirm site contamination process and timing. Integrate with new DP transition.
Inconsistency in referral process and how different departments contact applicant.	Confirm communication protocols with applicant and different departments.
Rejection of items review in EnerGov causes confusion to the workflow.	Standardize the use of the notes functionality in EnerGov and use of 'In Review' and 'Reject' status.
PPA can recommend legal agreements, but not require or oversee them.	Legal to provide a template to PPA group to identify the requirements the legal team could use for agreements.
Time consuming to identify if the fees are applicable or not.	Confirm fees or identify a DCC specialist that can advise PPA group.
Confirm use of paper and digital files as well as document sharing with Building department.	Initial change to scan PPA documents before transferring to Building. Longer term to evaluate document management overall.

2   Data Analysis

To help validate feedback about current state challenges and opportunities, an analysis of application data provided to KPMG from the City of Burnaby's EnerGov application processing software. Like in our STF data analysis, we drew on the concepts of lead time and cycle time from the lean methodology to provide additional insights to the feedback identified by staff in the current state workshops and to better understand how applicant delays factored into overall processing times. Findings from the analysis include:

Rezoning & Subdivision

1. Rezoning and subdivision application timelines are highly variable: Data on application processing times revealed lead times was inconsistent reinforcing staff feedback on unpredictable processing times. Data also identified a weak correlation between timelines and the level of complexity of a project as defined by the number of floors (i.e., the level of complexity) indicating the variability in processing times is not due solely to the level of complexity.

2. Cycle times are similarly variable with significant ranges in processing time between milestones.[4]

3. Processing times to meet legislative requirements and public hearing(s)s are a significant contributing factor to overall processing times. Long delays between bylaw readings was common across applications.

Commercial Building Permits

1. The time to assign a file quantifies the backlog and ranges significantly.

2. There is a weak correlation between the size of the building and the processing time suggesting that the size of the building is not a significant contributing factor to the overall processing times indicating the presence of causes of delays that are independent of scale.

3. Commercial reviews often include outliers contributing to the variation in the dataset. Additional information would be required to confirm the cause of these outliers and whether they should be tracked separately.

4. Timestamps indicate process uncertainty and inconsistent use of EnerGov's application tracking features contributing to challenges with data analysis. Standardization would increase the certainty and reliability of the data.

3   Key Findings

Based on the current state workshops and data analysis, the following key findings were identified:

- Interdepartmental communication and collaboration are common challenges across all of Burnaby's core processes. Staff expressed a desire to know more about what each department does and to integrate this knowledge into the future state.

- Ensuring the completeness and quality of applications earlier in the process represents a key opportunity for improving efficiency.

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[4] The review of the E2E process did not include an analysis of the role of, or timelines associated with, Council and bylaw approval requirements. During the DAP 02 project, but wholly separate from, changes were made to Council report submission deadlines, including Public Hearing reports. These changes increased processing times by one month and are not reflected in the historical data analysed as part of the current state assessment. Due to these changes and the overall impacts on the E2E process, an analysis of the role of, or timelines associated with, Council and bylaw approval requirements, including reporting deadlines, should be considered as part of DAP 03.

- There is a high level of variation in the ways that each of Burnaby's four core processes are executed. Standardization of tasks and increased clarity were identified as potential opportunities across all processes.

- While there is a recognition that more communication is needed, there is also a desire to identify optimal communication levels. Importantly, meetings should be used strategically and with a clear purpose.

- There is a significant lack of understanding around accountability and roles. This uncertainty has led to overlapping tasks, duplication of effort, and overall process delays.

- Additional roles and or resources are likely needed to increase communication and collaboration with applicants and to support staff with managing and overseeing process improvements.

- Communication with applicants is by department and on an as-needed basis. Applicants receive comments from different departments at different times. As a result, staff receive multiple plan / document revisions, often without knowing what has changed or why.

- Digitization has been uneven across Burnaby's core processes.

E2E Future State

Two key steps were used to define the future state and confirm a realistic and possible future state process that could be implemented. These steps included:

1. Future state workshops to design an ideal process including all relevant organizational touchpoints.

2. Validation and refinement of the future state process including additional workshops to incorporate recent changes to the Real Estate and Development Marketing Act (REDMA).

These steps are described below.

1   Future State Workshops

Building from the results of our current state assessments, a combined end-to-end future state workshop was conducted with City staff in early March 2023. Spanning two days, the purpose of this workshop was twofold:

1. To build a comprehensive understanding of each of the departments and tasks implicated across the rezoning, subdivision, commercial BP, and PPA processes;

2. To understand each of the different issue areas associated with these processes (i.e., servicing, fire, trees, etc.), their timings and their interdependencies across rezoning, subdivision, commercial BP, and PPA.

2   Future State Validation and Refinements

Working Group Validation

The draft E2E map was presented to the Working Group for review and discussion. As part of this discussion, staff identified the recent changes the Province made to the REDMA legislation that will impact the future state process as a result of changes to when pre-sales can start and the 12-month timeframe for developers to secure issuance of a building permit. As a result, an additional workshop was held to adjust the draft future state process to incorporate these changes.

Future State Redesign Workshop to integrate REDMA changes

An additional workshop was held with staff to refine the future state process to enable the City to proactively plan for the REDMA changes. A key goal for this workshop was to streamline the preparation and review of the legal documents following the public hearing, a key milestone for the E2E process. In addition to this workshop, follow up discussions were held with the Legal, Development Planning, and Subdivision teams to align on

future state changes and outcomes that would increase collaboration and efficiency for the City overall. Following this workshop, our team updated the draft process map.

Staff Validation

The updated process map was provided to staff from across the departments for review and comments. These comments were incorporated into a final update to the future state map.

Appendix D: Development Permit Transition Overview

Transitioning the city's PPA process to a development permit process will take place in two distinct workstreams that should be implemented concurrently. Workstream A, known as the 'Tactics' workstream, outlines the procedural steps required to phase out the PPA process and effectively implement DPs. The second workstream, known as the 'Governance' workstream, outlines the roles and legal framework needed to sustain an effective DP review and approvals process.

Workstream A: Tactics

Responsible Parties: OCP/Zoning Bylaw Team, Strategic Initiatives Division

Steps:

1. Staff to identify which development permits are most relevant for Burnaby's context and needs. Consultation with staff and a review of available permits yielded an initial list of recommended DPs and supporting actions:

   a) Implement hazard DPs for lands subject to site disclosure statements.

   b) Align form and character DP requirements with anticipated legislative changes to zoning framework.

   c) Explore opportunities to use form and character DPs to integrate climate action priorities and STEP code considerations into permit approvals processes.

   d) Continue to work with other departments to identify additional DP options and to inform about DP approvals priorities and requirements.

2. Conduct research to better understand the relative strengths and weaknesses of implementing DPs within the OCP versus in the City's zoning bylaw. Research into leading practices yielded the following recommendation:

   a) Identify and justify the existence of DPs in the OCP and implement DP guidelines in the zoning bylaw. This combination aligns the recommended DP implementation with legislative requirements and provides the City with strong enforcement mechanisms.

3. Define boundaries, purpose, and guidelines for first DP. Based on consultation with staff and research into leading practices, we recommend:

   a) Implementing a hazard DP for lands subject to site disclosure statements and align process implementation with current ERC review process. The team should also confirm that DP application requirements and review timelines align with future state milestones. If applicable, staff should also determine whether DP implementation will have any impacts on PPA process.

4. Once DP boundaries, purpose and guidelines are confirmed, the OCP and zoning bylaw should be updated to reflect the specifics of the first implemented DP. DP application requirements should be established along with the requisite application documentation (i.e., forms, checklist, websites, public communications). Staff should also be trained to undertake the tasks associated with the new DP approvals process.

5. Confirm and announce a start date for accepting DP. Monitor overall process flow and identify any impacts on PPA process. In cases where there is overlap between DP and PPA, remove the overlapping requirement from the PPA process to enhance efficiency. Clearly communicate changes to all staff as they occur to facilitate an effective transition.

6. Extend process developed during initial DP implementation to support additional DPs. It is important to distinguish between DPs that will be triggered early in the end-to-end process (i.e. hazard DPs) and those that will occur later (i.e., form and character DPs) and to structure their implementation to align with end-to-end process milestones. For example, form and character DPs will include similar review requirements and process milestones of the future state end-to-end process. This will allow DP applicants to submit much of the required information as part of their master application and will allow the review process to occur concurrently with the rezoning and subdivision review.

Workstream B: Governance

Responsible Parties: Senior Staff

Steps:

1. Confirm decision making approach for DP approvals and present options to Council. Initial research and consultation yielded the following recommendation:

   a) Make a delegated Approving Officer responsible for approving as many DPs as possible. This would allow for flexibility and expediency across the approvals process. Aligning delegated approvals with end-to-end process milestone would also enable DP approvals to coincide with 1st, 2nd, and 3rd reading, thus enabling council to receive enough information to grant 'approval in principle' without requiring formal Council approval.

2. Prior to the formalization of DPs within the City's OCP and zoning bylaw (Step 4 under Workstream A: Tactics), the City's procedures bylaw should be updated to include DP approvals processes. This update should state DP purposes and requirements, outline the formal approvals decision making structure, and indicate the ability of applicants to refer a delegated decision to Council.