



# Committee of Adjustment - Organizational Review

**Final Report**

**City of Ottawa Committee of Adjustment**

—  
January 2023



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# 1. Executive Summary

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# 1. Executive Summary

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The City of Ottawa's ("City") Committee of Adjustment ("CoA") engaged KPMG LLP ("KPMG") to undertake an organizational review. This report presents our findings, which are grounded in a substantive evidence base including:

- 30 hours of engagement with more than 68 stakeholders;
- Three online surveys with over 100 respondents;
- A review of over 90 documents and available data;
- Leading practice research into five comparator jurisdictions; and,
- A series of six co-design workshops with CoA staff, panelists, City Staff, and representatives from industry and community associations.

Additional background information, including our approach, is included in Appendix A.

The CoA is a high performing organization:

- CoA staff are widely recognized for their responsiveness to applicant and public inquiries;
- Statutory timelines are regularly met;
- Panelists and CoA staff have an excellent working relationship; 100% of panelists surveyed indicated that they are well-supported by CoA staff; and,
- The transition to virtual hearings has been well-executed and has positively impacted the applicant, panelist and public experience.

At the same time, our research indicates that the CoA is facing challenges that will impact its capacity to maintain service levels over the medium- and long-term.

These challenges include:

- Increases in application volume and complexity, a trend that is expected to continue with provincial legislative change and the City's new Official Plan;
- Late City staff planning reports provided to applicants and panelists after the internal commenting deadline of five days before the hearing;
- Increased public expectations to access more application information online (e.g., City staff planning reports) while continuing to meet statutory timelines;
- Increased expectations for easy-to-understand applicant- and public-facing resources in a complex and dynamic land use policy environment;
- Misalignment between the decision-making authorities and mandate of CoA management;
- The current funding structure, which limits opportunities for service delivery improvements; and,
- Limited data collection and management tools.

Taken together, these challenges negatively impact the organizational resilience of the CoA by:

- Increasing workloads for CoA staff and panelists;
- Contributing to a significant increase in the number of adjournments (adjournments increased by 80% between 2019 and 2021);
- Creating barriers to CoA staff attraction and retention;

# 1. Executive Summary

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- Contributing to applicant and public frustration;
- Limiting the CoA's capacity to plan, fund and implement strategic initiatives, including training and performance improvement programs; and,
- Limiting the CoA's ability to measure and manage organizational performance.

Additional information about the challenges facing the CoA is included in Appendix C.

## Recommendations

Section 2 of this report presents 17 recommendations to improve the organizational resilience of the CoA, including:

- Standardizing the commenting process with external City departments to improve panelist decision-making supports, decrease the number of adjournments, and reduce administrative workloads for CoA staff;
- Introducing new roles to provide additional capacity for management to focus on strategic issues;
- Formalizing reporting and working relationships;
- Improving training and professional development;
- Implementing procedural changes to the public hearing process to improve transparency and predictability; and
- Enhancing public- and applicant-facing materials and information.

These recommendations should be considered alongside the CoA's anticipated shift to hybrid hearings and ongoing response to provincial legislative change that may materially impact the CoA, including Bill 23.

A summary of our recommendations is included in Table 1 on Page 7.

Additional detail about each recommendation is included in Section 2.

The recommendations in this report are organized into the following five layers of our assessment framework:

- Services and processes;
- Organization and governance;
- People and culture;
- Public hearings; and,
- Information and technology.

The assessment framework, which was developed with the CoA's project team, is included in Appendix B.





## How to Read this Document

This report has three sections following the executive summary:

- Section 2 presents our recommendations to improve the medium- and long-term resilience of the CoA;
- Section 3 presents an implementation plan for the recommendations identified in Section 2; and,
- Section 4 presents supporting appendices, including additional project background (A), our assessment framework (B), current state assessment (C), leading practice research (D) a list of stakeholders engaged (E) and a list of documents and data reviewed (F).

# 1. Executive Summary

**Table 1: Summary of Recommendations, organized into the five layers of the assessment framework**

Layer	#	Recommendation	Page
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 <b>PUBLIC HEARINGS</b>	2.4.1	Create and refresh applicant- and public-facing information	28
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<b>INFORMATION AND TECHNOLOGY</b>	2.5.1	Use the anticipated Land Management Solution (LMS) software to help digitize CoA operations	33
	2.5.2	Develop and implement a performance management framework	34

# 2. Recommendations

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# 2. Recommendations

## Recommendations

Tables 2.1 to 2.5, starting on the next page, present our recommendations to improve the organizational resilience of the CoA.

For each opportunity, we provide a short description and rationale.

The recommendations are separated by the five layers of the assessment framework, which can be found in Appendix B. Section 3 includes implementation actions for each opportunity.

These recommendations were developed by testing and refining a selection of preliminary improvement opportunities through a series of co-design workshops. Stakeholders that attended these workshops included CoA and City staff, panelists, as well as industry and community association representatives. Appendix A includes more information on how these recommendations were developed.

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# 2.1 Services and Processes (1/5)

**Table 2.1: Recommendations related to Services and Processes**

#	Recommendation	Description	Rationale
2.1.1	Work with commenting partners to standardize the commenting process and stream complex applications	<p>City staff comments on CoA applications are often inconsistently formatted and do not clearly communicate recommendations and conditions (Finding 4.1.3).</p> <p>To address this gap, the CoA should work with commenting partners to i) develop and implement commenting templates and ii) stream complex applications. These measures will help to:</p> <ul style="list-style-type: none"> <li>— Reduce the time required to prepare for hearings; and,</li> <li>— Support the implementation of other improvements included in this report, for example, providing more detailed reasons (Recommendation 2.4.4).</li> </ul> <p><b>Commenting templates</b></p> <p>Standard commenting templates should be developed for each commenting partner, including Planning, Real Estate and Economic Development (PRED), Urban Forestry, conservation authorities, airport authorities and utilities. The commenting templates should:</p> <ul style="list-style-type: none"> <li>— Identify the specific comments required from each partner;</li> <li>— Follow a standard format across partners to improve readability for panelists, applicants and members of the public; and,</li> <li>— Include the commenting partner’s name and contact information.</li> </ul> <p><b>Stream complex applications</b></p> <p>With application complexity expected to increase, the CoA should encourage commenting partners to stream complex applications during the intake process. Benefits of streaming complex applications include:</p> <p><b>[Recommendation continued on next page]</b></p>	<ul style="list-style-type: none"> <li>— Decrease adjournments</li> <li>— Improve panelist supports</li> <li>— Enhance transparency and predictability</li> </ul>



# 2.1 Services and Processes (2/5)

#	Recommendation	Description	Rationale
2.1.1		<ul style="list-style-type: none"><li>— The ability to assign complex applications to more senior resources within commenting partners; and,</li><li>— The ability to implement different processing timelines for complex applications (Recommendation 2.1.2).<sup>1</sup></li></ul> <p>To implement this practice, the CoA should work with commenting partners to:</p> <ul style="list-style-type: none"><li>— Establish criteria for identifying complex applications. As a starting point, our research indicates that combined minor variance and consent applications, subject to site plan control, or applications in rural areas with extensive submission requirements could be considered complex;</li><li>— Develop supporting tools (e.g., terms of reference, picklists etc.) for the application intake process to support the identification of complex applications (Recommendation 2.1.3); and,</li><li>— Assess the City staffing levels required to assign senior resources to complex applications and/or increase oversight.</li></ul>	

<sup>1</sup> Any changes to application timelines should be considered alongside statutory timeframes.



# 2.1 Services and Processes (3/5)

#	Recommendation	Description	Rationale
2.1.2	Provide applicants, panelists, and members of the public with sufficient time to review and inquire about staff reports prior to a public hearing	<p>City Planning staff reports are often received after the commenting deadline (5 days before a hearing), sometimes as late as the day of the hearing. These delays contribute to the following:</p> <ul style="list-style-type: none"><li>— Negative impacts on the capacity of applicants, panelists and the public to review and respond to City comments; and,</li><li>— Adjournments, which have increased by 80% between 2019 and 2021.</li></ul> <p>The CoA should work with City Planning officials to evaluate opportunities to ensure that staff reports are posted online by the Friday before their hearing date. The implementation of these recommendations may require consideration of the following:</p> <ul style="list-style-type: none"><li>— The implementation of different timelines for simple and complex applications (Recommendation 2.1.1);</li><li>— Resourcing requirements for commenting partners, particularly for PRED and Urban Forestry;</li><li>— Resourcing requirements for the provision of planning reports to CoA to upload staff reports in accordance with the City’s Bilingualism Policy and AODA requirements, for example a Digital Services Officer (Recommendation 2.2.1); and,</li><li>— Impacts on CoA and PRED budgets and application fees.</li></ul> <p>In addition to ensuring stakeholders have enough time to review staff reports, the CoA should mitigate the delay of late staff reports by encouraging commenting partners to contact applicants directly to resolve complex issues. Our leading practice research found that commenting partners contacting applicants directly increases applicant satisfaction and reduces the churn associated with applicants obtaining and seeking clarity on comments through more time-consuming indirect channels.</p>	<ul style="list-style-type: none"><li>— Decrease adjournments</li><li>— Improve panelist supports</li><li>— Improve the applicant experience and public participation</li><li>— Enhance transparency</li></ul>



# 2.1 Services and Processes (4/5)

#	Recommendation	Description	Rationale
2.1.3	Implement a more rigorous review for completeness at application intake by CoA and PRED	<p>Our research indicates that applications –in particular, complex applications –are sometimes circulated and scheduled for a public hearing despite missing additional information such as an Environmental Impact Statement for planning staff review. The absence of required additional information contributes to the 80% increase in adjournments over the last three years.</p> <p>To address this challenge, the CoA should consider i) working with PRED to develop application intake guidelines for applicants and ii) increasing oversight over the processing of complex applications.</p> <p><b>Application intake guidelines</b></p> <p>Intake guidelines should clearly identify the documentation, drawings, reports and studies potentially required by PRED. The CoA can implement the guidelines through the following:</p> <ul style="list-style-type: none"><li>— Detailed terms of reference identifying information and studies required; and,</li><li>— Detailed review checklists to facilitate the efficient identification of a complete application.</li></ul> <p>Once complete, the terms of reference and supporting tools should be incorporated into enhanced training for CoA staff, particularly those held with commenting partners, to solidify best practices for reviewing application submissions for completeness (Recommendation 2.3.1).</p> <p><b>Additional oversight</b></p> <p>In addition to the intake guidelines, the CoA should consider providing additional oversight over the application intake process, particularly for complex applications, through a Senior Committee Coordinator (Recommendation 2.2.1).</p>	<ul style="list-style-type: none"><li>— Decrease adjournments</li><li>— Improve applicant experience</li><li>— Improve panelist experience</li><li>— Improve customer service</li></ul>



# 2.1 Services and Processes (5/5)

#	Recommendation	Description	Rationale
2.1.4	Build on existing engagement with community associations and industry representatives outside of the hearing process	<p>The CoA currently engages in the leading practice of periodically meeting with representative organizations for applicants and members of the public. To build on this practice, the CoA should consider formalizing its engagement with these organizations outside the public hearing process. Building on past and existing practices, these mechanisms could include the following:</p> <ul style="list-style-type: none"><li>— Establishing a Community Advisory Committee that meets annually to discuss emerging issues with CoA management. As a start, membership of the Community Advisory Committee could consist of industry representatives from the Greater Ottawa Home Builders Association and community representatives from the Federation of Citizens Association;</li><li>— Free annual training sessions for applicants, consultants and members of the public on the application process and how to effectively participate in a public hearing; and,</li><li>— An annual CoA drop-in co-hosted with a selection of frequent commenting partners (e.g., PRED, Conservation Authorities and Urban Forestry) to provide applicants, consultants and members of the public with an opportunity to learn about new requirements and policy changes or to speak directly to commenting partners.</li></ul>	<ul style="list-style-type: none"><li>— Increase stakeholder alignment on CoA purpose and procedures</li><li>— Enhance applicant and public participation</li><li>— Engage applicants and public in service delivery improvements</li></ul>



## 2.2 Organization and Governance (1/7)

**Table 2.2: Recommendations related to Organization and Governance**

#	Recommendation	Description	Rationale
2.2.1	Increase the CoA's strategic and operational capacity with the addition of three new roles	<p>Our research indicates that recent and emerging pressures are limiting CoA management's operational and strategic capacity. These pressures include:</p> <ul style="list-style-type: none"><li>— CoA staffing levels have remained constant since 2014, despite steady rises in application volume, including a 25% increase in application volume between 2019 and 2021;</li><li>— Increases in application complexity driven by infill development and provincial legislative change; and,</li><li>— The transition to virtual/hybrid hearings.</li></ul> <p>Taken together, these pressures are limiting the CoA's ability to plan and respond to strategic issues, which may lead to challenges in meeting statutory timelines and adequate customer service levels in the near term.</p> <p>To address these challenges, the CoA should introduce a i) third Deputy Secretary-Treasurer, ii) Digital Services Officer, and iii) Senior Committee Coordinator. The recommended roles and responsibilities of each position are described below.</p> <p><b>Third Deputy Secretary-Treasurer</b></p> <p>The CoA should introduce a third Deputy Secretary-Treasurer to support on operational matters including human resources and financial matters to improve the strategic management and capacity of the CoA's administrative leadership team. In addition, the added capacity provided by this role will enable the Secretary-Treasurer to focus on more organization-wide issues. Additional responsibilities could include the following:</p> <p><b><i>[Recommendation continued on next page]</i></b></p>	<ul style="list-style-type: none"><li>— Improve strategic management and capacity of CoA leadership team</li><li>— Enhance organizational resilience</li></ul>



# 2.2 Organization and Governance (2/7)

#	Recommendation	Description	Rationale
2.2.1		<ul style="list-style-type: none"> <li>— Leading business transformation and technology initiatives, such as the transition to hybrid hearings and the implementation of the Land Management System (LMS);</li> <li>— Sharing the operational workloads of the current Deputy Secretary-Treasurers, including processing applications, providing quality assurance of CoA documentation, and administering and attending committee meetings and hearings of the three panels; and</li> <li>— Supporting the potential establishment of a fourth CoA panel (Recommendation 2.2.4).</li> </ul> <p><b>Digital Services Officer</b></p> <p>With application volumes increasing, more resourcing capacity will be required to handle digital services. Digital services are currently performed by Committee staff with the support of contracted external resources. The CoA should centralize these services and bring them in-house through a Digital Services Officer. This new role should report to the Secretary-Treasurer and undertake the following responsibilities:</p> <ul style="list-style-type: none"> <li>— Uploading and publishing public hearing-related material (notices, agendas, maps, plans, reports and decisions) in accordance with City policy and requirements;</li> <li>— Supporting the development, publishing and maintenance of public-facing material identified in Recommendation 2.4.1;</li> <li>— Supporting the development of a CoA performance management framework identified in Recommendation 2.5.2;</li> <li>— Maintaining and updating the CoA website;</li> </ul> <p><b><i>[Recommendation continued on next page]</i></b></p>	





# 2.2 Organization and Governance (3/7)

#	Recommendation	Description	Rationale
2.2.1		<ul style="list-style-type: none"> <li>— Updating and improving CoA digital assets, e.g., “MagicInfo” display, eScribe, online appointment tool, Zoom (virtual public hearings), and the Committee of Adjustment YouTube page; and,</li> <li>— Collecting and responding to stakeholder feedback, inquiries and complaints about digital assets.</li> </ul> <p><b>Senior Committee Coordinator</b></p> <p>The expected increase in application complexity will require additional oversight and support for Committee Coordinators. In addition, added complexity may strain Committee Coordinators’ workloads as they review and process applications. To address these challenges, the CoA should introduce a Senior Committee Coordinator that reports to the Deputy Secretary-Treasurers and undertakes the following responsibilities:</p> <ul style="list-style-type: none"> <li>— Managing the intake and review of applications, particularly those that are determined to be complex, for quality and completeness;</li> <li>— Addressing escalations and customer complaints;</li> <li>— Providing initial quality assurance and quality control reviews of public notices;</li> <li>— Overseeing the frontend and backend cross-training program (Recommendation 2.3.2); and,</li> <li>— Providing mentorship and day-to-day guidance to Committee Coordinators.</li> </ul>	



# 2.2 Organization and Governance (4/7)

#	Recommendation	Description	Rationale
2.2.2	Empower CoA leadership by increasing authorities and formalizing reporting relationships	<p>Our current state assessment identified a significant gap between the mandates of the CoA’s Secretary-Treasurer and Deputy Secretary-Treasurers and their decision-making authorities. For example, CoA leadership is unable to authorize procurement-related matters above \$15,000 or manage certain HR-related matters.</p> <p>In addition, our research found that the reporting structure with the Committee Chair and City Clerk is not formalized (e.g., roles and responsibilities are not written down, consolidated, or made readily available), resulting in confusion among City stakeholders over the designated approvals person (Finding 4.2.3).</p> <p>To address these gaps, the CoA should consider i) increasing authority levels to fulfill day-to-day operational responsibilities, and ii) formalizing reporting relationships.</p> <p><b>Increase authority levels</b></p> <p>To empower CoA management and enable them to deliver on their mandate, the CoA should explore the following:</p> <ul style="list-style-type: none"> <li>— Increase the authority level of the Secretary-Treasurer to align with the role’s responsibilities and reflect the CoA’s independent nature and service area;</li> <li>— Increase the authority level of the Deputy Secretary-Treasurer to provide the authoritative capabilities needed to fulfill day-to-day responsibilities and manage effectively (e.g., inclusion in specific disciplinary and financial approval settings); and,</li> <li>— Ensure that authority levels align with commensurate roles at other independent local boards in the City.</li> </ul> <p><b><i>[Recommendation continued on next page]</i></b></p>	<ul style="list-style-type: none"> <li>— Improve strategic management and capacity of CoA leadership team</li> <li>— Enhance organizational resilience</li> <li>— Enhance the capacity for strategic planning and management</li> <li>— Reduce the administrative burden on CoA management</li> </ul>



# 2.2 Organization and Governance (5/7)

#	Recommendation	Description	Rationale
2.2.2		<p><b>Formalize reporting relationships</b></p> <p>The Planning Act prescribes the appointment of a CoA Chair and a Secretary-Treasurer. In comparator jurisdictions, the CoA’s Secretary-Treasurer reports to either the City Clerk or the Planning department head, and panelists are not involved in overseeing the CoA administration. In Ottawa, to reflect the CoA’s independent nature and service area, the Secretary-Treasurer reports to the CoA Chair. The Secretary-Treasurer leads the CoA administration and the Chair approves significant policy or operational matters such as the annual draft budget and application fees for final approval by Council. Because CoA panelists do not have access to the City’s automated systems, an informal “dotted line” relationship exists between the Secretary-Treasurer and the City Clerk. That relationship is meant to address only transactional and human resources matters, such as vacation leave and mileage claims, in accordance with the terms and conditions of employment as determined between the CoA and the Secretary-Treasurer.</p> <p>These key reporting relationships work well and should be formalized/documented in publicly available terms of reference.</p> <ul style="list-style-type: none"> <li>— Purpose of the CoA and its structure;</li> <li>— Roles and responsibilities of CoA staff, Chair and City Clerk as it relates to the CoA;</li> <li>— Management and oversight of the different aspects of the CoA (e.g., HR, procurement)</li> <li>— The reporting and decision-making structure of the CoA; and,</li> <li>— The arm’s length relationship between the CoA, Council, and City Clerk / City Administration.</li> </ul> <p>Once complete, the terms of reference should be shared widely with CoA staff, panelists, and external City departments. The CoA should store this document in a centralized location on the City’s intranet.</p>	



## 2.2 Organization and Governance (6/7)

#	Recommendation	Description	Rationale
2.2.3	Consider creating a reserve fund to support long-term initiatives and CoA service delivery improvements	<p>The CoA should explore creating a dedicated reserve fund to finance:</p> <ul style="list-style-type: none"><li>— Capital contributions required for investments in broader City initiatives;</li><li>— Double occupancy hiring for cross-training purposes when there are departing staff; and,</li><li>— The operation of the CoA in the face of unforeseeable events.</li></ul> <p>Our comparator research identified that CoAs benefit from reserve funds established by the city departments through whom they are linked to in the City's organizational structure. Through our research, we found that reserve funds provide CoAs with the following benefits:</p> <ul style="list-style-type: none"><li>— Increased funding available for service delivery improvements;</li><li>— Increased ability to fund medium-or long-term initiatives focused on addressing future challenges;</li><li>— The ability to sustainably build financial capacity; and,</li><li>— Stability to maintain capital spending during times of application fluctuations.</li></ul>	<ul style="list-style-type: none"><li>— Decrease adjournments</li><li>— Improve organizational resilience</li></ul>



# 2.2 Organization and Governance (7/7)

#	Recommendation	Description	Rationale
2.2.4	Consider introducing a fourth panel to address increasing and uneven applications volumes	<p>Our research indicates that the workload across panels is not evenly distributed:</p> <ul style="list-style-type: none"> <li>— Since 2017, the Urban and Suburban panels have received 87% and 77% more applications than the Rural panel (Finding 4.1.4); and,</li> <li>— Over the same period, the number of panelists remained constant, despite steady increases in application volume. This contributed to increased workloads for panelists and extended hearing durations.</li> </ul> <p>With the advent of Bill 23, this trend is expected to continue or even accelerate.</p> <p>To address this challenge, the CoA should actively monitor and evaluate options to re-distribute application volumes by introducing a fourth panel. To support the potential establishment of a fourth panel, the CoA should consider the following:</p> <ul style="list-style-type: none"> <li>— The application intake process for the fourth panel, which may intake applications from more high-volume panels to distribute volumes;</li> <li>— The suitability of identifying five alternate panelists during the 2023 panelist selection process that may be appointed during the introduction of the fourth panel; and,</li> <li>— Increases in CoA management capacity (i.e., a third Deputy Secretary-Treasurer) required to support the fourth panel (Recommendation 2.2.1).</li> </ul>	<ul style="list-style-type: none"> <li>— Continue meeting statutory timelines</li> <li>— Improve hearing durations</li> <li>— Improve panelist experience</li> <li>— Improve organizational resilience</li> </ul>



## 2.3 People and Culture (1/6)

**Table 2.3: Recommendations related to People and Culture**

#	Recommendation	Description	Rationale
2.3.1	Create and refresh training and orientation materials for CoA staff	<p>Our research identified a number of challenges with staff training and orientation, including limited and out-of-date onboarding materials, and little cross-functional and external training opportunities (Finding 4.3.3). This challenge is exacerbated by high staff turnover, which limits the CoA's ability to build and maintain organizational knowledge (Finding 4.3.1).</p> <p>To address this gap, the CoA should consider: i) developing a comprehensive staff onboarding binder, ii) developing and implementing a cross-functional training program, and iii) increasing access to internal and external training sessions.</p> <p><b>Staff onboarding binder</b></p> <p>The new staff onboarding binder should include the following:</p> <ul style="list-style-type: none"><li>— A central repository with all onboarding materials with separate chapters for each role. Currently, onboarding materials for different staffing levels and roles are scattered into separate files;</li><li>— Updated processes reflecting the end-to-end CoA process in its current form;</li><li>— Increased detail and guidance on the use of digital assets (e.g., eScribe, hybrid and virtual public hearing-related tools); and,</li><li>— Commonly asked questions by applicants and members of the public and general answers to them.</li></ul>	<ul style="list-style-type: none"><li>— Improve consistency</li><li>— Improve the Committee Coordinator experience</li><li>— Improve staff attraction and retention</li></ul>

***[Recommendation continued on next page]***



## 2.3 People and Culture (2/6)

#	Recommendation	Description	Rationale
2.3.1		<p><b>Cross-training program</b></p> <p>The CoA should develop and implement a cross-training program to improve organizational cohesion, as operational requirements allow. Based on our research, the program should include the following:</p> <ul style="list-style-type: none"><li>— Take the form of a rotational program for new Committee Coordinators as part of the onboarding process;</li><li>— Be structured to provide six months of frontend training before six months of backend training;</li><li>— Consider staff's preference to continue rotating or remain in a specific role at its conclusion; and,</li><li>— Allow existing staff to participate in the program at its inception if they so choose.</li></ul> <p><b>Internal and external training opportunities</b></p> <p>The CoA should promote professional development through enhanced internal and external training opportunities, including the following:</p> <ul style="list-style-type: none"><li>— Attendance at industry-related conferences;</li><li>— Enrollment into City-offered training courses relevant to their position, for example, French-language courses; and,</li><li>— Internal presentations from commenting partners concerning changes to City processes, policies and bylaws.</li></ul>	



## 2.3 People and Culture (3/6)

#	Recommendation	Description	Rationale
2.3.2	Create and refresh training and orientation materials for panelists	<p>Stakeholders consistently identified procedural and process inconsistencies within and across hearings. These inconsistencies reduce the transparency and predictability of public hearings and contribute to the perception that the hearing process is unfair.</p> <p>While panelists indicated that quarterly professional development meetings are helpful, they noted that technical training can be lacking, particularly concerning legal and planning matters.</p> <p>To address this gap, the CoA should consider i) reviewing and updating the Member Onboarding Binder (2018-2019); and ii) increasing training.</p> <p><b>Updated Member Onboarding Binder (2018-2019)</b></p> <p>The current binder should be updated to address the following processes identified as inconsistent within and across panels through our research:</p> <ul style="list-style-type: none"><li>— The use of consent agendas;</li><li>— The use of evidence and supporting materials such as staff comments;</li><li>— The inappropriateness of performing individual site visits;</li><li>— Application of the four tests;<sup>2</sup></li><li>— Approaches to contested matters;</li><li>— Approaches to balancing adjudicative duties and educating members of the public; and,</li><li>— Approaches to applicant engagement, regardless of experience level.</li></ul> <p><b><i>[Recommendation continued on next page]</i></b></p>	<ul style="list-style-type: none"><li>— Improve stakeholder experience</li><li>— Reduce administrative workloads</li></ul>

<sup>2</sup> The Committee is authorized to grant a minor variance if all of the following criteria, commonly referred to as the “four tests,” are met: i) the variance is minor, ii) the variance is desirable for the appropriate development or use of the property, iii) the general intent and purpose of the Zoning By-law is maintained, iv) the general intent and purpose of the Official Plan is maintained.





## 2.3 People and Culture (4/6)

#	Recommendation	Description	Rationale
2.3.2		<p>Alongside the updated manual, the CoA should consider creating a plain language guide for all panelists, including Panel Chairs for quick and easy reference that includes:</p> <ul style="list-style-type: none"><li>— Best practices for hearing management;</li><li>— Real-world examples; and,</li><li>— Frequently Asked Questions.</li></ul> <p><b>Training opportunities</b></p> <p>CoA staff currently administer quarterly professional development meetings for panelists to refresh training and discuss emerging issues, including permission applications, the pre-consultation process, updated tree bylaws and the new Official Plan. We recommend building on these meetings by expanding training to include the following topics:</p> <ul style="list-style-type: none"><li>— Process or procedural practices identified as inconsistent, including those identified in Finding 4.4.1;</li><li>— Adjudication best practices, particularly at the beginning of a new CoA term; and,</li><li>— Best practices around public hearing practices (e.g., granting adjournments, consent agendas, etc.).</li></ul>	



## 2.3 People and Culture (5/6)

#	Recommendation	Description	Rationale
2.3.3	Modify panelist appointment selection criteria and/or process	<p>To improve the diversity and experience of CoA panelists, the CoA should consider i) expanding its eligibility requirements, ii) establishing panel composition requirements; and iii) implementing staggered terms.</p> <p><b>Expand eligibility requirements</b></p> <p>In addition to the general eligibility requirements for citizen appointments by City Council, the City should expand (and post publicly) the CoA panelist eligibility requirements to include the following:</p> <ul style="list-style-type: none"><li>— A strong interest in the complexities and challenges of city building;</li><li>— An understanding of the diverse neighbourhoods and communities across the City;</li><li>— Knowledge in one or more areas of adjudication, administrative or planning law, urban planning, architecture, community development, land development, agriculture or environmental planning; and,</li><li>— Decision-making, communication, and mediation experience.</li></ul> <p><b>Establishing panel composition requirements</b></p> <p>Each panel should be composed of the following:</p> <ul style="list-style-type: none"><li>— At least two members with adjudication experience to facilitate hearing management;</li><li>— At least one bilingual speaking member; and,</li><li>— One or more members with distinct areas of professional knowledge and experience (as identified above)</li></ul> <p><i>[Recommendation continued on next page]</i></p>	<ul style="list-style-type: none"><li>— Improve transparency and consistency</li></ul>



## 2.3 People and Culture (6/6)

#	Recommendation	Description	Rationale
2.3.3		<b>Implementing staggered terms</b> To achieve the objective of term limits while ensuring the CoA can retain experienced panelists, the City should consider implementing staggered terms so that the terms of half the members expire every two years.	



# 2.4 Public Hearings (1/5)

**Table 2.4: Recommendations related to Public Hearings**

#	Recommendation	Description	Rationale
2.4.1	Create and refresh applicant- and public-facing information	<p>Our current state assessment identified significant limitations related to public and applicant-facing information, including the use of technical language (Finding 4.4.6).</p> <p>To address these gaps and improve participation for applicants and members of the public, the CoA should consider developing i) a comprehensive applicant handbook; ii) a comprehensive public guidebook; and iii) additional public-facing resources and tools. Each is explained in more detail below.</p> <p><b>Comprehensive Applicant Handbook</b></p> <p>Our review found no comprehensive applicant-dedicated resource about the CoA. The proposed Applicant Guidebook would address this gap and act as a detailed, step-by-step guide for applicants for the CoA process. The guidebook should include, at a minimum, the following information:</p> <ul style="list-style-type: none"> <li>— The purpose of the CoA and its jurisdiction under the Planning Act;</li> <li>— The Minor Variance and Consent application process, from submission to decision;</li> <li>— Specific information on the payment associated with each application type and circumstance;</li> <li>— Information on the four tests, with examples highlighting how they might be applied;</li> <li>— Potential additional information or studies required by PRED, beyond mandatory submission requirements. For example, the report submission requirements for infill development (e.g., elevation shadows) and hydrogeological reports for specific rural applications. The CoA should include the estimated costs and timelines needed to obtain these reports; and,</li> <li>— The elements of a persuasive and effective presentation at a public hearing.</li> </ul>	<ul style="list-style-type: none"> <li>— Enhance applicant and public participation</li> <li>— Improve applicant and public experience</li> <li>— Reduce administrative workloads</li> </ul>

**[Recommendation continued on next page]**



## 2.4 Public Hearings (2/5)

#	Recommendation	Description	Rationale
2.4.1		<p><b>Comprehensive Public Guidebook</b></p> <p>Our review also found that there was no public-dedicated resource for members of the public to reference. The proposed Public Guidebook would address this gap and act as a detailed, step-by-step guide for members of the CoA, the public hearing process and how to effectively participate. The guidebook should include, at a minimum, the following information:</p> <ul style="list-style-type: none"><li>— The purpose of the CoA and its jurisdiction under the Planning Act;</li><li>— The roles, responsibilities and rights of members of the public;</li><li>— The public hearing process, including notice procedures, hearing procedures with links to past public hearings;</li><li>— Lists of drawings and reports relating to an application that can be requested and how to request them; and,</li><li>— An overview of how to use City tools (e.g., Geo-Ottawa).</li></ul> <p><b>Other public-facing resources</b></p> <p>In addition to the proposed handbook, the CoA should also consider developing new public-facing resources, including the following:</p> <ul style="list-style-type: none"><li>— A list of Frequently Asked Questions, which should be posted on the website and included in the proposed handbook; and,</li><li>— A short, plain-language video overview of the public hearing process. The video would broaden the reach of the information contained in the handbook. The video could also be used at the outset of hearings to set participant expectations.</li></ul>	



## 2.4 Public Hearings (3/5)

#	Recommendation	Description	Rationale
2.4.2	Eliminate evening hearings	<p>The Ottawa CoA's suburban panel conducts public hearings in the evening (6:30 p.m.). It is the only panel that conducts evening hearings.<sup>3</sup></p> <p>A majority of stakeholders engaged through our research, including industry representatives, community associations, CoA staff and City staff, identified evening hearings as less effective than daytime hearings. Specific challenges consistently identified by stakeholders include:</p> <ul style="list-style-type: none"> <li>— Decreased attendance and participation by City staff, who are less likely to attend evening hearings;</li> <li>— Limited access to City staff (i.e., applicants are unable to contact City staff after hours);</li> <li>— Increased overtime expenses;</li> <li>— Negative impacts on participant and panelist effectiveness, particularly with long agendas that can extend hearings into the late evening (at or after 11:00 p.m.); and,</li> <li>— A smaller pool of panelist candidates that are available to attend evening hearings.</li> </ul> <p>While evening hearings can be more accessible for participants and panelists that are unable to attend during the day, stakeholders engaged through our research indicated that virtual hearings have helped make daytime hearings significantly more accessible.</p> <p>To address the challenges associated with evening hearings, the CoA should:</p> <ul style="list-style-type: none"> <li>— Conduct all public hearings during the daytime; and,</li> <li>— Conduct hearings on a second hearing date (i.e., a day other than Wednesday) to accommodate the transition to daytime hearings.</li> </ul>	<ul style="list-style-type: none"> <li>— Improve CoA and City staff experience</li> <li>— Improve applicant, panelist and public experience</li> <li>— Reduce overtime expenses</li> </ul>

<sup>3</sup> The Rural and Urban panels conduct hearings in the morning (9:00 am) and afternoon (1:00 pm), respectively.



## 2.4 Public Hearings (4/5)

#	Recommendation	Description	Rationale
2.4.3	Standardize approaches to agenda management across all panels including adjournments, the use of consent agendas	<p>The CoA should develop and implement a standard approach to adjournments and consent agendas across all three panelists. A standard approach would:</p> <ul style="list-style-type: none"><li>— Improve the structure of meetings;</li><li>— Improve the predictability of when a specific agenda item will be heard; and,</li><li>— Reduce hearing durations.</li></ul> <p><b>Adjournments</b></p> <p>The CoA should develop guidelines to help standardize the approach to adjournments. The guidelines should include the following:</p> <ul style="list-style-type: none"><li>— A threshold for adjournments;</li><li>— Criteria where specific adjournments are granted as a sine die; and,</li><li>— Criteria where specific applications are provided with a new hearing date.</li></ul> <p><b>Use consent agendas</b></p> <p>Consent agendas are already successfully used by some panels. Their use should be standardized across all panels. In doing so, the CoA should consider the following:</p> <ul style="list-style-type: none"><li>— The approach for identifying items without City Planning staff concerns or public opposition;</li><li>— The requirement for an applicant presentation;</li><li>— The uploading of the consent agenda prior to and/or at the outset of a hearing for applicant and public transparency; and,</li><li>— Updates to panelist training (Recommendation 2.3.2).</li></ul>	<ul style="list-style-type: none"><li>— Improve hearing durations</li><li>— Reduce administrative workloads</li><li>— Improve consistency across panels</li><li>— Improve applicant and public experience</li></ul>



## 2.4 Public Hearings (5/5)

#	Recommendation	Description	Rationale
2.4.4	Continue to develop plain language written rationale and detailed oral reasons for decisions	<p>Applicants and members of the public consistently identified the lack of oral reasons from panelists as a significant barrier to participation that negatively impacts overall confidence in the public hearing process.</p> <p>While written decisions address the appropriate statutory tests and are descriptive for contentious applications, our research indicates that stakeholders would benefit from enhanced plain language wording to increase understanding.</p> <p>To address this gap, the CoA should consider evaluating opportunities to enable panelists to provide detailed oral reasons for their decision. The evaluation should include the following:</p> <ul style="list-style-type: none"><li>— Supporting tools for panelists like templates and picklists (e.g., a picklist with reasons identifying how an application does or does not meet the four tests);</li><li>— A consistent approach to providing verbal reasons for decisions during hearings;</li><li>— The use of templates for commenting partners to support the provision of more detailed comments (Recommendation 2.1.1); and,</li><li>— The additional time and staffing costs associated with providing more tailored and plain language reasons.</li></ul>	<ul style="list-style-type: none"><li>— Improve transparency and predictability</li></ul>





# 2.5 Information and Technology (1/2)

**Table 2.5: Recommendations related to Information and Technology**

#	Recommendation	Description	Rationale
2.5.1	Use the anticipated Land Management Solution (LMS) software to help digitize CoA operations	<p>Our research indicated an urgent need for a modernized CoA application intake and tracking system. Currently, applicants must submit paper copies of their applications, including reports and drawings via mail or in person. In addition, applicants are required to submit a cheque or pay by credit card in person at a Client Service Centre. These added steps increase the cost and time required to submit a CoA application.</p> <p>The CoA should accelerate the modernization of its application workflow and management system through the implementation of the LMS software, which is expected to rollout in the coming years. In doing so, the CoA should ensure that the LMS implementation aligns with stakeholder preferences and improves operations by incorporating the following additions:</p> <ul style="list-style-type: none"><li>— A paperless application submission and payment process;</li><li>— Tracking application circulation to departments commenting on the CoA application;</li><li>— Real-time application tracking, including tracking comments received from each commenting partner, when the application was circulated and when comments were received; and,</li><li>— Automatic notifications for document uploads and revisions.</li></ul>	<ul style="list-style-type: none"><li>— Improve transparency and predictability</li></ul>



## 2.5 Information and Technology (2/2)

#	Recommendation	Description	Rationale
2.5.2	Develop and implement a performance management framework	<p>Our research indicates that while the CoA proactively monitors the efficiency and effectiveness of its services, it should develop better tools and capacity for statistical gathering, analysis and reporting. The CoA should consider developing a performance management framework to address this gap and enable continuous improvement. The framework should include the following:</p> <ul style="list-style-type: none"><li>— Key performance indicators (KPIs) for each of the CoA's services, including efficiency and effectiveness measures, as well as KPIs related to the public hearing process;</li><li>— Data to support each KPI, including how, when and by whom the data will be collected;</li><li>— A process for reporting on KPIs; and,</li><li>— A process for reviewing the effectiveness of KPIs.</li></ul> <p>Data availability will be a significant limitation on the development of KPIs, and the technology systems that support the CoA are undergoing modernization. The CoA should identify opportunities to integrate CoA-related data and information into these broader modernization initiatives.</p>	<ul style="list-style-type: none"><li>— Improve capacity to monitor and manage CoA performance, including effectiveness of participation</li></ul>

# 3. Implementation Plan

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# 3. Implementation Plan

Figure 1 presents an estimate of the impact on the public hearing process (high, low) and the associated implementation effort for each recommendation (high, low) in Section 2.

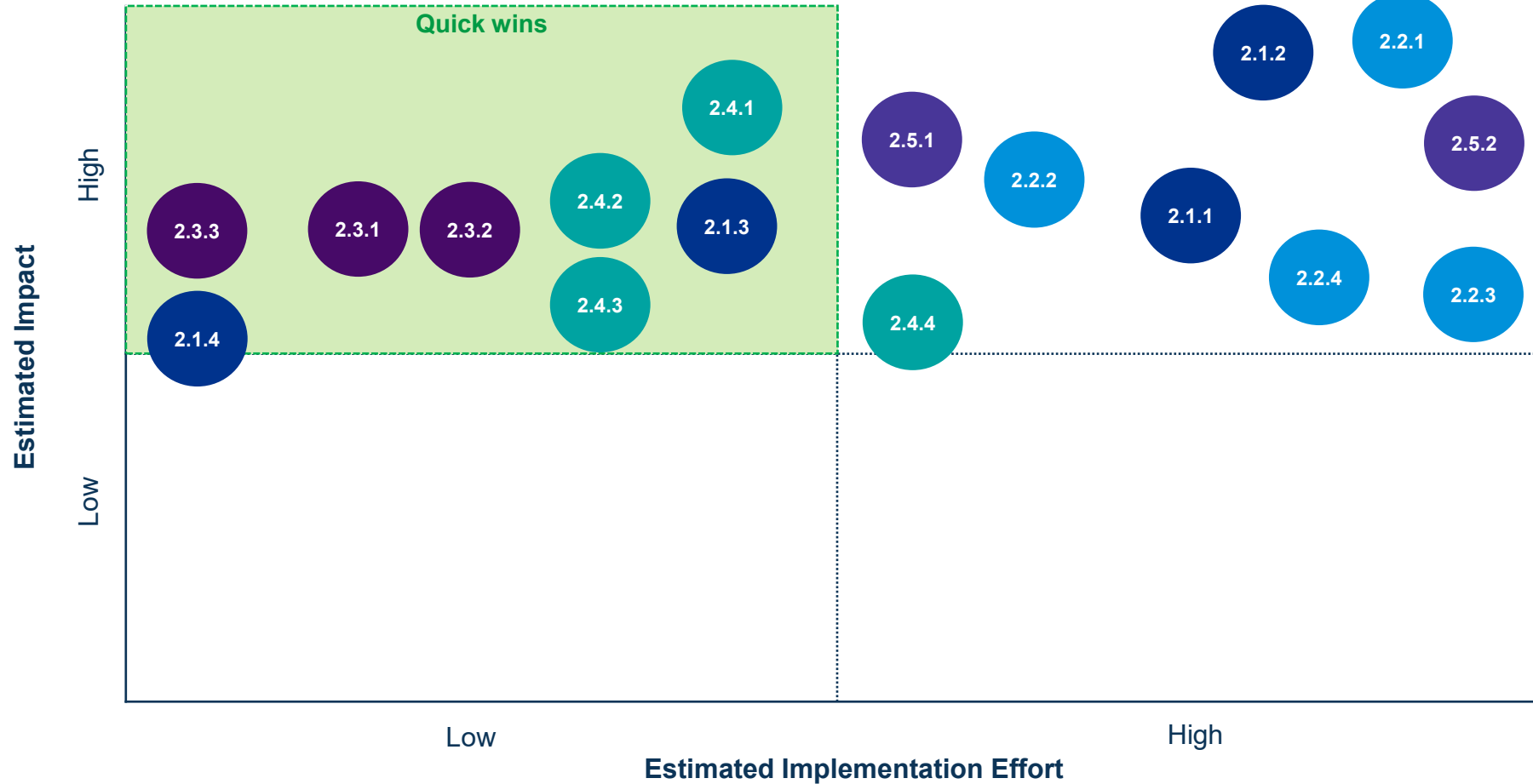
Tables 3.1 to 3.5 starting on page 38 present implementation actions for each of the recommendations included in Section 2. These actions are meant as a starting point for consideration by the CoA.

The implementation of the recommendations included in this report should be considered alongside the CoA's anticipated shift to hybrid hearings and the City's ongoing response to legislative change (e.g., Bill 109 and Bill 23).

Description	Page No.
3.1 Services and Processes	38
3.2 Organization and Governance	40
3.3 People and Culture	42
3.4 Public Hearings	44
3.5 Information and Technology	46

# 3. Implementation Plan

Figure 1: Implementation Matrix



- 

Services and processes
- 

Organization and governance
- 

People and culture
- 

Public hearings
- 

Information and technology



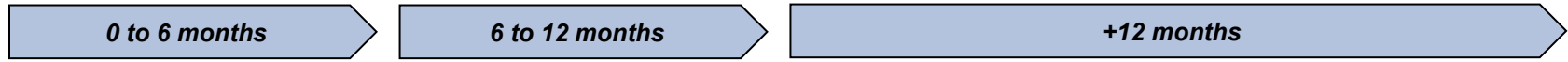
# 3.1 Services and Processes (1/2)

**Table 3.1: Implementation plan for recommendations related to Services and Processes**

		0 to 6 months	6 to 12 months	+12 months
#	Recommendation	Description of Activities		
2.1.1	Collaborate with PRED to standardize the commenting process and stream complex applications	<ul style="list-style-type: none"> <li>— Inventory commenting templates currently in use. Identify gaps.</li> <li>— Work with commenting partners to revise and refine existing templates and address gaps by developing new templates.</li> <li>— Identify criteria for identifying complex applications and establish supporting tools. Use preliminary criteria in Recommendation 2.1.1 as a starting point.</li> <li>— Establish a standard operating procedure for the involvement of senior planners.</li> <li>— Assess City staffing levels and resource requirements required.</li> <li>— Engage commenting partners at six-month internals to assess effectiveness of templates.</li> </ul>		
2.1.2	Provide applicants, panelists, and members of the public with sufficient time to review and inquire about staff reports prior to a public hearing	<ul style="list-style-type: none"> <li>— Evaluate the benefits and resourcing costs required to be able to upload staff reports online prior to the current commenting deadline. Assess potential impacts on application fees.</li> <li>— Work with commenting partners to develop a reasonable workback schedule for staff reports.</li> <li>— Evaluate the potential of establishing different timeline for simple and complex applications, using the criteria identified in Recommendation 2.1.1 as a starting point for differentiation between the two streams.</li> <li>— Engage with industry stakeholders to evaluate advantages and disadvantages of extending application timelines to ensure staff reports are uploaded by the commenting deadline.</li> </ul>		



# 3.1 Services and Processes (2/2)



#	Recommendation	Description of Activities
2.1.3	Implement a more rigorous review for completeness at application intake by CoA and PRED	<ul style="list-style-type: none"> <li>— Inventory current intake tools and checklists used by CoA staff.</li> <li>— Engage with commenting partners to establish terms of reference identifying the studies and information required for various application types, and their form.</li> <li>— Consider formalizing revised application intake process in a standard operating procedure or similar document.</li> <li>— Finalize application intake guidelines and develop roll out plan, including incorporation into training and onboarding.</li> <li>— Engage CoA staff, panelists and City staff at six-month intervals to assess effectiveness of guidelines.</li> <li>— Identify a designated CoA lead responsible for keeping the materials up-to-date.</li> </ul>
2.1.4	Build on existing engagement with community associations and industry representatives outside of the hearing process	<ul style="list-style-type: none"> <li>— Consult industry associations, community groups and residents' associations to identify preferences for engagement, using Recommendation 2.1.4 as a starting point.</li> <li>— Develop terms of reference to support each engagement mechanism and begin meetings.</li> <li>— Establish a publicly available repository on the CoA website to save records and materials from additional engagement sessions.</li> <li>— Monitor the effectiveness of these sessions through participant satisfaction surveys.</li> <li>— Identify a designated CoA lead responsible for managing additional engagement mechanisms.</li> </ul>



# 3.2 Organization and Governance (1/2)

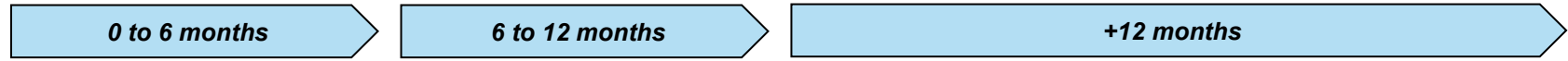
**Table 3.2: Implementation plan for recommendations related to Organization and Governance**

		0 to 6 months	6 to 12 months	+12 months
#	Recommendation	Description of Activities		
2.2.1	Increase the CoA's strategic and operational capacity with the addition of three new roles	<ul style="list-style-type: none"> <li>— Identify the roles and responsibilities of existing roles and staff at the CoA.</li> <li>— Identify current and future initiatives taking place at the CoA, including those identified in Recommendation 2.2.1 and more broadly in this review.</li> <li>— Identify the skillsets require to undertake these initiatives.</li> <li>— Allocate current and future roles and responsibilities to current and new roles, taking into account skillsets and current workloads.</li> <li>— Develop job specifications for new roles and initiate search for candidates.</li> <li>— Revise job specifications of current roles at the CoA as required.</li> </ul>		
2.2.2	Empower CoA leadership by increasing authorities and formalizing reporting relationships	<ul style="list-style-type: none"> <li>— Evaluate current authority levels against roles and responsibilities of CoA management and those of commensurate roles at other local independent boards.</li> <li>— Work with City staff to evaluate the potential for increasing authority levels of CoA management to align with roles and responsibilities and independent nature of the CoA.</li> <li>— Develop a terms of reference document formalizing reporting relationship as described in Recommendation 2.2.2.</li> <li>— Socialize the document across the City by sharing widely with CoA staff, panelists, and external City departments.</li> <li>— Ensure it is also be stored in a centralized location on the City's intranet.</li> </ul>		





## 3.2 Organization and Governance (2/2)



#	Recommendation	Description of Activities
2.2.3	Consider creating a reserve fund to support long-term initiatives and CoA service delivery improvements	<ul style="list-style-type: none"><li>— Consider engaging a specialist to support the reserve fund’s establishment through a reserve fund study.</li><li>— Evaluate current legislation around the authorities required and permitted purposes for the establishment of a reserve fund.</li><li>— Conduct a review of the CoA’s operating budget to identify historical surpluses and deficits.</li><li>— Identify capital and operating costs that were incurred over and above budgeted costs, and their rationale.</li><li>— Forecast future funding requirements, including those identified in Recommendation 2.2.3 and other anticipated changes.</li><li>— Establish the purpose of the reserve fund.</li><li>— Establish the reserve fund.</li></ul>
2.2.4	Consider introducing a fourth panel to address increasing and uneven applications volumes	<ul style="list-style-type: none"><li>— Monitor application volumes.</li><li>— Evaluate options to redistribute application volumes to a fourth panel based on geography or application complexity.</li><li>— Consider identifying alternate panelists who could mobilize into a fourth panel as needed.</li><li>— Evaluate the need for additional resources to administer the fourth panel.</li></ul>



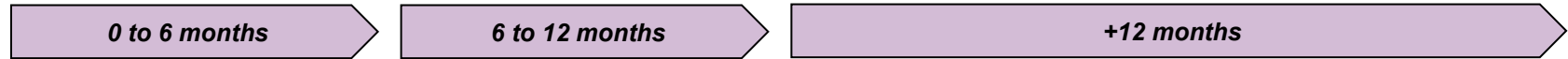
# 3.3 People and Culture (1/2)

**Table 3.3: Implementation plan for recommendations related to People and Culture**

			0 to 6 months	6 to 12 months	+12 months
#	Recommendation	Description of Activities			
2.3.1	Create and refresh training and orientation materials for CoA staff	<div style="background-color: #4a4a8a; height: 15px; width: 100%; margin-bottom: 5px;"></div> <ul style="list-style-type: none"> <li>— Inventory existing staff training and onboarding material. Identify gaps.</li> <li>— Update existing and develop new materials, using those areas identified in Recommendation 2.3.1 as a starting point.</li> <li>— Consolidate all staff training and onboarding material into a comprehensive binder.</li> <li>— Share updated material with staff and solicit feedback.</li> <li>— Incorporate feedback and finalize the material.</li> <li>— Identify a designated CoA lead responsible for keeping the materials up-to-date.</li> <li>— Incorporate into CoA staff onboarding and training.</li> </ul>			
2.3.2	Create and refresh training and orientation materials for Panelists	<div style="background-color: #4a4a8a; height: 15px; width: 100%; margin-bottom: 5px;"></div> <ul style="list-style-type: none"> <li>— Engage panelists on updates to the manual, using Recommendation 2.3.2 as a starting point.</li> <li>— Develop an updated draft manual and share with staff and panelists.</li> <li>— Incorporate feedback and finalize the updated manual.</li> <li>— Identify a designated CoA lead responsible for keeping the materials up-to-date. Incorporate into panelist onboarding and training.</li> <li>— Continue to engage with Chair and Vice Chairs to topics of interest for professional development meetings, using those identified in Recommendation 2.3.2 as a starting point.</li> </ul>			



## 3.3 People and Culture (2/2)



#	Recommendation	Description of Activities
2.3.3	Modify panelist appointment selection criteria and/or process	<ul style="list-style-type: none"><li>— Update the panelist selection and panel composition criteria, using Recommendation 2.3.3 as a starting point. Provide to the City Clerk.</li><li>— Monitor effectiveness of new selection criteria over the course of the next term.</li><li>— Modify panelist appointment process as required.</li></ul>



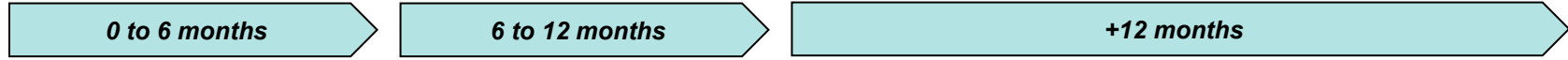
# 3.4 Public Hearings (1/2)



**Table 3.4: Implementation plan for recommendations related to Public Hearings**

			0 to 6 months	6 to 12 months	+12 months
#	Recommendation	Description of Activities			
2.4.1	Create and refresh applicant- and public-facing information	<ul style="list-style-type: none"> <li>Inventory existing applicant- and public-facing CoA materials to identify gaps and potential starting points.</li> <li>Develop draft materials using Recommendation 2.4.1 as a starting point.</li> <li>Consult with internal and external stakeholders to test the format, readability, and effectiveness of draft materials.</li> <li>Incorporate feedback from stakeholders.</li> <li>Publish materials on the CoA homepage. Ensure they are easily accessible, with links made available on notices.</li> <li>Solicit feedback on the effectiveness of these resources through the annual applicant and public touchpoints (Recommendation 2.1.4) and quarterly professional development meetings.</li> <li>Identify a designated CoA lead responsible for keeping the materials up-to-date.</li> </ul>			
2.4.2	Eliminate evening hearings	<ul style="list-style-type: none"> <li>Adjust panelist selection criteria as required.</li> <li>Implement schedule changes to coincide with the appointment of CoA panelists for the new term.</li> <li>Evaluate the feasibility operating public hearings on an additional day other than Wednesdays.</li> <li>Incorporate a six-week lead time to schedule changes to accommodate statutory public notification requirements.</li> </ul>			



# 3.4 Public Hearings (2/2)




#	Recommendation	Description of Activities
2.4.3	Standardize approaches to agenda management across all panels including adjournments, the use of consent agendas	 <ul style="list-style-type: none"> <li>— Establish a standard operating procedure for consent agendas and adjournments, using Recommendation 2.4.3 as a starting point.</li> <li>— Engage panelists, applicants and members of the public to test and refine the standard operating procedure.</li> <li>— Incorporate the updated procedure into panelist training and resources (Recommendations 2.3.2).</li> <li>— Update applicant- and public-facing materials (e.g., CoA website, application forms and applicant and public handbooks) to provide information on the process for consent agendas and adjournments.</li> </ul>
2.4.4	Continue to develop plain language written rationale and detailed oral reasons for decisions	 <ul style="list-style-type: none"> <li>— Engage with internal and external stakeholders on the options included in Recommendation 2.4.4.</li> <li>— Incorporating internal and external feedback, evaluate the costs, benefits and operational feasibility of the options included in Recommendation 2.4.4 and any additional options identified through engagement.</li> <li>— Incorporate any changes into the update public-facing materials identified in Recommendations 2.4.1 as well as the updated panelist training identified in Recommendations 2.3.2.</li> </ul>



# 3.5 Information and Technology (1/1)

**Table 3.5: Implementation plan for recommendations related to Information and Technology**

		0 to 6 months	6 to 12 months	+12 months
#	Recommendation	Description of Activities		
2.5.1	Use the anticipated Land Management Solution (LMS) software to help digitize CoA operations	<ul style="list-style-type: none"> <li>— Consider engaging with industry and public representatives through the methods identified in Recommendation 2.1.4 to identify functional preferences.</li> <li>— Engage with the LMS implementation team to communicate stakeholder preferences, including those identified in Recommendation 2.5.1.</li> <li>— Monitor the effectiveness of the software through satisfaction surveys with stakeholders.</li> </ul>		
2.5.2	Develop and implement a performance management framework	<ul style="list-style-type: none"> <li>— Inventory existing performance measures in place for the CoA including metrics, systems, collection frequency, and use.</li> <li>— Identify opportunities to align the performance management framework with commenting partners (e.g., the performance management framework being developed to support the City's development review process).</li> <li>— Identify a designated CoA lead responsible for managing the framework, including annual evaluations of its effectiveness.</li> </ul>		



# Appendix A: Project Background

# Project Background

The City of Ottawa's Committee of Adjustment (CoA) engaged KPMG LLP (KPMG) to complete an organizational review.

## Objectives and Scope

The objectives of the review are to i) assess the capacity of the CoA to deliver on its current and future mandate, including administrative, staff and panel capacity, ii) identify improvements to surpass client service expectations, and, iii) identify opportunities to improve public and community engagement.

The scope of the review includes processes, procedures and workflows that underpin the CoA, organizational structure and governance, people and culture, the applicant and public experience, committee structure, and opportunities to leverage the existing IT environment, among other topics that surfaced through the research.

## Assessment Framework

Research was guided by an assessment framework approved by the CoA's project team. This framework consists of five key areas of focus designed to facilitate understanding of the current state and develop recommendation. The assessment framework is included in Appendix B.

## Approach and Methodology

In the first phase of work, we worked closely with the Project Team to confirm the project objectives, workplan and assessment framework. We also reviewed and refined the stakeholder engagement strategy, including the identification of stakeholders, engagement tactics and engagement timelines. The engagement strategy and updated project charter was approved by the Project Team in May 2022.

During the second phase, we built a substantive evidence base to understand and evaluate the current state, as well as identify challenges and initial opportunities for improvement. Several qualitative and quantitative data sources were used to construct

our initial evidence base, including:

- Data and document review;
- Stakeholder research;
- Survey questionnaires; and,
- Leading practice research.

## Documents and Data Review

We conducted an in-depth review of over 85 documents provided by the Project Team. Documents included council motions and agenda items, staff reports, and communications related to the CoA. Data provided by the Project Team included application volumes and appeal rates since 2017.

## Stakeholder Research

We conducted a comprehensive stakeholder engagement exercise, involving approximately 18 hours of stakeholder engagement with more than 68 internal and external stakeholders. This included:

- Nine one-on-one interviews with representatives from the CoA and City;
- Three workshops with CoA panelists;
- One workshop with 17 industry representatives, including applicant agents and representatives from the Greater Ottawa Home Builders Association; and,
- Two workshops with 14 public stakeholders including community associations and other public-related organizations, including the Federation of Citizens' Association.



# Project Background

To encourage frank and constructive dialogue, interviews and focus groups were conducted confidentially and without attribution. Notes were taken to facilitate our analysis but were not shared externally.

One-on-one interviews were typically 30-90 minutes in length. We followed a semi-structured approach that included interview guides with questions distributed in advance but allowed interviewees to identify new issues. Workshops were several hours in length, and followed a similar, semi-structured approach.

## Survey Questionnaires

We developed and distributed separate online surveys for applicant, public and panelist stakeholders. The surveys were open for several weeks and included questions focussed on identifying existing strengths, challenges, and improvement opportunities. In total, over 100 responses were received in the applicant, public and panelist surveys.

## Leading Practice Research

The purpose of the jurisdictional research was to gather leading practice information to inform the development of our recommendations.

Working closely with the Project Team, we identified five jurisdictional comparators based on criteria including: population size and growth, geography, urban fabric and development volume.

The following municipalities were included as part of the benchmarking study:

- Toronto;
- Hamilton;
- Mississauga;
- Oakville; and,
- Brampton.

We conducted detailed desktop research into comparator municipalities and scheduled interviews with representatives to identify specific improvement opportunities for the CoA. We focused on what each jurisdiction does well, rather than a side-by-side comparison or analysis of each jurisdiction's development review or equivalent processes.

A summary of our leading practice research can be found in Appendix D.

# Project Background

## Interim Report

We synthesized our findings from the first two phases of work into an interim report. The interim report included a summary of the current state, as well as a long list of improvement opportunities for consideration and additional development during Phase 3. The interim report was presented to the Project Team in August 2022.

## Develop Improvement Opportunities

In the third phase of work, we refined our preliminary improvement opportunities into the recommendations included in this final report using two main inputs: the leading practice research completed in Phase 2 and co-design workshops.





## Co-design Workshops

We developed several key improvement opportunities included in our interim report through six co-design workshops, each 1.5-3 hours in length, with CoA and City staff, panelists, and representatives from industry and community associations. During the workshops, we worked alongside stakeholders to test and refine key improvement opportunities.

## Recommend and Report

During the fourth and final phase, we synthesized our findings into this final report and implementation roadmap. Draft versions of this report were shared with and reviewed by the CoA's project team. Revisions have been incorporated into this final version.

# Work Plan






	Phase 1: Project Set Up 	Phase 2: Assess Current State 	Phase 3: Develop Improvement Opportunities 	Phase 4: Recommend & Report 
Objectives	Establish project foundation and review work completed.	Confirm strengths, challenges, and opportunities for improvement.	Develop, test, and refine improvement opportunities.	Synthesize work into concise final report with recommendations.
Activities	<ul style="list-style-type: none"> <li>— Stand-up project reporting structure</li> <li>— Finalize work plan</li> <li>— Review work completed to date</li> <li>— Identify documents for review</li> <li>— Develop stakeholder engagement plan</li> <li>— Develop leading practice plan</li> </ul>	<ul style="list-style-type: none"> <li>— Document review</li> <li>— Stakeholder engagement</li> <li>— Leading practice research</li> <li>— Gap analysis</li> <li>— Develop Interim Report</li> </ul>	<ul style="list-style-type: none"> <li>— Improvement workshops</li> <li>— Additional stakeholder engagement</li> </ul>	<ul style="list-style-type: none"> <li>— Final Report</li> <li>— Presentation of Final Report</li> </ul>
Deliverables	<ul style="list-style-type: none"> <li>✓ Project Management Plan</li> <li>✓ Bi-weekly status meetings</li> <li>✓ Stakeholder engagement plan</li> <li>✓ Leading practice plan</li> </ul>	<ul style="list-style-type: none"> <li>✓ Interim Report of initial findings and high-level improvement opportunities</li> <li>✓ Project team presentation of Interim Report</li> </ul>	<ul style="list-style-type: none"> <li>✓ Detailed list of improvement opportunities</li> <li>✓ Design workshops</li> </ul>	<ul style="list-style-type: none"> <li>✓ Final Report synthesizing work completed</li> <li>✓ Presentation of Final Report</li> </ul>

A nighttime photograph of a city skyline, likely Ottawa, Canada, featuring the Parliament Hill buildings on a hill overlooking a lake. The scene is dimly lit with a blue color cast. The text 'Appendix B: Assessment Framework' is overlaid in white, with 'Assessment Framework' underlined.

# Appendix B: Assessment Framework

# Assessment Framework

This Appendix presents the assessment framework that was utilized to understand the CoA's current state, identify challenges and opportunities, articulate different future state options, and set out detailed recommendations.

 <b>Services and Processes</b>	The services delivered by the CoA and the processes, practices, procedures, and workflows that underpin them.
 <b>Organization and Governance</b>	The roles and responsibilities of staff, panel members and other stakeholders as well as the CoA's organizational structure (including committee structure) funding structure and supporting governance structures.
 <b>People and Culture</b>	The CoA's people and culture, including staff engagement and retention, as well as staff and panel member complements, compensation levels, qualifications and training.
 <b>Public Hearings</b>	Public hearings, including the applicant and public experience.
 <b>Information and Technology</b>	The use and flow of data, information, analytics, and technology to support the efficient delivery of the CoA's services.



Appendix C:  
Current State Assessment



# Challenges: Services and Processes (1/3)

This Appendix presents challenges related to services and processes, organization and governance, people and culture, public hearings and information and technology, identified through our current state assessment.

**Table 4.1: Challenges related to Services and Processes**

#	Challenge	Description	Impacts
4.1.1	Increasing application volume and complexity	<p>Application volumes increased 25% between 2019 and 2021 with no increase in CoA staffing levels or the number of CoA hearings, which have remained constant since 2014.</p> <p>Stakeholders indicated that application volumes are expected to continue to increase. Stakeholders also indicated that the complexity of applications is expected to increase due to increased levels of infill development.</p>	<ul style="list-style-type: none"><li>— Increases staff and panelist workloads</li><li>— Strains organizational capacity</li><li>— Increases staff and applicant frustration</li></ul>
4.1.2	Significant increase in adjournments	<p>Adjournments increased by more than 80% between 2019 and 2021, from 122 to 221 annually. CoA staff and panelists indicated that the increase is primarily due to late reports from commenting partners (provided less than five days prior to the hearing), particularly Planning, Infrastructure and Economic Development (City Planning) and Urban Forestry. In addition, late comments contribute to adjournments by decreasing the time available to panelists and applicants to prepare for hearings.</p>	<ul style="list-style-type: none"><li>— Increases staff and panelist workloads</li><li>— Reduces transparency and predictability</li><li>— Extends application timelines</li><li>— Increases applicant frustration</li></ul>



# Challenges: Services and Processes (2/3)

#	Challenge	Description	Impacts
4.1.3	Ineffective decision-making supports for panelists	<p>Panelists indicated that the information and materials that support decision-making are often ineffective:</p> <ul style="list-style-type: none"> <li>— City Planning staff comments are often inconsistently formatted, difficult to follow and include unnecessary information;</li> <li>— City Planning comments, often prepared by junior planners, do not clearly communicate recommendations and conditions;</li> <li>— Limited guidance on the appropriateness of completing individual due diligence (e.g., conducting site visits alone or using online mapping software); and,</li> <li>— Limited access to subject matter expertise for legal or surveying matters.</li> </ul>	<ul style="list-style-type: none"> <li>— Contributes to adjournments and inconsistencies in decision-making</li> <li>— Increases panelist workloads and frustration</li> <li>— Reduces transparency and predictability</li> </ul>
4.1.4	Unbalanced application volumes across panels	<p>Since 2017, the Urban and Suburban panels have received 87% and 77% more applications than the Rural panel, respectively.</p> <p>Despite the variation in application volumes, the number of hearings and panelists is the same across all three panels. As a result, the average hearing time of the Rural panel (77 minutes) was roughly half that of the Suburban (133 minutes) and Urban (160 minutes) panels in 2021.</p>	<ul style="list-style-type: none"> <li>— Increases panelist frustration</li> <li>— Inconsistent hearing lengths across panels</li> </ul>
4.1.5	City staff reports are not easily accessible for applicants and members of the public	<p>Reports from commenting partners are not easily accessible online for members of the public.</p> <p>Similarly, the staff leads from commenting partners assigned to specific applications are not identified online. To identify staff leads, applicants and members of the public must first contact CoA staff to identify commenting partner leads. This added step increases administrative workloads and creates a barrier to participation for applicants and the public.</p>	<ul style="list-style-type: none"> <li>— Increases staff workloads</li> <li>— Creates barriers to participation for applicants and public</li> </ul>





# Challenges: Services and Processes (3/3)

#	Challenge	Description	Impacts
4.1.6	Document translation can lead to delays in uploading information	<p>The City of Ottawa’s Bilingualism Policy requires the CoA to post information online in both English and French.</p> <p>CoA staff and panelists indicated that document translation can lead to delays in uploading information (e.g., City staff comments, agendas, etc.), contributing to applicant and public frustration.</p>	<ul style="list-style-type: none"> <li>— Contributes to late comments</li> <li>— Potential conflict with City policy and statutory timelines</li> </ul>
4.1.7	Ineffective application forms and intake processes	<p>CoA staff and applicants indicated that application forms are outdated and result in confusion, often among inexperienced applicants. Areas of confusion include:</p> <ul style="list-style-type: none"> <li>— The forms have two minor variance application types: (i) primary and (ii) secondary. The definitions provided for each in the form are vague and do not account for varying circumstances. In some cases, CoA and applicant stakeholders indicated that inexperienced applicants have paid for the wrong application, initially underpaying or overpaying; and,</li> <li>— Clarifying requirements are broad and do not indicate which reports are required (e.g., Tree Protection Reports).</li> </ul> <p>Applicants also indicated that the need to submit applications by mail and the lack of online payment methods reduces the time available to prepare applications.</p>	<ul style="list-style-type: none"> <li>— Barrier to participation for inexperienced applicants</li> <li>— Contributes to applicant frustration</li> </ul>



# Challenges: Organization and Governance (1/2)

**Table 4.2: Challenges related to Organization and Governance**

#	Challenge	Description	Impacts
4.2.1	Unclear roles, responsibilities and decision-making authorities of the Secretary-Treasurer, Chair and City Clerk	<p>The Secretary-Treasurer reports to both the Chair (for Committee-related matters) and the City Clerk (for administrative-related matters). Our review of documents indicates that this dual reporting structure has not been formalized (e.g., roles and responsibilities are not written down, consolidated or made readily available).</p> <p>City stakeholders indicated that the following roles and responsibilities are not clear:</p> <ul style="list-style-type: none"><li>— The navigation of human resource-related issues such as hiring, performance review signoffs, disciplinary matters as well as budgetary expense approvals; and,</li><li>— The decision-making authorities of the Secretary-Treasurer, Chair and City Clerk.</li></ul>	<ul style="list-style-type: none"><li>— Reduces transparency and predictability</li><li>— Increases administrative workload of CoA management</li></ul>
4.2.2	Current funding structure limits opportunities for service delivery improvements	<p>The CoA operates on a cost recovery basis, recovering all its operating expenses through application fees. Under the current funding structure, any surplus generated by the CoA is directed to the City's general revenues. As a result, there is little, if any, funding available for service delivery improvements, including performance improvement initiatives and training.</p> <p>The current funding structure also limits the ability to fund medium- or long-term initiatives focused on addressing future challenges, improving resiliency or building capacity.</p>	<ul style="list-style-type: none"><li>— Barrier to service delivery improvement and strategic initiatives</li><li>— Reduces organizational resilience</li></ul>



# Challenges: Organization and Governance (2/2)

#	Challenge	Description	Impacts
4.2.3	The Secretary-Treasurer and Deputy Secretary-Treasurers are not empowered to deliver on their mandates.	<p>The mandates of the Secretary-Treasurer and Deputy Secretary-Treasurer positions have expanded beyond their decision-making authorities, leading to challenges in managing the CoA's strategic and day-to-day operations.</p> <p>The Secretary-Treasurer operates with minimal oversight and manages the service area of an independent body. However, the current authorities in place (e.g., for procurement and hiring new staff) limit autonomy and the time available for strategic planning. Our research indicates that this is not aligned with the job classification levels at other independent local boards or comparable CoAs.</p> <p>Deputy Secretary-Treasurers are responsible for managing the Committee Coordinators and day-to-day operations yet cannot sit in disciplinary meetings. This limits their ability to manage resources efficiently and foster career development.</p> <p>The misalignment between authorities and mandates hinders the CoA's ability to be proactive in the face of increasing workloads by limiting the capacity for strategic planning and management.</p>	<ul style="list-style-type: none"><li>— Increases administrative burden on CoA management</li><li>— Barrier to strategic planning and management</li></ul>



# Challenges: People and Culture (1/2)

**Table 4.3: Challenges related to People and Culture**

#	Challenge	Description	Impacts
4.3.1	High Committee Coordinator turnover	<p>CoA staff indicated there has been a 150% turnover in Committee Coordinators since 2015. Stakeholders provided the following reasons for the high turnover rate:</p> <ul style="list-style-type: none"><li>— Limited opportunity for career advancement within the CoA as there is no intermediate position between a Committee Coordinator and a Deputy Secretary-Treasurer;</li><li>— Committee Coordinators have highly transferrable skills, allowing for lateral movement across City departments for higher paying opportunities;</li><li>— The current 2-week work cycle to process applications, which has resulted in a fast-paced environment that can be stressful; and,</li><li>— Limited accommodations to work from home, work outside of regular business hours, and take time off due to the nature of the work.</li></ul> <p>City and CoA staff at all levels indicated that staff turnover is a significant challenge that limits the CoA's ability to build and maintain organizational knowledge, leading to increased time spent training new staff and reduced time available to fulfil regular duties.</p>	<ul style="list-style-type: none"><li>— Increases staff workloads and frustration</li><li>— Barrier to transparency and predictability</li><li>— Reduces organizational resilience</li></ul>
4.3.2	Inadequate panelist training and commenting partner support on complex planning-related matters	<p>While panelists indicated that quarterly professional development meetings are helpful, they noted that technical training is lacking, particularly concerning the complexities brought on by the new official plan and zoning by-laws.</p> <p>City staff indicated that panelists could sometimes struggle when adjudicating complex applications and considering staff comments/conditions due to inadequate training and limited time available to review late staff reports.</p>	<ul style="list-style-type: none"><li>— Reduces transparency and predictability</li></ul>



# Challenges: People & Culture (2/2)

#	Challenge	Description	Impacts
4.3.3	Existing orientation and training materials for staff and panelists are outdated and ineffective	<p>Staff and panelists consistently indicated that orientation and training materials are inadequate and ineffective.</p> <p>CoA staff indicated that Committee Coordinators generally require six months of training, with shadowing being the primary learning method, increasing the workload for existing staff.</p> <p>The panelist onboarding binder is also outdated, with materials from as early as 2002. Areas where materials appear outdated include:</p> <ul style="list-style-type: none"><li>— The Committee of Adjustment Rules of Procedure are dated 2002 (but were amended in May 2020);</li><li>— No information is included on the shift to the virtual hearing process;</li><li>— No information is included addressing the use of online mapping software;</li><li>— Contact information for the Secretary-Treasurer is outdated and limited contact information for commenting partners exists; and,</li><li>— No information is provided on the new official plan and new transects system.</li></ul>	<ul style="list-style-type: none"><li>— Increases staff workloads</li><li>— Reduces transparency and predictability</li></ul>
4.3.4	The current panelist selection process does not promote diversity in expertise or skillsets	<p>City stakeholders indicated that the current panelist selection process does not consider the diversity of professional backgrounds across a panel. As a result, the Suburban panel consists of four members with similar professional backgrounds.</p> <p>Similarly, the majority of panelists are non-bilingual anglophones, leading to potential misalignment with the City's Bilingualism Policy.</p>	<ul style="list-style-type: none"><li>— Contributes to adjournments and inconsistencies in decision-making</li><li>— Potential conflict with City Policy</li></ul>



# Challenges: Public Hearings (1/3)

**Table 4.4: Challenges related to Public Hearings**

#	Challenge	Description	Impacts
4.4.1	Inconsistencies within and across panels	<p>Stakeholders consistently identified procedural inconsistencies within and across panels, such as:</p> <ul style="list-style-type: none"><li>— The application of the four tests;</li><li>— The use of evidence and supporting materials, including staff reports, written submissions and depositions;</li><li>— Approaches to contested matters, including the threshold for adjournments;</li><li>— Differences in the treatment of sophisticated and unsophisticated applicants; and,</li><li>— Balancing the adjudicative process with educating members of the public.</li></ul> <p>Of those panelists surveyed, one-third indicated that similar applications are not decided in a consistent manner across hearings.</p> <p>A number of applicant representatives indicated that they often choose the longer and more complex Zoning By-law Amendment process because it is seen as more predictable and transparent.</p>	<ul style="list-style-type: none"><li>— Reduces transparency and predictability</li><li>— Negatively impacts applicant and public confidence in the CoA process</li><li>— Increases applicant frustration</li></ul>



# Challenges: Public Hearings (2/3)

#	Challenge	Description	Impacts
4.4.2	Late-stage application revisions	<p>Stakeholders indicated that late-stage application revisions pose the following challenges:</p> <ul style="list-style-type: none"><li>— Frustration for panelists who have limited time to prepare for hearings;</li><li>— Applicants presenting outdated materials, as the presentation submission deadline is the Monday before a hearing;</li><li>— Written letters from the public becoming less impactful, as the written submission deadline is the Monday before a hearing; and,</li><li>— General unpreparedness among panelists, applicants and members of the public.</li></ul> <p>Taken together, these challenges diminish the effectiveness of public hearings and lead to increases in the number of adjournments.</p>	<ul style="list-style-type: none"><li>— Barrier to effective applicant and public participation</li><li>— Increases panelist frustration</li><li>— Contributes to adjournments</li></ul>
4.4.3	Unstructured hearings decrease the predictability of agendas	<p>Applicants and members of the public indicated that it is difficult to predict when specific agenda items will be heard, increasing the time commitment required to participate in a hearing.</p> <p>Stakeholders cited increased adjournments and the inconsistent use of agenda vetting as key contributors to agenda unpredictability. Stakeholders also indicated that the lack of indication as to which agenda item is currently under consideration further increases confusion.</p>	<ul style="list-style-type: none"><li>— Barrier to public and applicant participation</li></ul>



# Challenges: Public Hearings (3/3)

#	Challenge	Description	Impacts
4.4.4	Limited transparency in the decision-making process	Applicants and community associations both identified barriers to transparency in the decision-making process, including: <ul style="list-style-type: none"><li>— The lack of reasoning included in written decisions; and,</li><li>— The process of reserving decisions, which limits an applicant's ability to clarify concerns or to understand why an application was approved or refused.</li></ul>	<ul style="list-style-type: none"><li>— Reduces transparency and predictability</li></ul>
4.4.5	A one-size-fits-all approach to speaking durations and rebuttal structure are sometimes viewed as ineffective for applicants and members of the public	Applicants and members of the public consistently indicated that the current speaking durations are insufficient for complex applications, particularly where there are multiple concerned parties or reports from City staff.	<ul style="list-style-type: none"><li>— Barrier to applicant and public participation</li></ul>
4.4.6	Limited public and applicant-facing information about the CoA.	Our review of publicly available information and an analysis of stakeholder findings identified the following gaps related to publicly available information about the CoA and the public hearing process: <ul style="list-style-type: none"><li>— No easy-to-use, non-technical guide for members of the public about the CoA, the CoA's jurisdiction, the public hearing process or how to effectively engage in the CoA process;</li><li>— Despite recent improvements, notices (mailed or posted) are still overly technical, with limited guidance to educative resources; and,</li><li>— No information on application details (e.g., streetscape drawings, City staff comments, etc.) that may be provided to the public easily upon request.</li></ul>	<ul style="list-style-type: none"><li>— Barrier to applicant and public participation</li><li>— Reduces transparency and predictability</li><li>— Increases staff and panelist workloads</li></ul>





# Challenges: Information & Technology (1/1)

**Table 4.5: Challenges related to Information and Technology**

#	Challenge	Description	Impacts
4.5.1	Limited information and performance management	<p>The City does not currently collect or use much data or information about CoA operations. The little information collected tends to be highly manual and time intensive, creating a significant barrier to its use in performance management.</p> <p>Information that could help manage performance but is not currently collected includes:</p> <ul style="list-style-type: none"> <li>— The timelines associated with the pre-application consultation process;</li> <li>— The average time spent by panel members between application submission and hearing; and,</li> <li>— The number of registered speakers by agenda item.</li> </ul>	<ul style="list-style-type: none"> <li>— Barrier to effective planning, management and service delivery</li> </ul>



Appendix D:  
Leading Practice Research

# Leading Practice Summary

This appendix presents an overview of the leading practice research plan and findings.



## Objective

The objective of our leading practice research was to understand the related structure, processes, and organization of Committees of Adjustment in comparable jurisdictions to identify specific improvement opportunities. Working with the Project Team, we identified five comparator jurisdictions for detailed research. In addition, we also completed an interview with the Ontario Association of Committees of Adjustment.



## Purpose

- Understand common challenges and trends in comparable jurisdictions.
- Research specific leading practices used by comparable jurisdictions for use as inputs into our improvement workshops.



## Approach

- Conduct an interview with a senior representative(s) from each comparable organization.
- Perform desktop research across all comparator jurisdictions.
- Focus on success factors related to common challenges rather than an “apples-to-apples” comparison.
- Look into comparable data points as well as leading practices and benchmarks.

#	Comparator List
1	Ontario Association of Committees of Adjustment
2	City of Toronto CoA
3	City of Mississauga CoA
4	City of Hamilton CoA
5	City of Oakville CoA
6	City of Brampton CoA

# Leading Practice Summary

This section outlines the common challenges and leading practices identified through our research. The findings are organized into the assessment framework categories. Our research did not surface any significant findings pertaining to *Technology and Information*.

## Summary of common challenges

The table below summarizes the common challenges identified through our research.

Overall, representatives from the comparator jurisdiction indicated that are experiencing similar challenges to Ottawa’s Committee of Adjustment.

	Services and Processes	Organization & Governance	People & Culture	Public Hearings
Challenges	<ul style="list-style-type: none"> <li>— Application volumes and complexity.</li> <li>— Late City staff comment submissions.</li> <li>— Late posting of information online before a hearing.</li> </ul>	<ul style="list-style-type: none"> <li>— Inconsistent processes and practices across panels.</li> </ul>	<ul style="list-style-type: none"> <li>— Attraction and retention of CoA staff.</li> <li>— Resourcing challenges among City staff, impacting the quality of commenting partner submissions.</li> </ul>	<ul style="list-style-type: none"> <li>— Unpredictable agenda item hearing times.</li> <li>— Limited or ineffective applicant- and public-facing information.</li> </ul>
Impacts	<ul style="list-style-type: none"> <li>— Increases staff and panelist workloads.</li> <li>— Increases adjournments.</li> <li>— Applicant and public frustration.</li> </ul>	<ul style="list-style-type: none"> <li>— Contributes to inconsistencies in decision-making.</li> <li>— Reduces transparency and predictability.</li> </ul>	<ul style="list-style-type: none"> <li>— Increases staff workloads and frustration.</li> <li>— Reduces organizational resilience.</li> </ul>	<ul style="list-style-type: none"> <li>— Barrier to effective applicant and public participation.</li> <li>— Increases staff and panelist workloads.</li> </ul>

# Leading Practice Summary

## Summary of leading practices

The table below summarizes our preliminary leading practice findings.

Leading practice

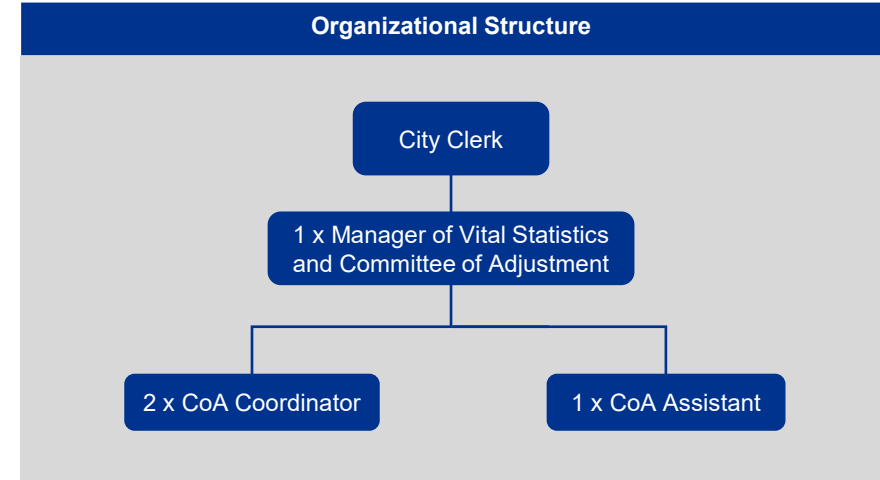
Impacts

Services and Processes	Organization & Governance	People & Culture	Public Hearings
<ul style="list-style-type: none"> <li>— Encouraging City staff to contact applicants directly to resolve issues.</li> <li>— Uploading City staff comments online as early as possible before a hearing.</li> <li>— Publishing the application submission deadline for each scheduled hearing.</li> <li>— Formalizing the process for adjournments, including the identification of new hearing dates.</li> </ul>	<ul style="list-style-type: none"> <li>— Clearly defining the roles, responsibilities, and timelines for all commenting partners.</li> <li>— Establishing and maintaining strong communication channels among CoA staff.</li> </ul>	<ul style="list-style-type: none"> <li>— Implementing cross-training programs for CoA staff to increase staff capabilities.</li> <li>— Implementing regular training and mentorship opportunities.</li> <li>— Increasing the number of panelist training sessions held by City staff.</li> </ul>	<ul style="list-style-type: none"> <li>— Grouping items into blocks and/or assigned times.</li> <li>— Increasing the quality and quantity of applicant- and public-facing information on the CoA homepage.</li> <li>— Implementing agenda vetting for applications without staff comments and registered deputants.</li> <li>— Posting City staff and public comments on-screen during hearings.</li> </ul>
<ul style="list-style-type: none"> <li>— Decrease adjournments.</li> <li>— Reduce late stage revisions.</li> <li>— Improve applicant and public experience.</li> </ul>	<ul style="list-style-type: none"> <li>— Reduce circulation periods.</li> <li>— Improve operational efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>— Improve attraction and retention.</li> <li>— Improve organizational resilience.</li> <li>— Improve consistency.</li> </ul>	<ul style="list-style-type: none"> <li>— Improve applicant and public participation.</li> <li>— Improve hearing durations.</li> <li>— Improve transparency and predictability.</li> </ul>

# Mississauga



Population	829,000
CoA reports to	Clerk
Annual no. of hearings	36
Annual no. of applications	500 to 700
Average time between submission and hearing for minor variance applications <sup>4</sup>	6 to 8 weeks
City staff comments posted online	Yes
Minutes posted online	Yes
Decisions posted online	Yes
City Planning attendance at hearings	Yes



## Findings

### 1. Challenges

- High application volumes.
- Adjournment rate of ~ 25%.
- Administratively-intense process associated with inserting application information (manual data entry) into SharePoint.

### 2. Leading Practices

- Upload City staff comments five days prior to a hearing.
- Display comments from City staff and public on-screen during hearings.
- Do not provide an adjournment date to an applicant unless formally requested, avoiding unnecessary re-circulations.
- Implement cross-training programs for CoA staff to promote organizational resiliency.
- City staff contact applicants 'in the background'.

### 3. Other Notable Initiatives

- Implement hard application revision deadlines to provide panelists with sufficient time to review applications. The trade-off associated with this initiative is an increased adjournment rate.
- Easy to navigate webpage with easy access to find livestreams, and locate agendas and minutes.
- Maintain educational resources on their website concerning the role of the CoA and use of City staff comments.
- Insert commenting partner names in the agendas for consent applications.

<sup>4</sup> Average time between submission and hearing for minor variance applications. This information was obtained through discussions with CoA staff in each jurisdiction.

# Oakville



Population	212,000
CoA reports to	Clerk
Annual no. of hearings	24
Annual no. of applications	200 to 300
Average time between submission and hearing for minor variance applications	6 to 8 weeks
City staff comments posted online	Yes
Minutes posted online	No
Decisions posted online	Yes
City Planning attendance at hearings	No

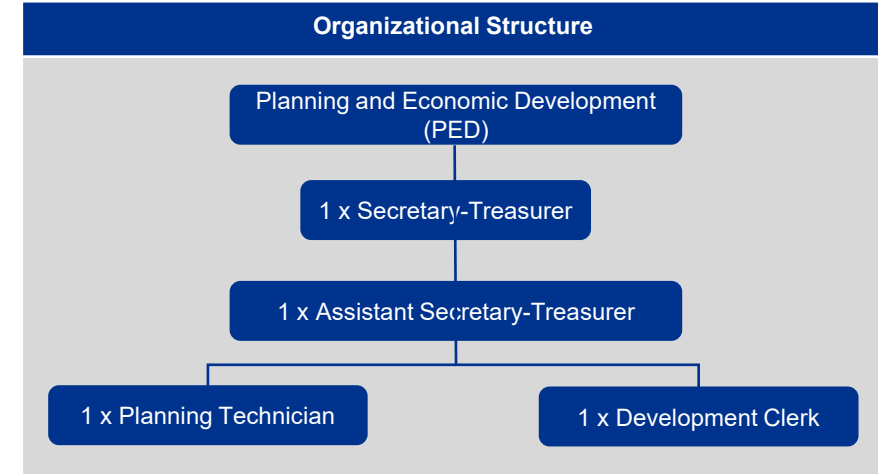


Findings		
<p><b>1. Challenges</b></p> <ul style="list-style-type: none"> <li>• High application volumes.</li> <li>• Delayed responses to applicant and public enquiries.</li> <li>• Heavy reliance on the usefulness of educational resources on the CoA website.</li> </ul>	<p><b>2. Leading Practices</b></p> <ul style="list-style-type: none"> <li>• High quantity and quality of applicant- and public-facing information on the CoA webpage, including the following materials:               <ul style="list-style-type: none"> <li>• CoA Citizens' Guide to minor variances;</li> <li>• Hearing procedures;</li> <li>• Design guidelines; and,</li> <li>• FAQ page.</li> </ul> </li> <li>• Display call-in number to participate in a hearing on-screen throughout hearings.</li> </ul>	<p><b>3. Other Notable Initiatives</b></p> <ul style="list-style-type: none"> <li>• Panelists conduct site visits.</li> <li>• CoA staff utilize template emails when responding to applicant and public emails.</li> <li>• Maintain a delegating authority to the Director of Planning Services for consent applications without minor variances.</li> </ul>

# Hamilton



Population	580,000
CoA reports to	PED
Annual no. of hearings	24
Annual no. of applications	550 to 650
Average time between submission and hearing for minor variance applications	6 to 9 weeks
City staff comments posted online	Yes
Minutes posted online	Yes
Decisions posted online	Yes
City Planning attendance at hearings	No



## Findings

### 1. Challenges

- High application volumes.
- Attraction and retention.
- Unable to consistently post all relevant application information on the CoA webpage prior to hearings.

### 2. Leading Practices

- Assign a specific time block for each item in the agenda.
- Upload City staff comments prior to a hearing to level the 'playing field' for members of the public.

### 3. Other Notable Initiatives

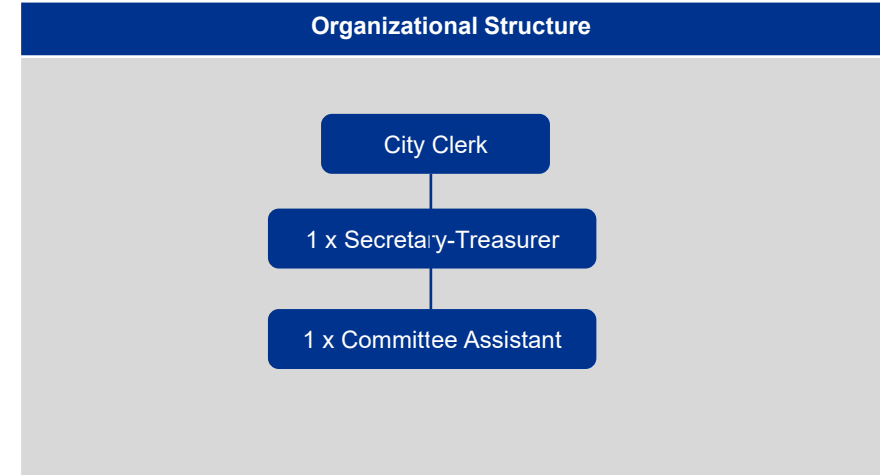
- Use very informal language during hearings to improve participants understanding of the hearing process.
- Include applicant agent name and company in the agenda portal to increase convenience for public members contacting applicants.
- Require applicants to submit contextual drawings.
- Strongly encourage applicants to undertake the pre-application process on the CoA webpage.



# Brampton



Population	604,000
CoA reports to	Clerk
Annual no. of hearings	20
Annual no. of applications	500 to 600
Average time between submission and hearing for minor variance applications	4 to 8 weeks
City staff comments posted online	Yes
Minutes posted online	Yes
Decisions posted online	Yes
City Planning attendance at hearings	Yes



Findings		
<p><b>1. Challenges</b></p> <ul style="list-style-type: none"> <li>• Staff workloads increased during the implementation of hybrid hearings.</li> <li>• 50% adjournment rate for consents.</li> <li>• Attraction and retention.</li> </ul>	<p><b>2. Leading Practices</b></p> <ul style="list-style-type: none"> <li>• City planning contacts applicants 'in the background' and attends hearings.</li> <li>• Staff comments are consistently delivered 5-days ahead of a hearing.</li> <li>• CoA has a publicly available filing deadline on the CoA homepage with application submission deadlines to appear in a hearing.</li> <li>• Strong alignment between the CoA and City Planning on the deadlines required to post City staff comments online and on-time before a hearing.</li> </ul>	<p><b>3. Other Notable Initiatives</b></p> <ul style="list-style-type: none"> <li>• Hybrid platform, which resulted in:               <ul style="list-style-type: none"> <li>• Increased human interaction between stakeholders;</li> <li>• Efficiently run hearings that are shorter in duration in comparison to virtual hearings; and,</li> <li>• Satisfaction from stakeholders preferring to attend in-person</li> </ul> </li> <li>• City Planning conducts site visits for complex applications.</li> </ul>

# Toronto



Population	2,930,000
CoA reports to	Planning
Annual no. of hearings	105
Annual no. of applications	3.2k to 3.5k
Average time between submission and hearing for minor variance applications	2.5 to 6 months
City staff comments posted online	No
Minutes posted online	No
Decisions posted online	Yes
City Planning attendance at hearings	No



## Findings

### 1. Challenges

- High application volumes.
- Attraction and retention.
- Long and unstructured hearing agendas.
- Unbalanced workloads across Districts.
- Inconsistent hearing procedures across Districts.
- Information concerning the outcomes of a hearing is not posted online (decisions and minutes).

### 2. Leading Practices

- Agenda vetting shorten overall hearing durations and is implemented in some Districts.
- Dedicated public-facing materials in the form of brochures.
- Contact information of Deputy Secretary-Treasurers is available online.

### 3. Other Notable Initiatives

- Notices of Hearing are distributed more than 21 days ahead of a hearing.
- Maintain a geographic portal that stores current and past CoA application information, allowing for:
  - Application information to be made available to the public;
  - Searches for CoA-related applications in specific city areas; and,
  - Review of information from past applications.

# Appendix E: Stakeholder Register



# CoA Staff

This Appendix presents stakeholders engaged during our project, including representatives from the CoA, City, panelists, applicants, and community associations.

**Table 5.1: CoA Staff**

#	Position	Department/Division
<b>CoA Staff</b>		
1	Secretary-Treasurer	CoA
2	Deputy Secretary-Treasurer	CoA
3	Deputy Secretary-Treasurer	CoA
4	Committee Coordinator	CoA
5	Committee Coordinator	CoA
6	Committee Coordinator	CoA
7	Committee Coordinator	CoA
8	Committee Coordinator	CoA
9	Committee Coordinator	CoA

# City Staff

**Table 5.2: City Staff**

#	Position	Department/Division
<b>City Staff</b>		
10	Program Manager, Human Resources - Business Services	Human Resources
11	Strategist	Human Resources
12	Consultant	Human Resources
13	Organization Design and Job Evaluation	Human Resources
14	City Clerk	City Clerk's office
15	Director	Planning, Real Estate and Economic Development
16	General Manager	Planning, Real Estate and Economic Development
17	Manager	Planning, Real Estate and Economic Development
18	Manager	Planning, Real Estate and Economic Development
19	Manager	Planning, Real Estate and Economic Development
20	Manager	Planning, Real Estate and Economic Development
21	Planner III	Planning, Real Estate and Economic Development
22	Planner III	Planning, Real Estate and Economic Development
23	Planner III	Planning, Real Estate and Economic Development
24	Planner III	Planning, Real Estate and Economic Development
25	Planner III	Planning, Real Estate and Economic Development

# Panelists

**Table 5.3: Panelists**

#	Position	Panel
1	Vice-Chair	Urban
2	Member	Urban
3	Member	Urban
4	Member	Urban
5	Chair	Suburban
6	Member	Suburban
7	Member	Suburban
8	Member	Suburban
9	Member	Suburban
10	Vice-Chair	Rural
11	Member	Rural
12	Member	Rural
13	Member	Rural

# Industry Representatives

**Table 5.4: Industry Representatives**

#	Organization
1	Greater Ottawa Home Builders Association
2	Amsted Design & Build
3	Morley Hoppner Limited
4	Novatech Engineering Consultants
5	RorTar Land Development Consultants
6	D.G.Belfie Planning
7	Robinson Consulting Limited
8	JD Plans Limited
9	Redevelopment Group Limited
10	Q9 Planning and Design
11	Regional Group Ottawa
12	Fotenn Planning and Design
13	WSP
14	Soloway Wright LLP
15	Urban Infill Council
16	Hamel Design
17	Zander Plans Inc.

# Community Associations

**Table 5.5: Community Association Representatives**

#	Organization
1	Federation of Citizen Associations
2	City View Community Association
3	Westboro Community Association
4	Hintonburg Community Association
5	Old Ottawa East Community Association
6	Queensway Terrace North Community Association
7	Rothwell Heights Property Owners Association
8	Huntley Community Association
9	Britannia Village Community Association
10	Glens Community Association
11	Lowertown Community Association
12	Carleton Heights & Area Residents Association
13	Carlington Community Association





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