



Municipality of Lakeshore

Planning, Engineering, and Building
Service Delivery Review

May 28, 2024

DRAFT FOR COUNCIL APPROVAL






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Executive Summary

This Planning and Development Service Delivery Review for the Municipality of Lakeshore presents a strategic assessment of the Municipality's planning, engineering, and building services in the face of significant growth. Immediate risks have been identified in the areas of infrastructure, workforce, strategic integration, and operational processes.

To address these risks, a set of recommended actions – summarized below – have been put forward:

Immediate Risks	Recommended Actions	Risk Level
 <p>1. Significant Infrastructure Challenges</p>	<p>A. Establish a Taskforce: To explore funding options, including partnerships and grants.</p> <p>B. Develop Financing Plan: To support the Water Wastewater Master Plan (WWMP), once completed.</p> <p>C. Implement Capacity Allocation Policy: To set transparent criteria for water and wastewater allocation.</p>	HIGH
 <p>2. Chronic Workforce Challenges</p>	<p>A. Professional Development: To build necessary staff skills internally and bolster organizational capacity.</p> <p>B. Improve Recruitment: To expand efforts to attract diverse talent, and work towards competitive pay rates.</p> <p>C. Explore Hybrid Work Models: To increase flexibility and productivity, responding to staff preferences.</p>	HIGH
 <p>3. Team Dynamic & Process Integration Challenges</p>	<p>A. Leverage Cloudpermit Implementation: To define new interdepartmental operating procedures.</p> <p>B. Use Technology Solutions: Use cloud-based platforms for enhanced communication/project management.</p> <p>C. Cross-Division Project Secretariat: Form secretariat to enhance interdepartmental coordination.</p>	MED-HIGH
 <p>4. Lack of Integrated Long-Term Strategic Vision</p>	<p>A. Develop a Growth and Development Roadmap: To guide implementation for the updated Official Plan.</p> <p>B. Develop an Infrastructure Plan: To strategically prioritize infrastructure investments; update every 5 years.</p> <p>C. Integrate Environmental Assessments: To ensure sustainable development and address flooding issues.</p>	MED-HIGH
 <p>5. Planning & Development Operational Challenges</p>	<p>A. Review Current Processes: To develop new planning and development-specific processes (build on '3A).</p> <p>B. Improve Online Resources: To help public/clients self-serve (when appropriate)/reduce administrative burden.</p> <p>C. Develop Communications Strategy: To manage public/client expectations and improve system navigation.</p>	MED

Lakeshore faces significant challenges, but it now has a clear opportunity to transform these obstacles into strengths with a focused, strategic approach.

Section 1: Introduction

- Project Purpose
- Methodology



Introduction: Project Purpose

Project Context

In the Fall of 2023, Lakeshore engaged StrategyCorp to conduct a comprehensive Service Delivery Review of the provision of planning, engineering, and building services. This review is directly linked to the advancement of Lakeshore's Strategic Plan and will build upon the previous Service Delivery Reviews.

This project is timely for the Municipality of Lakeshore as the Municipality is experiencing considerable population growth (10.4% increase between 2016-2021). With most new residents being young and educated, it is important that this growth is accompanied by investments in infrastructure and municipal services to meet the needs of all residents.

The Draft 2023 Budget specifically focusses on enhancing service delivery and emphasizing asset management in key service areas, such as planning, building and engineering. It is imperative that Lakeshore ensures its internal processes and structures are optimally set up to be able to meet these increasing demands.

Project Scope & Objectives

1

Understand the current state of services by analyzing available data and documents and conducting in-depth 1:1 interviews with senior staff and key stakeholders.

2

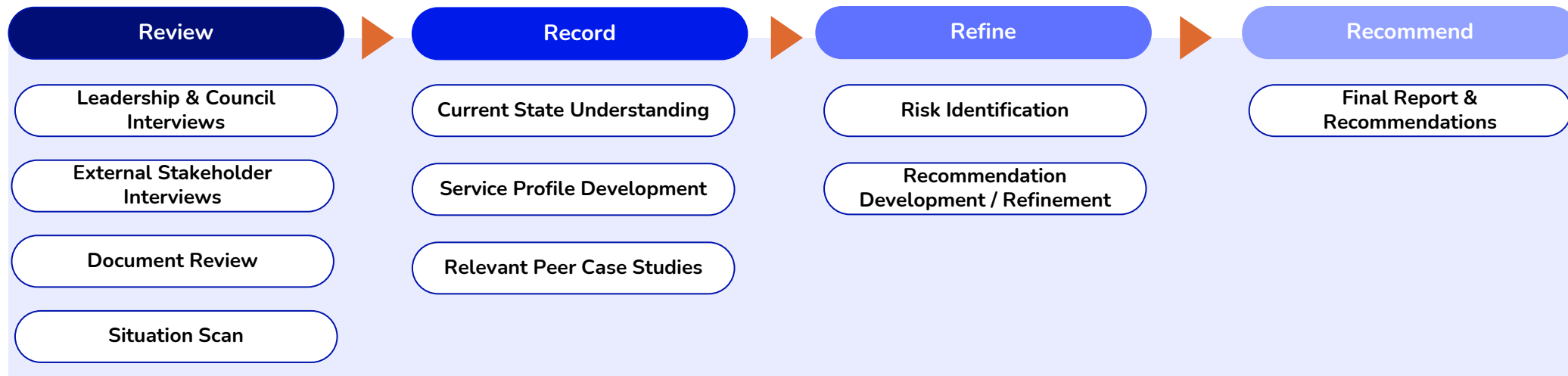
Identify peer municipalities to glean insight into practices, policies and procedures which work well in similar jurisdictions facing similar challenges to Lakeshore.

3

Identify key risks to Lakeshore's future growth and development and a set of recommendations to address these risks. Include implementation guidance.

Introduction: Methodology

Our review process was cumulative, each phase built on the next, while simultaneously refining and synthesizing the information gathered into actionable insights and recommendations.



Conducted a thorough review of the current state via interviews with senior leadership, members of Council, developers, and development consultants; examined all available documentation; scanned additional external sources for further detail and context.

Developed a summary of Lakeshore's Planning and Development context; documented the details of each service area (Engineering, Building, and Planning); conducted peer case study and leading practice research to glean relevant insights.

Conducted further analysis on the current state to identify top risks related to Planning and Development, and draft recommendations in response to each risk area; linked each recommendation to comparator or leading practice.

Finalized recommendations and developed implementation roadmap that includes timelines and other key considerations.

Section 2: Lakeshore's Current Context

- **Growth Context:**
 - **Population Forecasting**
 - **Capacity Constraints**
 - **Status of Secondary Plans**
- **Regulatory Context**
- **Financial Context**

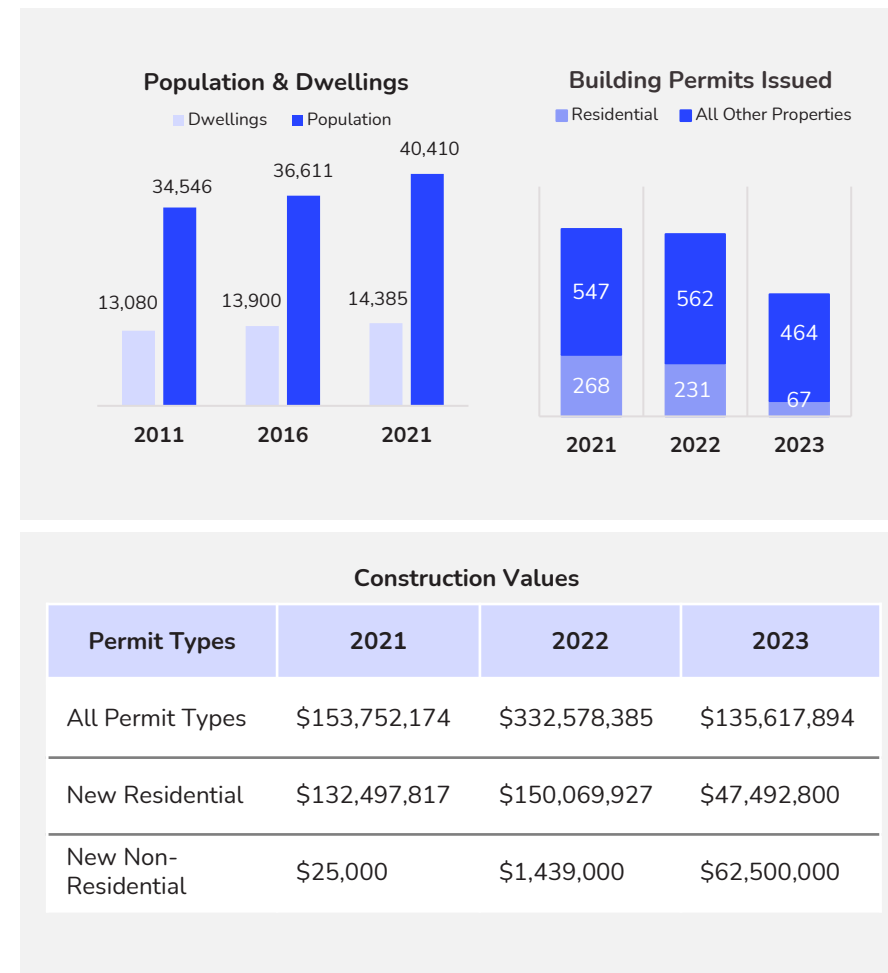
Growth Context: Population Growth and Constraints

Population Growth: 2021 Census data revealed significant population growth of 10.4% in Lakeshore when compared to 2016, bringing the settlement of approximately 4000 new residents in the area during that year. Further, the broader Windsor-Essex Region is observing a steady influx of an additional 500-1000 new residents per month, indicating an ongoing trend. Notably, Lakeshore stands out among its neighbours, with its growth rate surpassing that of Windsor, doubling it, while Tecumseh experienced only a modest 0.3% increase over the same period.

Infrastructure Challenges: This growth has presented Lakeshore with challenges commonly faced by rapidly expanding communities in Ontario, particularly regarding housing affordability and the provision of adequate water and wastewater services. Lakeshore is currently facing capacity constraints in its water and wastewater systems, impacting the approval process for new development projects. Lakeshore is engaging with regional partners to share information and explore alignment for future opportunities relative to Water/Wastewater services.

Construction Activity: There was a decline of 262 building permits issued in Lakeshore between 2022 and 2023. While the construction value of new residential properties experienced a 13.5% growth rate from 2021 to 2022, there was a notable 68.3% decrease in this category between 2022 and 2023. Non-residential projects, although representing a small percentage (0.43%) of total construction value in 2022, accounted for 46.1% of all permits in 2023.

These types of fluctuations can often be attributed to construction costs, however in Lakeshore's context, infrastructure limits have played a significant role in influencing fluctuations. Lakeshore currently has no conveyance/sanitary capacity for development.



Growth Context: Capacity Constraints

Lakeshore faces a series of challenges in its wastewater management and infrastructure development.

- At multiple wastewater treatment facilities, including Stoney Point and Comber, capacity constraints have been identified, indicating the strain on existing resources. Additionally, the Denis St. Pierre Water Pollution Control Plant, has numerous constraints within the sanitary conveyance system, exacerbating the issue.

Moreover, the conveyance system and treatment capacity are further impacted by high levels of inflow and infiltration within the sanitary system.

- Intensification trends in residential areas have led to a surge in wastewater flow and drinking water demand, surpassing the infrastructure's original design capacities. This surge includes the accommodation of apartment buildings, multi-unit residential buildings, and Additional Residential Units (ARUs), placing significant stress on the system.

In line with provincial policy and direction, there is an emphasis on the redevelopment of housing opportunities, particularly focusing on intensification and ARUs.

- However, the growth in Lakeshore has outpaced projections outlined in the 2018 Master Plan, impacting the ability to proactively finance and fund recommendations from the plan.

Furthermore, there is growing interest in developing areas that currently lack municipal wastewater servicing.

- These challenges underscore the need to address the accommodation of current development proposals while preparing for the anticipated growth of Lakeshore. It is evident that strategic planning and proactive solutions are essential to ensure the sustainable development of Lakeshore's infrastructure amidst these pressing challenges.

Balancing current development proposals with the need to accommodate future growth remains a pressing concern, necessitating strategic planning and solutions to ensure the sustainable development of Lakeshore's infrastructure.

Growth Context: Status of Planning-Related Projects

The Municipality of Lakeshore has several projects and studies underway related to the growth and development:

Community Planning and Development	Industrial and Business Development	Regulatory and Fiscal Management
<ul style="list-style-type: none"> Lakeshore Official Plan Update 	<ul style="list-style-type: none"> Wallace Woods Secondary Plan 	<ul style="list-style-type: none"> Industrial Greenhouse Business Park Study
<ul style="list-style-type: none"> County Official Plan Update 	<ul style="list-style-type: none"> Emeryville Secondary Plan 	<ul style="list-style-type: none"> Zoning Bylaw Consolidation
<ul style="list-style-type: none"> Development Manual Update 	<ul style="list-style-type: none"> Lighthouse Cove Secondary Plan 	<ul style="list-style-type: none"> Municipal Accommodation Tax
<ul style="list-style-type: none"> Transportation Master Plan 	<ul style="list-style-type: none"> Belle River Growth Strategy 	<ul style="list-style-type: none"> Water Wastewater Master Plan
<ul style="list-style-type: none"> 25 Year Community Plan (10) 	<ul style="list-style-type: none"> County Rd. 22 Design Charette 	
<ul style="list-style-type: none"> Community Engagement Plan for all Communities 		

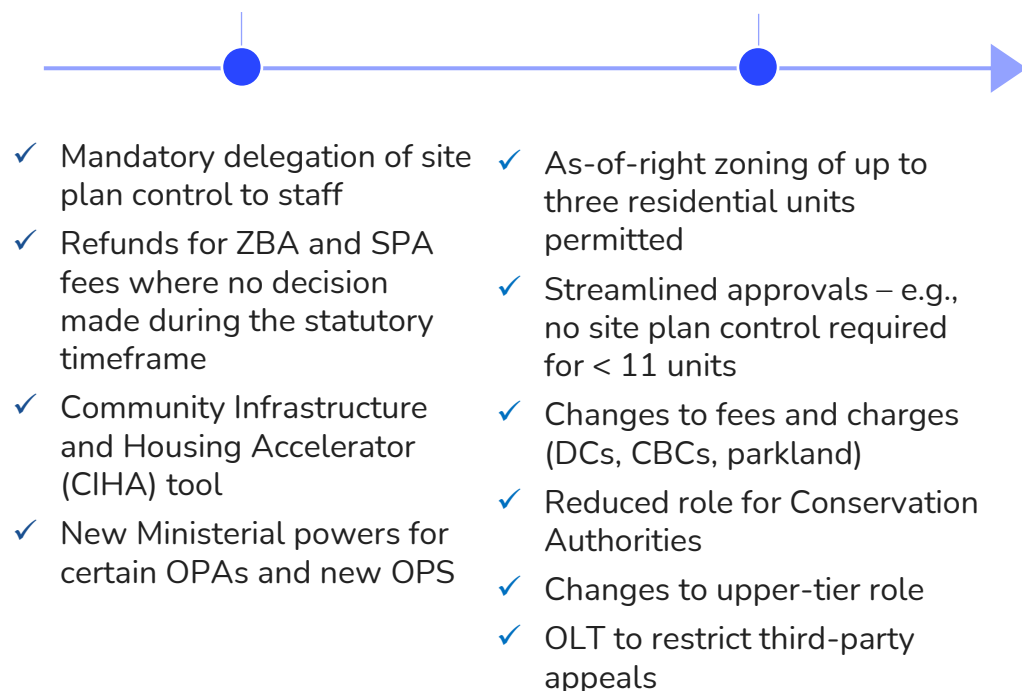
To maintain financial stability, it is crucial for Lakeshore to carefully plan and prioritize its fiscal activities.

- Effective financial and growth management is key to supporting major growth initiatives. For instance, while upgrading treatment facilities in areas that are not primary growth targets may seem necessary, these might not be the most strategic choices for capital investment.
- With the use of best practices, such as conducting a Financial Impact Analysis, Lakeshore can ensure that financial resources are allocated where they are most needed.

Regulatory Context: Evolving Policy

Bill 109, *More Homes for Everyone Act, 2022* (April)

Bill 23, *More Homes Built Faster Act, 2022* (November)



Key Impacts For Lakeshore

- Loss in fee revenue if the Municipality is unable to meet the new statutory timeframes for ZBA and SPA decisions, coming into effect on Jan. 1, 2023.
- Potential requirement for additional staff capacity to meet the new approval timelines.
- Reduction of development related charges and fees will impact the Municipality's ability to fund growth-related infrastructure – funding would either need to come from the property tax base or service reductions unless the province offers a new funding source.
- Limits on Conservation Authority comments regarding development applications to natural heritage, requiring an additional agency in the development process to ensure safety and compliance.
- The province is also proposing to integrate the Provincial Policy Statement (PPS) and Growth Plan (*A Place to Grow*) into a single policy instrument intended to help municipalities accelerate and increase housing supply through a more streamlined, province-wide land use planning policy framework.

Financial Context: Managing Capital Expenses

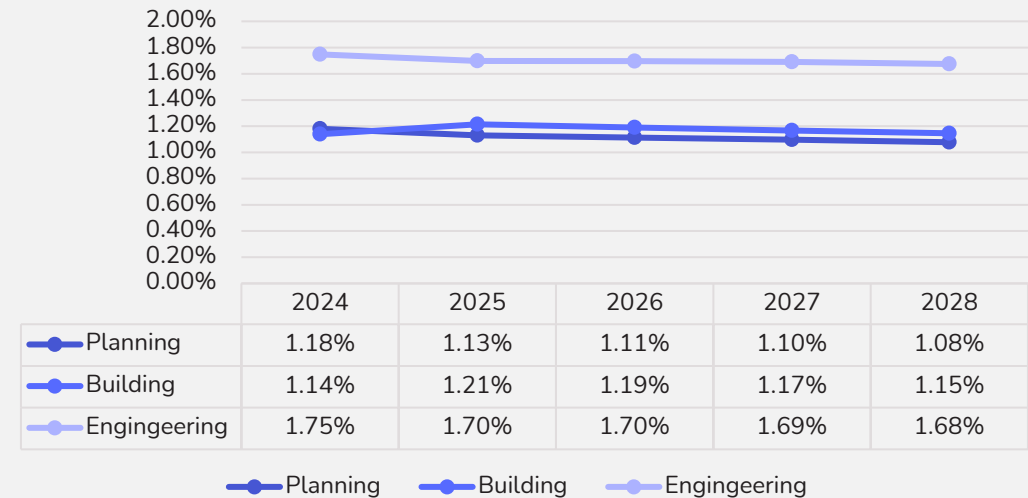
The anticipated increases in operating expense across the Community Planning, Building, and Engineering & Infrastructure departments from 2024 to 2028 are moderate and steady – particularly when viewed as a percentage of the Municipality’s total annual budget.

Of greater significance are current and upcoming capital requirements. In 2024 Lakeshore will add \$45 million to their existing debt of \$57 million, with an additional \$9 million in 2026. Significant loans were required to complete the Denis St. Pierre Water Pollution Control Plant expansion, which brought Lakeshore’s Annual Repayment Limit (ARL) to 11.04% for 2024. The Municipality flags this ARL as a “high risk designation” and consequently has a clear plan to reducing it below 10% by 2027.

Of note, Ontario’s 2024 Budget is investing \$1.6 billion in new funding to address Ontario's housing crisis. This includes \$1 billion in the Municipal Housing Infrastructure Program, dedicated to core infrastructure projects, and an additional \$625 million for the Housing-Enabling Water Systems Fund. These are opportunities worth pursuing.

Lakeshore’s 2024 Budget emphasizes a strategic approach to managing capital projects due to the inability to fund all of them within the forecasted period. It highlights the importance of prioritizing projects based on their necessity and strategic value, potentially necessitating cuts to non-essential projects. This focus ensures the optimal allocation of funds towards essential infrastructure maintenance and expansion.

Projected Divisional OpEx as % of Total Budget



Community Planning’s budget will see an 14.3% rise, Building a 25.9% rise, and Engineering & Infrastructure a 19.9% rise over the next five years. Growth can be attributed to operational adjustments that reflect Lakeshore’s efforts to adapt to legislative change, inflation, and the need for additional staffing to support service delivery objectives.

However, as shown above, their respective percentages of the total budget remain relatively flat and will only see slight changes, with Community Planning and Engineering & Infrastructure decreasing to 1.08% and 1.68% respectively, and Building increasing to 1.15%.

Workforce Context: Provincial Planner Shortage

Like other sectors, municipalities across Ontario are facing difficulties in recruiting professional planners across all levels.

Municipalities across Ontario are facing a pronounced shortage of professional planners, a sentiment echoed by various stakeholders such as the Association of Municipalities of Ontario (AMO), the Building Industry and Land Development Association (BILD), and the Ontario Professional Planners Institute (OPPI). For instance, the City of Toronto's City Planning division has faced notably high vacancy and turnover rates, reaching 15% in 2022. In comparison, the corporation's overall turnover rate is just 8.3%, indicating an ongoing challenge compounded by recent exacerbations.

There is an example significant municipality that has operated without a general manager of planning for over 15 months, while numerous municipalities outside major urban centres struggle to fill senior planning positions, some remaining vacant for periods exceeding six to nine months. The dearth of planners is partly attributable to a shortage of recent graduates, with Ontario's six planning programs producing only 439 planners in 2022.

The profession faces a specific challenge with senior vacancies due to a sustained uptick in retirements over the past decade, including formal retirements and attrition through non-renewal of OPPI membership.

The current political and legislative landscape, notably Bills 23, 39, 109, and 136, has further discouraged planners from joining or remaining in municipal roles, especially at senior levels. Constant changes in provincial planning and related laws have fostered a sense of instability within the profession, making it arduous for municipal planners to stay updated and effectively execute their duties. Workloads have also surged due to evolving legislative contexts, including tighter application review and approval timelines stipulated in Bill 109.

Municipal planners, compared to counterparts in other sectors, endure heightened scrutiny and pressure, particularly when local planning issues or development applications spark contention in the community.

Section 3: Planning and Development Service Assessment

- **Planning & Development: Service Overview**
- **Planning Service Profile**
- **Engineering Service Profile**
- **Building Services Profile**

Planning and Development: Service Overview

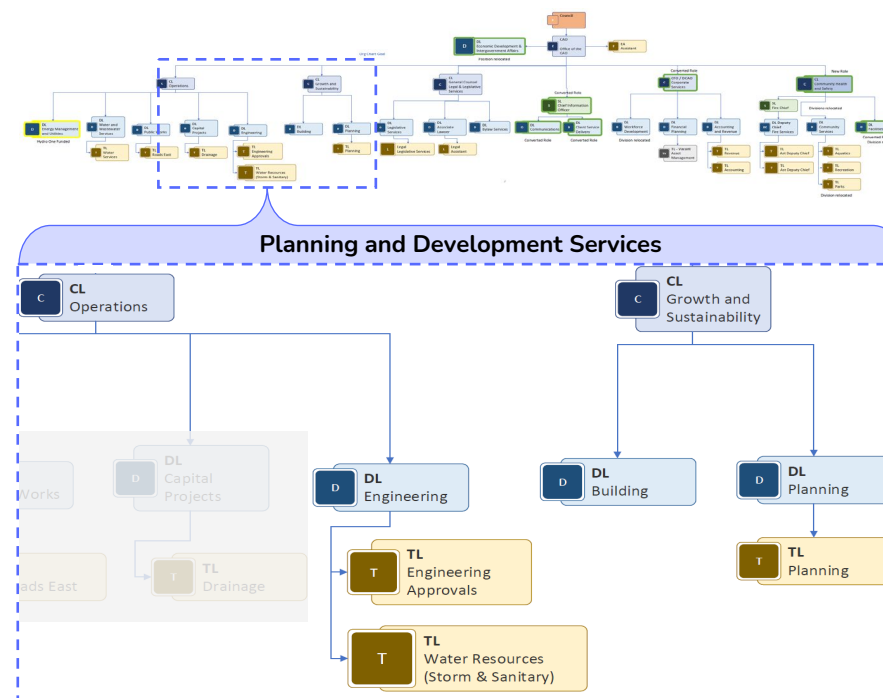
As illustrated, Planning and Development Services are jointly delivered by the Growth and Sustainability Department (Planning and Building Divisions), and the Engineering Division, which is part of the Operations Department.

Through this review process it became clear that Lakeshore's Planning and Development Services are delivered by a group of highly dedicated and experienced staff, but that there are some barriers – both internal and external – to optimal service delivery.

With respect to performance tracking:

- Planning requires structured tracking mechanisms to address the absence of formal performance data collection and enhance overall divisional performance.
- Building showcases compliance with Building Code-mandated response times yet struggles with template standardization and digital tool underutilization.
- Similarly, Engineering prioritizes meeting Minimum Maintenance Standards, but can only maintain meeting these standards when equipped with a full staff complement.

All three divisions are facing some level of resourcing challenges predominantly attributable to high turnover and recruiting challenges.



A detailed assessment of these (and additional) challenges to optimal delivery of planning and development services, as well as a set of recommendations to address each issue is provided in **Section 5** of this report.

Service Profile and Delivery Assessment: Planning

DIVISION RESPONSIBILITIES

Committee of Adjustment: Approves minor variances, consents, enlargements, extensions or changes to legal non-conforming uses. Provides consent to mortgages, partial discharge of mortgages, validation of title, access right-of-ways, easement and leases over 21 years and property standard appeals.

Planning and Development Services: Handling development applications, adjustments, zoning compliance, and ensuring adherence to the Planning Act. They also work on appeals and documentation for the Ontario Land Tribunal.

Financial and Legal Services: Managing financial aspects such as fee payments, securities, and addressing legal issues arising from construction projects, including municipal litigation.

Interdepartmental and External Coordination: Collaborating with other municipal departments like Fire, Engineering, and Economic Development, as well as intergovernmental and interagency entities, to resolve complex issues like flooding and service provision.

Process Improvement and Technological Integration: Efforts to improve internal processes through tools like Cloudpermit for better workflow management, despite challenges in implementation and training within existing workloads.

Regulatory Compliance and Support Services: Ensuring compliance with regulations in partnership with the Water Department and providing support through GIS for internal and public-facing functions.

STAFFING (As of Feb 2024)

Non-Union

- Manager (Acting)
- Supervisor (Vacant)

• Co-op Students
(Planning and GIS)

Union

- Admin
- Planner 1
- Planner 2
- GIS Tech

PERFORMANCE

A 2024 base division budget of \$943,280 is allocated for the Planning Division. The average annual increase in the base budget over the next 5 years is 1.1%.

Key Performance Indicators:

Performance data is not formally collected and measured. The Public Service Unit (PSU) records inquiries via Customer Relationship Management (CRM) software.

Recommended indicators for future tracking include:

- Percent of Development Applications Meeting Timeline Commitments
- % of emails that have been responded to
- % of applications meeting timelines

Qualitative Performance Feedback:

- Need to implement comprehensive file status monitoring.
- Generally, not meeting timeline commitments. Due to short-staffing in engineering, revisions take up to 6 weeks. Each revision to address the engineering comments starts another circulation which resets the time. Planning cannot process documents as fast as they are coming in, creating a backlog.
- Final sign-off or decision-making authority sometimes unclear, leading to revisiting of resolved issues.
- Quick pivoting to new issues leaves former issues unresolved.

Service Profile and Delivery Assessment: Building

DIVISION RESPONSIBILITIES

Building Permit Review and Issuance: In accordance with the Ontario Building Code with respect to structures on land, construction of new buildings requires an approved permit from the Building Department. Fees are collected depending on the individual permit. All permits require building inspection (and follow up inspections).

Permits:

- **Residential:** New Home, Renovations and Additions, Sewage Systems, Accessory Buildings, Decks, Swimming Pools, Fences.
- **Agricultural:** Livestock and Manure Storage, Not Housing Livestock or Manure Storage.
- **Other:** Signage, Demolition, Tent.

The Municipality of Lakeshore does NOT require the purchase of a business permit currently.

Inspections & Building Code Enforcement:

Approval of most building permits requires an individual inspection of the property or structure to confirm compliance. Permit renewal sometimes requires a follow-up building inspection.

PERFORMANCE

A 2024 base budget of \$910,300 is allocated for the Building Division. The average annual increase in the base budget over the next 5 years is 1.2%.

Key Performance Indicators:

Minimum response and process times are prescribed in the Building Code: 10-30 days once receipt of full submission has been confirmed.

Currently performing at or above standard.

Qualitative Performance Feedback:

- There is strong community engagement and a culture of responsiveness.
- Pre-consults lack a standard or shared template where comments from each department could be centralized.

STAFFING (As of Feb 2024)

Non-Union

- Chief Building Officer

Union

- 5 Inspectors
- Building Coordinator
- Admin

Service Profile and Delivery Assessment: Engineering

DIVISION RESPONSIBILITIES (as related to Planning and Development)

Development Manual

- Continuously generate and update new standards and guidelines ensuring all new plans and proposals comply with the current version.
- Coordinating and authorizing new utility construction within Lakeshore road allowances also called right-of-way.
- Ensuring compliance of Municipal Access Agreements and Franchise Agreements with utility companies in Lakeshore.
- Providing technical assistance, record drawing information, and completed studies to consulting engineers, developers, contractors, utility companies, builders, homeowners, etc.
- Asset Management Related to the assumption of sub-divisions (2-2.5-year timeline).

Consolidated Linear Infrastructure for the Ministry

- System set up, but work remains outstanding.

Coordinating the Secondary Plans

- Overall traffic management, stormwater management requirement post-adoption (each developer will do their plan, but for example a corridor will still require collaboration once approved).

PERFORMANCE

A 2024 base budget of \$1,397,289 is allocated for the Engineering & Infrastructure Division. The average annual increase in the base budget over the next 5 years is 1.7%.

Key Performance Indicators:

Minimum Maintenance Standards are set by the Municipal Act, Essex Region Conservation Authority standards and Environmental Compliance Approvals for all developments.

Performance measures are not formally tracked. In the engineering support functions, expectations are tied to timeframes within the planning process.

Qualitative Performance Feedback:

- Standard performance can only be met when staffing is not constrained.
- Currently, there are not enough resources, and team is unable to review files internally leading to 4–6-week turnaround time for all reviews. Strong oversight of critical infrastructure projects and services hindered by staffing challenges.
- Clear awareness of the challenges and importance of coordination between engineering and planning departments.
- The necessity to focus on immediate operational needs can detract from any long-term planning initiatives.
- Continuous “emergency mode” represents a strength in adapting to unforeseen challenges but contributes to exhaustion.

STAFFING (As of Feb 2024)	Non-Union	Union	
	<ul style="list-style-type: none"> Division Leader (Vacant) 	<ul style="list-style-type: none"> 2 Engineering Techs – Roads & Utilities, Development Team Leader – Sanitary and Stormwater (Vacant) 	<ul style="list-style-type: none"> Eng. Tech Storm/Sanitary (Vacant) 2 Eng. Tech Development (Vacant) Admin

Section 4: Municipal Case Studies

- **Case Studies**
 - Water Treatment Plant Expansion
 - Wastewater Management
 - Rapid Growth
 - Flooding Responses

Case Study: Collingwood Plant Expansion



Collingwood

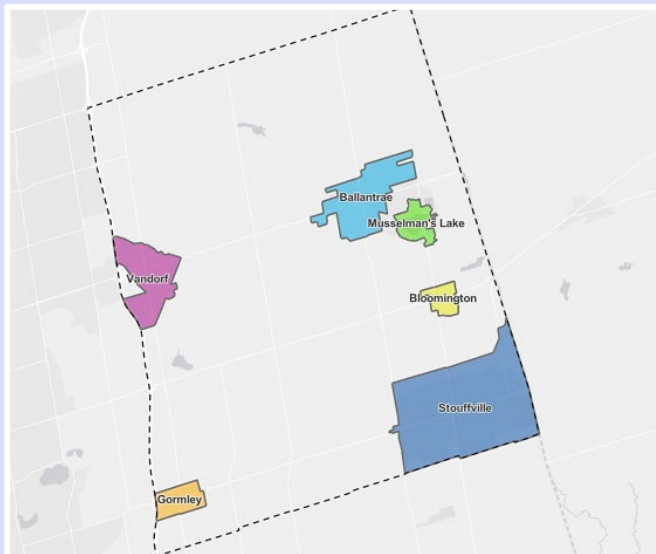
Collingwood is currently facing challenges regarding the financial feasibility of its water treatment plant expansion project. The total project costs have escalated to approximately \$270 million, and the completion timeline has been extended by about two years beyond the original projection. This represents a significant increase from the initial estimate of \$120 million in March 2022, reflecting supply and labor shortages.

City staff are actively engaging provincial decision-makers to discuss potential financial support and have developed an advocacy strategy targeting upper tiers of government. Additionally, a Task Force comprising developers, engineers, planners, and representatives from Collingwood, New Tecumseth, the Town of the Blue Mountains, and Clearview has been established to explore funding options.

In 2022, Collingwood Council approved the Servicing Capacity Allocation Policy, outlining transparent and sustainable guidelines for allocating water and wastewater capacity. The policy prioritizes projects offering the greatest benefit to the town and establishes commitments for allocation duration.

The Allocation Policy applies to various growth and development scenarios, including those requiring new water and wastewater infrastructure, subdivision creation, site plan approval, and developments not necessitating Planning Act applications.

Case Study: Whitchurch-Stouffville Wastewater Management



Whitchurch-Stouffville

Whitchurch-Stouffville is currently in the process of updating its Wastewater Management Master Plan to ensure continuous service quality. The study aims to identify long-term water and wastewater infrastructure requirements and servicing strategies to support growth until 2051.

The Wastewater Master Plan entails a comprehensive review of wastewater policies, criteria, and the existing collection system. It includes technical analyses and the development of preferred servicing strategies tailored to Whitchurch-Stouffville's needs.

Updates to wastewater policies and design criteria are integral to the Master Plan, providing guidance for future infrastructure decisions. The aim is to ensure wastewater flows align with infrastructure sizing and timing requirements.

Whitchurch-Stouffville receives water from the York Water System (YWS), which serves nine municipalities within the regional Municipality of York. The town prioritizes the construction and maintenance of efficient, reliable, and sustainable wastewater systems to deliver high-quality service to its residents.

To proceed with the plan, Whitchurch-Stouffville must obtain various permits and approvals from entities such as Drinking Water Source Protection, Regional Authorities, Conservation Authorities, and the Ministry of the Environment, Conservation, and Parks.

Funding considerations for the project include user fees, development fees, and reserves, aiming for a balanced and equitable long-term plan to finance servicing delivery.

Case Studies: Rapid Growth in East Gwillimbury & Thorold

East Gwillimbury

Between 2016 and 2021, East Gwillimbury experienced a significant 44.4% population increase. Forecasts indicate continued growth in both population and employment over the next 30 years.

To address this growth, a Water and Wastewater Master Plan has been initiated, focusing on expanding to accommodate the rising population. Detailed plans regarding timelines, approvals, and infrastructure requirements are currently in progress. Consultations began in May 2023 with Indigenous communities identified by the Minister of the Environment, Conservation and Parks, along with relevant agencies and stakeholders.

York Region and Durham Region are collaborating on the York Region Sewage Works Project to enhance wastewater servicing capacity. In the interim, York Region has completed upgrades to one Sewage Pumping Station and is constructing an additional Pumping Station. The total estimated implementation costs, covering capital, operational, and maintenance expenses, amount to \$219.7 million.

In response to reduced development charges, East Gwillimbury is exploring alternative revenue sources to fund necessary infrastructure. The town is leveraging government grants, partnerships, and property taxes. There may be a need to increase tax revenue to offset the reduction in development charges.

Thorold

Thorold, Niagara's fastest-growing municipality, experienced a 26.7% population increase between 2016 and 2021, ranking as the 8th fastest-growing community in Canada among municipalities with at least 5,000 inhabitants.

Factors contributing to Thorold's growth include its strategic location within the Niagara region, with access to major cities, and the availability of land for development, leading to increasing subdivision development within city limits.

The city has adopted a forward-thinking budget and strategic planning for transportation and recreational trails to accommodate growth, resulting in a surge in residential development.

Thorold's 2020-2023 Strategic Plan prioritized the development of an Asset Management Plan and funding strategy for a multi-year capital program to address growth. The Strategic Plan and Official Plan are scheduled for review in 2024.

To address inflationary pressures due to increased development, a 7.95% budget increase for water and wastewater services has been implemented effective Jan. 1st of each year, billed to local area municipalities based on usage.

The Niagara region anticipates implementing a \$400 million wastewater treatment plant, which could positively impact South Thorold. They have requested provincial funding to cover one-third of the cost.

Case Studies: Chatham-Kent & Tecumseh Flooding Response

Chatham-Kent

Chatham-Kent has faced recurring flooding issues due to intense rainfall events. In 2018, a sudden downpour of 100mm within one hour worsened flood risks. The situation heightened in April 2023 when the Lower Thames Valley Conservation Authority (LTVCA) issued a flood warning for the Thames River, highlighting the area's vulnerability.

In response, the Municipality declared a climate emergency in 2019, seeking cost-effective actions to address local climate change impacts. Tilbury, a city within Chatham-Kent, launched a comprehensive Stormwater Master Plan in 2021. The plan identified localized flooding issues attributed to storm sewers, poor road drainage, and historic tile drain problems, exacerbated by Tilbury's flat topography.

The Stormwater Master Plan proposed alternative solutions to enhance the stormwater conveyance system, outlining 14 recommended projects with timelines ranging from one to thirty years. Additionally, Chatham-Kent is developing a Climate Change Action Plan to manage climate-related risks, currently in the final stages of identifying actions.

Through these initiatives, Chatham-Kent aims to mitigate flood risks, enhance resilience against extreme weather events, and safeguard residents and infrastructure, laying the groundwork for long-term sustainability.

Tecumseh

Tecumseh has endured severe flooding events due to heavy rainfall and proximity to Lake St Clair, resulting in approximately \$300 million in local damages between East Windsor and Tecumseh.

To address these challenges, the Government of Canada is investing \$10.7 million through the Disaster Mitigation and Adaptation Fund (DMAF) in Tecumseh's \$26.75 million Climate Change and Flooding Resiliency Project. Windsor and Tecumseh have received over \$50 million for 16 flooding and wastewater projects.

Tecumseh has developed various reports, including the Tecumseh Storm Drainage Master Plan (2016) and the Flood Response Plan (2020). In 2022, the town contracted a Shoreline Management Plan to reduce coastal flood risks.

The Storm Drainage Master Plan highlighted a potential 400% increase in economic damages to \$188 million with projected climate change impacts. Proposed strategies include relocating development away from hazardous lands, floodproofing existing structures, and shoreline protection.

Future steps involve exploring cost-sharing methods and pursuing funding opportunities to enhance Tecumseh's resilience against flooding and coastal hazards.

Lessons Learned: Applications to Lakeshore's Context

The case studies provide insight regarding how comparable municipalities are managing their water wastewater, rapid growth, and flooding issues. These practices may be replicable in Lakeshore.

- I** **Establishing a Multi-Stakeholder Task Force:** Lakeshore could form a task force comprising developers, engineers, planners, and representatives from neighboring municipalities to explore funding options, share expertise, and develop strategies for growth management.
- II** **Integrating Environmental Planning:** Lakeshore could increase its focus on mitigating climate-related risks such as flooding and extreme weather events. Climate change should be addressed in conjunction with stormwater management and servicing issues to adequately prepare for climate related disasters.
- III** **Updating Infrastructure Master Plans:** Lakeshore could update its infrastructure master plans, including water, wastewater, and stormwater management plans, to accommodate projected population growth and address infrastructure needs.
- IV** **Engaging Provincial Decision Makers:** Lakeshore could actively engage upper-tier and provincial decision-makers to discuss potential financial support and advocate for funding assistance for critical infrastructure projects.
- V** **Implementing Transparent Allocation Policies:** Lakeshore could develop and implement transparent allocation policies for water and wastewater capacity. These policies can prioritize projects based on their benefits to the community and establish clear guidelines for allocation duration.
- VI** **Encouraging Community Engagement:** Lakeshore could foster dialogue and collaboration with residents, Indigenous communities, and other stakeholders to ensure that infrastructure plans align with community needs and priorities.






It is important to note that these activities currently extend beyond the levels of service that Lakeshore has capacity to deliver. As each of these items are integrated into recommendations, they will be accompanied by commentary on resourcing considerations.

Section 5: Risks & Recommendations

- **Risks to Lakeshore's Growth and Development**
 - **Infrastructure Challenges**
 - **Workforce Challenges**
 - **Team Dynamic Challenges**
 - **Lack of Cohesive Development Vision**
 - **Planning Specific Challenges**

Risks to Lakeshore's Growth and Development

Through extensive engagement with stakeholders and a thorough review of all relevant material, a set of risks to Lakeshore's future growth and development emerged.

Immediate Risks		Risk Level
	1. Significant Infrastructure Challenges: The Municipality has reached a critical juncture with respect to infrastructure, specifically concerning water and wastewater management, as it currently lacks the capacity to service any new development.	HIGH
	2. Chronic Workforce Challenges: Lakeshore's Engineering, Building, and Planning Divisions experience chronic turnover and difficulty filling vacant positions due to lack of flexible work models, compensation, and workloads, which has led to knowledge and skills gaps.	HIGH
	3. Team Dynamic and Process Integration Challenges: Tense internal team dynamics, resourcing gaps, and a lack of integration among the Planning, Building, Engineering, and sometimes Legal departments pose hurdles to workflow efficiency.	MED/HIGH
	4. Lack of Integrated Long-Term Strategic Vision: The absence of an integrated long-term strategic vision, with clear prioritization and a path to implementation, poses a serious barrier to proper planning, resource allocation, and risk management.	MED/HIGH
	5. Planning and Development Operational Challenges: It was observed that there are inefficient processes and a lack of documented procedures within the Planning Division, which may lead to further risk, including legal liability due to process violation.	MED

Overarching Risk:

Identified risks may prompt developers to explore opportunities outside of Lakeshore, leading to a decrease in development related revenues. Such a reduction in revenue will affect the Municipality's tax assessment and long-term financial stability and sustainability.



1. Infrastructure Challenges: Overview

What We Learned

Lakeshore faces significant infrastructure challenges, especially in water and wastewater management. Aging systems raise concerns about rising operational costs and potential service disruptions. These hurdles impede new development and highlight infrastructure servicing issues.

Challenges like wastewater capacity, water system integrity, and conveyance limitations are prominent and cast doubt on development prospects into the future (pending capacity expansion). Comber and Stoney Point are key instances in which wastewater service areas are outdated, at capacity, and must be addressed.

Upgrades to treatment facilities in non-primary growth areas could affect sound business case development for capital expenditures, which may result in an inability to service major growth clusters. For this reason, and as mentioned above in Section 2, it is necessary to focus on the sequencing of future improvements. If the Municipality does not strategically prioritize its expenditures, there will be challenges to its financial health. A Financial Impact Analysis and careful growth management will ensure optimum availability of financial resources.

Recommended Actions

A. Convene a Multi-Sector Taskforce: Establish a consortium comprised of developers, provincial decision-makers, community stakeholders, and other potential partners to investigate innovative funding mechanisms and champion financial backing strategies.

B. Develop a Robust Financing Plan: In collaboration with the proposed Task Force and in anticipation of the WWWMP finalization (expected for Summer/Fall 2024), begin the development of a comprehensive financing strategy and project timeline for its implementation. This plan should account for reserve contributions, potential supply and labour shortages, as well as unexpected contingencies to mitigate risks and ensure project delivery within budget and schedule constraints.

C. Capacity Allocation Policy: Develop a Servicing Capacity Allocation Policy to ensure transparent, sustainable, and orderly allocation of water and wastewater capacity for development projects in Lakeshore.

Implementation Considerations

Resourcing: The coordination of the Taskforce and the inter/intra-governmental activities involved will require an additional FTE. The development of the WWW Financing Plan will also require additional resourcing; potentially a “Growth Management Specialist.”

Alternative Service Delivery: It is important that Lakeshore be open to innovative or ‘non-traditional’ approaches to financing and delivery (e.g., use of grants from funders like the Canada Infrastructure Bank, partnering with a developer to fund upgrades upfront, and consideration of a Municipal Service Corporation for water and wastewater, etc.). This could include the utilization of the Canada Infrastructure Bank and a more strategic use of funds from Development Charges.

Proactive Customer Outreach and User Experience Improvement: Once service capacity is online, it will be important to engage in proactive outreach and communications to promote Lakeshore. Feedback from developers in the recommended “Multi-Sector Taskforce” could be leveraged to inform future models of processing.

Allocation Contingencies: As outlined in the previous section, it is currently unclear how much capacity the Denis St. Pierre Facility will be able to provide to Wallace Woods. The final allocation is dependent on the needs of the County Road 22 ‘Special Planning Area’. Other potential growth areas like Stoney Point, Comber, and Lighthouse Cove do not currently have the necessary service capacity and are not planned to have additional service resources allocated.



1. Infrastructure Challenges: Recommendation A

A. Convene a Multi-Sector Taskforce: Establish a consortium comprised of developers, provincial decision-makers, community stakeholders, and other potential partners to investigate innovative funding mechanisms and champion financial backing strategies. This approach will require a Full Time Equivalent (FTE) (e.g., Growth Management Specialist) and may encompass initiatives like securing upfront capital, ensuring guaranteed cash flow, exploring public-private partnerships, and tapping into grants and subsidies.

Comparable Practice: Collingwood Water Treatment Plant Expansion

- In an effort to address the rising cost and timeline extension of the Collingwood Water Treatment Plant Expansion, the Town of Collingwood has formed a task force with neighboring municipalities.
- The goal of this task force is to jointly seek financial support from provincial and federal governments for the project, which is now projected to cost \$270 million and set to be completed by 2028.
- This initiative came after the cost estimate for the project increased significantly in September 2023. Originally expected to be completed by 2026 with a budget of \$121 million, the cost estimate has now more than doubled and the completion date has been pushed back by two years. This is the second time the estimated construction costs have doubled, with the initial estimate being around \$60 million.
- The water treatment plant expansion is crucial for the town and its neighboring municipalities. The plant has been operating at over 80% capacity in 2021, and while additional infrastructure has been added to increase capacity, the expansion of the treatment plant is essential in meeting the growing demand. The town supplies treated drinking water to New Tecumseth and under a new deal struck in 2022, the capacity of water supplied is set to increase with the plant expansion.
- The task force will include representatives from all neighboring municipalities and members of the Collingwood development community.
- The final projected costs and recommended next steps will be presented to the Collingwood council in November. This case study serves as a testament to the importance of community collaboration and innovative thinking when tackling large-scale infrastructure projects.

Early Implementation Activities

Hire and onboard dedicated Growth Management Specialist resource.

Identify key stakeholders and assemble a multi-sector task force including developers, engineers, planners, and key intergovernmental representatives.

Establish objectives and goals for the task force, focusing on exploring funding options and advocating for financial support.

Facilitate regular meetings and workshops to foster collaboration and information sharing among task force members.

Develop a comprehensive advocacy strategy for engaging with upper tiers of government and securing financial assistance.

Monitor progress and outcomes of advocacy efforts and adjust strategies as needed to achieve desired results.



1. Infrastructure Challenges: Recommendation B

B. Develop a Robust Financing Plan: In collaboration with the proposed Task Force (supported by the same FTE) and in anticipation of the WWWMP finalization (expected for Summer/Fall 2024), begin the development of a comprehensive financing strategy and project timeline for its implementation. This plan should account for reserve contributions, potential supply and labour shortages, as well as unexpected contingencies to mitigate risks and ensure project delivery within budget and schedule constraints.

Comparable Practice: Town of Essex Water Financial Plan

- The Town of Essex commissioned Watson & Associates Economists Ltd. to develop a water financial plan. The financial plan required a comprehensive analysis of capital and operating needs, a review of current and future demand versus supply, and an evaluation of potential funding sources.
- The Town of Essex had already completed detailed financial planning and forecasting for the town's water systems through a Water and Wastewater Rate Study. The goal of this report was to adapt the findings of the Rate Study to meet the reporting requirements for a financial plan as defined by Ontario Regulation 453/07. The financial position was then projected over a ten-year forecast period.
- The exercise of developing this type of plan will strengthen the town of Essex's ability to plan, by consolidating and summarizing the revenues and expenses generated by the water system for a given period and the annual surplus/deficit, which measures whether the revenues generated are sufficient to cover the expenses incurred and in turn, whether net financial assets have been maintained or depleted.

High-Level Implementation Activities

Establish a project management team responsible for developing the financing and timeline plan.

Conduct a comprehensive assessment of potential financing options, including grants, loans, and public-private partnerships.

Collaborate with financial experts to analyze potential risks and develop contingency plans.

Engage with contractors and suppliers to assess potential supply and labor shortages and incorporate these factors into the timeline plan.

Develop a detailed project timeline that identifies key milestones, deliverables, and dependencies.

Regularly review and update the financing and timeline plan to account for changing conditions and emerging risks.



1. Infrastructure Challenges: Recommendation C

C. Implement a Servicing Capacity Allocation Policy: Develop a Servicing Capacity Allocation Policy to ensure transparent, sustainable, and orderly allocation of water and wastewater capacity for development projects in Lakeshore. This policy could proactively mitigate potential legal disputes with developers who may have been mistakenly assured of capacity allocations. Prioritize allocation to projects that provide the greatest benefit to the community and establish clear criteria for allocation commitments.

Comparable Practice: Collingwood Water and Wastewater Capacity Allocation Policy

- The Town of Collingwood has developed a Water and Wastewater Capacity Allocation Policy to manage the limited capacity of its water and wastewater treatment plants effectively.
- With strong forecasted growth, there's a need to align infrastructure with land use to support development. Capacity constraints in water services identified in 2021 are ongoing, and wastewater capacity is under evaluation.
- This Allocation Policy aims to sustainably and transparently assign service capacity, ensuring fairness and predictability for developers and the community, optimizing benefits to the town.
- The Allocation Policy of Collingwood applies town-wide, excluding rural areas without planned municipal services. The Environmental Services Division is tasked with assessing available water and wastewater capacity semi-annually, translating it into Service Delivery Units (SDUs) for allocation purposes.
- Developments needing new infrastructure, creating lots or units, or requiring site plan approval are subject to this policy. It excludes minor residential additions, lot adjustments without new lots, changes in use without increased water/sewage demands, and certain constructions or restorations. Projects previously exempted under specific by-laws are also excluded for one-year post-policy implementation.

High-Level Implementation Activities

Establish a working group comprised of municipal staff, developers, and community stakeholders to develop the Servicing Capacity Allocation Policy.

Conduct a thorough review of existing policies and practices related to water and wastewater capacity allocation.

Identify best practices and benchmarks from other municipalities and incorporate them into the policy development process.

Engage in consultation and feedback sessions with key stakeholders to gather input and ensure transparency and inclusivity in policy development.

Clearly define criteria and guidelines for allocating water and wastewater capacity to development projects, prioritizing community benefit and sustainability.

Develop a communication plan to inform developers and other stakeholders about the new policy and ensure compliance and understanding.



2. Workforce Challenges: Overview

What We Learned

Lakeshore faces persistent challenges in filling vacant positions and managing staff turnover which leads to knowledge gaps and institutional memory loss. This is a consistent trend across the Province. The resulting lack of continuity and increased workload contribute to burnout and a stressful work culture, with challenging dynamics among colleagues. Prior attempts to address cultural issues, such as implementing a Total Rewards Plan and Cultural Strategy, were halted due to funding constraints.

While the recent update to the CUPE collective agreement has addressed the disparity in pay and work flexibility between union and non-union workers, (with non-union roles offering higher salaries and better flexibility) it will be helpful to monitor this issue going forward. Until recently, this disparity has caused employees to leave for positions with lower titles at non-unionized municipalities that offer more competitive compensation and work arrangements.

Finally, to address staffing shortages, Lakeshore occasionally relies on consultants, though this solution poses management challenges, higher costs, and long-term capacity constraints. This is not sustainable.

Recommended Actions

A. Strategic Professional Development: To address staffing challenges and enhance organizational culture, deliver professional development workshops for Council and staff. These may cover planning and development updates, team-building activities, and executive coaching, ensuring staff are equipped with necessary skills while improving workplace dynamics. Provide executive coaching to leadership to support progress towards becoming a high-functioning SLT.

B. Enhance Recruitment Strategies and Ensure Competitive Pay: Consider partnering with educational institutions, professional organizations, and community groups to identify potential candidates and create pathways for employment within Lakeshore. Ensure that the pay rates are competitive within the industry and region for both union and non-union positions. Conduct regular reviews of salary benchmarks and adjust compensation as needed to attract and retain top talent.

C. Explore Hybrid Work Models: In light of the post-pandemic work environment, evolving workforce expectations, and increasing requests from Lakeshore staff for remote work options, it would be prudent to explore hybrid work models.

Implementation Considerations

- **General:** There are major recruitment challenges across the in the province with respect to recruiting and retaining skilled resources across the building, engineering, and planning professions.
- **Planning:** In addition to multiple vacancies, Planning does not currently have a registered planner (other than the Corporate Leader, Growth and Sustainability) who can represent the Municipality at the Ontario Land Tribunal. Addressing this gap should be a recruiting and training priority.
- **Building:** There is one Inspector role vacancy, but it has been difficult to find someone with 'Part Three' experience. There are plans to provide training to existing team members. Additionally, there is no Team Lead or Deputy CBO position within the Building division. This leaves the more senior building inspectors open to being easily recruited by municipalities that do have these positions available and/or are offering additional salary.
- **Engineering:** There are two current vacancies (Engineering Division Leader, and Sanitary and Stormwater Eng-Tech).



2. Workforce Challenges: Recommendation A

A. Strategic Professional Development: To address Lakeshore's staffing challenges and enhance organizational culture, professional development workshops for council and staff will empower them and foster inclusivity. These workshops cover planning and development updates, team-building activities, and executive coaching, ensuring staff are equipped with necessary skills while improving workplace dynamics. Additionally, encouraging a culture of continuous learning among employees, leadership, and Council through access to resources and training opportunities enhances knowledge and career prospects, supporting long-term organizational success.

Leading Practice: Harvard Business Review – Keeping People Through Job Training

- In a recent Harvard Business Review article, workplace strategist Erica Keswin highlighted professional development as a potent tool for enhancing employee retention.
- She emphasized three key strategies to achieve this:
 1. Starting Development from Day One: By initiating professional development opportunities immediately, organizations demonstrate their commitment to growth, laying the groundwork for ongoing learning.
 2. Integrating Learning into Regular Work Routines: Seamlessly embedding learning activities into daily tasks fosters continuous improvement, making learning an integral part of the job and enhancing engagement and skill development.
 3. Providing Access to Coaching Beyond the C-Suite: Extending coaching and mentorship opportunities beyond senior levels shows a dedication to growth at all organizational tiers. Personalized guidance empowers employees to excel and feel valued.
- By demonstrating a genuine commitment to employee growth, organizations can significantly enhance engagement and job satisfaction among their workforce. Investing in employees' careers not only benefits individual employees but also yields tangible returns for the organization.

Improved employee retention leads to greater stability and continuity within the workforce, ultimately translating into improved business outcomes and a more committed and high-performing workforce.

High-Level Implementation Activities

Review and assess training needs among council and staff, developing a training plan based on findings.

Initiate professional development workshops for council and staff.

Incorporate planning updates, team-building, and coaching into workshops to improve workplace dynamics.

Embed learning activities into daily tasks for continuous improvement and engagement.

Provide coaching and mentorship opportunities at all levels to empower employees.

Encourage continuous learning through access to resources and training opportunities.



2. Workforce Challenges: Recommendation B

B. Enhance Recruitment Strategies and Ensure Competitive Pay: Expand recruitment efforts to attract talent from diverse backgrounds and skill sets. Consider partnering with educational institutions, professional organizations, and community groups to identify potential candidates and create pathways for employment within Lakeshore. Additionally, ensure that the pay rates offered by Lakeshore are competitive within the industry and region for both union and non-union positions. Conduct regular reviews of salary benchmarks and adjust compensation packages as needed to attract and retain top talent.

Comparable Practice: City of Hamilton – Recruitment and Retention Strategy

In April 2023, the City of Hamilton launched a recruitment and retention strategy based on a comprehensive review by Optimus SBR. The review highlighted key challenges, including a 47% increase in non-union employee retirements, a 40% rise in voluntary resignations, high workloads, lengthy recruitment, uncompetitive compensation, and inconsistent policy implementation.

Based on these findings, the City of Hamilton focused on several initiatives:

1. Review of the corporate organizational structure to ensure sustainable workloads.
2. Modernize HR technology to reduce recruitment process time.
3. Realign economic comparators to reflect the current economy.
4. Revise the Hybrid Work Policy to include two "anchor days" in the office.
5. Increase maximum salary increases for promotions to 10% to incentivize internal career growth.
6. Launch an ongoing marketing campaign to promote the benefits of working in Hamilton.

City Manager, Janette Smith, cited the difficulties in attracting planners, during a media conference.
“We all know we’re in a housing crisis and developers want to get their housing built, of various types. If we don’t have those [planner] positions in place it starts slowing down approvals.”

High-Level Implementation Activities

Assess current recruitment strategies and pay rates to identify gaps and areas for improvement.

Expand recruitment efforts by partnering with educational institutions, professional organizations, and community groups to attract diverse talent.

Ensure pay rates offered by Lakeshore are competitive within the industry and region for both union and non-union positions through regular benchmarking.

Review and adjust compensation packages as needed to attract and retain top talent, based on findings from salary benchmarking and market analysis.

Implement pathways for employment within Lakeshore for candidates identified through partnerships, creating opportunities for retention and growth.

Monitor and evaluate the effectiveness of enhanced recruitment strategies and competitive pay practices, adjusting as necessary for sustained success.



2. Workforce Challenges: Recommendation C

C. Explore Hybrid Work Models: In light of the post-pandemic work environment, evolving workforce expectations, and the increasing requests from Lakeshore staff for remote work options, it would be prudent to explore hybrid work models. Increasingly, research is showing that hybrid work models offer several potential benefits. It accommodates the preferences and needs of the workforce, promoting greater work-life balance and flexibility. This, in turn, can contribute to higher job satisfaction and retention rates, reducing the risk of losing valuable talent. Furthermore, a hybrid model can enhance productivity by allowing employees to work in environments where they feel most comfortable and focused. It can also reduce overhead costs associated with maintaining a full-time in-office workforce, including office space and utilities. This of course will be a valuable impact when considering future Town Hall space needs.

Leading Practice: Wharton Daily News – Hybrid and the Future of Work

- In a 2023 paper, Martine Haas, a management professor at Wharton, asserts that the hybrid work model is becoming the new standard in the workplace and represents a fundamental shift in how organizations operate, offering flexibility and autonomy to employees while maintaining productivity and fostering innovation.
- During the pandemic, many companies transitioned to remote work with minimal disruption to productivity. As firms gradually began recalling employees to the office in 2022, there was a recognition of the growing demand for greater work flexibility among workers.
- A notable shift in power dynamics has occurred, granting employees increased leverage to negotiate remote work options. This reflects a broader trend towards prioritizing employee preferences and work-life balance.
- Implementing hybrid work poses various challenges, including managing remote and in-person teams, maintaining company culture, and ensuring equitable treatment of employees. However, Haas suggests that these challenges present opportunities for organizations to reassess their policies and procedures.

By embracing this paradigm shift and actively refining their policies, companies can navigate the complexities of the modern workplace and thrive in the evolving landscape of work.

High-Level Implementation Activities

Assess staff preferences and needs regarding remote work options and gather feedback on potential hybrid work models.

Research and analyze hybrid work model options, considering their potential benefits and alignment with Lakeshore's goals and values.

Develop a comprehensive hybrid work policy outlining guidelines, expectations, and procedures for remote and in-office work arrangements.

Pilot test the chosen hybrid work model with a select group of staff to evaluate its effectiveness, gather feedback, and identify any necessary adjustments.

Implement the hybrid work model organization-wide based on the insights gained from the pilot test, ensuring proper communication and support for staff transitioning to the new model.

Monitor the hybrid work model's impact on productivity, employee satisfaction, and organizational goals, adjusting as needed for long-term success.



3. Team Dynamics Challenges: Overview

What We Learned

Internal team dynamics and integration pose significant hurdles, particularly among the Planning, Building, Engineering and Legal departments. Because of high turnover, it has been difficult to develop cohesive team dynamics.

The organization grapples with ineffective interdepartmental communication and coordination, which exacerbate inefficiencies and create workflow bottlenecks.

Due to insufficient staffing in Planning, Engineering, and Legal, these departments require external consultant reviews, significantly increasing the time and complexity associated with file management.

In aggregate, these issues have led to Council and community dissatisfaction with perceived slow or inefficient services, resulting in diminished public trust and engagement.

Recommended Actions

A. Leverage the Cloudpermit Implementation Process: The Planning Division is in the early stages of the Cloudpermit implementation process. This is an ideal time to define new inter-divisional standard operating procedures (SOPs). Establishing clear guidelines and protocols for collaboration and communication can improve workflow efficiency and ensure consistency in service delivery across departments.

B. Leverage other Technology Solutions: Use technology solutions to facilitate communication, document sharing, and project management across departments (e.g., intranet and cloud-based productivity services). These platforms and project management tools (e.g., Microsoft Viva Goals) can streamline workflows and enhance collaboration among teams.

C. Establish a Cross-Division Project Secretariat: Establish secretariat comprised of members of Engineering, Building, Planning and Legal to optimize the review process. The use of project management tools and methodologies will enhance coordination and efficiency in interdepartmental (i.e., Terms of Reference, clear leads, etc.) Protocols decision making and final sign-off must be made clear.

Implementation Considerations

Resourcing: The coordination and general oversight of the Secretariat will require an FTE at the Senior Manager level. This should be the same “Growth Management Specialist” discussed above under Infrastructure Challenges – Implementation Considerations on page 27.

Leverage Existing Toolkit: Lakeshore has already integrated Microsoft 365 into its workflow and is steadily enhancing its utilization. Further advancing the maturity and sophistication of its implementation will significantly amplify transparency and collaboration across the organization.

Engage Network and Neighbours for Lessons Learned: When assessing which tools to use and then preparing for implementation, Lakeshore should leverage existing municipal professional IT networks (such as the Municipal Information Systems Association) and neighbours like the County of Essex and member municipalities.



3. Team Dynamics Challenges: Recommendation A

A. Leverage the Cloudpermit Implementation Process: The acting Planning Division Leader is in the early stages of the Cloudpermit implementation process. In order to set the software up, clear processes must be input. This is an ideal time and an important opportunity to define new inter-divisional standard operating procedures (SOPs). Establishing clear guidelines and protocols for collaboration and communication can improve workflow efficiency and ensure consistency in service delivery across departments. Lakeshore may benefit from speaking to other municipalities who have recently implemented Cloudpermit.

Comparable Practice: Leamington – Cloudpermit-Enabled Standardization of Pre-Consultations

- Like Lakeshore, Leamington's bylaws stipulated that most planning and development approvals required pre-consultation, but in practice, proposals only require formal pre-consultation once they are ready for development approvals (e.g. site plan). Applicants may therefore independently seek additional approvals and permits before or during pre-consultation, resulting in two main outcomes:
 1. Inconsistent intake and preliminary review processes that can result in unexpected costs or delays for the applicant.
 2. Potential for duplicated efforts and contradictory instructions as there is no mechanism in Pre-Consultation to account for independent departmental reviews and processes.
- As part of a comprehensive process review, it was recommended that Leamington re-define its pre-consultation process to act as the primary intake mechanism for all proposed development.
- The adoption of Cloudpermit will streamline some information or documentation requests, which will reduce the number of times that applicants must re-submit basic information.
- An integrated Cloudpermit process will also leverage embedded mapping to auto-populate legal descriptions, property code, zoning etc. based on a provided address, and allow the property owner to leverage “Parties to Application” to assign agents to act as primary liaison, eliminating the need for Consent Forms.

High-Level Implementation Activities

Conduct research and gather information from other municipalities who have recently implemented Cloudpermit to learn from their experiences and best practices.

Collaborate with representatives of different departments to define new inter-divisional standard operating procedures (SOPs) that align with the Cloudpermit implementation and improve workflow.

Establish clear guidelines and protocols for collaboration and communication to ensure consistency in service delivery across departments during the Cloudpermit implementation process.

Input updated processes into Cloudpermit and pilot test the newly established SOPs and Cloudpermit processes with a select group to identify any issues and make necessary adjustments before full implementation.

Continuously monitor and evaluate the effectiveness of the Cloudpermit implementation and SOPs, making improvements as needed to optimize workflow and service delivery across departments.



3. Team Dynamics Challenges: Recommendation B

B. Leverage other Technology Solutions for Collaboration: Make optimal use of technology solutions and collaboration tools to facilitate communication, document sharing, and project management across departments (e.g., intranet and cloud-based productivity services like Office 365). Implementing cloud-based platforms, project management software such as Viva Goals (part of Office 365), and communication tools can streamline workflows and enhance collaboration among team members. Furthermore, these types of services provide features for overseeing progress and generating reports both within the organization and for public dissemination.

Comparable Practice: Town of Aurora – Viva Goals

- The Town of Aurora adopted Microsoft Viva Goals to optimize its organizational efficiency and performance management. Utilizing the OKR framework, the initiative aimed to align team efforts with Aurora's strategic priorities, fostering a culture of engaged, purpose-driven work.
- Aurora, supported by a consulting firm, conducted strategic workshops resulting in a comprehensive Strategy Map and refined corporate-level OKRs. This facilitated clear goal ownership and introduced a systematic approach to performance evaluation, with quarterly updates and targets.
- The Viva Goals framework led to numerous benefits for Aurora: measurable performance targets were established, progress became more trackable, resource allocation was optimized, and there was a significant cultural shift towards accountability. Moreover, the seamless integration with Microsoft Teams simplified progress tracking and communication, further enhancing productivity and policy effectiveness.

Objective	Level	Status and
Ship next version of gaming platform by 6/1 to improve user engagement	PRODUCT	Behind
Exceed 90% user retention	PLATFORM	On track
Reduce latency by 10%	PLATFORM	On track 60%

High-Level Implementation Activities

Assess the current technology landscape and identify areas where collaboration tools can improve communication, document sharing, and project management across departments.

Research and select appropriate cloud-based productivity services and collaboration tools such as Office 365, Viva Goals, and other platforms to meet Lakeshore's specific needs and goals.

Develop a comprehensive implementation plan outlining the deployment strategy, training requirements, and timeline for rolling out the selected technology solutions across departments.

Provide training and support to staff members on how to effectively utilize the chosen collaboration tools and maximize their potential for streamlining workflows and enhancing collaboration.

Implement the selected technology solutions and collaboration tools organization-wide, ensuring proper integration and seamless communication among team members and departments.



3. Team Dynamics Challenges: Recommendation C

C. Establish a Cross-Division Project Secretariat: Explore the possibility of establishing a project secretariat comprised of the CAO and representatives from members of the Engineering, Building, and Planning Divisions to optimize the review process, streamline timelines, and facilitate issue resolution (i.e., lay out clear roles and responsibilities on decision making and sign-off). Leveraging project management tools and methodologies can enhance coordination and efficiency in interdepartmental projects using project management tools (i.e., project, charters, work plans, clear leads, etc.) The direct engagement of the CAO should be temporary, serving as a bridge until the Secretariat functions autonomously. Over time, the CAO can progressively transfer authority to the appointed Secretariat Lead.

Sample Template: Terms of Reference for Cross-Departmental Secretariat

See Appendix A for full sample as well as key mechanisms to enable success.

SAMPLE Terms of Reference:

Municipality of Lakeshore's Planning and Development Services Committee (PDSC)

1. Purpose: The Planning and Development Services Committee (PDSC) is established to enhance collaborative efforts and communication within the Municipality of Lakeshore's Planning and Development Services. The committee aims to streamline the development application review process by facilitating preliminary assessments and addressing complex issues, ultimately improving the efficiency and effectiveness of development approvals.

2. Objectives:

- To act as an initial review platform during the pre-consultation phase, offering detailed feedback and guidance to applicants.
- To resolve discrepancies in comments across departments and tackle unique development issues, particularly those affecting the Municipality's strategic development goals.
- To incorporate feedback from Third Party Agencies early in the process to streamline consultations and reduce unnecessary expenses.
- To directly involve applicants in the review process when beneficial, fostering a more collaborative and transparent approach to addressing application concerns and queries.

3. Membership: The PDSC will include key managers and staff from essential departments, such as Planning, Development, Building, Engineering, Fire, and Legal, among others. Membership may also include representatives from Third Party Agencies and department heads as required.

4. Roles and Responsibilities:

- **Application Officer:** Responsible for overseeing the administration and review of applications, ensuring completeness and compliance with all requirements.
- **Department Heads:** Charged with delivering thorough and accurate reviews and comments from their respective departments on the applications.
- **Chair (CAO):** Leads the committee, making final application recommendations within the Municipality's jurisdiction.

5. Meetings:

- Regular meetings will be scheduled based on the current demands of development applications. The frequency can be adjusted to accommodate the volume and nature of the applications being reviewed.
- Additional meetings may be called to address specific, urgent, or complex application issues as they arise.

6. Decision-Making: The PDSC aims for consensus in its decisions. If consensus is not achievable, the chair will make a final decision, taking into consideration the majority viewpoint and in line with the Municipality's and Council's strategic priorities.

7. Reporting: The PDSC will provide regular reports to the Municipal Council, outlining its progress, identifying process improvements, and suggesting possible changes to the development approval framework as needed.

8. Review and Amendment of Terms: These Terms of Reference will be reviewed on an annual basis to ensure they remain relevant and effective, with amendments made to reflect shifts in the Municipality's priorities, legislative changes, or operational requirements.

9. Confidentiality and Compliance: PDSC members are expected to uphold confidentiality regarding the specifics of the applications and discussions. All committee activities must adhere to applicable laws, regulations, and municipal policies related to development within the Municipality of Lakeshore.

High-Level Implementation Activities

Assess the current technology landscape and identify areas where collaboration tools can improve communication, document sharing, and project management across departments.

Research and select appropriate cloud-based productivity services and collaboration tools such as Office 365, Viva Goals, and other platforms to meet Lakeshore's specific needs and goals.

Develop a comprehensive implementation plan outlining the deployment strategy, training requirements, and timeline for rolling out the selected technology solutions across departments.

Provide training and support to staff members on how to effectively utilize the chosen collaboration tools and maximize their potential for streamlining workflows and enhancing collaboration.

Implement the selected technology solutions and collaboration tools organization-wide, ensuring proper integration and seamless communication among team members and departments.

Continuously monitor and evaluate the usage and effectiveness of the implemented technology solutions, adjusting as needed to optimize collaboration and workflow efficiency.



4. Lack of Integrated Vision: Overview

What We Learned

Lakeshore currently lacks a cohesive roadmap for future development and growth, leading to challenges in achieving consistency with longer-term planning documents. The intricate nature of Official Plan review processes complicates this task.

Council's interest in exploring new planning directions, such as greenhouses and energy storage projects, often conflicts with the Provincial Policy Statement (PPS). Long-range discussions are deprioritized in favor of immediate issues, exacerbating the challenge of aligning aspirations with regulatory frameworks.

Reconciling Council's aspirations with the perpetual, lengthy review processes of the PPS, County OP, and Lakeshore OP further complicates this matters. The absence of a clear vision results in unplanned and scattered community development, ineffective resource allocation, and limited sustainability considerations. Moreover, it contributes to Council and community disengagement, lack of confidence, and challenges in fostering meaningful public participation in decision-making processes.

Recommended Actions

A. Develop a Growth and Development Implementation Plan: Create a roadmap for implementing the updated OP, aligning the roadmap with Council's strategic priorities, as well as the Infrastructure Master Plan. Adherence to this plan, with flexibility, and regular progress monitoring will enhance accountability and commitment to community goals. Prioritizing existing projects like Wallace Woods Secondary Plan and others is critical given limited resources and will positively impact long-term capital development plans.

B. Develop an Infrastructure Master Plan: A long-term Integrated Infrastructure Master Plan for the next 25+ years should be created and updated every five years to adapt to changing circumstances and needs. This plan will assess infrastructure capacity, condition, performance, and projections for future demand and growth.

C. Integrate Thorough Environmental Impact Assessments: Leverage the existing Municipal Class Environmental Assessments (MCEAs) process to further incorporate comprehensive environmental impact assessments into the planning process to ensure that future development projects are sustainable and environmentally responsible.

Implementation Considerations

Resources: Lakeshore does not have any dedicated long-range planning resources. This type of role would be required to drive these recommendations forward. Further, the Corporate Leaders of Operations and Growth and Sustainability, along with the Chief Building Official, are hindered from prioritizing strategic and forward-looking initiatives due to their overwhelming focus on addressing operational issues.

Current Status of Relevant Plans: The WWWMP is being updated, targeting Q4 2024; there are specific updates being made to the Official Plan in response to revisions from the County of Essex; Lakeshore's Asset Management Plan was updated in 2022, and it is understood that a more coordinated approach and further investment is required to fund the plan.



4. Lack of Integrated Vision: Recommendation A

A. Develop a Growth and Development Implementation Plan: The Municipality is updating its Official Plan. Once updated the Town should create a clear roadmap for the implementation of Growth and Development section of the Plan titled "Where and How to Grow". Once direction on "Where and How to Grow" is finalized, linkages between the Official Plan, Council's Strategic Plan and priorities, and the Infrastructure Master Plan can be clearly made. Adherence to the Plan, with flexibility, and regular progress monitoring will enhance accountability and commitment to the community's goals.

Comparable Practice: Niagara Region – Official Plan Implementation Chapter

- Niagara Region's Official Plan includes a detailed chapter on implementation. The chapter addresses a comprehensive array of topics focused on ensuring effective regional planning through collaboration and legal compliance. It covers the delineation of roles and responsibilities among stakeholders, clear guidelines for reading and interpreting the Plan, and established timelines for its review and updates.
- To ensure alignment with provincial policies, it details the process of maintaining conformity and outlines various tools for achieving the Plan's vision. Additionally, the chapter emphasizes the importance of systematic monitoring and review, guidance on development priorities, procedures for Plan amendments, fiscal responsibility in policy implementation, and the critical need for consultation with First Nations and Indigenous communities.
- These topics collectively aim to create a unified and effective planning framework that supports:
 1. **Coordination:** Clarifies stakeholder roles, streamlining collaboration.
 2. **Consistency:** Standardizes Plan interpretation, ensuring legal compliance.
 3. **Alignment:** Bridges lower-tier, regional, and provincial policy goals.
 4. **Strategic Planning:** Establishes review timelines for Plan relevancy.
 5. **Accountability:** Implements monitoring for progress and policy effectiveness.
 6. **Sustainable Development:** Directs growth with sustainable priorities.
 7. **Transparency:** Provides amendment procedures and fiscal oversight.

High-Level Implementation Activities

Develop a comprehensive implementation plan for the updated Official Plan, outlining clear strategies and milestones for execution.

Establish linkages between the Official Plan, Council's Strategic Plan and priorities, and the Infrastructure Master Plan to ensure alignment and coherence in growth and development efforts.

Ensure adherence to the Plan while maintaining flexibility to adapt to changing circumstances, fostering accountability and commitment to the community's goals.

Implement regular progress monitoring mechanisms to track the implementation of the Official Plan and assess its effectiveness in achieving desired outcomes.

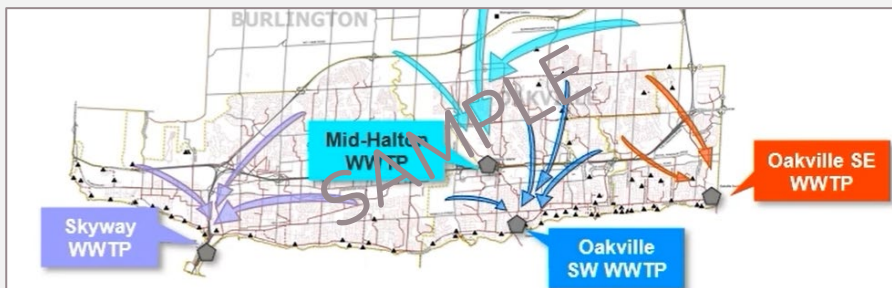


4. Lack of Integrated Vision: Recommendation B

B. Develop an Infrastructure Master Plan: Begin the development of a long-term Integrated Infrastructure Master Plan to address the core infrastructure within the Municipality for the next 25+ years. Update this plan on a five-year cycle to adapt to changing circumstances, emerging trends, and evolving community needs. These updates should include assessments of infrastructure capacity, condition, and performance, as well as projections for future demand and growth.

Comparable Practice: Halton Region Infrastructure Master Plan

- Halton Region's Integrated Master Plan is designed to address the future growth and infrastructure requirements up to 2051, focusing on enhancing water, wastewater, and transportation systems.
- This initiative aims to optimize system capacity, ensure sustainability, and improve community well-being. Key components include safe and efficient water delivery, sustainable wastewater treatment, and a comprehensive transportation network catering to all users.
- Vision statements guide the plan towards equitable, resilient infrastructure development that prioritizes safety, health, and environmental sustainability.
- Community feedback from initial Public Information Centers is instrumental in shaping the plan, which covers Burlington, Halton Hills, Milton, and Oakville. The plan emphasizes innovation, climate adaptation, and integrated planning to meet the region's needs.



High-Level Implementation Activities

Initiate the development of a long-term Integrated Infrastructure Master Plan to address core infrastructure needs for the next 25+ years.

Establish a regular update cycle of every five years to ensure the plan remains current and adaptable to changing circumstances and community needs.

Conduct assessments of infrastructure capacity, condition, and performance as well as projections for future demand and growth as part of the plan updates.

Collaborate with relevant stakeholders including municipal departments, utilities, and community members to gather input and insights for the Infrastructure Master Plan.

Develop strategies and prioritize projects based on the findings of the assessments and stakeholder input to effectively address infrastructure needs and support sustainable growth.

Implement monitoring and evaluation mechanisms to track progress, assess the effectiveness of the Infrastructure Master Plan, and adjust as necessary to achieve desired outcomes.

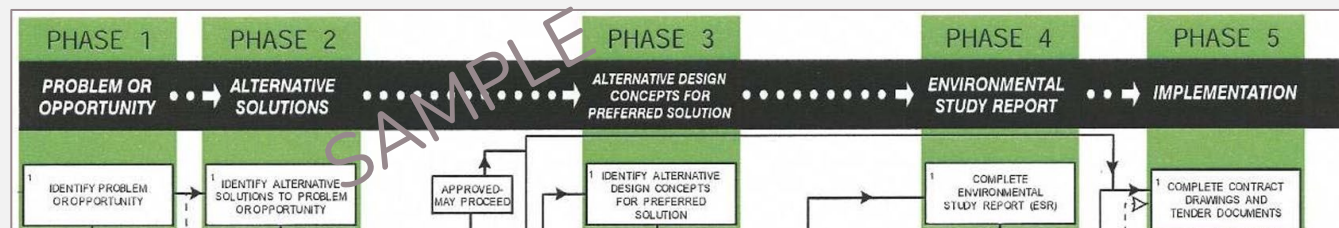


4. Lack of Integrated Vision: Recommendation C

C. Integrate Thorough Environmental Impact Assessments: Leverage the existing Municipal Class Environmental Assessments (MCEAs) process to further incorporate comprehensive environmental impact assessments into the planning process to ensure that future development projects are sustainable and environmentally responsible. These assessments should consider factors such as habitat preservation, water quality, air pollution, and biodiversity conservation. By integrating environmental considerations into the planning process, Lakeshore can mitigate negative environmental impacts and promote sustainable development practices.

Legal Requirement and Leading Practice: Municipal Class Environmental Assessments

- Lakeshore is already compliant with MCEAs, which are required by law in Ontario under the Environmental Assessment Act, a standardized process for planning municipal infrastructure projects like roads, water, and wastewater systems.
- It categorizes projects based on their environmental impact into Schedules A, A+, B, and C, with Schedule A projects having minimal impact and being pre-approved, while Schedule C projects involve new facilities or major expansions and undergo a detailed assessment process.
- Municipalities can apply the principles and processes of the MCEA beyond the statutory requirements to enhance project outcomes. By incorporating broader environmental considerations, engaging more deeply with stakeholders, and applying innovative sustainability practices, municipalities can go above the minimum legal requirements. This approach ensures compliance, promotes environmental stewardship, improves community relations, and can lead to more sustainable and accepted infrastructure projects.



High-Level Implementation Activities

Utilize the existing Municipal Class Environmental Assessments (MCEAs) process as a framework for conducting comprehensive environmental impact assessments.

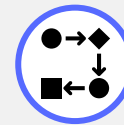
Enhance the MCEAs process to incorporate thorough assessments of factors including habitat preservation, water quality, air pollution, and biodiversity conservation.

Ensure that future development projects undergo rigorous environmental impact assessments as part of the planning process to promote sustainability and environmental responsibility.

Collaborate with environmental experts, stakeholders, and regulatory bodies to gather input and ensure that assessments are thorough and comprehensive.

Integrate environmental considerations and findings from impact assessments into the planning process to inform decision-making and mitigate negative environmental impacts.

Implement monitoring and evaluation mechanisms to track the effectiveness of environmental mitigation measures and ensure ongoing compliance with sustainability objectives.



5. Planning & Development Challenges: Overview

What We Learned

The Planning Division has been disproportionately affected by staff turnover over a prolonged period. As discussed under Risk #2 'Chronic Workforce Challenges,' this has contributed to unclear file status, fragmented and unclear processes, lack of documented procedure, and disrupted coordination with delivery partners among other issues.

At present the volume of planning applications, which is expected to increase¹, exceeds workload capacities, exacerbating efficiency levels. Further, the onboarding process for new employees is described as 'clunky' due to the absence of documented processes and siloed operations within the organization, which also poses a threat to the overall efficiency of the Planning Division and development services more broadly.

Information provided to applicants is not structured in an easily digestible manner. As a result, applicants and employees may be overwhelmed by the amount of information and may not read what is provided

Due to these impediments to efficient and effective service delivery, Planning staff are struggling to keep up with customer service and correspondence, causing frustration amongst residents and developers, among others.

Recommended Actions

A. Process and Policy Review: Leverage the Cloudpermit implementation process² to review existing processes and policies. Ensure timely and periodic reviews to maintain relevance and alignment with leading practices. Any new policies or updates should link to the Council's development priorities outlined in the Municipality's Strategic Plan and, upon completion, the Official Plan and Growth Management Plan.

B. Update Online Resources for Enhanced Client Experience: Work with the Civic Engagement and Communications team to update current Planning and Development documentation and develop new online applicant guidance content which leverages best practices in Information Architecture and municipal planning, to effectively redirect inquiries online.

C. Develop a Planning and Development Communications Strategy: Collaborate with the Civic Engagement and Communications team to craft and execute a Planning and Development Communications Strategy. Emphasize transparent communication channels like a dedicated website, social media updates, or community meetings. Consider using a digital newsletter to deliver timely updates on development issues, manage expectations, and mitigate negative perceptions.

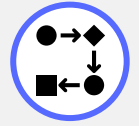
Implementation Considerations

Planning Application Volume: The Planning Department is currently conducting a review of its file load to better understand the backlog.

Resourcing: Oversight of the above three recommendations will require a dedicated resource. These activities fall under long-range planning and would fit well within the mandate of the long-range planning resource mentioned above.

Partnerships to Ease Burden: Consider opportunities to attract potential developers with capacity for large scale projects.

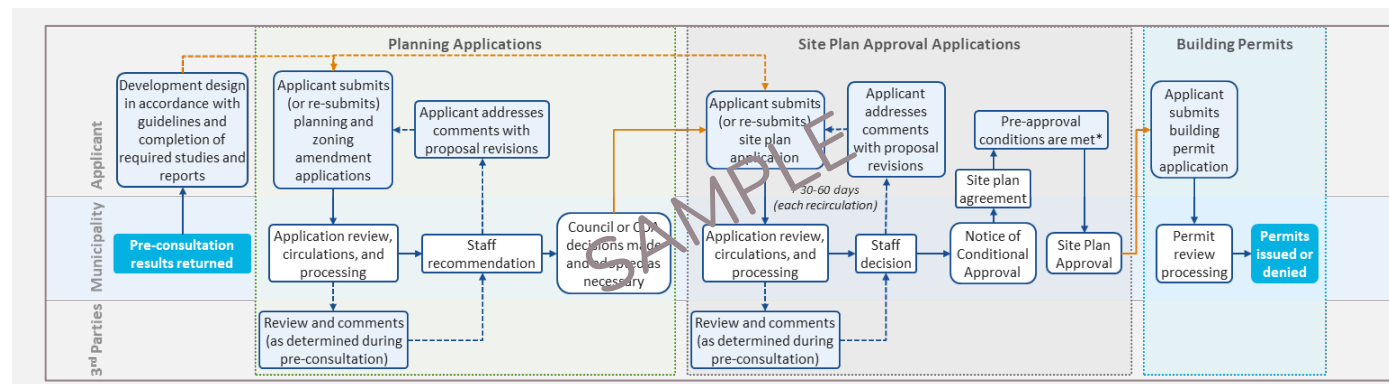
5. Planning & Development Challenges: Recommendation A



A. Process and Policy Review: In tandem with Recommendation A, in response to Risk #3 'Team Dynamic and Process Integration Challenges,' leverage the Cloudpermit implementation process to conduct a review of processes and relevant policies. Conduct timely and periodic reviews to ensure they are up to date and reflective of leading practice. The development of new policies or any updates to existing ones should be linked to Council's development priorities found in the Municipality's Strategic Plan and when complete, the Official Plan, and Growth Management Plan.

Comparable Practice: [See Recommendation 3A](#)

Illustrative Process Map:



High-Level Implementation Activities

Use the Cloudpermit implementation process as an opportunity to review existing processes and policies related to Risk #3, focusing on team dynamics and process integration challenges.

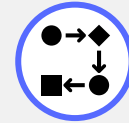
Conduct timely and periodic reviews of processes and policies to ensure they remain up-to-date and aligned with leading practices.

Link the development of new policies or updates to existing ones to Council's development priorities outlined in the Municipality's Strategic Plan, Official Plan, and Growth Management Plan.

Collaborate with relevant stakeholders including department heads, team leads, and legal advisors to gather input and insights for the review and update of processes and policies.

Ensure that the revised processes and policies reflect best practices and support the Municipality's strategic goals and objectives, promoting efficiency and effectiveness in operations.

5. Planning & Development Challenges: Recommendation B



B. Update Online Resources to Enhance Client Experience: Work with the Civic Engagement and Communications team to update current Planning and Development documentation and develop new online applicant guidance content which leverages best practices in Information Architecture and municipal planning, to redirect inquiries online. Providing easy access to necessary information can lead to considerable time savings for both applicants and administrative staff. By providing clear guidelines, checklists, and instructions online, applicants can efficiently navigate the application process without the need for multiple inquiries or manual assistance. This streamlined approach not only reduces administrative burden but also empowers applicants to progress through the process at their own pace.

Leading Practice: Accessible Web Content

Best practices for web content go beyond providing links to the information online or publishing content in PDFs:

- Information should be searchable, up-to-date, consistent, easy to find and accessible. It should be structured using Progressive Disclosure, whereby information is presented at a high level at first with links or drop-down menus available for applicants to click on topics they want to explore further.
- Information relevant to specific applications should be presented together (e.g., including direct links to fees) so that applicants do not have to spend time clicking through multiple pages for answers.
- Lakeshore can leverage Google Analytics, a tool for monitoring website usage data to track which pages are visited most frequently and where users are located, to continuously review and improve site structure.

Common Errors for Website Content and Communication

- | | |
|--|----------------------------------|
| – No Structure | – Invisible Navigation Options |
| – Search and Structure Not Integrated | – Inconsistent Navigation |
| – Missing Category Landing Pages | – Too Many Navigation Techniques |
| – Subsites/Microsites Poorly Integrated with Main Site | – Made-Up Menu Options. |

High-Level Implementation Activities

Collaborate with the Civic Engagement and Communications team to assess current Planning and Development documentation and identify areas for improvement.

Develop new online applicant guidance content leveraging best practices in Information Architecture and municipal planning to enhance user experience.

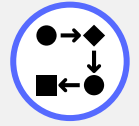
Ensure that the updated online resources provide clear guidelines, checklists, and instructions to streamline the application process and redirect inquiries online.

Test the usability of the updated online resources with a sample of applicants to gather feedback and make necessary adjustments for improved user experience.

Launch the updated online resources and promote their availability to applicants, emphasizing the time-saving benefits and empowering them to progress through the process independently.

Monitor usage and feedback on the updated online resources, making ongoing improvements to optimize the client experience and maximize the efficiency of Planning and Development processes.

5. Planning & Development Challenges: Recommendation C



C. Develop a Planning and Development Communications Strategy: As part of Cloudpermit implementation, work with the Civic Engagement and Communications team to develop and implement a Planning and Development Communications Strategy. Focus on establishing transparent communication channels, such as a dedicated website, social media updates, or community meetings, and consider utilizing a digital newsletter to provide timely communication on development issues, manage expectations, and minimize negative perceptions.

Comparable Practice: The Town of The Blue Mountains – Communications Strategy

- The Town of The Blue Mountains' Communications Strategy (2021-2025), is an innovative blueprint dedicated to enhancing the town's communication landscape. This strategy, developed in collaboration with the Community Communications Advisory Committee (CCAC) through a public survey and an online engagement session, seeks to address the distinctive challenges posed by the town's demographic diversity, including full-time, seasonal, rural, and urban residents.
- Aligned with the 2020-2024 Corporate Strategic Plan, this strategy is rooted in the principles of transparency, accountability, and community engagement. A notable aspect of this strategy is its emphasis on creating department-specific explainer content, including "How To," "Did You Know," Infographics, and Videos. This initiative underscores the town's commitment to demystifying planning and development processes for its residents, making information more accessible, engaging, and easier to understand.
- The inclusion of a dedicated Communications Coordinator for planning and development projects further highlights the town's proactive approach in ensuring transparency and clarity in communication related to development initiatives.
- To measure the impact of the Communications Strategy, a series of metrics will be utilized, covering areas such as email and social media engagement, website traffic, and community participation in town initiatives. These metrics aim to establish benchmarks for evaluating the success of the strategy, ensuring the town's responsiveness to its community's needs.

High-Level Implementation Activities

Collaborate with the Civic Engagement and Communications team to assess current communication practices and identify areas for improvement.

Develop a Planning and Development Communications Strategy focused on establishing transparent communication channels such as a dedicated website, social media updates, and community meetings.

Consider utilizing a digital newsletter to provide timely communication on development issues, manage expectations, and minimize negative perceptions.

Ensure that the Communications Strategy aligns with the goals of the Cloudpermit implementation and supports effective communication with stakeholders.






Implement the Communications Strategy, including the launch of new communication channels and tools, and provide training to staff involved in its implementation.

Section 6: Implementation and Next Steps

- **High-Level Implementation Timelines**
- **Conclusions and Next Steps**

Implementation: High-Level Timelines

The Municipality should begin implementation of these recommendations as early as Q2, 2024 given the urgency of the risks they address.

Risk Area	Key Activities and Milestones	2024				2025			
		Q2	Q3	Q4	Q1	Q2	Q3	Q4	
 Infrastructure Challenges	A. Establish Taskforce: Convene stakeholders to explore funding options, including partnerships and grants.	[Bar]							
	B. Develop Financing Plan: Create a financing plan for the WWWMP.	[Bar]							
	C. Develop and Implement Capacity Allocation Policy: Set transparent criteria for water and wastewater allocation.	[Bar]							
 Workforce Challenges	A. Professional Development: Develop curriculum and provide workshops for staff, fostering continuous learning.		[Bar] Ongoing						
	B. Improve Recruitment: Expand efforts to attract diverse talent, ensuring competitive pay rates.	[Bar] Ongoing							
	C. Hybrid Work Models: Explore options for flexibility and productivity, responding to staff requests.		[Bar]						
 Team Dynamics and Integration Challenges	A. Cloudpermit Implementation: Define new interdepartmental operating procedures for software setup.	[Bar]							
	B. Technology Solutions: Utilize Office 365 and cloud-based platforms for communication/project management.		[Bar]						
	C. Cross-Division Project Secretariat: Form secretariat to enhance interdepartmental coordination.	[Bar]							
 Lack of Cohesive Long-Term Vision	A. Growth and Development Roadmap: Align Official Plan with strategic priorities. Prioritize key projects.			[Bar]					
	B. Infrastructure Plan: Develop long-term infrastructure strategy, updated every five years.				[Bar]				
	C. Environmental Assessments: Integrate comprehensive assessments for sustainable development.					[Bar] Ongoing			
 Planning & Development Operational Challenges	A. Review Processes: Use Cloudpermit implementation (see 3A) to develop new planning-specific processes.	[Bar]							
	B. Develop Online Resources: Provide self-serve resources online to reduce administrative burden.				[Bar]				
	C. Communications Strategy: Use transparent channels like a website or newsletter to manage expectations.		[Bar]						

Implementation: Conclusions and Next Steps

As Lakeshore gears up for the implementation of these recommendations, it must address the foundational aspects critical for smooth execution.

Implementation considerations revolve around securing necessary resources, both human and capital, to address the identified risks.

- There's a need to fill key vacant positions to bolster the staff's capacity and to formalize the adoption of new technologies and processes, such as Cloudpermit and other cloud-based productivity tools, which will require training and change management to ensure a seamless transition.
- Additionally, the effective deployment of these solutions depends on clear communication channels and the establishment of a dedicated oversight body, possibly in the form of a secretariat, to ensure cross-departmental coordination and accountability.

Key success factors include the commitment of leadership to drive and champion these changes, the active engagement of all stakeholders, and the alignment of new initiatives with the Municipality's broader strategic goals.

- Moreover, the success of the implementation will rely on the clarity of newly defined procedures, a strong emphasis on continuous professional development, and a structured approach to evaluating and adjusting pay scales to attract and retain talent.

While the Municipality of Lakeshore faces significant challenges in infrastructure, workforce, and process integration, it has a clear opportunity to transform these obstacles into strengths with a focused, strategic approach.

- By establishing a comprehensive, adaptive framework and aligning it with long-term strategic planning and immediate operational imperatives, Lakeshore can ensure its growth trajectory remains both sustainable and resilient.

Immediate Next Steps:

- 1. Priority Setting:** Quickly identify and prioritize recommendations based on their urgency and potential impact.
- 2. Resource Allocation:** Allocate necessary budget and personnel to lead and support the initiatives.
- 3. Work Planning:** Develop concise planning templates outlining accountabilities, timelines, and key performance measures for each initiative.

Appendix A: Planning and Development Services Secretariat

- Sample Terms of Reference
- Success Factors

Appendix A: Secretariat Sample Terms of Reference

SAMPLE TERMS OF REFERENCE: MUNICIPALITY OF LAKESHORE'S PLANNING AND DEVELOPMENT SERVICES SECRETARIAT

1. Purpose: The Planning and Development Services Secretariat (PDSS) is established to enhance collaborative efforts and communication within the Municipality of Lakeshore's Planning and Development Services. The committee aims to streamline the development application review process by facilitating preliminary assessments and addressing complex issues, ultimately improving the efficiency and effectiveness of development approvals.

2. Objectives:

- To act as an initial review platform during the pre-consultation phase, offering detailed feedback and guidance to applicants.
- To resolve discrepancies in comments across departments and tackle unique development issues, particularly those affecting the Municipality's strategic development goals.
- To incorporate feedback from Third Party Agencies early in the process to streamline consultations and reduce unnecessary expenses.
- Directly involve applicants in the review process when beneficial, fostering a more collaborative and transparent approach to addressing concerns and queries.

3. Membership: The PDSC will include key managers and staff from essential departments, such as Planning, Development, Building, Engineering, Fire, and Legal, among others. Membership may also include representatives from Third Party Agencies and department heads as required.

4. Roles and Responsibilities:

- **Application Officer:** Responsible for overseeing the administration and review of applications, ensuring completeness and compliance with all requirements.
- **Department Heads:** Charged with delivering thorough and accurate reviews and comments from their respective departments on the applications.
- **Chair (CAO):** Leads the committee, making final application recommendations within the Municipality's jurisdiction.

5. Meetings: Regular meetings will be scheduled based on the current demands of development applications. The frequency can be adjusted to accommodate the volume and nature of the applications being reviewed. Additional meetings may be called to address specific, urgent, or complex application issues as they arise.

6. Decision-Making: The PDSC aims for consensus in its decisions. If consensus is not achievable, the Chair will make a final decision, taking into consideration the majority viewpoint and aligning with the Municipality's and Council's strategic priorities.

7. Reporting: The PDSC will provide regular reports to the Municipal Council, outlining its progress, identifying process improvements, and suggesting possible changes to the development approval framework as needed.

8. Review and Amendment of Terms: These Terms of Reference will be reviewed on an annual basis to ensure they remain relevant and effective, with amendments made to reflect shifts in the Municipality's priorities, legislative changes, or operational requirements.

9. Confidentiality and Compliance: PDSC members are expected to uphold confidentiality regarding the specifics of the applications and discussions. All committee activities must adhere to applicable laws, regulations, and municipal policies related to development within the Municipality of Lakeshore.

Appendix A: Secretariat Success Factors

The success of such a Planning and Development Secretariat (or some similar entity), hinges on several critical mechanisms:

1. **Clear Mandate and Authority:** The secretariat or coordinating body needs a clearly defined mandate, detailing its responsibilities, scope of work, and limits of authority. This includes specifying who has the final decision-making power on various issues, ensuring there's no ambiguity that could lead to conflicts or delays.
2. **Defined Roles and Responsibilities:** Successful operation requires clear roles and responsibilities for all involved, from the secretariat members to departmental representatives and external stakeholders. This clarity helps prevent overlaps, fills gaps in the planning process, and ensures that all necessary competencies and viewpoints are included.
3. **Inclusive Communication Channels:** Establishing effective, inclusive communication channels that allow for regular updates, feedback, and discussions among all stakeholders is crucial. This includes both internal departments and external entities such as community groups, developers, and regulatory bodies.
4. **Integration with Existing Structures:** The secretariat should not operate in isolation but be integrated with the municipality's existing planning and development processes. This ensures that its activities complement rather than complicate the overall planning framework.
5. **Decision-Making Protocols:** Establishing clear protocols for decision-making, including criteria for when decisions can be made by the secretariat versus when they need to escalate to higher authority levels (e.g., municipal council). This also includes mechanisms for resolving disagreements within the secretariat or with external stakeholders.
6. **Transparency and Accountability:** Implementing measures for transparency and accountability, such as regular reporting on activities, decisions, and outcomes, helps build trust among stakeholders and ensures that the secretariat operates in the municipality's best interests.
7. **Flexibility and Adaptability:** Given the dynamic nature of urban planning, the secretariat must be flexible and adaptable, capable of responding to new information, changing conditions, and emerging priorities.
8. **Support and Buy-In from Leadership:** Critical to the success of any such body is the support and buy-in from the municipality's leadership, including the council and senior management. Their commitment to the secretariat's role and decisions is essential for ensuring that its recommendations are taken seriously and implemented effectively.

For smaller municipalities like Lakeshore, adapting these principles to their specific context, resources, and needs can help ensure that their planning processes are efficient, integrated, and aligned with long-term strategic goals



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