

Streamlining the Development Application Review Process

Town of Perth

Prepared by Leading Edge Group

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Heritage
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PERTH

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1. Executive Summary

The Town of Perth (“the Town”) engaged the Leading Edge Group (LEG) to conduct a Lean review of their Development Applicant Review process. This engagement focused on how the people, processes and practices including the use of technology impacted the effort required and timeliness in processing applications.

The review followed the lean roadmap of Plan-Do-Check-Act with a stepwise approach to understanding and mapping the current state, analyzing the process, identifying waste and determining the underlying root causes. Potential solutions were then identified and prioritized. These then formed the basis for developing a comprehensive set of recommendations for enhancing the process going forward.

With respect to the findings, one theme that emerged, was a lack of an efficient way of determining the status of each application. This impacted internal stakeholders and applicants alike. The process relied heavily on institutional knowledge and memory rather than documented procedures. In addition, the use technology was fragmented and suboptimal in its implementation. There were also divergent opinions with respect to how various stakeholders viewed the current issues as well as potential solutions. Notably they were those who favoured an integrated system relying on all electronic documentation. On the other hand, there were those with a felt need for paper-based documentation as well as segregation of functions within the technology platform.

Key recommendations include establishing clear and easy-to-understand documentation to provide clarity to the process steps, documentation and payment required, as well as timelines for key activities and meetings. This would minimize uncertainty while also managing applicant expectations. In addition, technology could be leveraged in a number of areas to simplify tracking and accountability for adherence to timelines as well as providing general information accessible online.

The future enhancements to the application review process would also benefit from a cross-functional collaborative approach to ensure stakeholder alignment. The system would also have to be flexible to accommodate both electronic and paper flows and also segregation of data accessibility as necessitated by legislations and other practical requirements.

2. Client Requirements

As is the case with many municipalities within the province, the Town of Perth has committed to do more with less, identify efficiencies and provide real value for tax dollars. Therefore, there is the need to discover and implement new ways to drive efficiencies without compromising the level of service provided to the citizens that they serve. With the recent COVID-19 pandemic and the fiscal challenges it has posed for municipalities across Canada, the need for efficiencies and citizen confidence in how tax dollars are spent is even more prevalent.

The development application process is the subject of special focus due the increase in the number of applications in recent years. This is a highly collaborative and cross-functional process that relies on contribution from staff across the organization. It is also subject to the scrutiny of developers who require timely and efficient turnaround. The resource demands as well as sub-optimal use of technology creates significant opportunity for gains to be achieved by process improvement.

The objective of the review will be to examine the development application process, the impact on the staff, external customers, and the use of technology. All of these factors impact turnaround times and effort required. The goal is to minimize the time and effort required to process an application, leading to more efficient service and added capacity for future increases in application volumes.

3. Sources of Information

In order to create a comprehensive view of the Development Application Review Process it was necessary to obtain input from a cross-section of individuals. These stakeholders included staff at varying levels of responsibility across the organization.

Process information was received from staff representing various accountabilities as well as functional areas. These included: Building, Development Services, Engineering, Community Services, Corporate Services and Legal Services.

Historical data was provided by subject matter experts with access to various legislative requirements, electronic systems and other repositories of information.

4. Introducing Lean and Process Improvement Methodology

Lean is a systematic approach to identifying and eliminating wasteful activities in a process through continuous improvement. The key focus of Lean Thinking is identifying the value of any given process by distinguishing value-added steps from non-value-added steps and eliminating waste so that, eventually, every step adds value to that process. This is achieved by enabling the flow of a product or service at the pull of the customer, so that the service can be responsive to the customer's needs.

The term 'Lean' is applied to a process because a Lean process utilizes:

- Less operational space
- Fewer financial resources
- Fewer materials and services
- Less time to deliver a service to its customers

Lean Thinking is not a manufacturing strategy or a cost-reduction program, but a philosophy that can be applied to a variety of organizations. This is because it is focused on processes. All organizations are made up of a series of processes, sets of activities or steps intended to create value for people who are dependent on them, namely customers and colleagues.

Lean Thinking is based around the application of a number of tools and strategies aimed at streamlining all aspects of a process. These tools are intended to reduce unnecessary labour, space, capital, materials, equipment and time involved in the delivery of appropriate services to customers.

Using the principles and tools associated with Lean Thinking to reduce and eliminate waste enables organizations to increase their quality of service and become more competitive. It enables them to:

- Operate more quickly and efficiently at lower costs
- Become more responsive to the needs of customers
- Focus on quality
- Increase service levels

This helps organizations to ensure their employees experience increased job satisfaction and their customers receive the best possible service.

During a Lean review, all processes can be examined with a view to finding waste across eight common sources.

Waste	Definition
Defects	These are process outputs that need to be corrected through rework.
Over-production	Producing more information than the customer needs in order to manage the next step in the process or producing something before it is actually required.
Waiting	Wasted time waiting for the next step in the process to occur.
Non-utilized skills	Staff performing functions that are better suited to other grades of staff.
Transportation	Unnecessary movement of inventory, materials, equipment, supplies and products.
Inventory	Keeping excessive inventory and products that are not being processed which ties up money and reduces available space.
Movement	Unnecessary movement of staff members in order to complete their daily work activities.
Excessive processing	Excessive processing work that is not required by the customer and adds no value but consumes resources.

Table 1: The eight wastes

5. Background and Context

Since the economic recession of 2008, governments throughout the world have committed to do more with less, identify efficiencies and deliver perceived value for tax dollars with which they are entrusted. Therefore, these entities need to discover and implement new ways to become more efficient while maintaining current levels of service while being poised to handle growth and future needs.

It is with the above context in mind that Leading Edge Group (LEG) was engaged to conduct a review of the development application process within the Development and Protective Services department at the Town of Perth (the Town) to establish how services can be delivered in the most effective, efficient and cost-effective way. In doing so, we will aim to focus on a number of elements for each process:

- Alignment with the Town's strategic plan – key priorities and guiding principles – in particular, Section #4 – Planning and Development
- Citizen, Council and employee expectations
- Value and waste
- Resource, work and information flow
- Demand management
- Visibility, transparency and communication for all stakeholders
- Costs and benefits – direct, indirect and tangible
- Current performance versus Lean best practice
- Digital/technological maturity

Lean and its emphasis on engaging with staff and stakeholders to identify and eliminate waste and non-value-added elements of processes from the customer's perspective, means the approach will further align with some of the priorities outlined in the Town's strategic plan, in particular:

- ***Economic Prosperity***
- ***Fiscal Responsibility***
- ***Quality of Life***
- ***Sustainability***

6. Approach Taken

In order to understand the current state of the Development Application Review Process, it was necessary to gain insights from the various stakeholders. It was important to integrate all aspects of the process from initial inquiry, formal application to approval, inspections and final release of securities upon completion. This broad-based assessment necessitated gathering input from stakeholders spanning multiple functional areas.

Initially, telephone interviews were conducted with the key staff of each functional area. Key aspects of the activities related to Development Application were discussed through a series of structured questions and process concerns were noted. These insights served as a starting point for a comprehensive analysis of the process.

Division	Current State Review Date
Development Services	August 13, 2021
Corporate Services	August 20, 2021
Legal Services	August 20, 2021
Community Services	August 20, 2021
Engineering	August 27, 2021

Table 2: Initial interview schedule

It is worth noting that while the **Chief Building Officer** was not a part of the interview schedule, he was very generous in sharing valuable insights, feedback and legislative context. This was done by means of reviewing emailed process flowcharts, findings and analysis, and providing feedback documented via copious notes.

Based on the insights gleaned from the stakeholders, it became apparent that while all stakeholders had the best interest of the citizens at heart, the various functional perspectives and priorities had to be balanced.

Development Services

The scope of activities undertaken by the Director of Development Services and the Administrative Assistant in this area, run the full range from initial enquiries to final involvement with the release of securities upon completion of a development. Often, development applicants are not professional developers and as such do not bring with them the knowledge or expertise to the table required to keep an application moving along. There has been a significant improvement in the process. This was as a result of a change to the bylaws. There is now a pre-consultation process, which allows the applicant to gain clarification before moving forward with a formal application. A change was made in 2019 that allowed up to three homes to be situated on one plot of land. This was done in an effort to create more affordable housing. However, this now had homeowners acting as developers, an area in which they had very little prior experience or know how.

There is significant variability in the kinds of applications that are received on an ongoing basis. There may be larger development projects such as condominiums or apartment buildings which require input from a broad-based team meeting. The group that weighs in on these matters is the Development Discussion Team (DDT). This comprises senior leaders and stakeholders across multiple areas of the town. There are also requests for zoning amendments as well as minor variances such as needed for making simple additions to a property.

Another aspect that tends to drive multiple inquiries will be applicants calling in to find out what can be done with a particular vacant lot within the limits of the town. This latter category could generate up to four or five calls per day as well as a similar number of emails. In order to respond effectively to these areas a number of steps need to be taken. First, there has to be a check of a zoning bylaw, then a look at the size of the lot as both of these factors need to be taken into account in order to determine appropriate use. Calls and emails may be related to raw land properties with existing buildings.

The CGIS platform that is used for managing the application process, has several modules that are used by the various functions. It is used to track bylaw and zoning requests. There is a module for building permits which runs independently. The system tends to be a catch all for all activities on the property for varied actions such as burn permits.

There are a number of meetings and checkpoints through which an application must navigate. Therefore, the timing of an application relative to the schedule of these meetings can have a significant impact on the turnaround time for the application. The DDT meetings tend to be every third or fourth Thursday. Staff reviews include Development Services, Environmental Services, Protective Services, Building and Engineering as well as peer reviews from other directors such as Community Services. The Planning Advisory Committee comprising three councillors and two members of the community, meets once per month on the third Monday. The Director of Development services prepares a report which is presented to PAC. Subsequently the application will be presented either to the Committee of the Whole (COW) or full Council meeting. In addition to their application fees, applicants are also required to deposit security amounts which may be up to \$500,000 depending on the nature of the project. Upon final inspection that the Site Agreement Plan has been duly executed, the funds are released by Treasury to the applicant. Funds may also be released partially in phases as various milestones are achieved.

From an applicant's perspective, there is the challenge of getting real time status updates. It is difficult to ascertain which stage of the process their application is currently at and what would be the next step required. There may also be difficulty in grasping the need for significant sums in terms of security deposits. In addition, there may be dissatisfaction with the overall length of the process as this may vary due to the relative timing of the various meetings and committees through which the application must pass.

Community Services

Directors within the town may either be a member of the DDT or may be engaged for cross-functional input as part of the Senior Management Team (SMT). As such they are a part of the internal review cycle for reports generated to support development applications. In addition, some applications may warrant special review should they impact properties that fall within the Heritage or Conservation District which was created in 2013.

The Heritage process requires a separate application. However, this process has not been formally documented. As such, the sequence of activities may vary with this process being conducted either before or after the building permit application has been submitted. As with other aspects of the development process, applicants tend to be quite unfamiliar with the requirements for the Heritage District. The governance for the District can be quite bureaucratic and as such, efforts have been made to simplify the application process. The application consists of a two-page form which relies primarily on open text for the applicant to indicate what they would like to do with the property. The process from there includes review of the application, then a site visit followed by open dialogue with the applicant. This is followed by a discussion with the Heritage Panel prior to a presentation to Council. The Heritage process tends to be conducted in parallel with the main development application process.

Applicants navigating the Heritage process are quite often not large developers. Typically, they are contractors who do not understand the process which can be quite complicated. Consequently, from time to time, key milestones for their comments or decision are missed. Also, the situation is further compounded as there is lack of clarity among internal stakeholders in the Town about the overall process including timelines. There is no quick and efficient way of knowing the status of each application at a specific point in time. Providing a status update can be a time-consuming manual process.

Engineering

The Engineering function is represented at the DDT as well as during the pre-consultation process. Typically, a month after the initial consultation a draft proposal plan is submitted by the applicant as per engineering design guidelines provided. There is then a review of the submission. This is an iterative process with a number of revisions depending on the size and complexity of the project. These could range from a single revision for a small apartment building up to three revisions in the case of a subdivision. One particular challenge occurs when there is a reluctance on the part of the developer to change their design in order to comply with necessary codes and standards. The process also includes a review of cost estimates to determine the appropriate amount for the security deposit.

After the security deposit has been obtained, there are a number of steps that have to be executed. There is a pre-construction meeting with the developer and contractors, then a construction schedule is obtained followed by site inspections.

Field visits take place during the construction phase. Alerts may be sent to Emergency Services to alert them of roadblocks or other impediments to traffic during construction.

Once construction has been complete, samples from the site are collected and tested. Upon a request for release of securities, there is another field inspection visit to verify that all the work has been done. This step involves reviewing the “as built” drawings with a check to ensure that deficiencies have been addressed. Once work has been satisfactorily completed, Engineering provides comments to the Director of Development Services allowing for the release of securities to be processed.

Challenges are typically related to the human factor. This includes the negotiations with developer or contractor to obtain all the necessary documentation as well as modifications as requested. The three-week process for reviews may sometimes seem too long from the applicants’ perspective. Also embracing electronic application submission and leveraging digital plans as a means of streamlining and accelerating the process present its own set of challenges. There is a preference for having hard copies of plans when conducting site visits. This makes it easier to manage version control as well as validate that the correct scale is being used. In addition, the current by-laws require engineering drawings and storm water reports to be provided as hard copies.

Chief Building Official (CBO)

The Building Permit process is legislated by the Building Code Act to be independent of scrutiny or the authority of any other Act. To achieve this, the Act further assigns a Chief Building Official as a Statutory Officer, answering only to Council. It is from this perspective that the CBO provided input on the Development Application Process as a Subject Matter Expert.

Overall, the development process is a two way, sometimes multiple stakeholder relationship. From start to finish of the process, the “task ball” gets batted back and forth between numerous interested parties. If one party “drops the ball” the other parties committed time frames are upset, and self-imposed time limits are not achieved. As such, the process includes notification, comments, and approval processes of third-party agencies such as the Rideau Valley Conservation Authority (RCVA), Ministry of Transportation Ontario (MTO), school boards or upper levels of government. Any one of these partners can impact another partner’s timelines.

The review of a Building Permit application is done by the CBO. As stated previously, the building permit process is independent of other jurisdictions, as such under the Building Code Act only a CBO may determine if a building permit application is complete or not. Multiple external agencies are involved in the review process and missed timelines result in delays to the overall process timelines. That is the nature of development. Numerous regulations can apply to a development, each one administered by qualified persons in their area of expertise. Some are by “in-house” staff and others are through external agencies.

The CBO operates within a prescribed set of legislative parameters with a specific focus on the issuance of building permits. That said, many of the pain points identified by other stakeholders, were not deemed to be applicable to this role or function. In addition, with the need for segregation of responsibilities, combining the building function into a fully integrated software platform that would be accessible to all parties was not deemed to be a viable option for this function either.

TECHNOLOGY REVIEW

Why Digital Lean?

Organizations are re-evaluating their business models and efficiencies to meet the changes and challenges resulting from unprecedented recent developments and an increasing array of technology advancements. For some, it is a means to stay competitive, for others it is a means to stay in business. There is wide acknowledgement that we need to look at digitalizing the way we work to ensure that we will evolve in line with these strong external forces.

Digital Audit

The following software applications are currently used within the Development and Planning processes.

Application	Purpose
Microsoft Office Suite (Outlook, Word, Excel, PowerPoint)	Enquiries and applications are received via email.
CGIS	Used by all stakeholders to track applications and obtain information about properties
Teams/Zoom	Virtual meetings and chat
iCreate	To manage the content of the website
OneNote	Track and manage work and tasks
Adobe Acrobat DC	View and edit PDFs, create fillable forms
MS Paint	Create images for reports and notices

Table 3: Software packages currently being used.

Digital Maturity Assessment

A survey was deployed to the relevant staff members to gain insights into the level of maturity with respect to technology. Our current assessment is that Town of Perth is at level 2 in the model (Informal and Reactive), where some digitalisation of processes has begun and the staff are broadly aware of the benefits and opportunities of digitalisation, with the caveat that it must be compliant with legislative requirements and sustainable with the user base.

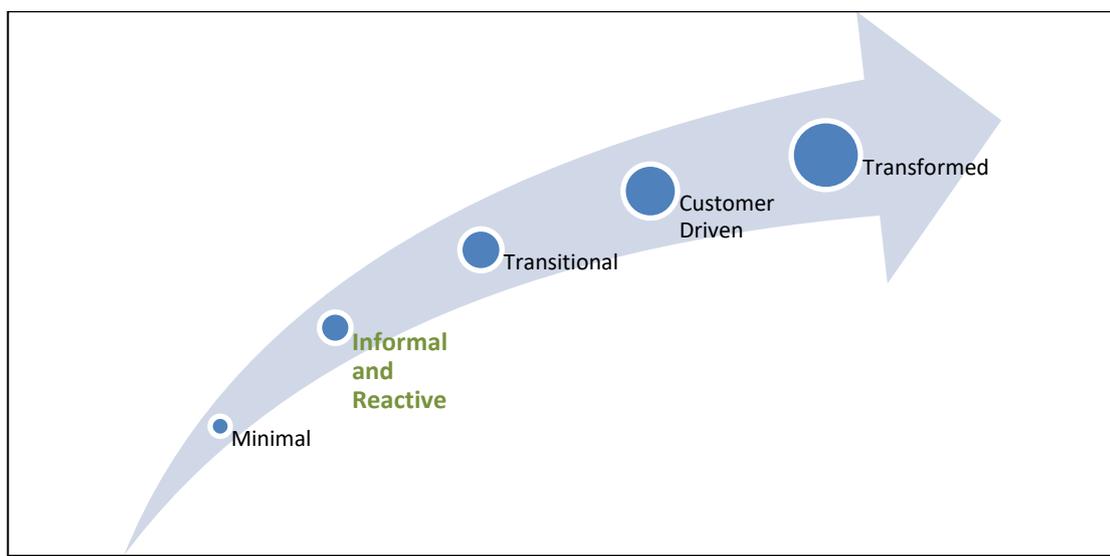


Figure 1: Digital Maturity Index

Current GIS Software

The Town currently uses a GIS software package from a local company called CGIS Spatial Solutions. The effectiveness of the solution to meet the needs of the organization appears to be in doubt, based on some of the feedback received. On the one hand, there is the view that CGIS would be fine if used to its full potential. Also, information held in CGIS is relied upon by stakeholders to some extent. However, there is the concern expressed that it is not integrated with the end-to-end planning process. In addition, the perception exists that CGIS creates more work than necessary.

Value Stream Mapping (VSM)

Due to the current pandemic restrictions, value stream mapping was conducted virtually by interviewing the subject matter experts. The output was shared electronically and validated.

A value stream is a list of activities in a process that outlines the flow from the beginning to the end, from the initiation of the service delivery to the final delivery to the customer (internal or external). A value stream map follows a service or item from beginning to end, identifies and quantifies value-adding and non-value-adding activities within the value stream and links all associated material and information flows.

The VSM process is based on the following:

1. Developing a current state ('as is') value stream map of pre-identified/pre-selected processes/services to fully understand how things currently operate.
2. Conducting a Lean analysis of the current state to identify opportunities for improvement.
3. Establishing a desired future state ('to be') value stream map through stakeholder consensus for a more streamlined process or service where value-adding activities are increased and non-value-adding or wasteful activities are minimized, while process steps and procedures are standardized as is practical.
4. Developing priorities that will allow for a transition from current to future state and realize and sustain improvement opportunities.

A VSM workshop should involve the people who understand the process best (those who work with it every day). The team provides input to map out the process, develop the current and future state maps and agree on a plan to realize improvement opportunities.

As well as providing the platform for identifying improvement opportunities, VSM activities enable a common language and standard for process improvement, while participants gain new perspectives and a deeper appreciation of flow issues across functions and functional areas.

The key stakeholders identified challenges and bottlenecks within the existing processes as well as opportunities for improvement. Below is a list of issues identified by the team. The accompanying solutions included those proposed by the team as well as those drawn for the consultant's experience that could serve as inspiration for continuous improvement activities.

VSM Output: Cross Functional Stakeholder Group

#	<u>Issue/Pain Point</u>	<u>Solution Ideas</u>
1	Applicants' lack of understanding of the overall process flow, timing and document requirements	✓ Develop user friendly guides posted on the website with guidelines and timelines

		✓ Load zoning bylaw on the website
2	Process is time consuming for determining the status of an application at any given time	<ul style="list-style-type: none"> ✓ Implement an electronic workflow that provides statuses as well as email prompts ✓ Create electronic submission for applications¹ e.g., fillable forms: ✓ Provide central document storage ✓ Give ability to click on a property and view all history of permits, inquiries etc.
3	Timeline for triaging incoming inquiries can be extended based on Director's time and availability	✓ Create a checklist for more complicated developments to allow administrative staff to provide even more support
4	There is limited ability outside of Treasury to track payments that have been made	✓ Investigate and adopt payment tracking status and invoice generation within the existing CGIS system
5	Scheduling the DDT meeting can be delayed due to time constraints on internal staff and external agencies	✓ Book meetings sufficiently far in advance and create a calendar to give applicants visibility and manage expectations
6	Multiple external agencies are involved in the review process and missed timelines result in delays to the overall process timelines	✓ Negotiate timelines and Service Level Agreements supported by workflow solution
7	Delays on obtaining signatures required by legislation e.g., CAO, Mayor and the Clerk	✓ Implement electronic document signing within the workflow for increased flexibility e.g., DocuSign
8	CGIS program currently being used is suboptimal	✓ Conduct a benchmarking scan of municipalities with respect to software platforms and implement a more comprehensive system ²

¹ Electronic document submission should retain the flexibility to allow for the submission of hard copies of engineering drawings and all documents contained within a Building Permit File, such as, application forms, building plans, inspection reports and notices of violation.

² A new system will need to be vetted to ensure that it meets the specialized functional requirements such as the CBO or will be flexible to align with other platforms that do.

Table 4: Issues by the cross functional working group and solutions developed.

7. Challenges Encountered

A cross functional multi-stakeholder process improvement initiative is never without its fair share of challenges and this engagement was no exception. Some of the specific challenges encountered included the following:

- Due to the health and safety measures related to the pandemic, it was not possible to host in-person workshops and value stream mapping sessions.
- Ideally Lean process mapping would engage the staff who actually perform the day-to-day tasks. However, in light of the ongoing restrictions stakeholders were engaged via video conferencing.
- Without a centralized repository of historical data, it was challenging to quantify the impact of various root causes responsible for extending timelines and increasing workloads.
- Gaining alignment on the most pressing issues was quite challenging as stakeholders had such varied perspectives, priorities and needs.

8. Analysis and Recommendations

Within the Town of Perth staff across all functions, involved in the Development Application Process, share a common desire to deliver highest level of customer satisfaction and value to the community. This is evidenced by their focus on being responsive to applicants while maintaining professional integrity and adherence to the relevant legislations and guidelines. The team is therefore faced with the challenge of improving turnaround times and timeliness of responses in light of a manual system.

An increase in the number of development applications places added demands on staff and their external partner organizations. There are limits to what can be achieved within the context of the existing technology platform and the undue reliance on memory, institutional knowledge and ongoing follow up to determine application statuses and next steps.

Consideration is given to creating greater transparency to the process for all concerned. In addition, there is a focus on embracing technology more fully over time to enhance effectiveness and efficiency. In light of the broader themes for improvement identified, a number of specifics for improvement are outlined below:

Summary of Recommendations

Short-term Recommendations

Improve Understanding of the Process & Timelines

The following measures will alleviate some of the immediate issues that arise due to lack of clarity about process steps among both internal and external stakeholders.

- ✓ Develop user friendly guides posted on the website with guidelines and timelines.
- ✓ Load zoning bylaw on the website.
- ✓ Create a checklist for more complicated developments to allow administrative staff to provide even more support.
- ✓ Book meetings sufficiently far in advance and create a calendar to give applicants visibility and manage expectations.

Medium-term Recommendations

Invest Modestly in New Technology/Optimize Current Technology³

- ✓ Investigate and adopt payment tracking status and invoice generation within the existing CGIS system.

- ✓ Implement electronic document signing within the workflow for increased flexibility e.g., DocuSign.
- ✓ Implement an electronic workflow that provides statuses as well as email prompts:
 - Create electronic submission for applications e.g., fillable forms:
 - Provide central document storage
 - Give ability to click on a property and view all history of permits, inquiries etc.
- ✓ Negotiate timelines and Service Level Agreements with internal and external stakeholders supported by reminders within the workflow solution.

³ More comprehensive lists of technology options are included in Appendices 5-8

Long-term Recommendations

In the future, implementing a more robust software platform that manages all aspects of the Development Application Process would be ideal.⁴ This would require a jurisdictional scan of municipalities of varying sizes for the purposes of benchmarking and alignment on best practices. This would need to be a system that has the flexibility to leverage electronic applications and forms, while still being able to accommodate hard copies of plans and supporting documents as required by legislations or the practical requirements of some roles. A prerequisite for this transformation would be alignment and cooperation of stakeholders across the various functional areas.

⁴ Options for ePermitting Software are included in Appendix 10.

BENEFITS

The benefits to be accrued from the process improvement are as follows:

Applicants:

- Improved understanding of the process
- Enhanced visibility to statuses and timelines and next steps
- Reduced frustration arising from “surprise” requirements
- Greater willingness to choose the Town of Perth for development projects

Internal Stakeholders:

- Less effort required to provide updates
- Faster turnaround times for applications
- Smoother handoffs between functional areas
- Increased capacity to handle a higher volume of applications

9. Future Challenges and Opportunities

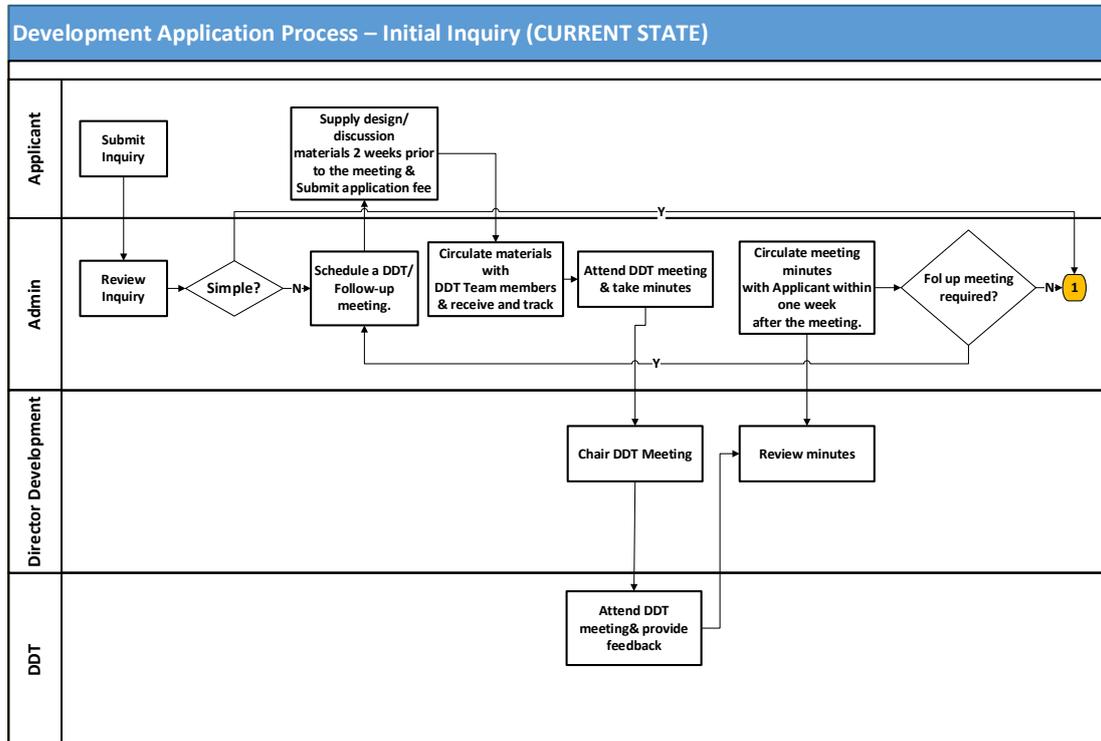
The key staff who carry out the Development Application Review process have felt that the time and effort required to execute the process and maintain visibility to statuses and provide updates has been significant. A reduction in the amount of manual effort involved will create more capacity for value-added activities that drive customer satisfaction for the residents of the Town. This will also position them well to accommodate future growth in development activities.

Development Application is currently not conducted as an integrated whole but as a series of interrelated activities with varying lines of responsibility and accountability. Adopting a more holistic approach to the oversight of the process as well as leveraging appropriate technology will serve to alleviate the administrative burden. The benefits from these enhancements will impact staff across multiple functions, external agencies as well as citizens, developers and contractors.

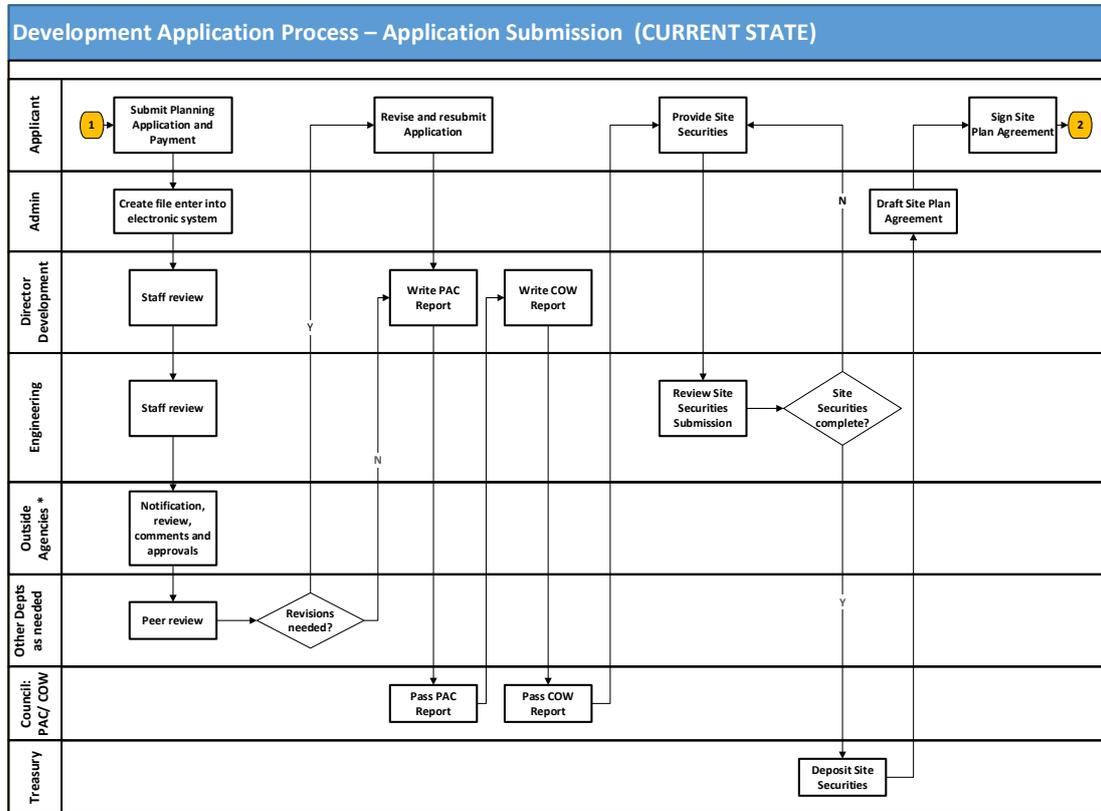
By continuing to leverage insights gleaned in the context of the Lean review, the organization will undoubtedly have a more efficient process spanning the full cycle from application through approvals, construction and release of securities. By enhancing communication by means of ongoing dialogue between all impacted stakeholders and with an eye to embracing and integrating new technology, the team will be well positioned to enhance both internal and external stakeholder satisfaction.

10. Appendices - Development Application Process Maps

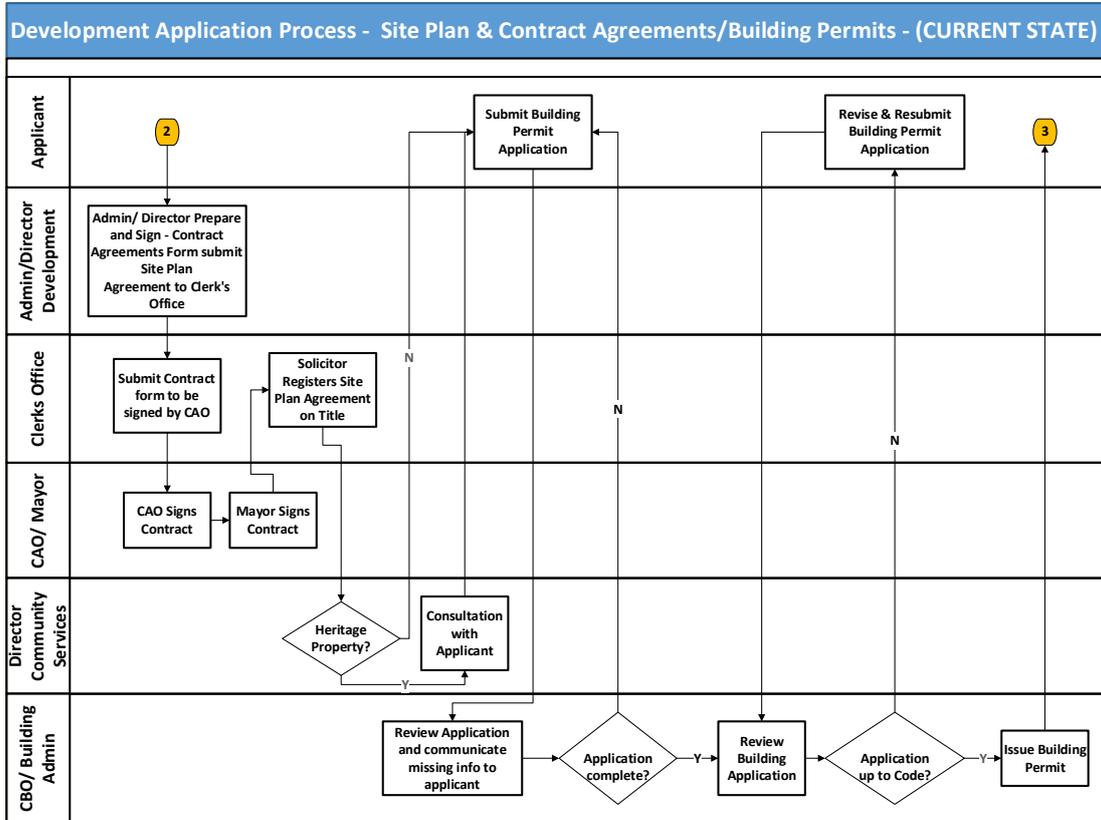
Appendix 1: Current State – Initial Inquiry



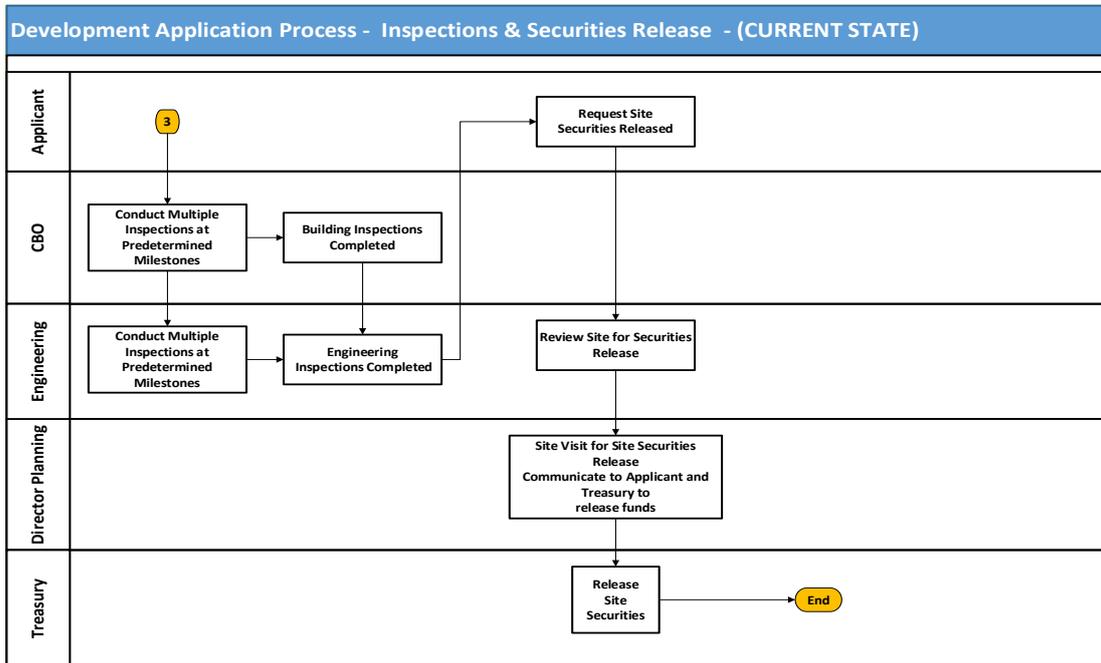
Appendix 2: Current State – Application Submission



Appendix 3: Current State – Agreements & Building Permit



Appendix 4: Current State – Inspections & Securities Release



Appendix 5: Opportunities for Leveraging Technology - Initial Enquiry

Opportunity	Benefit
Provide initial enquiry form for applicants on website	Replace general email enquiry. Better process for applicant. Enable Town of Perth to control format of enquiry.
Automate the creation of enquiry details in a workflow to track applications	Enhanced visibility of enquiry progress. Enable all documentation relating to the enquiry to be attached to an electronic record.
Create notification alerts when enquiry is created, updated, progressed	Ensure information flows to relevant people to take action at the appropriate time.
Capture DDT meeting minutes and attach to relevant enquiry	Enable minutes to be sent automatically without manual intervention.

Appendix 6: Opportunities for Leveraging Technology - Application Submission

Opportunity	Benefit
Provide online form for submitting a new application	Replace fillable PDF form, control content and eliminate errors in completing form. Enhance experience for applicant.
Automate the creation of application details in a workflow, use details of previous enquiry relating to application	Eliminate rework of information provided on initial enquiry, enhance visibility of application.
Eliminate the need to open a file manually	Time saving, reduce manual work.
Track progress of application in workflow	Enhanced visibility.
Revision and resubmission of application to be semi-automated via an app using information stored in workflow system	Reduce likelihood of mistakes in resubmission, provide better experience for applicant and save time for admin.

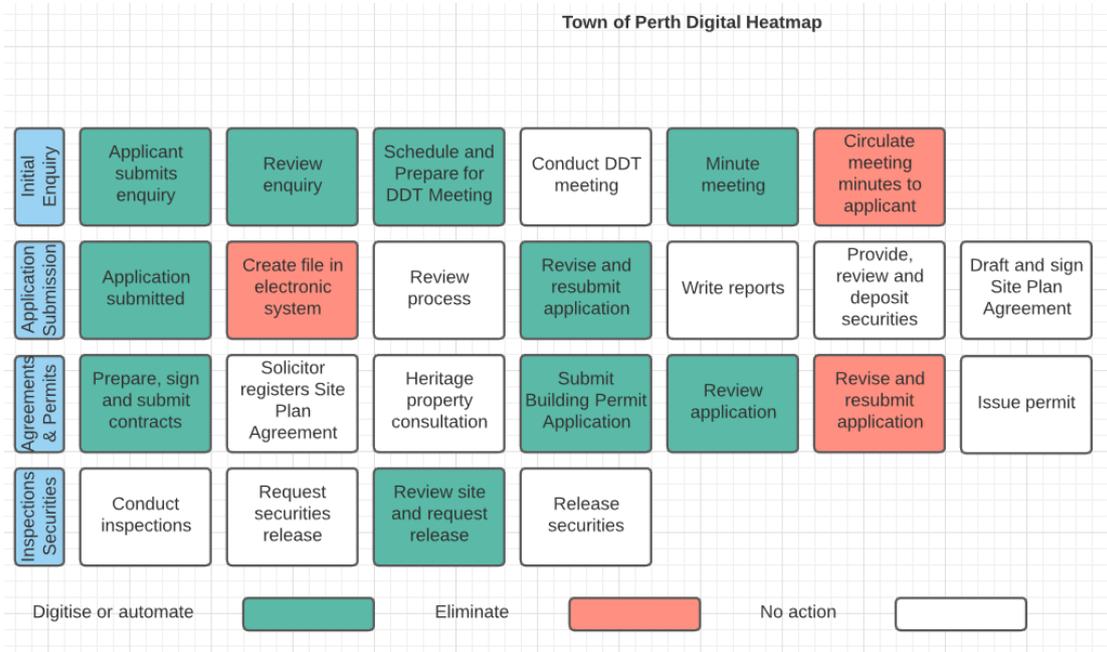
Appendix 7: Opportunities for Leveraging Technology – Agreements and Building Permits

Opportunity	Benefit
Use information in workflow system to prepare contract docs	Ease of access to info relevant to application.
Digitise permit application form	Eliminate mistakes on form, provide better experience for applicant. Save review time for admin.
Eliminate need to revise and resubmit application	Time saving for applicant and admin.

Appendix 8: Opportunities for Leveraging Technology – Inspections and Securities Release

Opportunity	Benefit
Use workflow to track status in inspections phase	Increased visibility of application status.
Use workflow system to automatically notify applicant when securities are to be released	Time saving.
Use workflow system to notify Treasury to release securities to applicant	Time saving.

Appendix 9: Digital Heatmap



Appendix 10: ePermitting Software ⁵

<u>Features</u>	<u>Benefit</u>
<p>Built specifically for local governments and citizens, a class-leading ePermitting software can bring all development application processes into a unified digital workspace:</p> <ul style="list-style-type: none"> ▪ Applications ▪ Communication and notifications ▪ Inspections ▪ Online Payments ▪ GIS integration ▪ Reporting ▪ Configurable workflows 	<ul style="list-style-type: none"> ✓ Faster, contactless and paperless permitting ✓ Centralised system for all information ✓ Conduct on-site mobile inspections ✓ Online applications for permits and inspections <ul style="list-style-type: none"> ○ Replace fillable PDFs and emails ○ Less “back-and-forth” between staff and applicant – get it right first time ✓ Online communications with all stakeholders ✓ Online payments process for applicants ✓ Greater visibility of application status for all staff
<p><u>Software Providers</u></p> <p>The following is a selection of software providers with solutions that provide online, end-to-end permitting software for local governments:</p> <ul style="list-style-type: none"> ▪ Cloudpermit ▪ PSD Citywide ▪ GovPilot 	

⁵ A fully digitized software platform would require stakeholder alignment and agreement to go paperless and could require bylaw/legislative changes as well.