

May 9, 2018

Town of Ladysmith
410 Esplanade
PO Box 220
Ladysmith, BC V9G 1A2

ATTENTION: FELICITY ADAMS, DIRECTOR OF DEVELOPMENT SERVICES

Dear Ms. Adams:

REFERENCE: DEVELOPMENT APPLICATION PROCESS REVIEW

Attached is the Final Report of the Development Application Process Review. Our consulting team of Leftside Partners Inc., Defero-West Consulting, and Neilson-Welch Consulting Inc. (the consultants) was honoured to be awarded the project, and acknowledges the cooperation and hard work of Ladysmith staff in completing the project.

Please feel free to contact me directly if you have any questions or comments, or if you require any further information.

Sincerely,

LEFTSIDE PARTNERS INC.

A handwritten signature in black ink, appearing to read 'Sherry Hurst', with a long horizontal stroke extending to the right.

Sherry Hurst, M.Pl., RPP, MCIP
Principal



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1.0 PROJECT OVERVIEW

Ladysmith is a growing town of more than 8,500 people. The Town takes pride not only in Ladysmith's character, but also the quality of the amenities and services delivered. In order to continue to provide the growing community with excellent service, the Town commissioned this study to assess how its development application processes can be improved to meet the demands from the development and building community, while ensuring sufficient oversight and due diligence to uphold the community's planning and sustainability goals, Town character and public interest. This study was therefore intended to identify some of the issues and different perspectives on the development application processes at the Town, and determine what changes or practices are available to address those issues. The study was a priority because the Town wants to build upon its record and ensure it is engaging with the development community to better understand the needs of the industry, and identify options to respond to those needs. The Town is committed to working together with the development industry to facilitate growth and investment while enhancing the Town's character, livability and sustainability.

2.0 STUDY PROCESS

The following summarizes the steps involved in the review process.

Review and Research

The consulting team reviewed the Town's current development processes, forms, brochures, bylaws, as well as terms of reference for the Town's committees. Information regarding the number of applications and processing times for the past 10 years was also reviewed, as well as the outcomes from the building permit review process. The Town had also conducted some comparative research with other Island municipalities, and this was combined with the team's research and knowledge of other municipal practices and documented best practices.

Interviews

The consultants interviewed Town staff, including the CAO, representatives from Planning and Engineering departments, as well as Council members. In addition, the staff used the list prepared by the Town of applicants over the past few years and contacted 22 of the applicants on the list to request interviews. Some applicants declined, and others did not respond. In total 13 applicants were interviewed in depth over the phone.

Survey

An online survey was prepared and reviewed with the Town. The survey was intended to be brief, to encourage participation, but asked questions about the type of application, the characteristics of the applicant (full-time developer, owner



applicant, etc.), and years of experience applying with the Town. The survey asked applicants to rate aspects of the application process, as well as the level of customer service in various categories. Applicants had an opportunity to identify things that were going well with the process, as well as items that needed improvement. Applicants were also asked to identify other jurisdictions that had an exemplary process.

At the conclusion of the survey, the results were compiled and analyzed. There were 16 surveys filled out. A copy of the survey is included in Appendix A, with the aggregated results provided in Appendix B.

Developers' Forum

A developers' forum was hosted on April 12 to report back on the feedback received from both the interviews and the survey, and provide an opportunity for further feedback from the development industry. The event was hosted at lunch over a 2-hour period, and included a presentation, some open house boards, and facilitated roundtable discussion. Lunch was provided. A brief two-page newsletter was distributed at that time with some results highlights, and a form was available to provide feedback on the options to improve the process. The newsletter and feedback form were also emailed out to all the Town's applicant contacts. The newsletter (see Figure 1) is included in Appendix C, and a copy of the forum boards is in Appendix D.



Figure 1: Developers' Forum newsletter

Final report

The preparation of this report, submitted to staff initially as a draft, then finalized after a review period, was the final step in the process.

3.0 WHAT WE HEARD

The interviews and survey highlighted a number of interesting perspectives regarding aspects of the Town's development application process. It revealed strengths and identified opportunities for improvement.

3.1 SUCCESSES

Overall, the results of the survey and interviews indicated that the Town was doing a good job at processing applications, and in particular the planning department staff were well-regarded, and were delivering high levels of customer service. Based on the feedback provided, the Town was particularly well-regarded in comparison to other communities by those who had experience working and making applications in other jurisdictions.



DEVELOPMENT APPLICATION PROCESS
SCALE = 1 (strongly disagree) to 5 (strongly agree)



Figure 2: Average Survey Results, Development Application Process

CUSTOMER SERVICE RATINGS

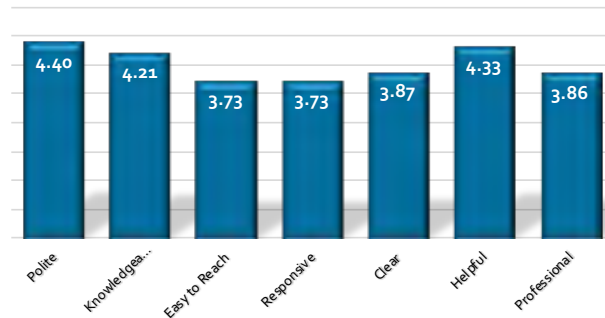
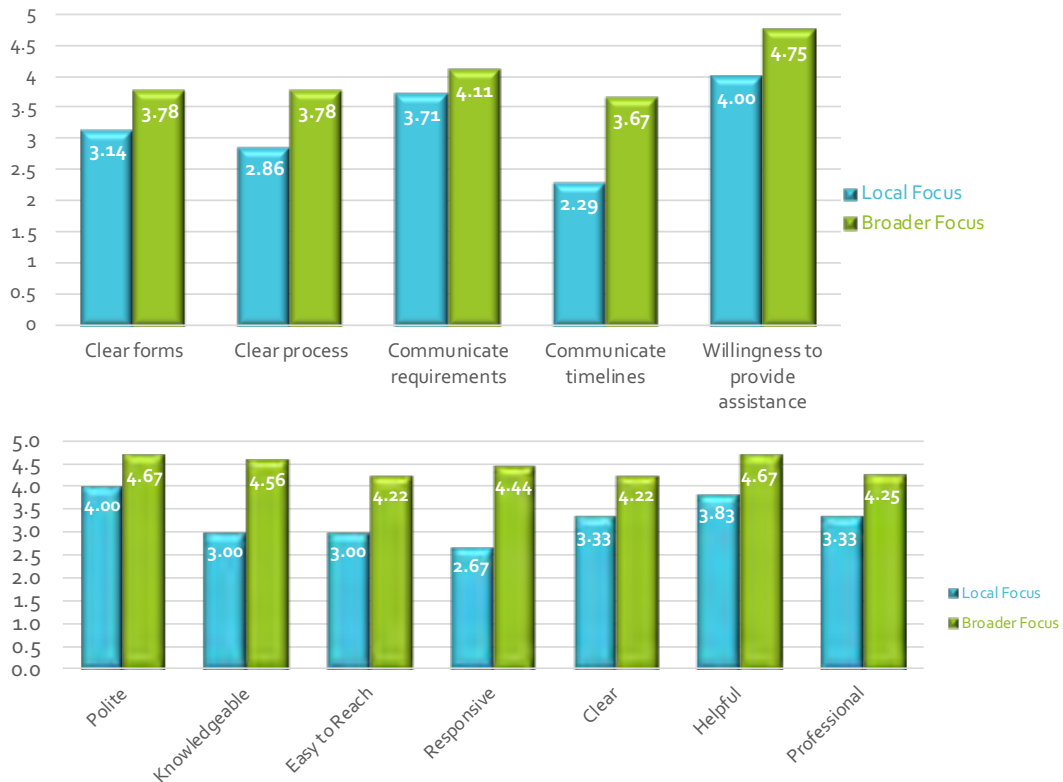


Figure 3: Average Survey Results, Customer Service Ratings

Both the Town’s application process and customer service were rated more highly by applicants with projects and experience in other communities, and those who are full-time developers or industry professionals (planners, engineers, surveyors and architects).

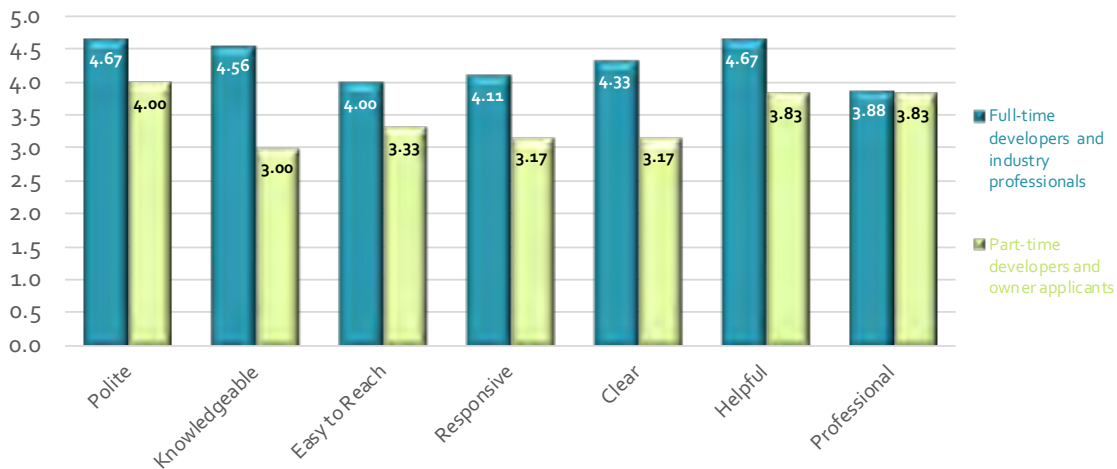
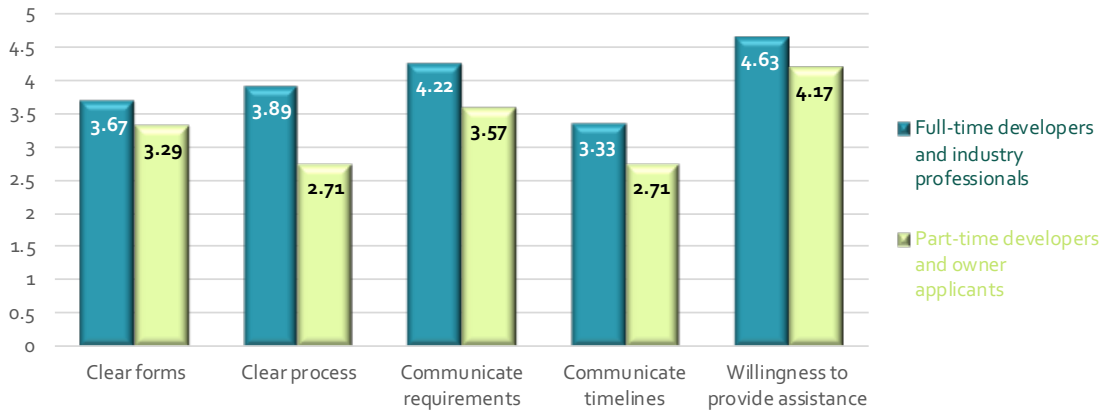
LOCAL APPLICANTS VS. THOSE ACTIVE OUTSIDE LADYSMITH



Figures 4 & 5: Survey Results, Local Applicants vs. Those Active Outside Ladysmith, Development Process and Customer Service Ratings



FULL-TIME DEVELOPERS & INDUSTRY PROFESSIONALS VS. PART-TIME DEVELOPERS AND OWNER APPLICANTS



Figures 6 & 7: Survey Results, Full-time Developers & Industry Professionals vs. Part-time Developers and Owner Applicants, Development Process and Customer Service Ratings

3.2 OPPORTUNITIES TO IMPROVE

The survey feedback that identified lower satisfaction levels and applicant concerns centred around a few aspects:

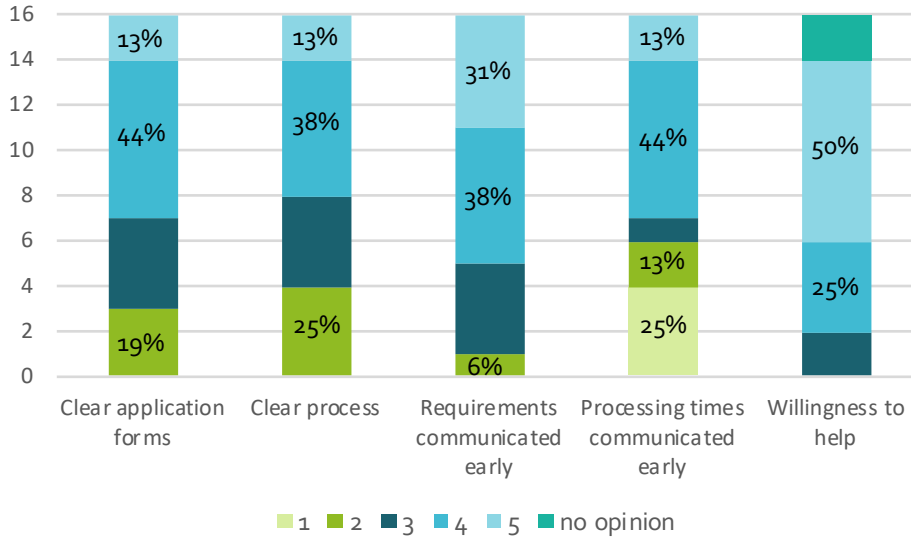
- Understanding the application process
- Understanding all the requirements at the outset of the process
- Having a clear understanding of the timeline (and achieving that timeline)
- Town’s responsiveness in returning calls and responding to questions.

The items with lower satisfaction ratings in both the application process and customer service levels are shown in the charts below in green at the bottom of the columns. As noted above, many of these concerns were identified by applicants who

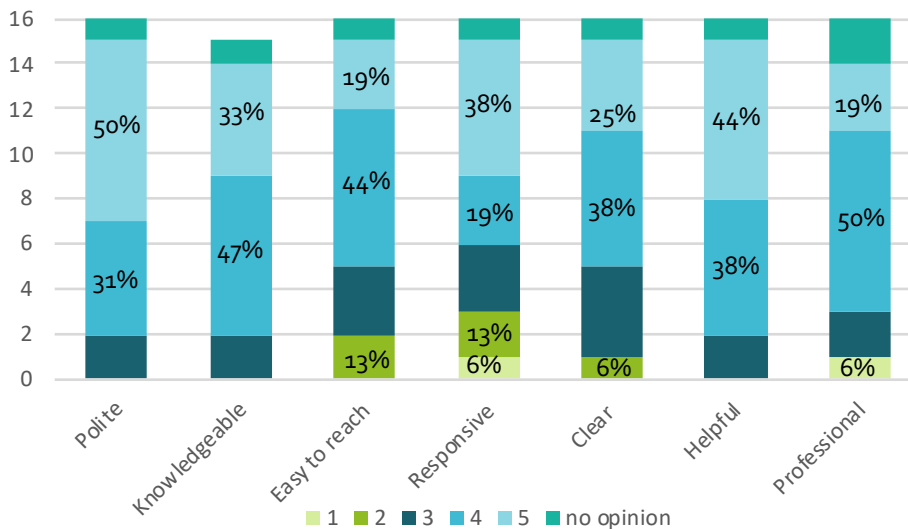


characterized themselves as either part-time developers (i.e. not their full-time job, but often have a project or two on the go), or owner-applicants.

DEVELOPMENT APPLICATION PROCESS RATINGS (ALL RESPONSES)



CUSTOMER SERVICE RATINGS (ALL RESPONSES)



Figures 8 & 9: Survey Results, Development Process and Customer Service Ratings

Unique Circumstances

The interviews and surveys also highlighted concerns about a few complex applications that appeared to have unique circumstances. These cases represented multi-faceted applications, with multiple approvals, involvement of more than one



department, and where key infrastructure decisions were required. While it is still important to learn from these applications and experiences, and review them to determine what could be improved, it is useful to recognize that there will always be some applications that represent unique challenges that are difficult to anticipate as part of the process. These applications often represent outliers, and are not necessarily indicative of larger process issues.

4.0 ISSUES AND OPPORTUNITIES

The following issues and opportunities are based on what was learned from the survey and interviews, as well as review and knowledge of best practices, and practices in other jurisdictions.

4.1 WHO IS WELL SERVED?

It was noted previously that those who either have experience developing in other jurisdictions, as well as those who identify themselves as industry professionals, rated the Town's process and customer service highly. It is promising to learn that the Town is well-regarded by industry professionals, and this rating bodes well for the Town's attempts to attract experienced developers from across BC and beyond. Those who have experience in other communities are perhaps more likely to network with other developers and spread the message that Ladysmith is a good place to do business. The message from many of these applicants was that Ladysmith is doing well, is easy to deal with, and that the applications were processed in a timely fashion. Applicants indicated the Town rated highly in comparison to much larger centres, including Nanaimo, North Cowichan, and several CRD communities.

The flip side of this message is that the Town's service is not perceived as well by those applicants who are local, and who are not experienced developers. Those applicants are rating the process, and the service they are receiving, lower. So while the Town's process seems to provide excellent service to professionals who know what they are doing, it isn't working as well for those who are not as experienced with the development application process.

The ability to serve inexperienced applicants well is an issue that many municipalities struggle with tackling. It is well documented that applications from professionals are typically processed more quickly by municipalities, in part because these applicants know the process, they know what needs to be included, what to expect, when to contact the Town, and how to get what is needed. From a staff perspective, those who do not understand the process require more time in almost all aspects of the process – explaining the process, advising them what is needed, and helping connect them with the professionals that can provide the reports, title searches, drawings,



etc. that are required. Some municipalities have two-stream processes: one for experienced or “pre-approved” applicants and another for those that need more assistance with applications. Some municipalities are reviewing whether to charge applicants who do not have a professional to manage the process a higher fee in recognition of the additional help that staff provide to these applicants. The move by most municipalities, and best practice of accepting only complete applications, is consistent with this approach.

While charging inexperienced applicants higher fees, or refusing their incomplete applications might be a way to encourage the use of a professional in some communities, this might not be an approach that the Town of Ladysmith wants to pursue. Inexperienced applicants are most often local residents, and the Town is as interested in delivering good service to these applicants as it is in attracting sophisticated developers. Several improvements to the process identified in this report are therefore focussed on opportunities to improve service levels to inexperienced applicants (without jeopardizing the high service levels already provided to more experienced applicants).

4.2 IMPACT OF STAFF

Another issue identified during the research is the impact that individual staff members have on the level of service provided. While it is critical to have good processes in place, the feedback received served as a reminder of how the actions of individual staff members can significantly impact the experienced and service level for an applicant. This is equally true on the positive and negative ends of the scale. Several applicants referenced outstanding service received by individual staff members. Some applicants, however, noted negative experiences with individuals. While one negative experience or unsatisfied applicant may seem minor, in a small community such as Ladysmith, where residents are well connected with other community members, the experience of one applicant can quickly become the perception of many. Unsatisfied applicants often seem more likely to share their experiences with others. Positive experiences seem to spread or be shared or celebrated less often.

The Town is already aware of the challenges in finding and retaining good staff in today’s market. Although the Town has the benefit of being a vibrant waterfront Island location, and is a desirable place to live, the affordability of living on the Island, high demand for qualified local government staff and availability of jobs in the various local governments makes it even more challenging to find and retain good staff. Many local governments are working hard to create a positive culture and great work environment as incentives to supplement collective agreement compensation and holiday time. Great service starts with great staff. While not reviewed as part of



this process, it is worth noting that other local governments, in recognizing the challenge to recruit and retain good staff, have initiated strategies to:

- Review union contracts (compare pay scale, holidays, training opportunities, etc.)
- Ensure staff have the tools to do their job well (equipment, software, training, etc.)
- Create a positive culture through the celebration of staff successes
- Establish and build a relationship between staff and Council so that staff feel supported by Council and motivated to achieve Council priorities.

4.3 IMPACT OF COUNCIL

It may seem that a good development application process, and a review of it, has little to do with Council. However, there are many ways in which Council affects and impacts the process.

Building on the previous section that references the ability to attract and retain good staff, Council can play an instrumental role in providing a supportive environment. One need only look to other examples on the Island to point to jurisdictions where Council has created an environment where local government staff are not interested in working. An acrimonious Council can make it difficult to attract or retain qualified staff in a market where there are multiple job opportunities. While there are obvious poor examples reported in the news, there are also many good examples where staff feel supported in their work. Staff at one municipality known for its fast processing specifically commented that Council recognizes that mistakes will be made as they work to advance applications quickly, and that Council focuses on the successes and not the mistakes. Staff support is often expressed publicly during public hearings and Council meetings, and Council does not tolerate criticism of staff. Celebration of staff successes for a job well done can send a message to residents and applicants.

When speaking with other municipalities regarding development application processing, one of the consistent messages was that processing development applications is easier for staff in jurisdictions when the staff review process and subsequent recommendations are routinely approved and supported by Council. In many municipalities, if applicants know they do not have the support of staff, they will opt not to proceed to Council. In other communities, applicants want to proceed to a Council meeting anyway, knowing that Council may not share the same perspective as staff, and may approve the development regardless of the staff recommendation. It is therefore useful to remember that if a Council does not publicly support staff – not only staff recommendations that come to Council, but also the role of staff members, their expertise, and ability to process applications – this can have impacts on the propensity for applicants to listen to staff advice during the process.



In addition to providing support for staff through consistent decision making, Council has a role in listening to, and addressing complaints. On the one hand, Council members must always be open to listen to residents and concerns they have; however, many times the complaints may be best handled or addressed at a staff level. Once Council members become directly involved in trying to solve a problem, it in turn encourages more residents or applicants to go directly to a Council member with a complaint rather than trying to resolve that issue through other, often more appropriate and efficient, channels. Council members should know where to direct those who have issues or complaints, so they are not put in the position of trying to solve process or Town staff concerns. Council should discuss, as part of the orientation process, a protocol on dealing with the range of requests and concerns they receive, to help them deal with requests and concerns consistently.

The role of Council was raised several times by applicants who had concerns with:

- Ensuring Council members are informed on applications (expressed concern that Council members are not conducting a site visit, attending the public meetings held on an application, or speaking to applicants to get more information. Some applicants felt Council was not well informed on their applications).
- Concern that Council priorities such as strategic plans often require significant amounts of staff time. Given the small size of the Planning and Engineering departments, these strategic projects result in less resources available to process development applications. Applicants wanted development application processing to be identified as a Council priority. In larger municipalities, long range planning and development planning have dedicated staff, so long-range plans or policy planning (OCP, area plans, zoning bylaws, subdivision design, etc.) can proceed without impacting the resources dedicated to processing applications. Similarly, there are often “development engineering technicians” who are dedicated to the subdivision or application review process, regardless of any capital improvement projects or master planning that requires engineering department time. Because the Town is not large enough to have separate staff dedicated to each function, it has to be cognizant of the impacts different priorities and Council projects will have on development application processing timelines. Placing application processing as a priority was the top rated improvement identified by one of the roundtables at the Developers’ Forum.
- Some discussions with Council members revealed a misunderstanding or lack of knowledge regarding legislative authority – what staff has authority to approve (or what flexibility staff has to approve something that may differ slightly from a policy or bylaw), and what decisions must be made by Council. In addition, what authority is delegated to staff, and what could be delegated.



These topics can be covered at Council orientation, but can be a lot to learn or digest at that time, particularly for new Council members. The legislative and policy context can also be emphasized in reports to Council.

5.0 OPTIONS FOR IMPROVEMENT

Based on the review, including the issues referenced in the previous section as well as those identified through the interviews and survey, a number of options for improvement have been identified. A range of options is discussed in each of the following sections, including ones that are likely to have the most relevance for Ladysmith. Following the discussion of the range of improvements is a summary of recommended changes, with an emphasis on some key priorities moving forward.

The improvements are grouped into three main categories:

- Communications
- Process
- Relationship

5.1 COMMUNICATION

Options for improving communication are based in part upon the suggestions referenced in the survey, interviews and developers' forum, but also on the need to improve service levels for inexperienced applicants, as identified previously. One of the key ways to improve service to those who are not familiar with the development application process is to provide simple, accessible information regarding how the process works – what is required, what the timelines are, and what the process involves. Conversations with some municipalities revealed this as their primary aim with development applications –ensuring that the level of experience of the applicant does not matter, and that the process can be easily understood by all. In Ladysmith many applicants are smaller builders, developers or land owners without staff or outside development consultants. For these type of applicants, simple, clear application requirements for rezoning, subdivision, development and building permits is key. Understandable forms, checklists and guides can eliminate unnecessary delays caused by incomplete or inaccurate submissions. The Greater Vancouver Home Builders Association's 2017 report, *Housing Approvals Study: A Review of Housing Approval Processes in Metro Vancouver* notes that “a pre-application checklist, including sample forms, identifying the most common pitfalls of incorrect/incomplete applications, will aid in submissions of a correctly completed application.”¹

¹ *Housing Approval Study: A review of housing approval processes in Metro Vancouver*, Greater Vancouver Home Builders Association and Landcor Data Corporation. 2017. p. 11.



Accordingly, there are several types of materials that can assist in making the process understandable, including:

- Simple **checklists** that identify requirements for all applications, and a second set that are identified based on the specifics of the application (i.e. riparian area, or hazard lands, traffic study, etc.). The second group of requirements will give applicants a sense of what MIGHT be required, and would be reviewed together with staff during a pre-application meeting to confirm which, if any, of those additional requirements pertain to their application. The current development application checklist includes 53 items, making it overwhelming for many applicants, particularly when many requirements do not apply. The checklists should focus on the basic requirements.
- A **process guide** or handbook for each application type – Rezoning/OCP Amendment, Subdivision, Development Permit and Development Variance Permit. The guide would include, at a minimum, a checklist, flow chart illustrating the process, and would provide examples of the materials required such as site plans, explaining why each bit of information is needed. Illustrations are key. Photos are particularly useful for development permit guides referencing design guidelines, to help residents who are not architects appreciate what finishes, exterior materials and elements the Town is seeking (and often just as important – what is NOT acceptable). Process guides can also include tips for a successful application, common pitfalls, FAQs, the role of Council vs. staff, expected timelines, and a list of fees and costs to consider (some fees will be set, others such as works and services cannot be specifically identified, but they can still be noted as something that applicants can expect, and how that number is determined). Ladysmith’s Coach House guide is a good example of providing accessible information to help applicants.

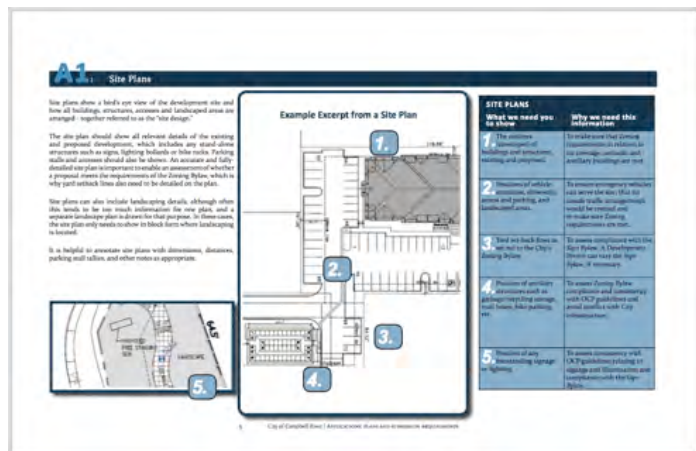


Figure 10: City of Campbell River Development Permit Handbook

- **Application forms** themselves. There were comments during the review that the application forms were daunting, making more than one applicant reluctant to apply. One applicant subsequently discovered that much of the form did not apply to his situation (as noted in the previous comment



regarding the development application checklist's 53 items). Regardless, the message that any of the forms appear daunting is not a reaction the Town wants, and that response is likely to exacerbate the divide between the perceived service for experienced vs. inexperienced applicants. The sustainability checklist, in particular, is easily understood by experienced applicants, but may be more effort for inexperienced applicants who are not clear on how their project can best address the Town's sustainability goals, and are unclear about what supporting comments and documentation to supply.

- Some municipalities include a **feedback form** that applicants can fill out after the project to report back on how the process went (both for staff to continually improve, and also to be able to record and report back to Council). These forms are typically found online. While this practice is becoming more common, it was not identified as a priority by Ladysmith's applicants.
- **Online tracking** is another tool that can provide extra information for applicants, but it is not something that is of particular benefit to less experienced applicants. Many municipalities do provide information regarding the number of applications underway, the type, purpose and location. If nothing else the information can be useful for Council to not only gauge volumes, but also to look at the specific applications so they know what projects are coming, and which projects they may not know about (i.e. helping to ensure Council remains informed). The information can be provided in a spreadsheet

Application Information and Status Sheet – Active/ Ongoing Only/Newest to Oldest Updated March 21, 2018

Development Permit (DP) Application	Legal Address	Purpose	Application Progress/Status	Status
DP-18-04	368 Wilkeson Lake Road Lot 1, Section 18, Highway 58 West Plan 1916010	Water and Riparian A&D Promotion of Energy Conservation and Reduction of Greenhouse Gas Emissions - Integration through the setting of a Green Building Standard for the project.	Received March 13, 2018	APPROVED March 13, 2018
DP-18-04	1172 Deer Mountain Lot 8, Section 9, Range 4, Plan 1916010	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gas Emissions - New Single Family Dwelling and Accessory Building.	Received February 9, 2018	APPROVED February 21, 2018
DP-18-04	710 Neil Carter Court Lot 8, Section 28, Plan 19181361	Water & Riparian A&D Reduction of Greenhouse Gases (RPA - Tree Cut Permit)	Received February 14, 2018	WIPY STAFF, awaiting Potential Riparian Action Package Assessment
DP-18-04	8271 Rossview Arm Road B & 1760 10th Ridge Place Lot 1, Section 74 & 75, Plan 1916010 Lot 1, Section 14, Plan 19120466	Deep Steep, Water and Riparian, and Energy Conservation and Reduction of Greenhouse Gases	Received February 16, 2018	APPROVED February 23, 2018
DP-18-04	115 Rossview Road Lot 1, Section 57, Plan 19120466	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - New Single Family Dwelling and Accessory Building)	Received February 16, 2018	APPROVED February 23, 2018
DP-18-04	14916 John O'Donnell Highgate Lake Road and Campbellton Highgate Lake Road Lot 1, Section 39, Plan 19170215 Lot 1, Section 39, Plan 19172833	Water and Riparian, Surface Impervious A&D Promotion of Energy Conservation and Reduction of Greenhouse Gases (RPA - Lot Area Adjustment)	Received November 16, 2017	APPROVED February 23, 2018
DP-18-04	888 Southwood Drive Lot 1, Section 74, Plan 19160101	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - New Single Family Dwelling, Accessory Building A&D)	Received November 16, 2017	APPROVED January 25, 2018
DP-18-17	3047 Skene Road Block 1, Section 77, 31494 Plan 1916010	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - New Single Family Dwelling, Accessory Building A&D)	Received October 23, 2017	APPROVED December 9, 2017
DP-18-17	3047 Skene Road Block 1, Section 77, 31494 Plan 1916010	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - New Single Family Dwelling, Accessory Building A&D)	Received October 23, 2017	APPROVED December 9, 2017
DP-18-17	2029 Skene Crossing Lot 1, Section 8, Range 4W, Plan 1916010	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - New Single Family Dwelling, Accessory Building A&D)	Received September 8, 2017	APPROVED October 18, 2017
DP-18-17	883 Sandstone Road Lot 1, Plan 19162247	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - New Single Family Dwelling, Accessory Building A&D)	Received September 8, 2017	APPROVED October 18, 2017
DP-18-17	1712 Wilkeson Road The part of the South 1/4 of Section 16, Plan 1916010	Water, Riparian, and Riparian, Surface Impervious A&D Promotion of Energy Conservation and Reduction of Greenhouse Gases (RPA - Preliminary License Assessment/PLA-2017-022)	Received August 22, 2017	APPROVED December 18, 2017
DP-18-17	888 Sandstone Road Lot 1, Plan 19162247	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - New Single Family Dwelling and Accessory Building)	Received August 22, 2017	APPROVED September 26, 2017
DP-18-17	2046 Skene Road Lot 8, Plan 191615	Promotion of Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - Accessory Dwelling)	Received August 15, 2017	APPROVED September 26, 2017
DP-18-17	170411211 Wilkeson Lake Road Lot 17, Lot 20, Lot 1, Section 31, Plan 1916010	Water, Riparian, and Riparian A&D Energy and Water Conservation and Reduction of Greenhouse Gases (RPA - Water Conservation by Preliminary License Assessment/PLA-2017-022 - include building)	Received June 9, 2017 Council's Consent February 23, 2018. Staff report 04/26	APPROVED March 21, 2018

Figure 11: Development application tracking information (District of Highlands)

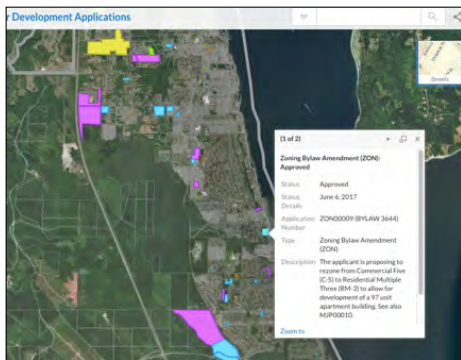


Figure 12: Development application tracking information (City of Campbell River)

format, consistent with the department's current tracking system (such as Highlands), or there are more sophisticated ways of displaying the information on a map. The biggest challenge with providing this information online is ensuring it is updated regularly, which involves additional staff time. The City of Campbell River indicated that their database, which is used to create the development maps that illustrate all applications, takes a staff member approximately two hours every two



weeks. The City already has, however, a GIS system that is used for other purposes, as a base for the map.

Based on the feedback received from the survey, interviews and Developers' Forum, the checklists and process guides are likely the most useful communication tools to improve the Town's communication with applicants. Reviewing and simplifying the forms is also recommended. Providing online information about development applications may be desired by Council as a means of staying informed about the applications in process, and was identified as being of interest to some, but not all applicants. Online tracking would be preferred, but is not recommended as a high priority.

In addition to the documents referenced above, a consistent message from applicants was the need for the Town to be responsive. Some applicants mentioned difficulty in getting hold of staff, or in having email and phone messages or inquiries left unanswered. Some applicants felt that this was indicative of a lack of customer focus by the Town. The Town does have some documented service standards, including returning phone calls "as soon as you can" and preferably within the same working day, with a 24-hour reply standard for emails (noting that if an issue is complicated, to send a reply saying you received the email, and estimating when you will be able to provide a complete response). However, the standards are not a formal Council policy, and may not be top of mind, particularly in departments with higher staff turnover, or during busy times. It is recommended that the Town reiterate its customer service focus and response standards as a reminder to staff, perhaps even formalizing either a 24-hour or 48-hour response policy (email and phone calls), with responses encouraged to be even more prompt where possible. As noted previously, all it takes is for one staff member to be unresponsive to change the perception of an applicant. Emphasizing the customer service response policy was one of the recommendations that was highly recommended through the Developers' Forum feedback form.

5.2 PROCESS

There are a few aspects of the application review process that are done differently in other communities, as well as those identified as best practices, that the Town could draw upon. However, not all of the different approaches may be appropriate for Ladysmith, given its size and the nature of the development applicants. Process improvement opportunities are identified below.

Mandatory Pre-application Meeting (all applications)

Pre-application meetings happen in many instances already. These are meetings together with a potential applicant who brings forward a proposal for a development or subdivision. The meeting is often with representatives of both the engineering and planning departments, with the purpose of jointly identifying the requirements of the



application, and discussing potential challenges or roadblocks, as well as answering the applicant's questions. Applicants should leave the meeting confident that they understand what is required to make a complete application, and what the process will entail. Other jurisdictions have indicated that many applicants, particularly those who are not experienced, often underestimate the magnitude of costs involved in development. The pre-application meeting is an opportunity to identify some of those costs (fees, but also other cost items to consider, even if the amount is not yet known). When the file is complex, or the applicant is not confident with the process, staff can encourage applicants to engage a professional (noting that the time savings by having someone experienced navigate the system can offset the cost of hiring a professional). Applicants can be supplied with the checklist and process guide, and go through it so there is a good understanding of what is needed, the timelines, tips on how to proceed, etc. By the end of the meeting, engineering, planning and the applicant should be on the same page, and the applicant and staff will have established process timeline expectations.

It is noted that given the limited staff in engineering and planning, it may be difficult to coordinate meetings with everyone. Standing meetings should be scheduled for both pre-application meetings (i.e. every Monday morning from 9 – 11 every second week, or once a month) as well as for application review (same time, but on alternating weeks) to ensure staff availability for pre-application meetings and review meetings, and then cancel meetings when they are unnecessary. The frequency of meetings will depend upon the volume of applications. Depending on the application type, some pre-application meetings could be undertaken with just the planning department (i.e. where there are no engineering implications, such as many development permits, temporary use permits, some façade improvements, some variances, etc.).

Pre-application meetings were noted by survey applicants as one of the more helpful options for improvement. Furthermore, pre-application meetings (together with improved process guides and checklists) were noted in the Developers' Forum as the main priority for improvements from one of the two roundtables. A total of 10 feedback forms were submitted from this event, and 40% of them referenced mandatory pre-application meetings in their top 3 priorities for improvements to the process.

Complete Applications

The concept of only accepting complete applications is related to the pre-application meetings referenced above. Submission of complete applications is always preferred by staff. Complete applications reduce time chasing down applicants to make additional requests (which then take the applicants time to obtain), and enable more efficient processing. When planning staff can sit down and review a file, make recommendations and write a report, it results in a timely review. When planners



begin a review and then realize some information is missing, the file gets put aside, and time is wasted while the missing piece is requested, obtained, received, and the file is reviewed again.

Many municipalities indicate that they “will not accept incomplete applications.” However, not all (including those that make this statement) follow this rule. The City of Campbell River, for instance, has this wording on all the City’s development application materials, but recently noted that it will likely move to refusing incomplete applications in the fall. It is useful to promote the message and intention of only accepting complete applications prior to making that change.

In 2014 and 2017 the Greater Vancouver Home Builders’ Association commissioned reports on the residential building approval process to compare differences, similarities and identify best practices among municipalities in the Greater Vancouver area. In 2014, the best practice of “refusing to accept incomplete applications” was identified in the report.² By 2017, refusing incomplete applications was standard among most municipalities. Instead, in 2017, the report’s language regarding the best practice has evolved to emphasize the municipal role as “gatekeepers.”

“The gatekeeper function is to prevent incomplete and/or poor quality applications from entering the system. Given the additional staff time required to deal with substandard applications, preventing their entry at the outset can improve staff productivity, and improve processing time for competent, professional builders submitting quality applications.”³

While the Metro Vancouver context is not analogous to Ladysmith, where many of the builders and applicants are local residents that do not have the breadth of experience of many Metro Vancouver developers, the principal that substandard applications are one of the primary causes of delays in the process still holds true. These types of applications take more staff time, cost the municipality more money to process, and delay not only that application, but by extension impact staff ability to spend time on other applications, thereby causing delays throughout the system. While some municipalities address this concern by charging higher fees to applicants who do not use a professional (i.e. development manager or coordinator), Ladysmith needs to recognize who the applicants in the Town are, and service those clients well. Rather than just turning such applicants away, more education is needed – through the use of checklists and guides, and through a comprehensive pre-application process. Some municipalities in Vancouver charge for the pre-application process, given that it does use staff time and resources. However, a pre-application

² *Residential Building Approval Processes In Metro Vancouver*, Greater Vancouver Home Builders Association. 2014.

³ *Housing Approval Study: A review of housing approval processes in Metro Vancouver*, Greater Vancouver Home Builders Association and Landcor Data Corporation. 2017. p. 10.



meeting can have the effect of minimizing incomplete applications (and eventually help staff justify the refusal of incomplete applications because the checklists and information requirements are communicated to the applicants during the pre-application meeting), and help smooth the rest of the process. In this way pre-application meetings can actually help to reduce staff workload. As part of the process for each application, the time involved should be accounted for in the determination of appropriate application fees.

During discussions at the Developers' Forum, it was suggested that some, but not all information is required for the Town to initiate its review. If this is indeed the case, any flexibility regarding timing of information could be identified during the pre-application process. However, this is rarely the case. Not only does having all the information in advance make for more efficient review by staff (i.e. especially because some information may then result in changes to the application), but it eliminates the delays caused by applicants – both in communicating the missing information and then the time to obtain that information, which interrupts the process. Incomplete applications are often based on the misunderstanding that there is some value in getting the review started, or that the other information requested isn't necessary (either at the beginning of the process, or sometimes at all). In Coquitlam's development application process review, a report to Council noted that "In the name of customer service, the past practice of accepting incomplete applications sets false expectations for customers as these applications are not able to proceed in a timely way."⁴ In that same report it indicated that "Staff have in the past, accepted incomplete applications on the expectation that

"My application was processed in half the time they quoted because I had a complete application."

- Ladysmith applicant

outstanding requirements would be submitted shortly. However, this has not always been the case and staff has not been able to do a thorough review in a timely manner as they are waiting for the applicant to submit additional information (and are then criticized about lengthy processing times)."⁵

Providing more information in the process guide and during the pre-application process not only of what is needed but why should help to educate applicants on the process. Furthermore, the emphasis that complete applications will be processed more quickly should be an incentive to some. While this is not exactly a two-stream process or a "nexus line" for applications (like some municipalities are pursuing), complete applications will always be able to be reviewed more quickly, which has the effect of fast-tracking complete applications. Staff can promote complete applications by noting that they

⁴ Report to Council from Director of Development Services. City of Coquitlam. July 21, 2017, p. 4

⁵ Report to Council from Director of Development Services. City of Coquitlam. July 21, 2017, p. 7



are fast-tracked. Staff could also add a column to their current tracking spreadsheet to note when complete applications were submitted, to be able to identify the difference in processing timelines at a future date, or to be able to share estimates regarding complete application processing times (e.g. it may be that a complete application is likely to take you 4 to 6 weeks, but those who submit incomplete applications are generally averaging more of a 8 to 12-week timeline).

Single File Manager and Point of Contact

One concern identified during the interview and survey process was knowing who to call regarding different issues or questions with an application. In particular, the cross-over between planning and engineering can be challenging for applicants to understand. The application may be planning related, such as a rezoning, but there may still be servicing issues that need to be resolved in order to allow the proposed use. Servicing issues require information from engineering. Often municipalities will have a “development engineer” who works on development application review, but who has the technical engineering knowledge to bridge the departments. Other municipalities have a combined development services department that includes engineering. Ladysmith has neither the staff resources to have a dedicated development engineer, nor a combined engineering and planning department. To complicate matters, planning and engineering are located in two different buildings. Applicants should not need to know which department they need to contact to make inquiries on an application. Providing a “one stop shop” for all development applications (planning, subdivision, building) is a higher level of service that would make it easier, particularly for those applicants who aren’t experienced or who don’t know the differences between the processes or application types.

The physical separation is not only challenging for applicants wanting to speak in person to both departments, but also results in less interactions between the staff in these departments. Often even informal interactions can help facilitate the sharing of information. While amalgamating the departments, or even just locating them within the same physical location may be the ultimate goal to improve service, in the interim, providing each application with a single file manager as the contact would improve service. Often this is the case already, particularly for those files that only involve planning review. However, where there is an application that has both planning and engineering implications, there needs to be a coordinated approach and one person responsible for funnelling information back to the applicant. Internally, this will mean that someone in planning may be responsible for obtaining answers from engineering, or vice versa. Responding to internal inquiries will be as important as responding to outside information requests in order to maintain high levels of customer service. The file manager will be the one who will have ultimate responsibility for customer service levels for that file, regardless of where the information is coming from.



Internal Review

In many municipalities complete development applications are referred to departments and advanced to a multi-disciplinary review team meeting shortly thereafter (i.e. within two weeks of receipt). These meetings are often referred to as the “development review team” or “development review group” and typically involve representatives from several departments. In some large municipalities this group can involve the fire department, solid waste, transportation, engineering, planning, parks, bylaw enforcement, and building. The joint staff meetings are generally an opportunity for each department to provide feedback on the application, identify any additional requirements or concerns – everything from concerns regarding garbage and recycling collection to frontage improvements, park needs, fire access, transportation concerns, etc. Occasionally, for more complex applications, the applicant is invited to the meeting to hear what staff have to say, or to provide further explanations.

The development review team meeting is not unlike the pre-application meeting, although at many municipalities, it is more comprehensive in the feedback provided and the departments consulted. In addition, the applicant has ideally listened to the preliminary feedback at the pre-application meeting, made adjustments if necessary, and has submitted a formal (complete) application. Staff comments are therefore based on an actual submission. After the development review team meeting, staff prepare a letter for the applicant that documents the feedback and any additional requirements for proceeding. The letter will confirm items requested in the pre-application process, but there may be additional requirements that are identified with the more thorough inter-disciplinary review of the complete application. The letter can provide clarity for the applicant on what is needed, and act as a reference for both staff and applicants later in the process.

Currently in Ladysmith development applications go through an internal review process and a staff meeting that often includes multiple departments (i.e. planning, engineering, and building when required). In Ladysmith, the various departments have been included on a more “as needed” basis. This process is encouraged to continue as a regular standing meeting for each of these departments, with an eye to monitoring whether the frequency of meetings need to be adjusted to respond to application volumes. Some applications are primarily planning related, (other municipalities often exclude minor variances or issues that may have limited impacts outside planning from the comprehensive development review team meetings), and could continue to be reviewed solely by the planning department. However, for the majority of subdivision, rezoning, and development permit applications, the ability to identify potential concerns often comes from having the different perspectives and expertise from each department. For instance, building can appreciate how the proposal will impact built form and may be able to encourage alternatives to meet various sustainable building objectives, engineering can identify servicing or



operational concerns and planning may be able to foresee planning issues or layout concerns associated with a subdivision application, such as changes that will minimize the number of variances or development permits required for builders. These comments may not always relate to the initial planning application, but could identify concerns or opportunities related to subsequent processes such as building permits.

Committee and Public Meetings

In addition to the internal review, the Town requires some applications to be reviewed by committees, and some applicants to host public information meetings in order to gather input from the surrounding neighbourhood. While neighbourhood and committee meetings can provide valuable community input, eliminating the meetings is one option if the Town is looking to streamline the application review process. The extra time associated with both committee review and public information meetings was referenced by applicants as a potential solution for paring down the process.

1. Committee meetings

The Town of Ladysmith has an Advisory Planning Commission, Advisory Design Panel and a Heritage Revitalization Advisory Commission, each of which is referred different types of development applications. Staff currently refer development permit applications to the advisory design panel for form and character for multi-family, commercial and industrial projects, in addition to rezonings (as directed by Council) and when a change in building use is proposed. There are situations where the development permits are not referred, including amendments that are consistent with the original guidelines, additions that represent 15% or less of an increase in floor area, as well as façade improvements in the downtown, and DP applications for signs that are issued consistent with an issued development permit. The latter two – signs and façade improvements in the downtown area – are instead referred to the Heritage Revitalization Advisory Commission. The Advisory Planning Commission is referred development variance permits that propose changes in height greater than 3.0 metres, and rezonings (as directed by Council).

In comparison to the practices in several other BC municipalities, Ladysmith makes more use of citizen committees in their review process than many other municipalities. Most communities of Ladysmith's size (and even larger) don't have Advisory Planning Committees, Design Review Panels and Heritage Commissions. Many have either a design panel or an advisory planning commission, although a handful of municipalities do have both. Because advisory design panels typically rely upon volunteers who are architects, smaller municipalities can often be challenged in attracting and retaining sufficient qualified volunteers. In October 2017 the Architectural Institute of BC was advertising the need for architects to volunteer for 12 different design panels in the province. Notably, the Town's ADP does not require



any members to be architects. Instead, the Ladysmith ADP membership is comprised of citizen representatives with “background in economic and social development, design and development.”⁶

In the past advisory design panels were relied upon to provide key guidance on the form and character of development proposals. However, development permit guidelines have evolved over time, providing more concrete form and character direction. Given that the Town’s ADP is not necessarily providing architectural advice, combined with the more detailed nature of most of the development permit guidelines now included in the OCP, it may be worth considering a combined advisory design panel/planning commission. This body could still include members with building/design industry experience, but also reflect the community input of an advisory planning commission. The committee’s recommendations and comments would still be forwarded to Council, but the feedback would not necessarily result in any requirement to make changes and re-submit to the committee (as some submissions require). While combining the two committees may make some sense, it does not reduce the number of referrals or meetings for development applicants. The exception may be that a design panel sometimes requires applicants to incorporate changes and re-submit plans to a subsequent advisory design panel meeting. A second review by the combined advisory design/planning commission is not anticipated. It would also eliminate any need for a rezoning to be reviewed by both the ADP and APC.

One option to address the delay that committee meetings can cause is to make use of teleconferencing or other means of reviewing and commenting on materials without physically attending meetings, particularly when committees do not meet frequently, or when scheduling becomes difficult. The Town has used some alternative approaches to in-person meetings, such as email circulation of plans, to reduce the need for scheduled meetings. The planning department noted that email “discussions” do not allow for the same level of discourse and due process, and these approaches have thus far had limited success.

If Ladysmith wants to facilitate faster review of development application, the Town could reduce the number or type of files that are referred to the committees. An example may be to limit referrals to the Heritage Revitalization Advisory Commission to proposed changes to structures designated as heritage buildings (or identified on a heritage register). This would eliminate the referral of development permits for signs in the Downtown area, and some facades, to the Heritage Commission.

⁶ Town of Ladysmith Advisory Design Panel Terms of Reference, approved March 3, 2008.



2. *Public information meetings*

Public information meetings were identified as a stage that adds time and cost for applicants. This stage is referenced in the Development Procedures Bylaw. Hosting a public meeting is a required step for rezoning applications, OCP amendments, and development variance permits where the request is for a height variance greater than 3 metres. The public meeting must be held at least 30 days prior to a public hearing for the OCP amendment and rezoning, and 14 days before consideration of the variance permit by Council. The meetings must be advertised in at least one issue of the local newspaper.

Applicants noted that this meeting not only adds time to the process, but considerable money is spent preparing the presentation and materials, as well as advertising. Concern was raised over the efforts and time expended, the fact that Council members do not always attend these meetings, and applicants noted that efforts to obtain early feedback from the community do not always translate into advantages at the public hearing stage. Applicants indicated that project opponents often won't attend or provide feedback at public meetings, and instead wait until the public hearing to express opposition. The efforts of applicants to consult with the community, listen to residents and incorporate changes into the proposal should be recognized as the project moves forward. For instance, if residents show up only at the public hearings with suggestions, there should be some recognition that the applicants provided opportunity to comment earlier in the process (especially if changes were made in response to that early feedback).

Public information meetings are most effective when there are some significant changes in use, policy or buildings proposed, and when there is flexibility in what is possible or planned for the property. This may not be the case for all rezonings. In some communities public meetings are voluntary, and are recommended when appropriate as a best practice to seek meaningful input from neighbours early in the process. Many applicants choose to host these meetings, even when they are not required, and are sometimes able to mitigate opposition by consulting with the neighbourhood and incorporating feedback into the proposal. Developers are more likely to take this approach if Council recognizes their efforts to consult with the community early in the process when evaluating their application. Staff can also emphasize to applicants the risk of opting for a faster process that omits the neighbourhood public meeting. Neighbours who have no opportunity to comment and shape the project are more likely to express opposition at the public hearing stage, which can result in delays, denied applications or the need to make revisions at later stages in the process.

Delegation

Delegation of authority to staff can be provided for Development Permits and sign permits. Currently Town staff are delegated authority to approve development



permits for signage and façade improvements, and amendments to development permits.

In some municipalities, all development permits are delegated to staff. This is the case in Langford, for example, which is a municipality that many developers regard as one of the best places to make a development application. The City is known for its “open for business” attitude and efficient processing of development applications. Other communities choose not to provide staff with the authority for all development permits, but instead delegate some development permits. Often the development permits delegated to staff are those that involve technical issues, such as permits with riparian areas or hazard lands. These types of DPs typically involve a report from a qualified professional, and planning staff review the reports for consistency with the Town’s standards, but otherwise rely upon the recommendations made by the professional (i.e. biologists, geotechnical engineer). Even when not delegated to staff, Council does not have the authority to turn down these permits unless there is something inconsistent with the Town’s guidelines. For instance, if an application for a hazard land DP is for a monster house that Council does not support, but the applicant has obtained the necessary geotechnical report and assurances that there are no impacts (and the use is consistent with the zoning regulations), then Council cannot refuse to issue the development permit. Given that these technical type of development permits typically meet the Town’s guidelines, rely upon assurances provided by professionals, and that Council has little flexibility in its approval authority, then the time and effort completing a report to Council, combined with the delay for the applicant, seem unnecessary.

Delegation of additional development permits was referenced during interviews, surveys and at the Developers’ Forum as a significant opportunity to speed up the processing time for some development permit applications. Over the past three years, development permit applications that are approved by staff have been issued significantly faster than DPs that require Council approval. In the past three years, a total of 70% of the DPs that are approved by staff were issued within 1 month (43% are issued within 2 weeks), compared to only 20% of development permits that Council must approve. It is true that sign and façade DPs may be simpler, however, hazard land and riparian DPs may also provide easy opportunities to reduce process with minimal impact on the results of the process. Delegation of authority to approve additional DPs was rated as the highest (most helpful) process improvement by those who filled out feedback forms at the Developers’ Forum.

In the past 3 years, a total of 70% of the DPs approved by staff were issued within 1 month, compared to only 20% of DPs approved by Council in the same time frame.



Timelines

The topic of processing timelines is both a process and a communication issue. On the one hand, applicants always appreciate fast processing; delays cost money, and holding costs can be significant. But what Ladysmith applicants indicated is equally important is having a realistic and achievable timeline that relates to their application.

Some municipalities post average timelines for different application types to give applicants an idea of what to expect from the process. Timelines are a common benchmark for building permits, where the review process is more standardized, and there is less variation (within new single-family dwellings, for instance). Given the standard process, municipalities can and do compare their building permit timelines with other communities as an indication of service levels and efficiency. Planning applications, however, encompass a significant range of complexity. A rezoning can be a minor text amendment to add a bank to a list of permitted commercial uses or could involve the proposed construction of a new 10-storey multi-family apartment building within a single-family neighbourhood, including significant traffic and servicing impacts, height variances and development permit design guidelines. Rezoning timelines are supposed to provide guidance for both these applicants. If municipalities set the bar too high, some applicants are likely to have unreasonably high expectations and ultimately be disappointed in the process; long timeframes can scare away prospective applicants. It is therefore difficult to indicate that all variances or rezonings, for instance, would take 3 months. Some municipalities get around this by noting the range of application processing times, suggesting that variances can be from 3 to 6 months, or rezonings from 4 to 12 months, adding the caveat that complex applications may require additional processing time. While a more accurate reflection of the scale of complexities and applications, these timelines are not helpful for applicants who do not know which end of the range their application falls.

Applicants interviewed during this review were asked about the importance of timelines. While faster was always preferred, applicants were less focussed on the overall timeline, and more concerned about receiving a clear indication from staff of the timeline for their application. In other words, the municipality's overall target or average processing time was not relevant. What applicants want is a reasonable estimate of the timeline for their specific application, and for a process that achieves that estimate. An accurate estimate may therefore not be possible to provide in a process guide, but instead may be a product of an initial review and shared during a pre-application process, or else after the internal development review process. Making a more informed estimate, and sharing it with the applicant early in the process may provide better service to applicants than focussing on the median timeframe based on past applications (which may or may not be similar to future applications).



5.3 RELATIONSHIP AND PARTNERSHIP

Other improvements to development application processes are less about the process itself, or about the communication materials, but instead are more about the relationship between the Town and the development industry. The relationship is the intangible support that can be maintained even when there are complex files that take longer than anticipated, or even when mistakes are made. For instance, the City of Langford has established a reputation for being open for business and helping advance development applications. The City acknowledges that sometimes mistakes are made, in part because staff are working hard to maintain quick processing timelines. However, there is a recognition by both Council and the development industry that the mistakes are due in part to the aims of the City to support the development industry. Langford's council does not focus on the mistakes, and they do not hamper the City's reputation.

Development Liaison Committees

Part of establishing a relationship with the development industry is about trust and providing opportunities for dialogue. While having an open door policy for applicants is one option, several municipalities have created a development liaison committee. This committee usually includes a few developers or construction industry representatives from the community, as well as representatives from a home builder association, construction industry or real estate board, and potentially the Chamber of Commerce. The committee meets together with Town staff from the planning, engineering and building departments to discuss issues, concerns, problems, or changes to municipal processes, bylaws or fees, etc. In general the committee provides a voice for developers to express concerns and successes from the industry's perspective. In other communities this type of committee is often a creation of the Urban Development Institute (i.e. UDI Development Liaison Committee), but while UDI has an active Victoria chapter, there is not one that represents the remainder of the Island.

If created, Council members could refer individual applicants with concerns about specific applications to the committee as a forum for airing development-related concerns. Applicants could be encouraged to speak to the industry representatives on the liaison committee so complaints or concerns could be brought forward to the meetings. Sometimes connecting applicants with other developers or industry professionals may help to address the concerns before they even come to the committee, with committee members sharing their own advice and experience on how to navigate the application approvals process.

The success of these committees varies in different communities. The committees are often the first point of contact for the Town when changes are proposed to development policies and procedures, but they do not take the place of broader



consultation. If there is a particular issue in the development community that needs resolving, then a development liaison committee can provide an effective way of sharing the concern with staff before it becomes a larger problem or perception in the community. The creation of the committee can also be seen as a proactive move by the Town to consult with and understand the concerns of the industry. However, if the industry does not see any value to their input as a result of the committee (i.e. changes made to policies based on the input, or concerns resolved), then support can wane. The committee would need a clear terms of reference so that expectations are reasonable.

At the Developers' Forum roundtables, support for this type of committee was mixed. Some applicants felt that due to the size of the community, this type of committee could be beneficial, while others suggested that more frequent use of Developers' Forums could suffice as opportunities for the industry to share concerns and provide input to the Town.

An alternative to a development liaison committee that some municipalities use is to have a staff member designated as a "developer liaison." This staff member has the responsibility to meet with applicants and developers regularly to check in and listen to concerns. Where this approach is used, the liaison establishes regular meetings with key developers, but is also open to meeting with others as requested. This approach is typically used in larger communities and requires staff with time to invest in this method of outreach. Furthermore, the developer liaison is typically not the same person who is responsible for processing applications (either is independent of that process, or a manager of that department, but not directly involved in the processing of individual files).

Developers' Forums

Many communities hold developers' forums or meetings on a regular basis to inform the development community of upcoming changes in regulations, such as Step Code, updates to DCCs, or other topics of mutual interest. These meetings are often focussed on one topic, and can be "lunch and learn" sessions, or can be longer development roundtable discussions. In some communities they can even be day-long sessions with a range of guest speakers covering several topics. Some topics explored in other communities include Step Code, DCCs, Development Application process, OCP changes, First Nation treaty updates, and other studies or regulations, including provincial or federal initiatives that may impact the area. Hosting these type of meetings on a regular basis helps to establish a relationship with the development community and facilitates the sharing of ideas and information.

Council Protocol

Having an explicit process for Council members to deal with complaints regarding the development application process can be helpful for both Council members as well as



staff. A protocol can provide an avenue for Council members to respond to concerns from the development industry or building community. Council members cannot be expected to know the details of each development application and the associated process, so when there is a concern voiced by a resident, rather than feeling the need to investigate on behalf of the resident, Council members should be able to direct the resident to a consistent process for dealing with the concern. While the process should start by referring the resident to the staff member in charge of the processing (i.e. engineering for subdivisions, or planning for other applications), other options can be established, such as connecting the resident with a representative of the development liaison committee who can provide advice and bring forward the concern to a subsequent meeting, and options to lodge a formal complaint with the Town's CAO. Ensuring that Council members know what the process is for dealing with complaints or concerns from developers, applicants or residents helps to provide consistency in how concerns are handled, and provide Council members with comfort that there is a process they can rely upon. Having a process that empowers staff to resolve concerns is also a way of supporting staff. Having individual Council members investigate complaints only encourages residents to bring issues to individuals rather than solving problems through staff channels.

Measuring Progress and Reporting

One of the common requests from Council and the development industry is for information on processing timelines. While some stats are available to Council, or published through the annual report, these generally provide the number of applications and type. Reporting information to the development community as well as Council and residents is an opportunity to share goals, successes, workloads, progress toward targets, development activity, etc. Some municipalities choose to communicate in a separate report on development activity, and others use their annual reports. Still others have online development tracking information that is updated bi-weekly or even more often to demonstrate current activity levels and processing times.

It is useful to note that the communities that use processing timelines as a performance measure typically do not accept incomplete applications. If municipal departments are going to be evaluated (and criticized) on processing times, then the metrics that are used should reflect processes where the municipality has some control. If submission of a complete application is used as a start date, this removes some of the time spent in obtaining required materials from applicants. Similarly, for subdivisions, often the measure is the timeline to Preliminary Layout Acceptance (PLA). The timeline after a PLA is granted depends on the works that need to be done and the speed with which the applicant wants to proceed. This timeline is less indicative of the Town's approval process.



While reporting back is important, it must be recognized that setting up new systems, as well as reporting back or preparing an additional publication takes time and effort (resources). That said, planning applications are generally already tracked by the department, and may not require significant changes in order to make additional statistics available. However, subdivision file tracking information, as part of this review, was not easily available, and may take more effort to implement an internal file tracking system to facilitate reporting. File tracking would be useful for internal review of subdivisions as well as reporting purposes. Reporting back was not indicated as a high priority during the survey and interview process.

Feedback Form

Some municipalities provide feedback forms for applicants to fill out after the completion of the development approval process. The forms are generally an opportunity for applicants to indicate what went well and what did not. While the forms can be submitted anonymously, given that there are not significant numbers of applications in the Town, some applicants may not feel comfortable making comments (out of concern for repercussions on future applications). For meaningful feedback to be provided, applicants must feel confident in the openness of the Town to accepting criticism and that the feedback will be taken in the spirit of improving the process. While feedback forms were generally identified as a helpful improvement during the Development Application Process Review, they were not identified as a priority by most applicants.

Customer Service Policy

The need for a Town-wide emphasis on the importance of returning emails, phone calls and other contact was referenced previously in the Communication section. Emphasizing this policy – even though the majority of the Town is already following the protocol – can help send the message to the development community that the Town recognizes that customer service is a priority.

Council Priorities

One of the issues raised by applicants with respect to the relationship between the Town and the industry was a recognition from Council that taking on planning projects impacts the Town's ability to maintain service levels on processing applications. As noted previously, several municipalities have dedicated "current planning" or "development planning" departments that are not impacted by the work levels of "policy planning" or "long-range planning" that work on Official Community Plans, or other strategic documents. However, in smaller communities such as Ladysmith, undertaking any of these projects, and even the additional work of updating zoning bylaws, or subdivision servicing bylaws, or even providing better "reporting" materials to Council, requires additional work by staff that then, in effect, takes time away from working on development applications. Even when policy projects are undertaken by consultants, these projects still require staff time to



manage the contract or consultant, respond to questions, and provide information (ie. Even the Development Application Process Review required time to develop the terms of reference, staff interview time, time spent at Developers' Forum, time reviewing deliverables, as well as reports to Council).

The desire for Council to place priority on development approval resources was the key message from one of the two tables at the Developers' Forum. One way to respond to this concern would be to evaluate the time (resource) impacts of each strategic project, and the corresponding impact on application processing in staff reports. This ensures that Council is aware of the impact during the decision-making process.

In addition to recognizing the impact of their policy projects, in response to the issue identified previously of Council not being well informed about projects, and the concern about public information meetings, Council may want to consider having at least one representative attend public information meetings when they are held, as well as designating a member to conduct a site visit for key projects prior to the meeting.

5.4 OTHER

The last two improvement recommendations are longer term considerations that do not fit easily into any of the previous categories. The first is considering software tools such as GIS and development tracking software that, over time, could provide a platform for communicating information to the public and applicants, such as development application maps and online tracking, but can also have many internal applications for staff, including engineering services and asset management. These are likely beyond the Town's needs in the short term, but there may be grant opportunities to take an incremental approach to acquiring tools that offer multiple benefits to the Town. Several other communities that have GIS programs are happy to discuss their uses, and their costs and time associated with the programs. There are also options to partner with other municipalities or the regional district to share the cost of a service, program or even technical staff.

The second improvement opportunity is that the ideal situation for applicants is for the Town to offer a "one stop shop" and provide a common application/inquiry counter, where applicants can ask questions from engineering, planning or building. This means that the three departments would be located in one common physical location. As well as being beneficial to applicants, co-location would provide more interaction between the staff in these departments, which could facilitate better understanding and more efficient sharing of information between individuals and the departments. Further integration of the departments could also be considered to increase service levels, particularly for the development review functions



(development and subdivision applications). Even without combining the departments, with co-location comes the opportunity to share some resources or staff members to better respond to counter inquiries and coordinate the submission of complete applications and initial application review.

6.0 CONCLUSIONS

The primary takeaway from the Development Application Process Review should be that the Town of Ladysmith, in terms of its process and customer service, is doing a commendable job. The Town is rated highly by the majority of applicants, and in particular is highly rated by those who have experience developing in multiple municipalities. However, there are improvements that can be made, and many of those adjustments need to focus on improving the process for less experienced applicants.

This report references a number of potential improvements that were identified as part of the review. The improvements were raised through the review of best practices, tools and approaches used in other communities, as well as suggestions provided by Ladysmith applicants and the development community. While the implementation of many of these options may help to improve the process, it is recommended that the Town focus on a few key priorities that will have the most significant impacts in the short term, while identifying some longer-term initiatives to work toward.

The following short-term priorities are recommended for the Town to provide higher service levels to applicants. Several of these improvements involve minor changes for staff, while others will require more significant staff resources.

- Process guides (including checklists and flow charts)
- Redesign of forms (simplify or eliminate sustainability checklist)
- Reaffirm and/or formalize a 24 or 48-hour response standard and customer service priority
- Commit to hosting regular Developers' Forums
- Mandatory pre-application meetings
- Designating a single file manager for each application
- Delegation of riparian/environmental Development Permits and hazard land Development Permits to staff
- Consider eliminating some referrals to Heritage Revitalization Advisory Committee (signs and facades)
- Consider policy regarding public information meetings with eye to eliminating requirements



- Consider having Council attend public information meetings and/or conducting site visits for key applications to demonstrate Council's interest in the project and in being informed
- Include evaluation of impacts on development application processing when Council is considering strategic projects and priorities
- Create an internal file tracking system for subdivision applications

Mid-term

- Explore feasibility and interest in creating a Development Liaison Committee and develop terms of reference
- Evaluate committee structure and referrals
- Identify complaint protocol/policy for Council

Long term

- Consider the benefit of additional software tools (GIS, development tracking)
- One location for departments, and potential for shared counter resources to make one-stop shop.



SURVEY: Ladysmith Development Application Process Review

1. How long have you been submitting development applications to the Town of Ladysmith? *(please check one)*

- Less than 1 year
- 1-3 years
- More than 4 years

2. Which of the following statements best applies to you? *(please check one)*

- I am not a developer but applied to develop/subdivide/build on my personal or business property.
- I am not a full-time developer, but usually have one or two development/subdivision/building projects on the go.
- I am (or work for) a full-time developer.
- Other (please describe: _____)

3. Approximately what percentage of your projects are in Ladysmith? ____ %

The Town of Ladysmith is reviewing the following application processes:

Application	Managing Department
Official Community Plan amendment	Development Services (132C Roberts St)
Zoning amendment	Development Services (132C Roberts St)
Development permits (including Façade permits)	Development Services (132C Roberts St)
Development variance permits	Development Services (132C Roberts St)
Sign permits	Development Services (132C Roberts St)
Subdivision	Infrastructure Services (330 6 th Ave at Public Works)

Note - building permit applications are also accepted by the Town; however, that process was reviewed as part of a separate study in 2016.

4. Which of the following applications have you submitted (or been involved in) over the past 3 years? *(please check all that apply)*

- Official Community Plan amendment
- Zoning Bylaw amendment (rezoning)
- Development Permit (including façade permits)
- Development Variance Permit
- Subdivision application
- Sign permit

5. In what capacity were you dealing with Town staff? *(please check all that apply)*

- Agent for property owner or developer
- Builder
- Business owner
- Developer
- Property owner
- Other (please describe: _____)

6. Based on your experiences in Ladysmith, please rate the following statements by circling the number that comes closest to your opinion.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	No Opinion
In general, the Town of Ladysmith's development application <u>forms</u> are clear and easy to understand.	1	2	3	4	5	N/A
In general, the Town of Ladysmith's development application <u>process</u> (e.g. the key steps/path of progression for each type of application) is clear and easy to understand.	1	2	3	4	5	N/A
Application requirements and fees are clearly communicated by staff at an early stage in the review process.	1	2	3	4	5	N/A
Anticipated processing times are clearly communicated by staff at an early stage in the review process.	1	2	3	4	5	N/A
If there is something I do not understand about the application form, process and/or requirements, I feel welcome to contact Town staff for assistance.	1	2	3	4	5	N/A

7. Please describe your overall customer service experience during your most recent application.

Town staff were...	Very Poor	Poor	Neutral	Good	Very Good	No Opinion
Polite	1	2	3	4	5	N/A
Knowledgeable	1	2	3	4	5	N/A
Easy to reach	1	2	3	4	5	N/A
Responsive (I was helped in a timely manner)	1	2	3	4	5	N/A
Clear and easy to understand	1	2	3	4	5	N/A
Helpful	1	2	3	4	5	N/A
Professional	1	2	3	4	5	N/A

8. What went well during your most recent application to the Town of Ladysmith?

9. How could the Town improve service to you throughout the development application process?

10. Various tools are used in other communities to assist and/or communicate with applicants throughout the process. Which of the following tools, if any, do you think would be helpful for applicants in Ladysmith?

	Not Helpful at All	Somewhat Helpful	Neutral	Helpful	Very helpful	No Opinion
Mandatory pre-application in-person meeting with staff to review application process, requirement, timelines, and fees	1	2	3	4	5	N/A
Flow charts illustrating the application/review processes	1	2	3	4	5	N/A
Tracking information available online showing current applications and status	1	2	3	4	5	N/A
Process guides/checklists/tip sheets for each type of application (OCP amendment, rezoning, development permit, subdivision application)	1	2	3	4	5	N/A
Follow-up customer service surveys after the process is complete for applicants to provide feedback	1	2	3	4	5	N/A

11. Other communities have introduced various procedural changes to make development application review timelines more efficient. Which of the following changes, if any, do you think would be helpful for applicants in Ladysmith?

	Not Helpful at All	Somewhat Helpful	Neutral	Helpful	Very helpful	No Opinion
Town only accepts and begins to process complete applications (i.e. submitted with all required documentation as detailed on the application form/checklist and discussed in pre-application meetings).	1	2	3	4	5	N/A
Council delegates approval of some or all development permits to staff (i.e. no Council meeting required).	1	2	3	4	5	N/A
Reduce or eliminate requirements for review of some application types by citizen committees (Advisory Planning Commission, Advisory Design Panel, Heritage Revitalization Advisory Committee)	1	2	3	4	5	N/A

12. Are you aware of any development application processes in other communities that you think are particularly well done? If so, please share where, and what you like about them.

Thank you for taking the time to respond to this survey.

We look forward to the opportunity to share the results with you at the Developer’s Forum in April.

1. How long have you been submitting development applications to the Town of Ladysmith? (Please check one.)	Less than 1 year	12.5%	2
	1 - 3 years	18.8%	3
	4 or more years	68.8%	11
2. Which of the following statements best applies to you? (Please check one.)	I am not a developer but applied to develop/subdivide/build on my personal or business property.	18.8%	3
	I am not a full-time developer, but usually have one or two development/subdivision/building projects on the go.	25.0%	4
	I am (or work for) a full-time developer.	12.5%	2
	Other. Please describe:	43.8%	7
3. Approximately what percentage (%) of your projects are in Ladysmith? (Answer must be a whole number, between 0 and 100.)	100%	31.3%	5
	99%	6.3%	1
	90%	6.3%	1
	50%	12.5%	2
	33%	6.3%	1
	30%	6.3%	1
	20%	6.3%	1
4. Which of the following applications have you submitted (or been involved in) over the past 3 years? (Please check all that apply.)	Official Community Plan Amendment	12.5%	2
	Zoning Bylaw Amendment (rezoning)	43.8%	7
	Development Permit (including façade permits)	56.3%	9
	Development Variance Permit	43.8%	7
	Subdivision Application	56.3%	9
	Sign Permit	18.8%	3
5. In what capacity were you dealing with Town staff? (Please check all that apply.)	Agent for property owner or developer	50.0%	8
	Builder	12.5%	2
	Business owner	18.8%	3
	Developer	25.0%	4
	Property Owner	50.0%	8
	Other. Please describe:	0.0%	0
6. Based on your experiences in Ladysmith, please rate the following statements by circling the number that comes closest to your opinion.			
In general, the Town of Ladysmith's development application forms are clear and easy to understand. ()	1 = Strongly disagree	0.0%	0
	2 = Disagree	18.8%	3
	3 = Neutral	25.0%	4
	4 = Agree	43.8%	7
	5 = Strongly agree	12.5%	2
	No Opinion	0.0%	0
In general, the Town of Ladysmith's development application process (e.g. the key steps/path of progression for each type of application) is clear and easy to understand. ()	1 = Strongly disagree	0.0%	0
	2 = Disagree	25.0%	4
	3 = Neutral	25.0%	4
	4 = Agree	37.5%	6
	5 = Strongly agree	12.5%	2
	No Opinion	0.0%	0
Application requirements and fees are clearly communicated by staff at an early stage in the review process. ()	1 = Strongly disagree	0.0%	0
	2 = Disagree	6.3%	1
	3 = Neutral	25.0%	4
	4 = Agree	37.5%	6
	5 = Strongly agree	31.3%	5
	No Opinion	0.0%	0
Anticipated processing times are clearly communicated by staff at an early stage in the review process. ()	1 = Strongly disagree	25.0%	4
	2 = Disagree	12.5%	2
	3 = Neutral	6.3%	1
	4 = Agree	43.8%	7
	5 = Strongly agree	12.5%	2
	No Opinion	0.0%	0
If there is something I do not understand about the application form, process and/or requirements, I feel welcome to contact Town staff for assistance. ()	1 = Strongly disagree	0.0%	0
	2 = Disagree	0.0%	0
	3 = Neutral	12.5%	2
	4 = Agree	25.0%	4
	5 = Strongly agree	50.0%	8
	No Opinion	12.5%	2

7. Please describe your overall customer service experience during your most recent application.

Polite ()	Very Poor	0.0%	0
	Poor	0.0%	0
	Neutral	12.5%	2
	Good	31.3%	5
	Very Good	50.0%	8
	No Opinion	6.3%	1
Knowledgeable ()	Very Poor	0.0%	0
	Poor	0.0%	0
	Neutral	13.3%	2
	Good	46.7%	7
	Very Good	33.3%	5
	No Opinion	6.7%	1
Easy to reach ()	Very Poor	0.0%	0
	Poor	12.5%	2
	Neutral	18.8%	3
	Good	43.8%	7
	Very Good	18.8%	3
	No Opinion	6.3%	1
Responsive (I was helped in a timely manner) ()	Very Poor	6.3%	1
	Poor	12.5%	2
	Neutral	18.8%	3
	Good	18.8%	3
	Very Good	37.5%	6
	No Opinion	6.3%	1
Clear and easy to understand ()	Very Poor	0.0%	0
	Poor	6.3%	1
	Neutral	25.0%	4
	Good	37.5%	6
	Very Good	25.0%	4
	No Opinion	6.3%	1
Helpful ()	Very Poor	0.0%	0
	Poor	0.0%	0
	Neutral	12.5%	2
	Good	37.5%	6
	Very Good	43.8%	7
	No Opinion	6.3%	1
Professional ()	Very Poor	6.3%	1
	Poor	0.0%	0
	Neutral	12.5%	2
	Good	50.0%	8
	Very Good	18.8%	3
	No Opinion	12.5%	2
8. What went well during your most recent application to the Town of Ladysmith?	(See attached text responses)		14
9. How could the Town improve service to you throughout the development application process?	(See attached text responses)		16

10. Various tools are used in other communities to assist and/or communicate with applicants throughout the process. Which of the following tools, if any, do you think would be helpful for applicants in Ladysmith?

Mandatory pre-application in-person meeting with staff to review the application process, requirements, timelines, and fees. ()	1 = Not helpful at all	0.0%	0
	2 = Somewhat helpful	0.0%	0
	3 = Neutral	12.5%	2
	4 = Helpful	37.5%	6
	5 = Very helpful	50.0%	8
	No Opinion	0.0%	0
Flow charts illustrating the application/review processes. ()	1 = Not helpful at all	6.3%	1
	2 = Somewhat helpful	6.3%	1
	3 = Neutral	12.5%	2
	4 = Helpful	43.8%	7
	5 = Very helpful	25.0%	4
	No Opinion	6.3%	1
Tracking information available online showing current applications and status. ()	1 = Not helpful at all	6.3%	1
	2 = Somewhat helpful	6.3%	1
	3 = Neutral	18.8%	3
	4 = Helpful	25.0%	4
	5 = Very helpful	37.5%	6
	No Opinion	6.3%	1
Process guides/checklists/tip sheets for each type of application. (OCP amendment, rezoning, development permit, subdivision application.) ()	1 = Not helpful at all	0.0%	0
	2 = Somewhat helpful	0.0%	0
	3 = Neutral	6.3%	1
	4 = Helpful	50.0%	8
	5 = Very helpful	37.5%	6
	No Opinion	6.3%	1
Follow-up customer service surveys after the process is complete for applicants to provide feedback. ()	1 = Not helpful at all	6.3%	1
	2 = Somewhat helpful	6.3%	1
	3 = Neutral	43.8%	7
	4 = Helpful	25.0%	4
	5 = Very helpful	12.5%	2
	No Opinion	6.3%	1
11. Other communities have introduced various procedural changes to make development application review timelines more efficient. Which of the following changes, if any, do you think would be helpful for applicants in Ladysmith?			
Town only accepts and begins to process complete applications (i.e. submitted with all required documentation as detailed on the application form/checklist and discussed in pre-application meetings). ()	1 = Not helpful at all	18.8%	3
	2 = Somewhat helpful	25.0%	4
	3 = Neutral	12.5%	2
	4 = Helpful	31.3%	5
	5 = Very helpful	6.3%	1
	No Opinion	6.3%	1
Council delegates approval of some or all development permits to staff (i.e. no Council meeting required). ()	1 = Not helpful at all	0.0%	0
	2 = Somewhat helpful	0.0%	0
	3 = Neutral	25.0%	4
	4 = Helpful	18.8%	3
	5 = Very helpful	37.5%	6
	No Opinion	18.8%	3
Reduce or eliminate requirements for review of some application types by citizen committees (Advisory Planning Commission, Advisory Design Panel, Heritage Revitalization Advisory Committee) ()	1 = Not helpful at all	6.3%	1
	2 = Somewhat helpful	0.0%	0
	3 = Neutral	25.0%	4
	4 = Helpful	18.8%	3
	5 = Very helpful	37.5%	6
	No Opinion	12.5%	2

12. Are you aware of any development application processes in other communities that you think are particularly well done? If so, please share where, and what you like about them. (See attached text responses) 10

Note that specific references to individuals have been eliminated, to protect staff and Council, and some minor edits to preserve the anonymity of the respondents.

Question 2: Which of the following statements best applies to you?

Other (please describe):

- land surveyor / consultant assisting clients or acting as agent for development projects
- recently retired with the intent to continue developing
- Mortgage lending and development
- we are planners and building designers working for multiple clients with interests in Ladysmith
- Planner acting on behalf of applicants
- Land development consultant
- Architect acting on behalf of an owner to rezone and develop property

Question 8: What went well during your most recent application to the Town of Ladysmith?

- Staff were easy to deal with
- Rezoning application was successful
- Always courteous
- Initial meeting was helpful and informative. Subsequent meetings to review requirements with staff and P. Eng retained were informative. Variance process went well.
- Working with the people at the Roberts St office. They are always so amazing.
- Nothing has gone well ... Timelines are consistently 5x longer than forecast, procrastination has replaced decision-making. This community is in development paralysis.
- Approval process
- Done in timely matter
- Staff reviewed some specific challenges for the Client relative to the essential applications and modified the process to make it work. Very impressed
- responsiveness of planning dept to all applications
- Defined rezoning and subdivision process to follow. Helpful staff input.
- It's not yet finished
- Agreement on zoning classification. Interpreting the rationale with reference to parking requirements.
- Planning staff are extremely polite, helpful, responsive and attentive. The Engineering department, which also handles subdivision questions and approvals, has some bottlenecks and can be a bit of a blackhole for correspondence. If there's an area that needs improvement, it's on 6th avenue.

Question 9: How could the Town improve service to you throughout the development application process?

- Allow staff to make more decisions and grant approvals rather than having to go to council for everything.

- Overall the planning staff is easy to work with. I would like to see council more involved in the development application process so that they are educated in the decisions they are making. At the last public information meeting I was required to hold for a rezoning no Councillors attended.
- Simplify the documents. Design documents with "Seamless" in mind.
- The process is a black hole. No contact person is given so you do not know who to follow up with. There is no one person to contact who is responsible from beginning to end. Important email messages ignored, erroneous information provided that resulted in useless engineering costs, no concept of time, no ongoing updates regarding status, redundant requests for information.
- One staff member can be very confrontational and difficult to deal with. Working with everyone else is a pleasure.
- Make decisions in a timely manner.
- Faster processing turnarounds
- Expedite projects that are actually going to happen and quit prioritizing and wasting time and resources on projects that may never happen (waterfront) I can only imagine how much time and taxpayer money has been spent on the waterfront studies and we are still going nowhere
- more flow charts with reference to expectant timelines
- more info upfront
- subdivision applications and obtaining PLA/engineering to determine what is specifically required is slower than it should be and not in keeping with planning depts. promptness
- Established timelines for processing applications. More staff in engineering to review applications.
- Be more responsive and timely. Nothing happens when someone goes on vacation or is out of the office. Work more as a team with other departments.
- By not being so greedy with the fees
- Helping to foresee issues relating to committee process (development permit design panel)
- Remove bottlenecks and have quick response out of 6th avenue.

Question 12: Are you aware of any development application processes in other communities that you think are particularly well done? If so, please share where, and what you like about them.

- Langford
- City of Nanaimo is very consistent in their application requirements. They also have very good long-term planning for most parts of the city.
- I have heard of communities that utilize the checklists referenced previously. Timelines for the Town/City are defined. Currently there is nothing holding staff accountable for their inaction. In the time I have been waiting my costs have increased \$100,000, I have missed opportunities of another \$100,000, 28 new lots are now competing, a government known to be unfriendly to business has been elected frustrated and disappointed to say the least.

- Langford ... Unambiguous, clearly identified and articulated expectations, definitive timelines, a culture of objectivity. Ladysmith has developed a culture of subjectivity, with ambiguous, nebulous and constantly changing expectations, never-adhered-to timelines, indifference to impacts on developers arising from delays, changing expectations and interminable paralysis.
- Langford is extremely efficient
- in terms of land -use applications, the Town is very efficient. Subdivision requirements are slower
- No other local government has a clearly better process, therefore no specific examples
- So far the process is better than Nanaimo and Parksville. Port Alberni is the easiest.
- Langford has a 48hr turnaround on building permits, which is exceptional. Ladysmith will never have the number of employees to match that, but aim for something reasonable like 7 to 10 business days. In a hot market, it's painful waiting 3 weeks+ for a permit

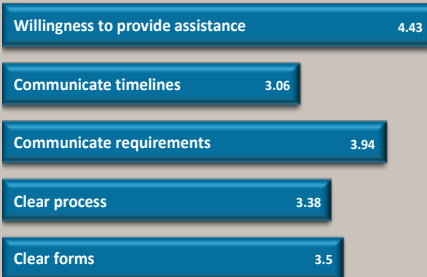
Development Applications Process Review

SURVEY HIGHLIGHTS

- 69% have submitted applications to Ladysmith for more than 4 years
- 44% have 90%+ of their projects in Ladysmith, the remainder have less than half of their projects in Ladysmith
- The application process was rated relatively high, especially the willingness to assist applicants. Opportunities to improve include better communication of timelines (38% disagreed these were communicated early) and providing a clearer process (25% noted the process was not clear).

Development Application Process

(1 = strongly disagree to 5 = strongly agree)



- On customer service, the Town rated particularly high on politeness, knowledge and helpfulness.

Customer Service

(1 = very poor to 5 = very good)



We are listening!

The development application process review included a survey to hear from applicants about what went well, and what didn't, based on their own experiences applying for development permits, rezonings, variances and subdivisions in Ladysmith.

A total of 16 surveys were completed (44% return on Ladysmith's applicant list), and the consultants interviewed 13 applicants, including a range of local developers, and those with experience in other communities. Members of Council and staff were also interviewed. Some of the survey results are highlighted here.

Primary themes from the interviews and survey results are summarized as follows:

Strengths:

- Planning staff are helpful, professional and responsive.

- Most applicants thought Ladysmith was as good as, if not better than most Island municipalities in terms of application assistance and timelines.

Room to improve:

- Responsiveness (particularly engineering/public works department)
- Subdivision process and timelines, clarity in engineering requirements
- Guides, flow charts and checklists would be helpful (particularly for developers or owners unfamiliar with the process)
- Communicating processing timelines and expectations, and taking into account the complexity of the application before providing timelines
- Forms could be simpler

How does Ladysmith compare?

Applicants who were interviewed or responded to the survey indicated that Ladysmith compared favourably – in particular to Capital Regional, Cowichan Valley and Nanaimo region municipalities. Responses from applicants with experience in other municipalities ranked Ladysmith significantly higher than those who conduct business primarily within Ladysmith. Langford was referenced most often as an example of a municipality with efficient development processing. Langford's inter-disciplinary Development Review committee reviews applications within 2 weeks of submission, providing prompt and clear feedback.

Next Steps

Once we hear feedback regarding preferred approaches to improve the Town’s application processes, a report will be prepared that outlines recommendations for improvement for review by staff and Council.

We all have a role in making this work!

While this review process is examining what the Town can do, it’s always useful to remember that Council, Town staff and applicants each have a role in the development approval process, and making it run smoothly.

- **Applicants** can expedite the process by familiarizing themselves with application requirements, and submitting complete applications to allow thorough and timely review.
- **Staff** can provide simple forms and easy-to-understand guides, timely review, clear communications and coordinated review processes.
- **Council** can add certainty by applying policies consistently, and monitoring the impact of strategic projects on Town’s capacity and resources.

How can we improve?

We know developers are looking for clear, timely processes. Delays cost money. While we received some feedback from the survey, the following is an expanded list of suggestions that could potentially improve the process, or your experience dealing with the Town. Tell us which of these changes would most benefit you!

Communication materials

- Guides, flow charts and checklists outlining the application process
- Application tips sheet
- Summary of staff authority vs. council (who has discretion where ... and where does staff NOT have discretion?)
- Feedback forms/customer service survey (completed at the end of each application)
- Simpler application forms (sustainability checklist)
- Application tracking information online

Process

- Mandatory pre-application meeting

Process (continued)

- Identification of one staff contact for each application
- Fast track processing for complete applications (or refusal to accept incomplete applications)
- Formalize a 48-hour customer service response policy
- Locate engineering together with development services and building
- Delegation of more development permit approvals to staff (rather than Council)
- Flexible requirements for public information meetings
- Streamlining of committees or what is reviewed by the committees (design panel, advisory planning, heritage)

Other

- Regular Developers’ Forums to explore topics of interest and provide opportunities to discuss new regulations or process changes, concerns and successes with the Town, and network with local developers
- Create a liaison committee of development industry representatives to meet semi-annually with engineering and planning staff to identify and resolve issues

Tell us which improvements will help you!

The more we understand your preferences, the better we can respond and improve our processes to help you. Fill out a feedback form (available at the door) regarding the ideas you’ve heard today, or access the form on the Town website before April 20.

WHAT IS THE DEVELOPMENT APPLICATION PROCESS REVIEW?

We want to improve!

The Town of Ladysmith is committed to improving. We understand that the development application process takes time and resources, and delays cost developers money. We believe we can establish an “open for business” culture while maintaining our high standards for development to preserve our small town character.

To continue to improve our service, the Town of Ladysmith is undertaking a review of the development application process for:

- ✓ Rezoning and OCP amendments
- ✓ Development variance permits
- ✓ Development permits
- ✓ Subdivisions
- ✓ Sign permits
- ✓ Temporary use permits



We have examined the applications, how they are approved, sought feedback on what works well and what does not, and are now identifying options to improve the efficiency of the process to ensure the Town remains open to development.

We invite you to ...

- Review the presentation boards
- Complete a feedback form on what you have read and heard today
- Discuss your views with the project consultants

Your input will help build recommendations for improvements for the Town’s development application process.

WHAT IS THE PROCESS?

We have undertaken a review of the development application process, including:

- Reviewed Town policies, procedure bylaw, application forms
- Reviewed past applications, including approval timelines
- Interviewed staff and members of Council
- Interviewed past applicants (13)
- Conducted an online survey for applicants regarding their experiences, thoughts and suggestions (16 responses)
- Researched what other municipalities are doing
- Reviewed best practices



The Forum is an opportunity to share the feedback we've received, including the tools and suggestions for improvements.

Now it's your turn! Please share with us ...

- Are we missing any perspectives or information?
- What are your thoughts on the suggestions presented?
- What other ideas do you have to improve the process?

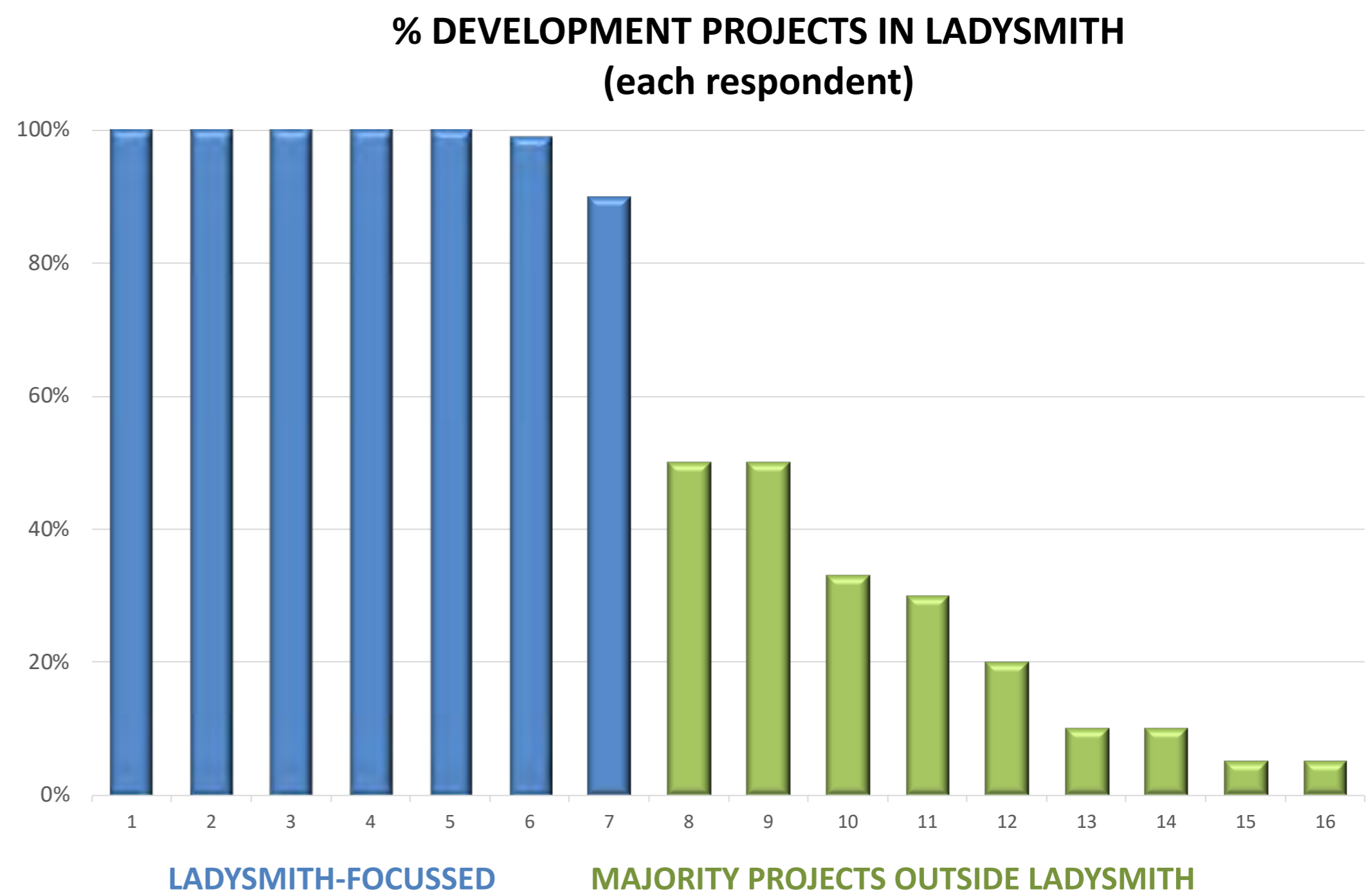
WHAT WE HEARD

Survey – Who Responded?

Of the 16 applicants who filled out the survey ...

LOCAL AND THOSE WITH BROADER FOCUS

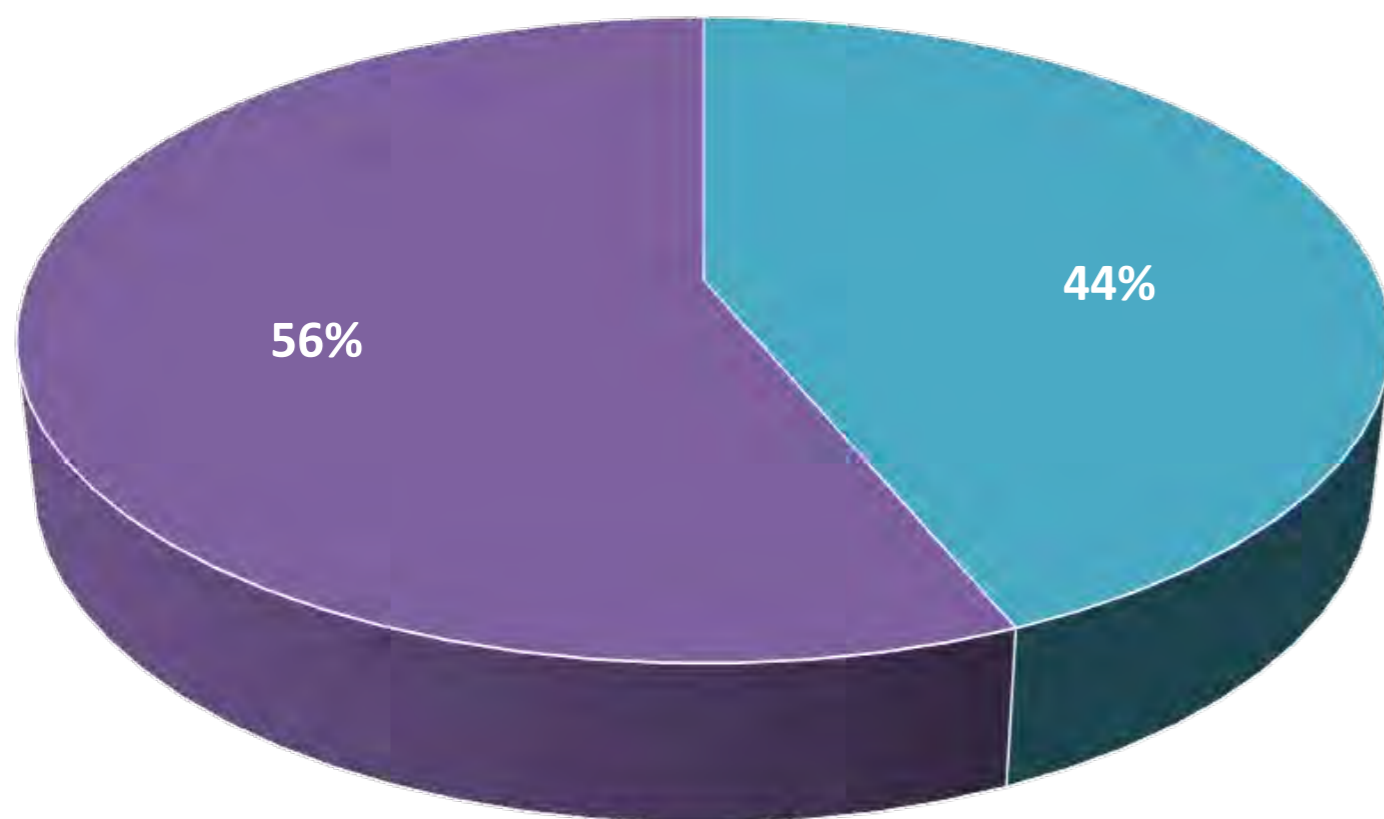
- 56% primarily work in other communities (50% or less of their projects are in Ladysmith)
- 44% can be characterized as primarily local, with (90% or more of their projects within Ladysmith)



APPLICANTS WITH DIFFERENT LEVELS AND YEARS OF EXPERIENCE

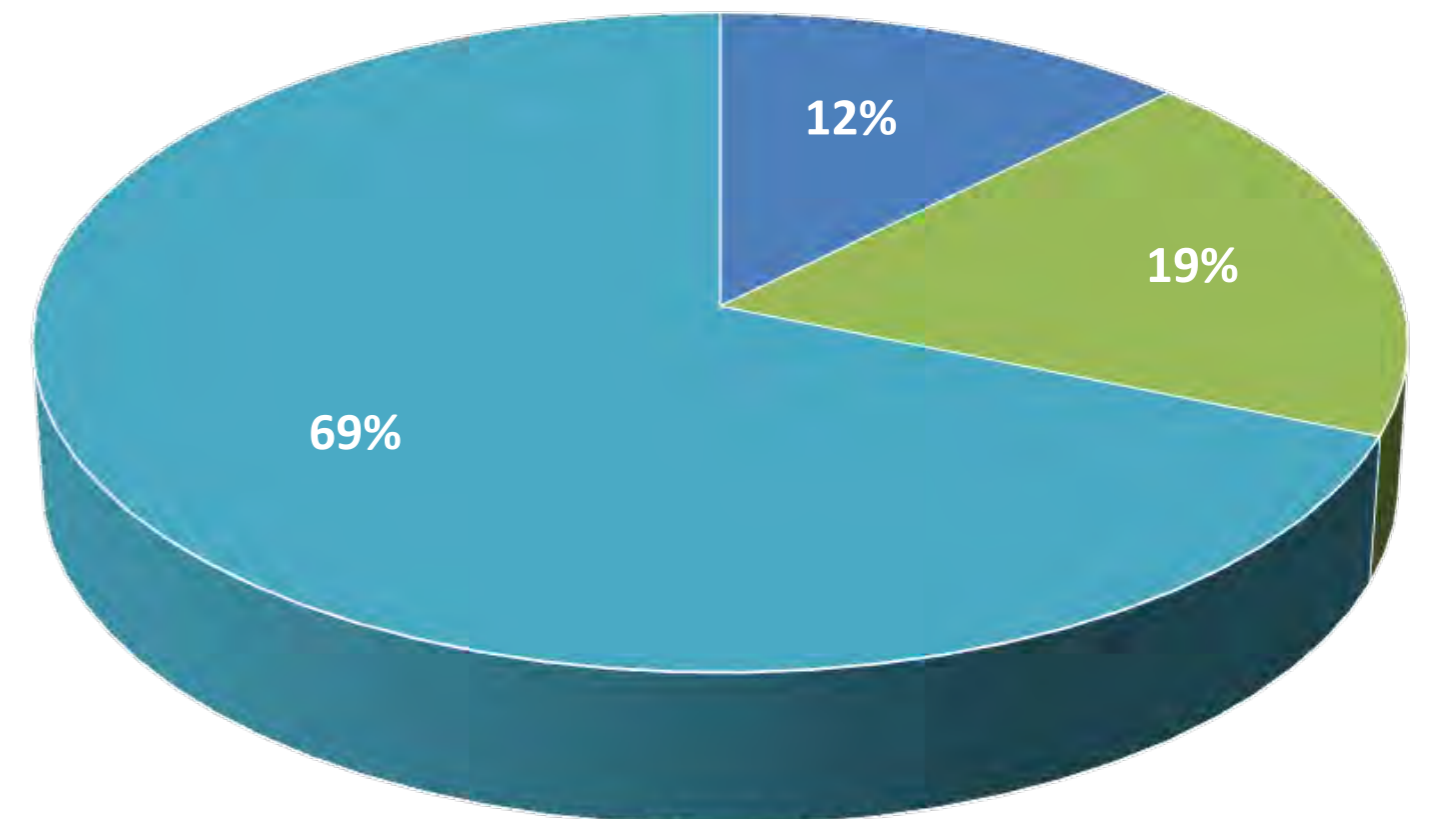
- 56% were full time developers or industry professionals (architects, planners, engineers, surveyors) who submit applications on behalf of owners.
- 44% described themselves as builders/developers with one or two projects on the go, or owners who are applicants developing their own property.

APPLICANT CHARACTERISTICS – DEVELOPMENT EXPERIENCE



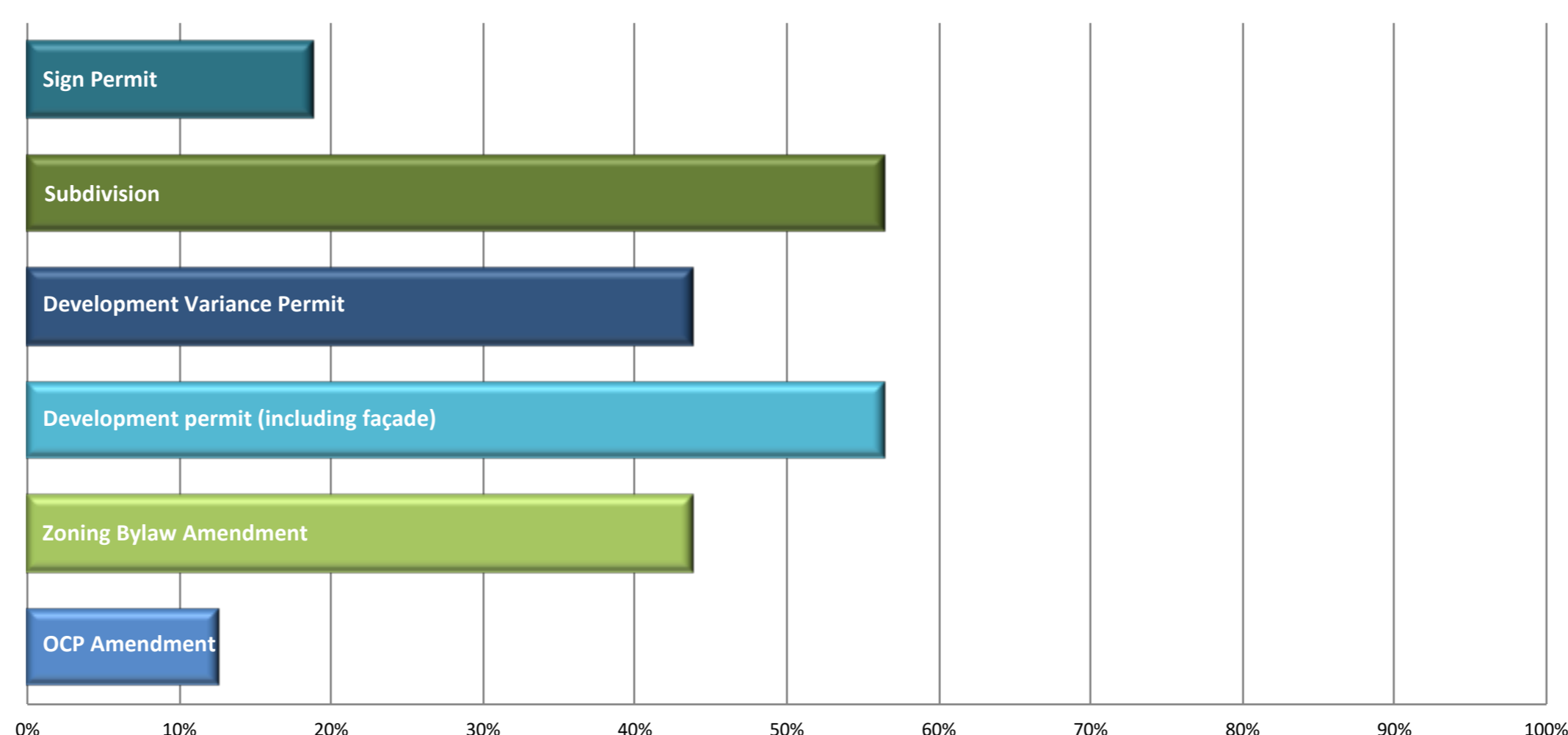
- Part-time developers and owner applicants
- Full-time developers and industry professionals

YEARS SUBMITTING DEVELOPMENT APPLICATIONS IN LADYSMITH



- Less than 1 year
- 1 - 3 years
- 4 or more years

EXPERIENCE WITH DIFFERENT APPLICATION TYPES



WHAT WE HEARD

Survey Results – Development Application Process

POSITIVES

- 56% agreed or strongly agreed that the **application forms** are clear and easy to understand
- 50% agreed or strongly agreed that the **application process** was clear and easy to understand
- 69% agreed or strongly agreed that **application fees and requirements** were communicated early
- 56% agreed or strongly agreed that the **anticipated processing times** were clearly communicated early in the process
- 75% agreed or strongly agreed that if there was something they did not understand, they felt welcome to contact Town staff for assistance

ROOM TO IMPROVE

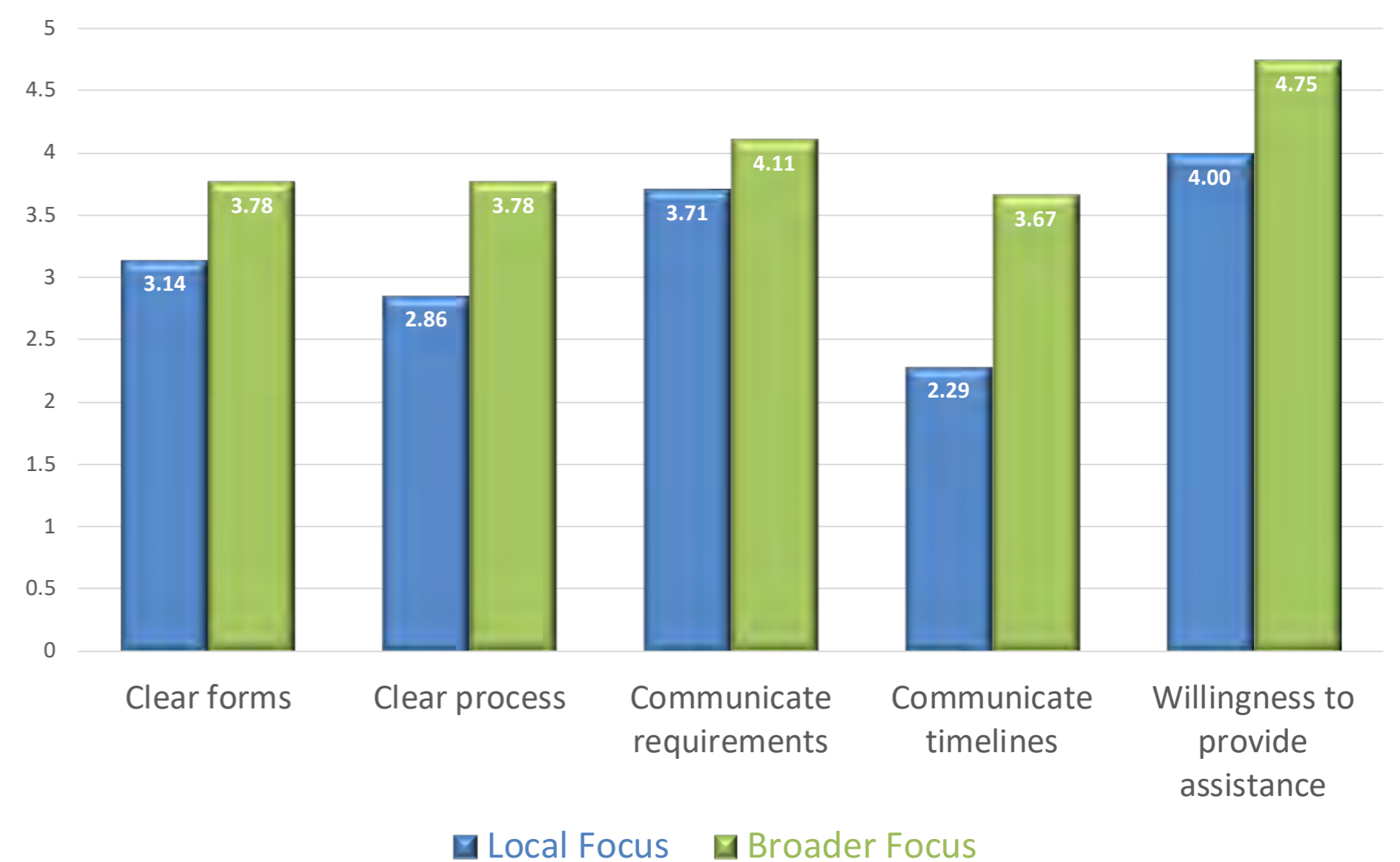
- 19% disagreed or strongly disagreed that the **application forms** are clear and easy to understand
- 25% disagreed or strongly disagreed the **application process** was clear and easy to understand
- 6% disagreed or strongly disagreed that **application fees and requirements** were communicated early
- 38% disagreed or strongly disagreed that **anticipated processing times** were clearly communicated early in the process

DEVELOPMENT APPLICATION PROCESS

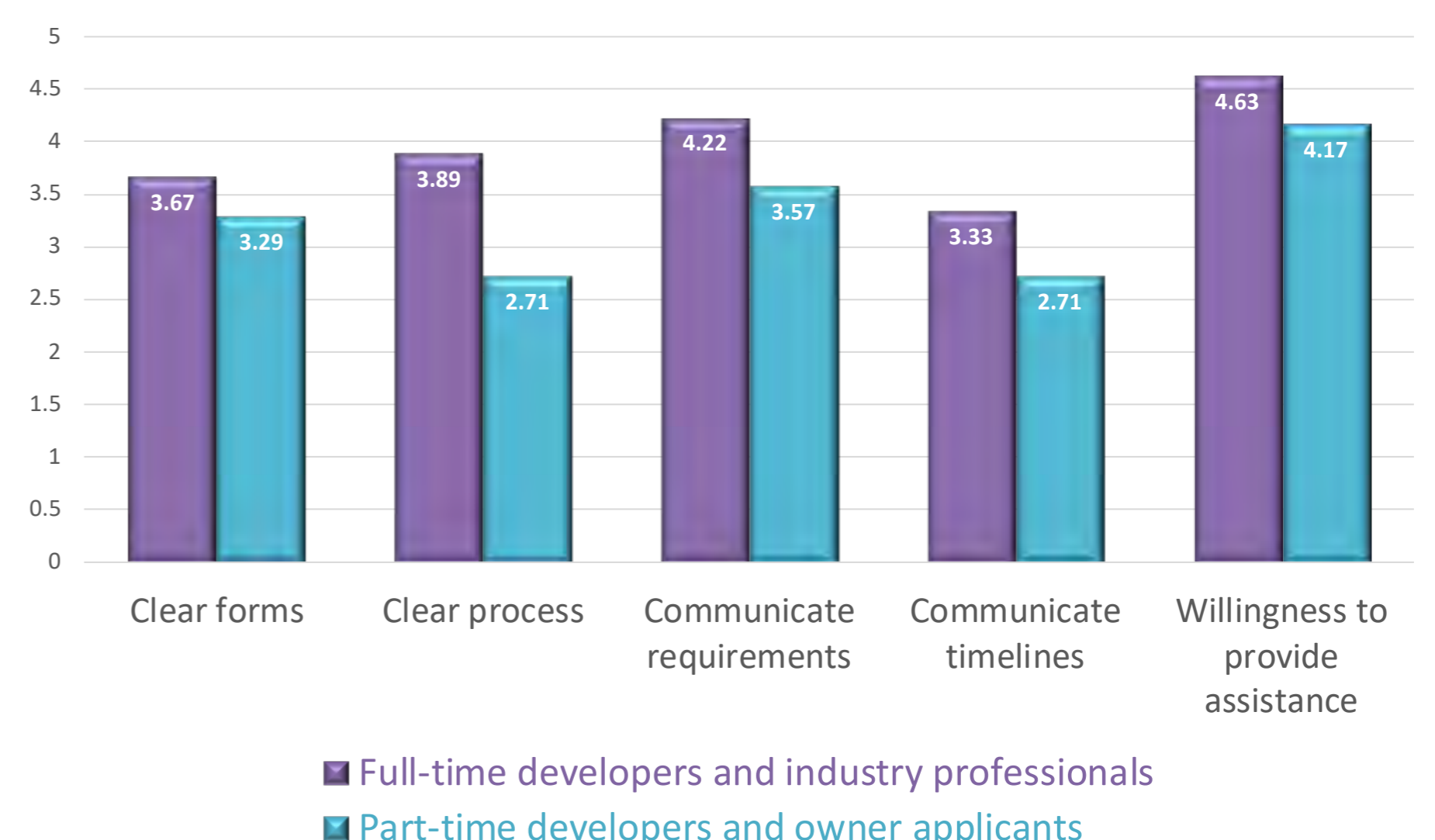
SCALE = 1 (strongly disagree) to 5 (strongly agree)



LOCAL APPLICANTS VS. THOSE ACTIVE OUTSIDE LADYSMITH



FULL-TIME DEVELOPERS & INDUSTRY PROFESSIONALS VS. PART-TIME DEVELOPERS AND OWNER APPLICANTS



OBSERVATIONS

Applicants who have the majority of their projects outside Ladysmith rated the Town's development application service higher than those who primarily or only develop in Ladysmith.

Full-time developers or industry professionals (planners, architects, engineers, surveyors) rated the Town's development application process higher than those who are part-time developers or owner applicants.

WHAT WE HEARD

Survey Results – Customer Service

Applicants were asked to rate Town development application staff on a scale of 1 (very poor) to 5 (very good) based on their most recent application. The following highlights focus on those who rated the Town either high (good or very good) or low (poor or very poor). Those who rated the Town “neutral” or “no opinion” are not referenced in the percentages below (but are taken into account in the charts).

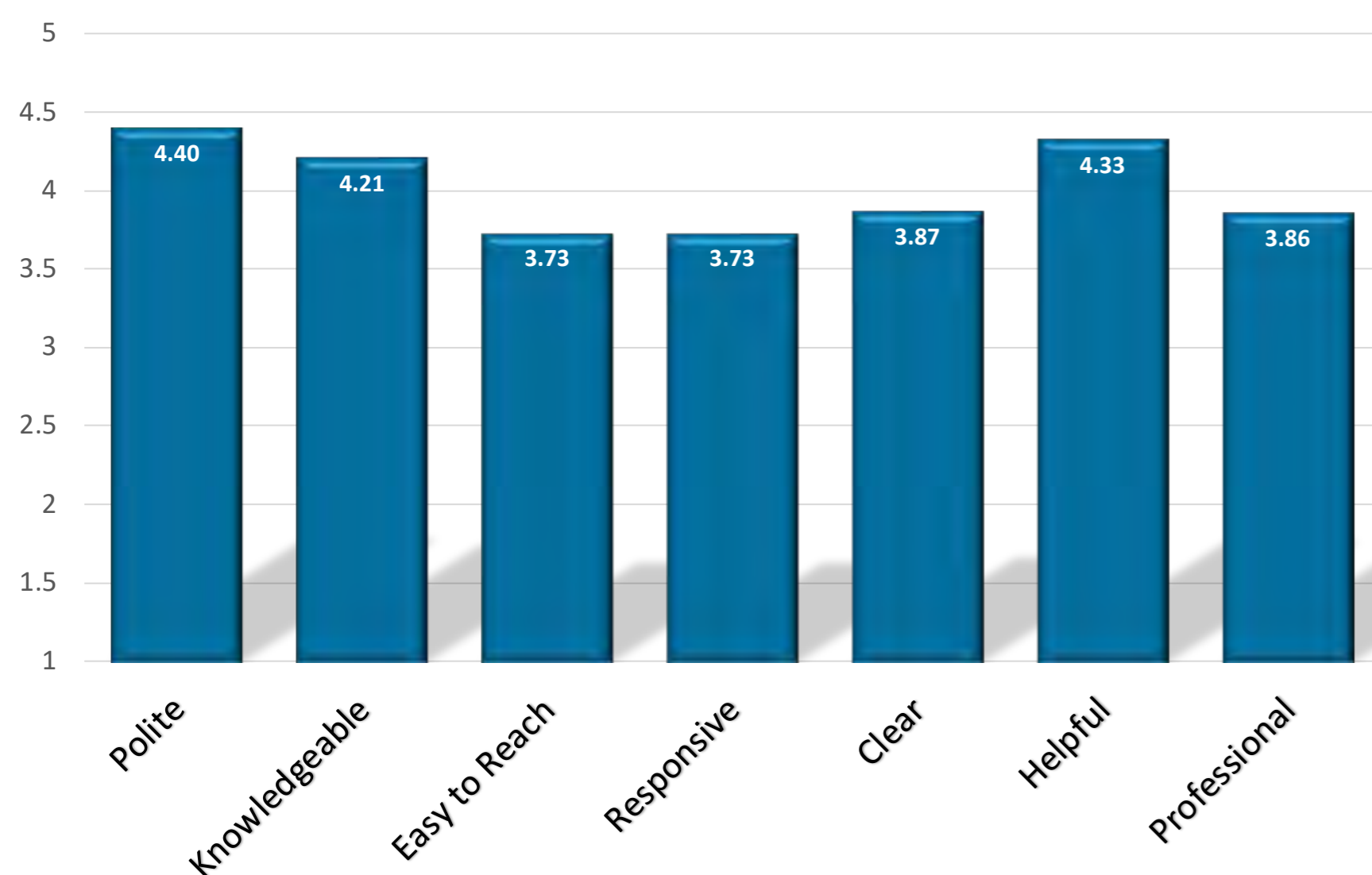
POSITIVES (GOOD OR VERY GOOD)

- 81% rated Ladysmith’s staff as polite
- 80% rated Ladysmith’s staff as knowledgeable
- 63% rated Ladysmith’s staff as easy to reach
- 56% rated Ladysmith’s staff as responsive
- 63% rated Ladysmith’s staff as clear and easy to understand
- 81% rated Ladysmith’s staff as helpful
- 69% rated Ladysmith’s staff as professional

ROOM TO IMPROVE (POOR OR VERY POOR)

- 13% rated Ladysmith’s staff as not easy to reach
- 19% rated Ladysmith’s staff as unresponsive
- 6% rated Ladysmith’s staff as unclear or not easy to understand
- 6% rated Ladysmith’s staff as unprofessional

CUSTOMER SERVICE RATINGS

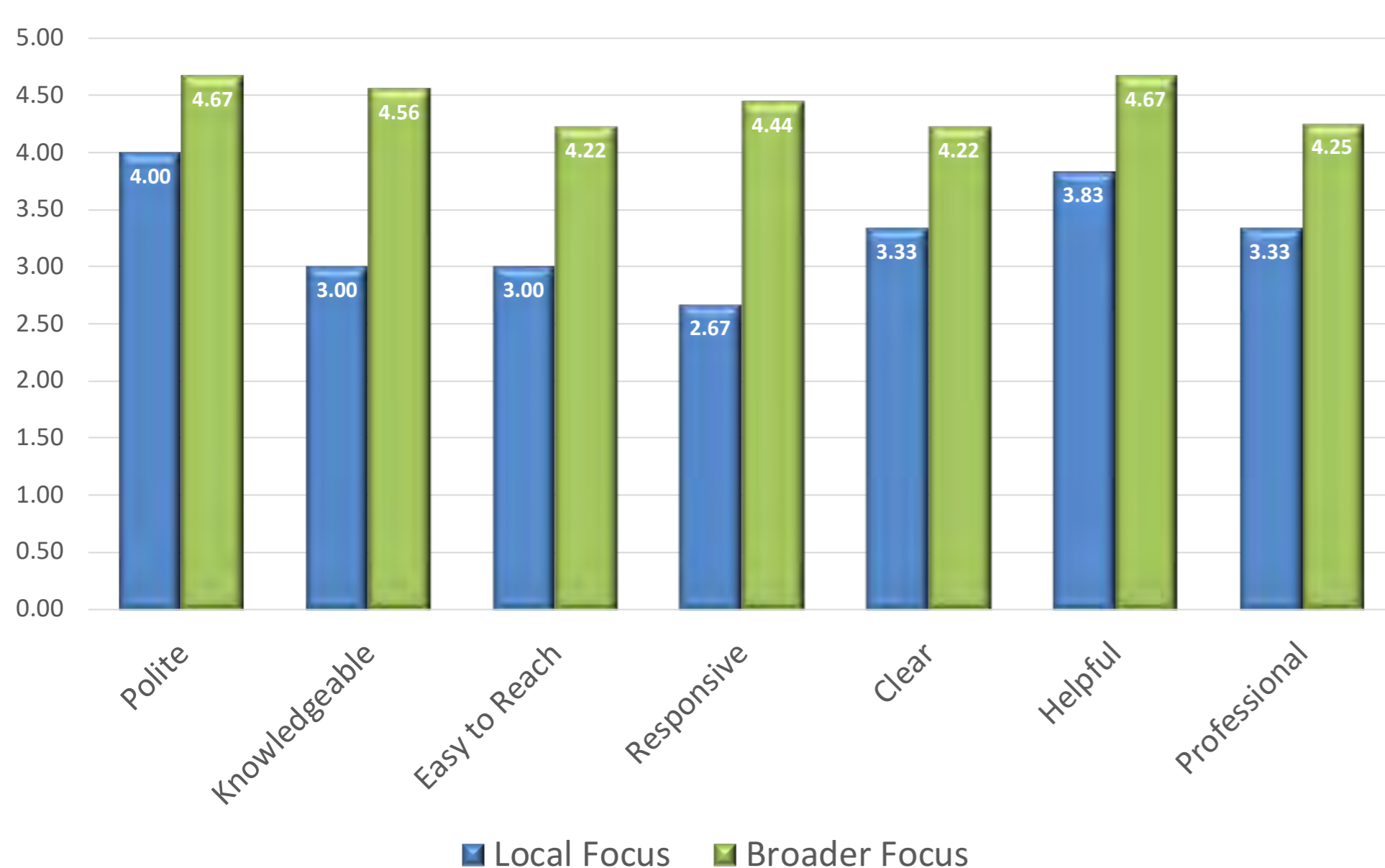


OBSERVATIONS

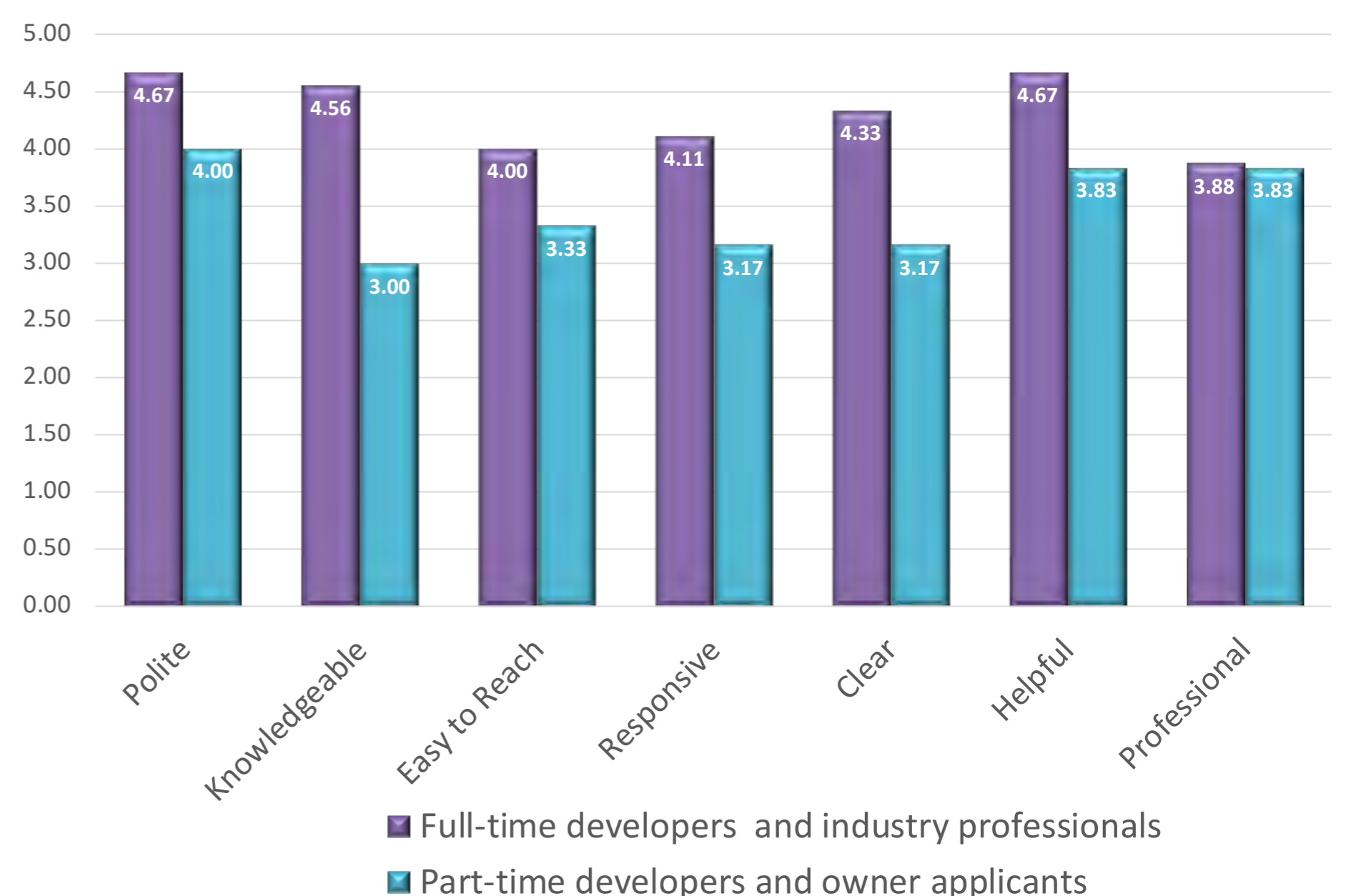
Staff customer service levels were rated higher by applicants with development projects outside Ladysmith than those who primarily had development projects inside Ladysmith.

Staff customer service levels were rated higher by applicants who are full-time developers or industry professionals than those who are part-time developers or owner applicants

LOCAL APPLICANTS VS. THOSE ACTIVE OUTSIDE LADYSMITH



FULL-TIME DEVELOPERS & INDUSTRY PROFESSIONALS VS. PART-TIME DEVELOPERS AND OWNER APPLICANTS



WHAT WE HEARD – SURVEY AND INTERVIEWS

The following quotes and comments are from the survey and the interviews with individual applicants. Applicants were asked to identify what went well, what areas needed improvement, and what suggestions they had for improving the Town’s development application process.

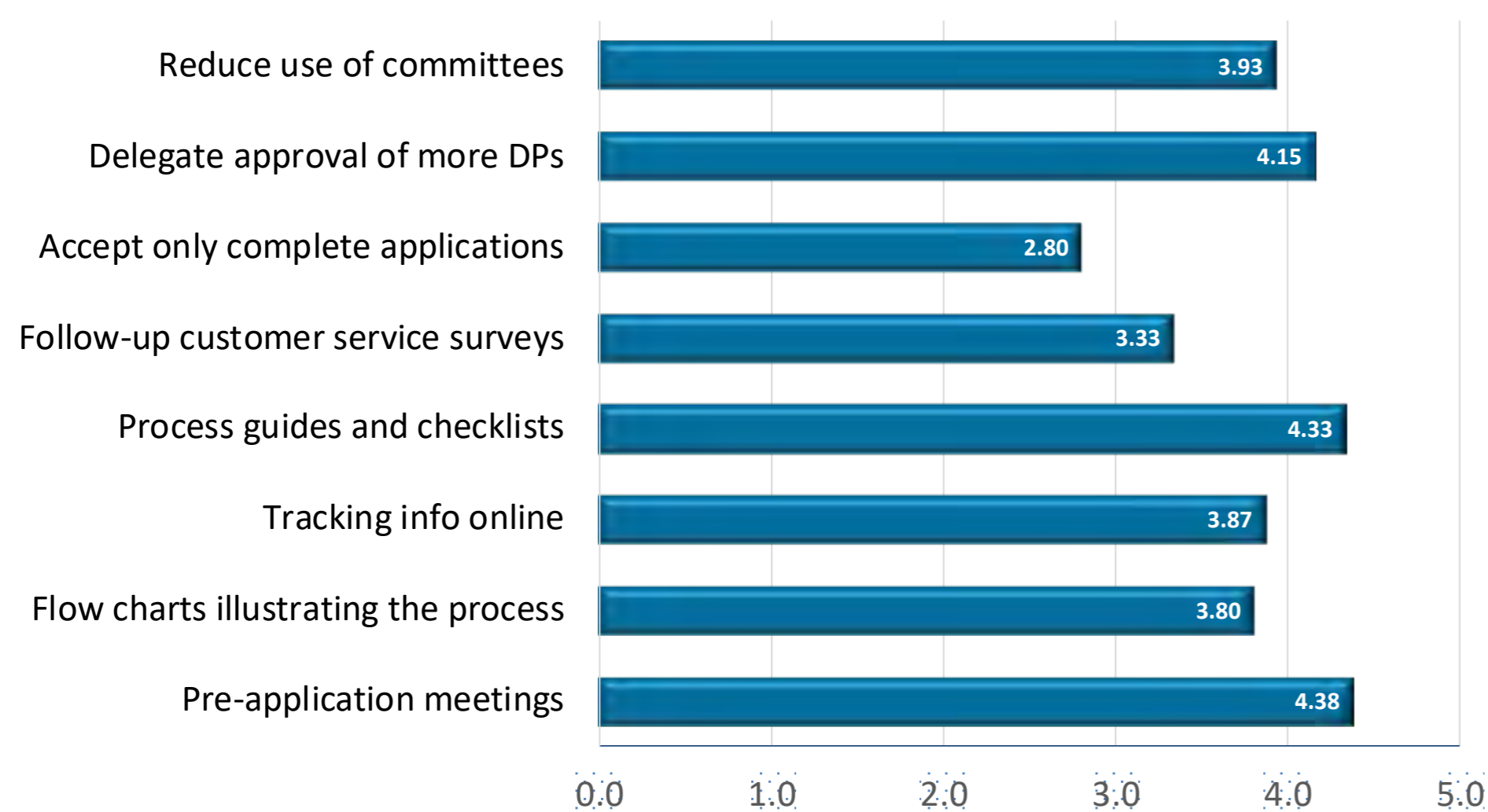
WHAT IS GOING WELL?

- Staff are courteous and easy to deal with
- Timely approvals
- Planning staff are extremely polite, helpful, and responsive
- Initial subdivision application meeting, and subsequent meetings to review requirements were helpful and informative
- Staff reviewed some specific challenges ... and modified the process to make it work. Very impressed
- Defined rezoning/subdivision process, with helpful staff input
- My application processing time was cut in half because I had all my information submitted
- Time was taken to explain the process and provide timelines; there have been no unexpected requirements, no delays
- On-site pre-application meeting with engineering and planning was an excellent opportunity to have questions answered
- Pre-application meeting was helpful in identifying very clear expectations for required information, and all went smoothly
- Town staff are extremely responsive and professional to deal with – applications are often processed more quickly than anticipated. I had a rezoning that took just 3 months and that is unheard of in the industry. Many of my DPs and DVPs are processed in around 3 months, which is impressive
- I have projects in 6 communities. On a scale of 1 to 10, Langford is the best; Ladysmith is about an 8

AREAS AND IDEAS FOR IMPROVEMENT

- Allow staff to make more decisions and grant approvals instead of going to Council for everything
- Simplify the forms. Variance application form was daunting
- Remove bottlenecks in subdivision application process and improve response and turnaround times
- Provide more information upfront. Flow charts, checklists and timelines would be helpful
- Work as a team with other departments
- Expedite projects that are actually going to happen and quit prioritizing and wasting time and resources on projects that may never happen
- Establish processing timelines. Timeliness with PLAs is critical
- More staff to address backlogs and improve responses to emails and phone calls
- Have Council more involved in the development application process (attend public meetings) so that they are more informed about the decisions they are making
- Reduce fees
- Provide one staff person to contact who is responsible from beginning to end. There is no single point of contact, no champion for me
- Guidance in what committees are looking for in advance
- Make sure there are pre-approval meetings to figure out what is needed at the outset
- Submission of incomplete applications creates delays for everyone.
- Flexibility with some landscaping requirements to recognize impracticality of planting in winter
- Delegate more authority to staff for DPs to expedite processes
- The specifics of any application should be reviewed before providing the standard or average processing timeline
- Full-time working families can’t attend in-person meetings during regular working hours.
- Online tracking of applications would really help
- Staff are way too focused on process, there’s not enough judgement and decision-making
- Sustainability vision filter is a huge delay

HOW COULD THE TOWN IMPROVE ITS DEVELOPMENT APPLICATION PROCESS?



OPTIONS TO IMPROVE

Throughout the process several opportunities are identified for improvement, based on:

- Practices in other communities
- Identified best practices
- Suggestions from surveys and interviews with applicants, staff and Council

The following are some **suggestions**. Help us identify which ones could work or have the greatest impact in Ladysmith!

Communication

- ✓ Pre-application checklists
- ✓ Re-designed forms (focus on simple forms)
- ✓ Process guides including:
 - Process flow charts, sample drawings such as site plans
 - Tips on common pitfalls
 - Overview of everyone's role (applicants, staff and Council) to increase understanding of the process
- ✓ Formalize the Town's existing staff customer service/response policy (48 hours) to emphasize its importance
- ✓ Feedback form AFTER the process is complete (how did we do? How can we improve?) to provide continual feedback loop
- ✓ Tracking information online
 - Viewing of application summary and where it is in the process
 - Provide applicants, public and Council with a sense of how many applications type and volumes in process
 - Help applicants and the public understand what projects are proposed in their neighbourhood



OPTIONS TO IMPROVE

Process

- ✓ Pre-application meetings for all applications
 - Provide verbal guidance and review checklist items prior to submission
 - Applicants ask questions, staff identify issues in advance
 - Communicate timelines based on identified issues
- ✓ Require complete applications
 - Best practice identified by home builder municipalities
 - Assistance on applications is provided during application process
 - Applications do not receive a file manager to processing until they are complete
- ✓ File manager assigned as single point of staff contact
- ✓ Continue to have applications reviewed by inter-disciplinary staff committee. Adjust schedule to ensure regular meetings to respond to application volumes.
- ✓ Council consider delegating authority for additional development permit approvals (e.g. Riparian, Hazard Lands, Industrial)
- ✓ Council consider whether there is flexibility to remove requirement for public information meetings in some instances
- ✓ Consider streamlining advisory committee process
 - combine advisory planning and design panel
 - consider exempting signs from heritage review

Complete applications are processed much faster, resulting in significantly reduced approval timelines



OPTIONS TO IMPROVE

Relationship and partnership culture

Good relationships take time, effort and support. Creating trust between the development community, Council and the Town is key to providing good service.

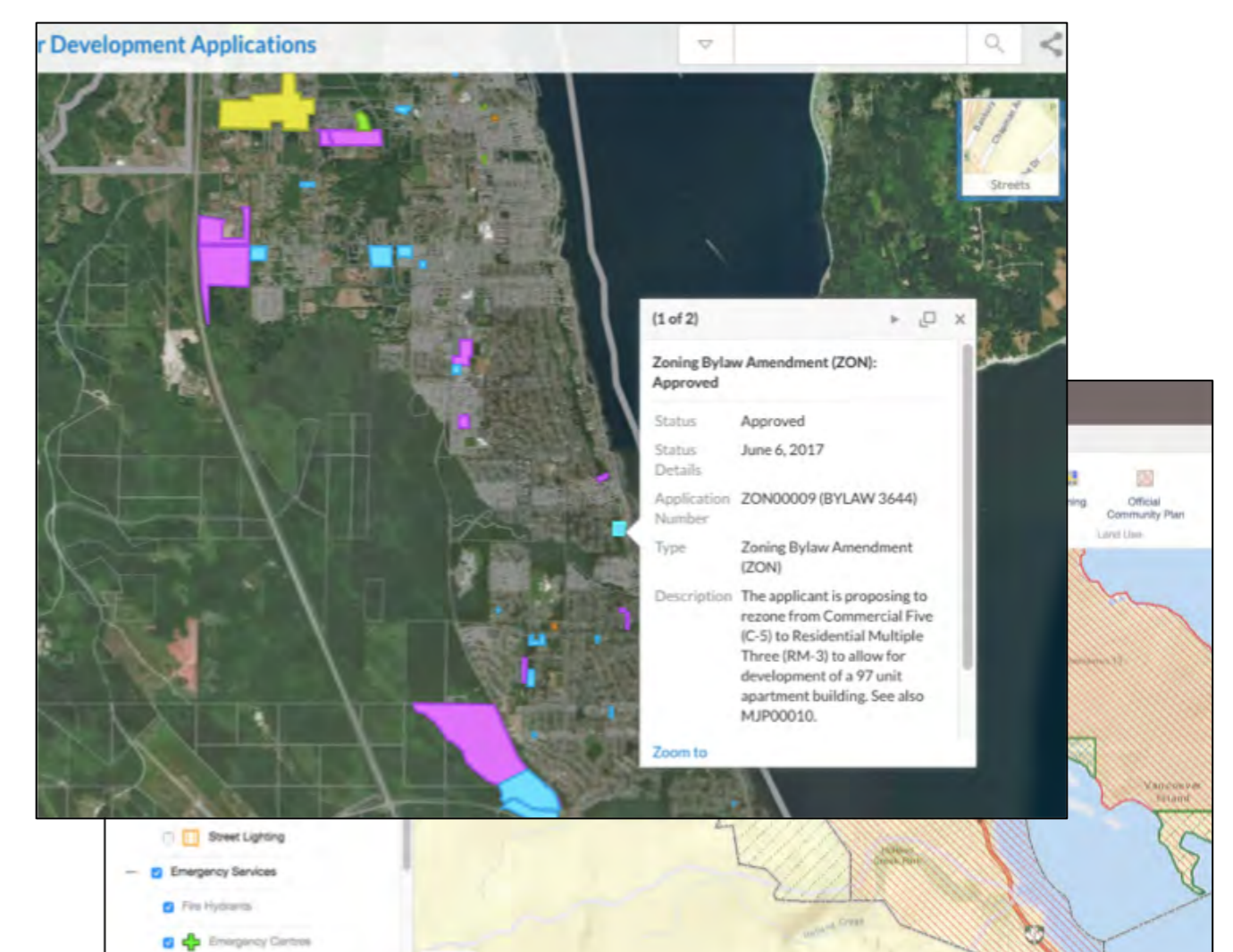
The following options are intended to continue fostering a relationship where everyone is respectful, listens and works together to continually improve the process.

- ✓ Create a development liaison committee
 - Industry representatives and engineering and planning staff
- ✓ Host regular development forums
- ✓ Create a feedback form (online and paper) to solicit feedback after each application is complete
- ✓ Measure progress & report back to development community and Council annually on how the Town is doing
 - Volume of applications (type and complexity)
 - Process timelines (measure parts of the process the Town controls)
 - Accomplishments and successes
 - Highlight other long-range initiatives
 - Ongoing improvements
- ✓ Formalize and emphasize Town customer service protocol/response policy
- ✓ Council protocol (use of liaison committee) to deal with process complaints
- ✓ Council commitment to prioritize application processing over strategic projects



Other (long term) Improvements

- ✓ Move development services/engineering into one location (one stop shop for all application types)
- ✓ GIS and development tracking software



DEVELOPERS' FORUM – FEEDBACK FORM

- The Developers' Forum provided several suggestions and ideas to improve the Town's Development Application Process. Please take a minute to identify which of the suggestions you think are helpful for improving the process.

Not Helpful at All Somewhat Helpful Neutral Helpful Very helpful No Opinion

COMMUNICATION	Not Helpful at All	Somewhat Helpful	Neutral	Helpful	Very helpful	No Opinion
Process checklists for each type of application (OCP amendment, rezoning, development permit, subdivision application) to aid in preparing complete applications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redesign the application forms with a focus on simple forms. Mandatory pre-application in-person meeting with staff to review application process, requirement, timelines, and fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Process guides for each type of application (OCP/Zoning amendment, development permit, subdivision) including process flow charts, illustrated examples, information on who has what authority, and application tips.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formalize and reinforce Town's 48-hour response (email and phone message) policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow-up customer service surveys after the process is complete for applicants to provide feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking information available online showing current applications and status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROCESS						
Mandatory pre-application in-person meeting with staff to review application process, requirements, timelines, and fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Require complete application packages prior to assigning a file manager and beginning processing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
One file manager assigned as single point of staff contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased authority to staff to approve and issue development permits (e.g. riparian, hazard or industrial DPs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streamline advisory committee process (either what needs to be reviewed by committees, or combine committees to reduce requirements)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RELATIONSHIP & PARTNERING CULTURE						
Create a development liaison committee with industry representatives and planning and engineering staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host regular development forums to discuss topics of interest, changes in Town regulations, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Measure progress and present an annual report on development application process statistics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a Council protocol for dealing with process complaints, to promote consistency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Council commitment to prioritize application processing over strategic projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OTHER						
Locate public works/engineering together with development services (planning/building) in one location to create a one-stop shop for all development applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acquire GIS and development tracking software to allow for tracking of applications online.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Of the above suggestions, please identify your **TOP 3 PRIORITIES** for improving the process by placing a **checkmark ✓** beside your top 3 priority improvements.
- On the reverse side, please share any other suggestions you have on how we can improve the development application process.

Please submit this form to the Town of Ladysmith prior to April 27, 2018 at ds@ladysmith.ca.

Ideas for improving Ladysmith's development application process:

Thank you for taking the time to help the Town improve its service to you!

Developers' Forum Feedback Form Results

	Number of times identified as a top 3 priority	1 = Not helpful at all	2 = Somewhat helpful	3 = Neutral	4 = Helpful	5 = Very helpful
COMMUNICATION						
checklists	2				2	7
application forms	1				4	6
process guides	1				4	6
48-hour response				1	1	7
customer service surveys			1	1	4	2
tracking info online				1	4	4
PROCESS						
pre-application mtgs	4		1	1	4	4
complete applications			2	1	5	2
one file manager	2			1	4	5
delegate dp	1				2	8
committee process	1				1	7
RELATIONSHIP BUILDING						
	1					
developer liaison committee		1	1	3	4	1
development forums			1	2	4	3
measure and report back			1	3	4	2
council protocol			1	1	8	0
commitment to prioritize processing			1	1	3	5
OTHER						
co-location	1		1		2	7
GIS/development tracking software				3	5	1

IDEAS FOR IMPROVING LADYSMITH'S DEVELOPMENT APPLICATION PROCESS:

- information checklist for each permit (require supporting docs)
- status updates/tracker of permits
- FAQ sheet for standard projects/applications
- status updates/tracker of permits
- streamlining and channelling of information requests (80/20 principle of customer service)
- there are 2 streams of applicants (professional and non-professional)
- access to information streams - online, hard copy info packs and in-person