



REPORT

Council

Meeting Date: February 24, 2025

FROM: Community Development Commission

DATE: February 11, 2025

SUBJECT: **Customer Experience in Building Services and Planning and Development Departments**

LOCATION: Town-wide

WARD: Town-wide

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RECOMMENDATION:

1. That the report titled "Customer Experience in Building Services and Planning and Development Departments" be received.

KEY FACTS:

The following are key points for consideration with respect to this report:

- The Town of Oakville is experiencing significant growth while responding to frequent legislative changes and increased application complexity.
- The Building Services and Planning and Development departments offer most services online with customers able to apply, pay fees, track status, and request:
 - All building inspections
 - Zoning Certificate of Occupancy
 - Property Surveys
 - Planning Applications (Part Lot Control Exemption, Fence Variance, Zoning Removal of Holding Provision)
 - Development Engineering applications and inspections
 - Development Applications – planned for 2025/2026
- In-person support by building and planning staff remains available at Town Hall, Monday through Friday, 8:30 am – 4:30 pm.
- Recent and planned initiatives will enhance service delivery and transparency by providing applicants with real time tracking of their progress.

- The development of a Customer Experience Plan (CX) is underway for 2025. This is a long-term plan to clarify service expectations and accountabilities across all departments, increasing the use of ServiceOakville as the first point of contact and exploring changes to ServiceOakville's model to support end-to-end service resolution.

BACKGROUND:

The Town of Oakville continues to grow, resulting in increased demands on department staff and resources. In particular, the Building Services and Planning and Development departments manage development applications, building permits, and planning initiatives to support the Town's sustainable growth. However, this growth is accompanied by several challenges, including:

1. **Legislative Complexity:** Frequent changes in legislation at provincial and federal levels add complexity to the development approval process, proving challenging for staff, applicants and the public to remain informed and compliant.
2. **Rising Service Demands:** The growing volume of complex applications and inquiries has placed significant pressure on existing systems and resources, leading to customer service inconsistencies.
3. **Digital Expectations:** There is an increasing demand for accessible online services, aligning with national trends in municipal service delivery. According to the *2023 Citizen First National Report*, online transactions are the most preferred method for Canadians.
4. **Customer Experience Challenges:** Services provided by Building Services and Planning and Development are not fully integrated with ServiceOakville and do not use the Town's Customer Relationship management (CRM) system. As a result, current systems for tracking and responding to inquiries and complaints are inconsistent and can cause confusion and delays. The public may encounter delays and confusion due to misrouted inquiries and inadequate communication among stakeholders throughout the process. Additionally, there has been a growing trend of customers seeking design advice from Town staff before and during the application process, which may indicate a lack of the necessary skills, resources, or qualifications to prepare a complete and accurate application submission. This additional support demands significant staff time, diverting resources from processing other applications which can contribute to further delays.

To address these challenges, the Town has outlined a series of planned enhancements. These include the implementation of advanced digital tools like ProjectDox for electronic plan mark up, the integration of CRM systems, and the development of a comprehensive Customer Experience Strategy in 2025. These initiatives aim to:

- Clarify service expectations and accountabilities.
- Streamline workflows and reduce processing times.
- Enhance transparency and accessibility through improved digital platforms.
- Establish standardized service protocols to ensure consistency.
- Improve our educational approach and resources by offering additional information and early guidance on essential information applicants need to have.
- Build public trust by addressing customer needs effectively and fostering continuous improvement through feedback mechanisms.

COMMENTS:

The report presents an overview of current practices, highlights key challenges, and outlines a roadmap for enhancing customer experience in Building Services and Planning and Development departments.

Overview of Current Practices

Customer Service Response Standard: Both Building Services and Planning and Development departments' staff aim to respond to inquiries within 24–48 hours, prioritizing same-day responses whenever possible. This standard applies across email, phone, and in-person inquiries, although complex issues may take longer to resolve.

Online Services:

The Citizen Portal (since 2021) and Planning Application Expansion (since 2022) allow applicants to:

- Apply for building and development engineering permits and select planning applications, pay fees, track application status, and schedule inspections.
- Virtual pre-consultation and technical meetings (since 2020) are held weekly, providing structured discussions with cost and time savings for applicants.

In-Person Support:

- Zoning Examiner on Duty handles over 5,200 inquiries annually, serving as the first contact for zoning-related inquiries.

- Planner on Duty system (rotating daily) ensures staff availability for planning-related inquiries.
- Building Services Representative (BSR) Rotation System ensures in-person staff presence at Town Hall for walk-ins, phone calls, and emails.
- Quarterly meetings with development industry stakeholders to maintain engagement.
- Appointments are encouraged for detailed discussions to ensure the necessary personnel are available.

Phone Support:

- Some inquiries are recorded in the Town CRM system via ServiceOakville, while others are lost in email exchanges.
- Developers and experienced applicants often bypass ServiceOakville and communicate directly with staff managing their applications

Email Support

- There are various dedicated email accounts for customer inquiries.
- Complex application inquiries vary in response time, with appointments encouraged for detailed discussions.

Key Challenges

- 1. Legislative Changes and Process Complexity:** Frequent legislative changes and the increasing complexity of the development approval process create significant challenges for both staff and customers, leading to delays and confusion, particularly when digital services and website information are not promptly updated. Additionally, the transfer of responsibilities from Regional and Conservation Halton authorities to local municipalities has increased workloads, straining resources as staff adapt to new roles with limited training.
- 2. Inconsistent Inquiry Tracking:** Building Services and Planning and Development inquiries lack uniform tracking with only application-based inquiries formally logged. General inquiries can get lost in emails, making it difficult to assess service demands and staffing needs.
- 3. Response Delays:** Misrouted inquiries, redundant communication, and complex issues contribute to response delays, prompting the development of an approval wizard to improve efficiency.
- 4. Owner and Applicant Communication:** Owners are not always aware of their application status due to miscommunication with their agent or contractor. New technology improvements will provide direct updates to owners, eliminating this gap.

Several initiatives are planned for 2025-2026, as outlined in Appendix B, aim to address these challenges by focusing on:

- **Staffing and Service Improvements:** Filling vacancies, evaluating service capacity and assessing any additional staffing needs or position changes, and enhancing customer service training will improve communication, issue management, and overall service efficiency.
- **Digital Tools Enhancements:** Upgrade the Citizen Portal, implement electronic plan review (ProjectDox), introduce a mobile inspection app, and expand self-service tools will streamline application processing and reduce reliance on staff for routine inquiries.
- **Customer Support and Engagement:** Enhance customer education, expand ServiceOakville's role and its knowledgebase, and create technology-equipped meeting space to provide better guidance and support for applicants.
- **Strategic Customer Experience Enhancements:** Develop a Town-wide Customer Experience Strategy to improve service delivery, customer satisfaction, and operational efficiency including the development of customer satisfaction measurement framework.

By focusing on delivering an effective and efficient service, the Town will:

- Streamline workflows and reduce service delivery times.
- Enhance transparency and accessibility through digital platforms.
- Build trust and improve public perceptions by addressing both staff and customer obligations.

The Building Services and Planning and Development departments have demonstrated a commitment to responsive customer service. However, opportunities remain to elevate communication, efficiency, transparency, and consistency. By leveraging modern digital tools, formalizing service standards, and improving inquiry tracking, the Town can better inform the applicant on their obligations and deliver a more efficient, seamless, and satisfying experience for residents and applicants.

Additional information on current customer experience practices, key challenges and future enhancements are outlined in Appendices A and B.

CONSIDERATIONS:

(A) PUBLIC

Improvements will enhance accessibility and transparency for residents and developers, reducing confusion and dissatisfaction with the development approval process.

(B) FINANCIAL

None

(C) IMPACT ON OTHER DEPARTMENTS & USERS

Collaboration with Service Oakville and ITS will be crucial to ensure seamless integration of new tools and processes.

(D) COUNCIL STRATEGIC PRIORITIES

This report addresses Council's strategic priorities of Growth Management and Accountable Government.

(E) CLIMATE CHANGE/ACTION

Reducing paper usage through online applications and digital communications aligns with the Town's sustainability efforts. In addition, improved operational efficiency through streamlined workflows contributes to a reduced environmental footprint.

APPENDICIES:

Appendix A – Current Customer Experience Practices and Key Challenges

Appendix B – Future Customer Experience Enhancement Projects

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