

# Planning Application Review and Enforcement System (PARES)

## Ontario Association for Impact Assessment Conference

Presented by:

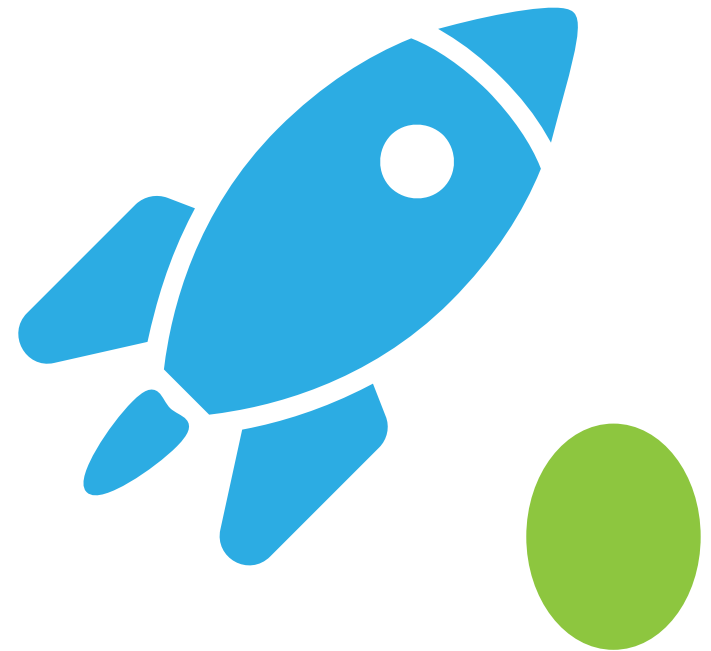
Beth Williston, Associate Director, Infrastructure Planning & Permits  
Mark McKnight, Chief Information Officer

October 25, 2023



# Agenda

- Changing Times
- What is PARES?
- Timeline, Funding & Approvals, Governance
- Development
- Testing
- Training
- Launch
- Next Steps

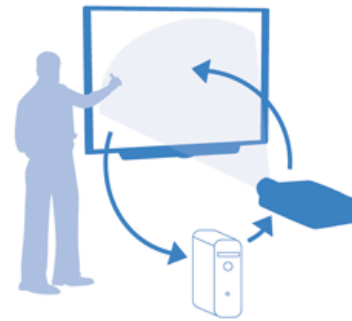
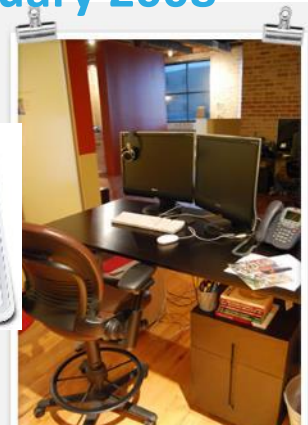


# Where Change Began.... Digital Review at TRCA

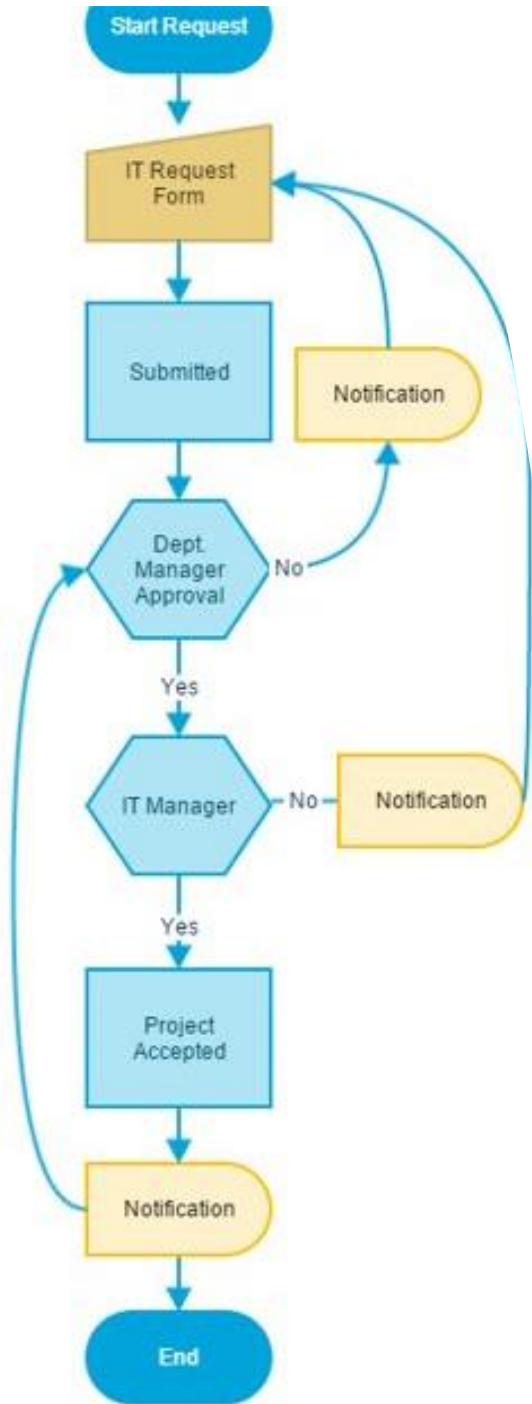
THE NEXT GENERATION USING SMART TECHNOLOGIES - January 2008

The Vision ...

- Having computer monitors big enough to read reports ...
- Having a digital desk white board where you can capture and save your written comments on the reports ...
- Having Smart Boards where the digital review of plans can be captured ...
- Having interactive and video-conferencing capabilities ...
- Having an interactive commenting forum with your peers ...





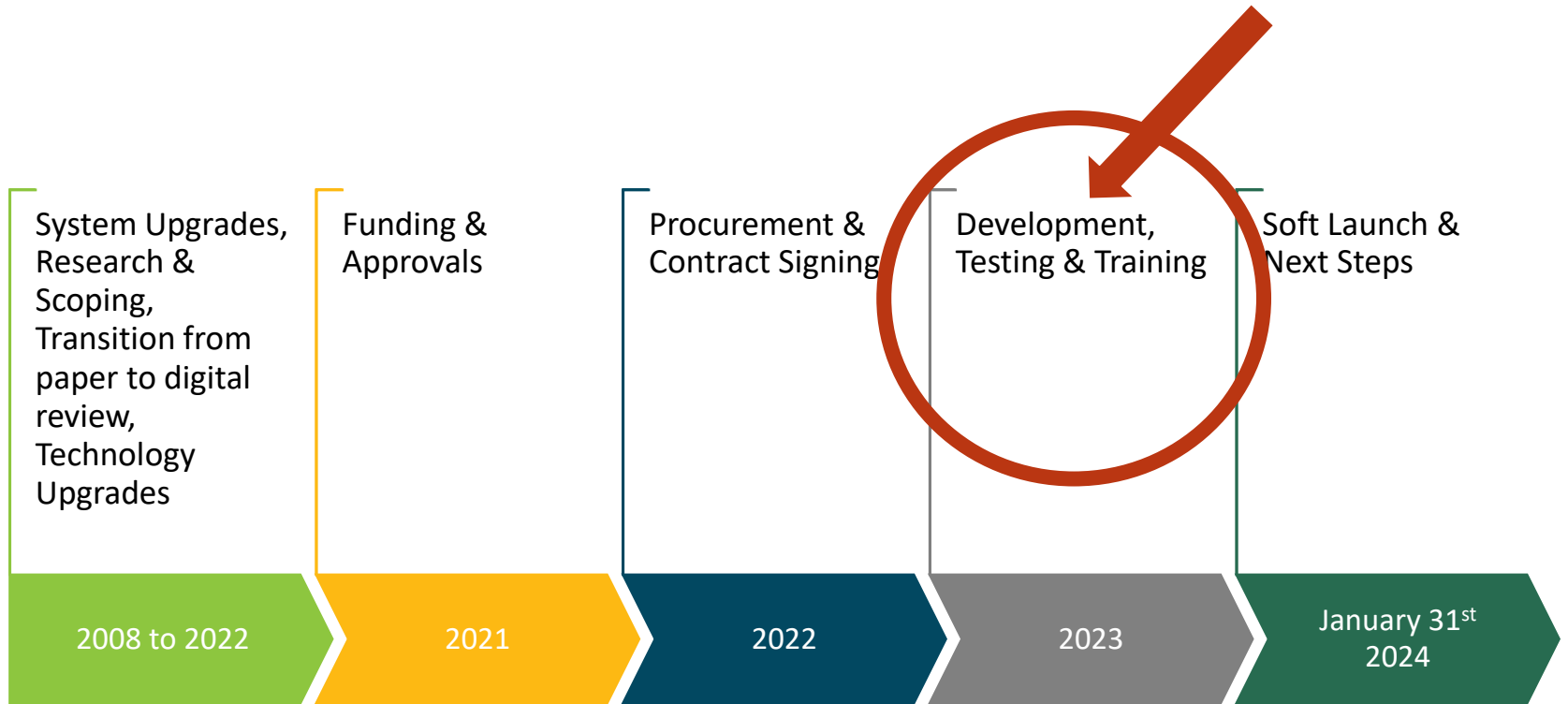


# What is PARES?

- **Planning Application Review and Enforcement System**
- A Cloud-based, interactive system for:
  - Intake of planning, permit and internal project applications
  - Technical review and commenting
  - Integration with BlueBeam Studio Prime <sup>TM</sup>
  - Real time client comment collaboration and response
  - Fee administration
  - Enforcement inspection and reporting
  - Interactive dashboards for tracking and reporting
- The Client Portal will be available through the TRCAs website.
- Future integrations and the building of APIs to integrate with municipal, agency and private enterprise planning solutions.

# Overall Project Timeline

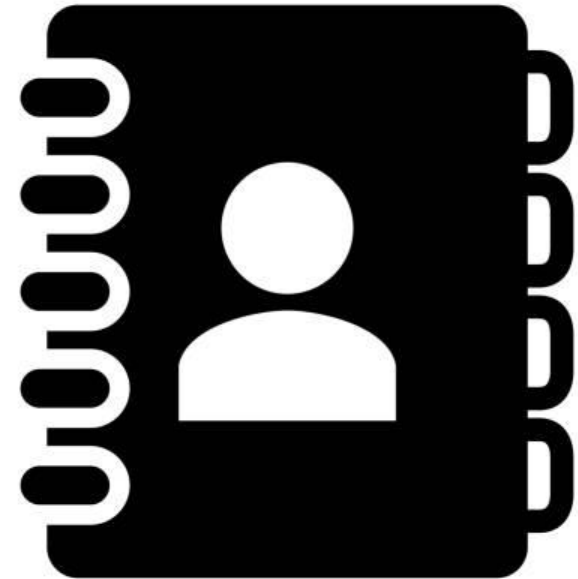
**We are Here!**



# Research, Funding & Approvals

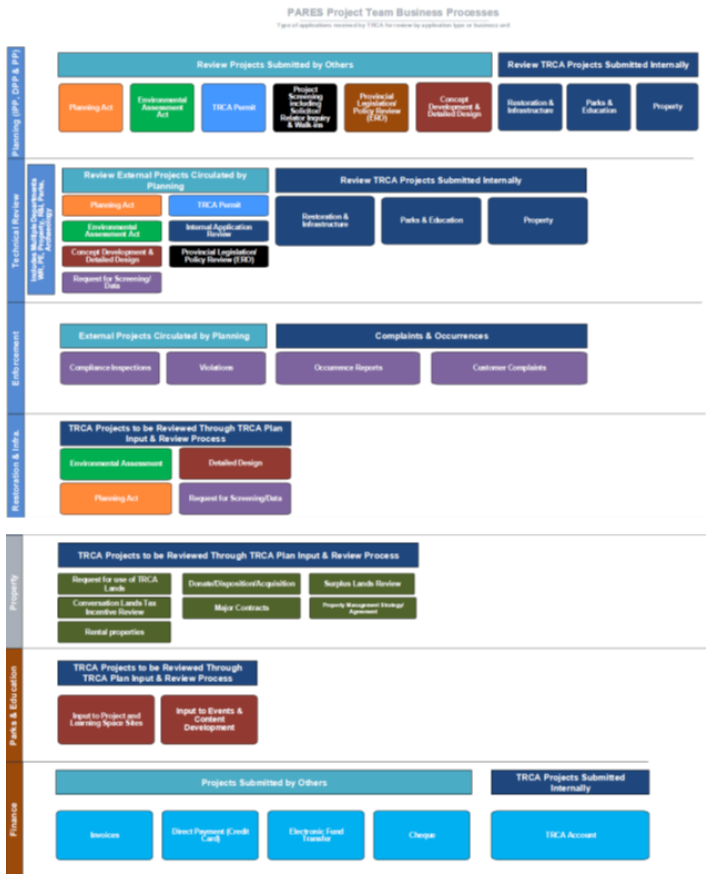
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- **Partner Meetings**
  - Learned what worked
  - Discussed lessons learned
  - Discussed costs and timelines
- Decision point – Create our own system or buy an “off the shelf” solution?
- **Challenges**
  - Most off the shelf systems are designed for municipalities; conservation authorities are different with different expectations
  - Custom built solutions are expensive and require extensive staffing to maintain
- **Costs**
  - Capital cost, long-term maintenance and staff support funded through planning and permitting fees
  - Board of Directors committed to funding PARES and the PARES deliverables in 2021; procurement took close to a year
- **Governance**
  - Project overseen by internal and external teams of experts





# Research, Funding & Approvals



Multi-User Requirements
<b>Submissions</b>
Submissions are submitted through an online portal
Fees are assigned and processed through the online portal
There is communication between client and TRCA staff
There is communication amongst TRCA staff
Submissions are assignable to other TRCA staff, such as technical reviewers
Planners are notified of any updates for a plan submission
Staff and clients can view submissions on a map
Validation supports multiple submission types
Data is fully auditable
Data must be searchable
Ability to support digital signatures
Ability to support digital stamps
Ability to accept resubmissions
Submissions must have robust change management (multiple versions, iterations, audit logs)
Ability to accept renewals
Must be able to link to an internal system workflow if a necessary step
Must be able to transmit data to clients (review comments, follow up, documents)
Ability to attach files to a submission
Ability to pre-screen applications with GIS tools
Ability to view projects nearby with GIS tools
Ability to generate permits as an output
Ability to generate letters as an output
Ability to choose comments from a template library
All data in the system must be able to be modified
Ability to have a checklist for a submission to track progress
Ability to process internal submissions
<b>Application Review</b>
Ability to provide comments on an application
Ability to pull comments or comment section headings from a checklist or comment library, but that can then be customized
Ability to provide markups on an application
Ability to track communication to planning staff and other technical reviewers
Ability to assign and circulate applications
<b>Enforcement</b>
Ability to assign enforcement officers to projects
Ability to view all active permits assigned to an enforcement officer
Ability to be used in the field
Ability to be used offline
Ability to view all comments, files, and location of a permit
Ability to issue non-conformance
Ability to issue violations
Ability to issue letters
Ability to create letter templates
Ability to assign privacy levels to documents
<b>Reporting</b>
Ability to create dashboards to track real-time stats
Ability to create ad-hoc reports
All data can be reported on
Reports are exportable as files
Has a report building tool
<b>Integration</b>
There is integration with TRCA's financial system
There is integration with other TRCA business units at defined points
Must have a defined output for integrated systems (csv, excel, etc.)
Must be able to transmit data to and from municipal systems
Ability to trigger notifications (e-mail when permit is issued, if the user checks off to be notified).

- Business Process Mapping of TRCA Planning, Enforcement and related processes
  - Defined work activities
  - Highlighted dependencies
  - Identified stakeholders and communications
  - Identified opportunities to streamline work and build efficiencies
- Translated into solution requirements for RFP
- Helped to clarify business needs and expectations for vendors
  - Minimized gaps between what we want and what can be delivered

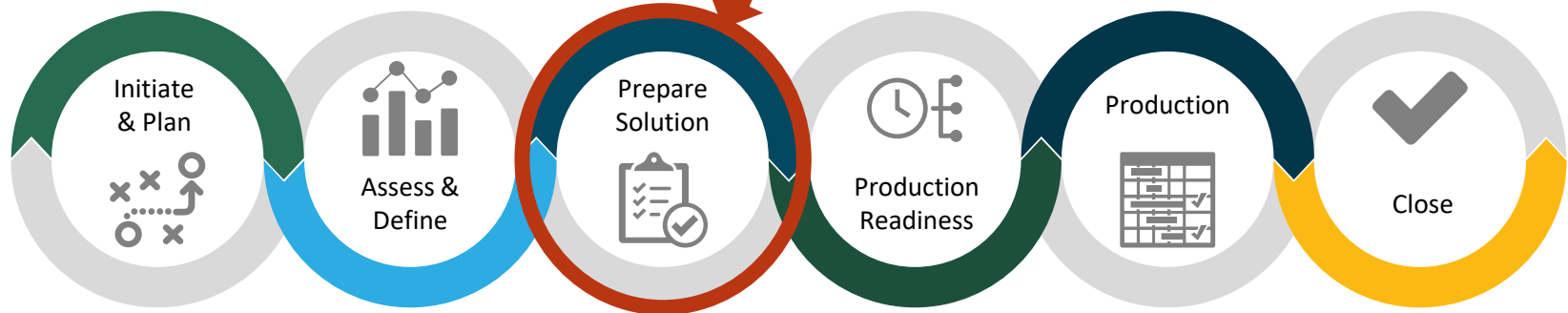


# Implementation Timeline

- System Design & Development
- Data Conversion
- Testing Preparation
- Training Preparation
- Report Development



**We are Here!**



Q4/22

Q1/23

Q2-Q4/23






Q4/23 – Q1/24

# Design & Development

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- Translate and Configure TRCA business processes into the new System
  - Workflow steps and tasks
  - Review teams
  - Automation rules
- GIS and Screening Tools
- eReview integration with BlueBeam™ Studio Prime
- Applicant Portal and Services
- Reports, Templates & Letters

# Integrations

				
<ul style="list-style-type: none"><li>• ArcGIS Version 10.7.1</li><li>• Visualization and screening</li></ul>	<ul style="list-style-type: none"><li>• Laserfiche Version 11</li><li>• Corporate Records</li></ul>	<ul style="list-style-type: none"><li>• Payments and Financial System Integration</li><li>• Sales and Revenues</li></ul>	<ul style="list-style-type: none"><li>• Dayforce Version 60</li><li>• Time management and utilization</li></ul>	<ul style="list-style-type: none"><li>• Forms and Workflow integration to related systems</li><li>• Service Requests</li><li>• Work Orders</li><li>• Program Inquiries</li></ul>

# Applicant Portal

- Customer portal to manage individual accounts and applications
  - Track status and communications
  - Central collaboration on files, documents and drawings
  - Online invoicing and payments

**Toronto and Region Conservation Authority**

Home Toronto and Region Conservation Authority Apply Map Report Search Calendar

You can add multiple scrolling notifications here, set start and end dates for notifications, and activate them as needed.

## Welcome to the Toronto Regional Conservation Authority Civic Access Page

Testing

- TRCA Testing**  
Testing
- Search Public Records**  
This tool can be used to search for existing permits, plans, inspections, code cases, requests and licenses.
- Apply**  
This tool can be used to apply for a permit, plan or license.
- Login or Register**  
Login to an existing or create a new account. You can also find help if you forgot your login information.
- Pay Invoice**  
Use this tool to pay for individual invoices.
- Map**  
Explore the map to see the activity occurring in your neighborhood.

### Application Assistant

Search for application names and keywords

All Trending PERMITS PLANS

Show Categories

- Accessory Structure**  
Category Name: Building (Residential) Description: TEST [Apply](#)
- Minor Works Letter of Approval**  
Category Name: Conservation Authority Act - DPP Description: Minor Ancillary - Must be outside of all hazards and valley and stream corridors and set back a minimum of six meters from all hazards. [Apply](#)
- Projects on Subdivision Lands, Commercial, Industrial and Institutional Properties, Recreation and Other Projects (per component)**  
Category Name: Conservation Authority Act - DPP Description: Projects on Subdivision Lands, Commercial, Industrial and Institutional Properties, Recreation and Other Projects (per component). [Apply](#)
- Works on Private Residential Property**  
Category Name: Conservation Authority Act - DPP Description: Works on Private Residential Property [Apply](#)

# Reporting



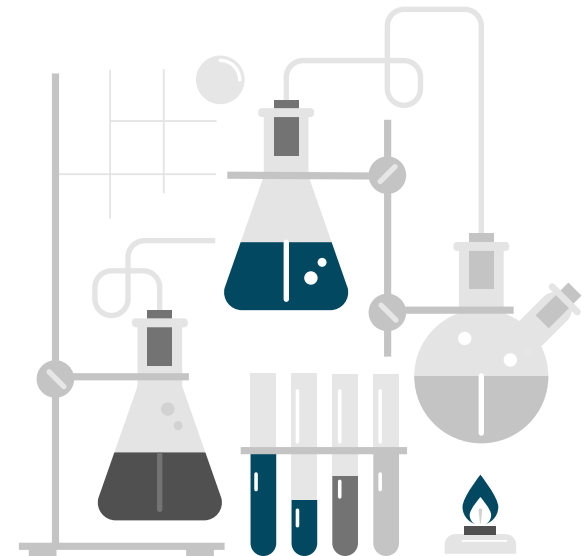
- PARES will provide TRCA staff and clients with advanced, customizable real-time dashboards and reporting tools.
- Internal and Customer Progress Dashboards
  - File Activity and Status
  - Inspection Planning
  - Work assignments
- Reports and Letters
- Performance Reporting Dashboards
- Exportable Data



# Testing

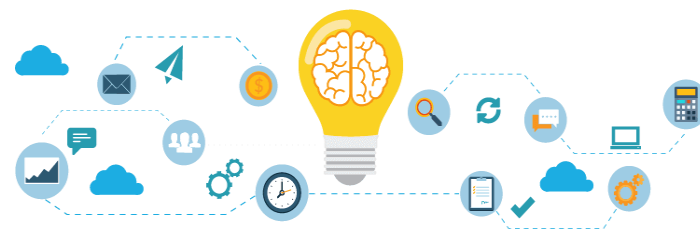
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- Testing the system will commence mid-October and last about a month
- Tyler Technologies will be hosting sessions to train the testers
- Select staff from across the organization are involved, including:
  - Planning staff from our development, infrastructure and policy departments
  - Technical review staff from our water resources, planning ecology, geotechnical, hydrogeology and property departments
  - Enforcement staff
  - Project management staff who lead TRCA projects
  - Administrators from affected departments across the organization
- Testing staff include all levels, from junior staff to senior management



# Developing the Training

- We will be using “train the trainers” approach
- Select senior staff from across the organization are involved, including planners, technical review staff, enforcement, project management leads, and administrators
- Tyler will be hosting Train the Trainer meetings in November
- At the end of these sessions, training plans will be drafted
- Trainers will complete their plans in December
- Trainers will be responsible for training their respective staff





# Training Staff

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- Staff Training will commence mid-January and take two weeks, one for PARES and one for BlueBeam™ Studio Prime
- All end users will be trained:
  - All Planning staff from our development, infrastructure and policy departments
  - All Technical review staff, including not only our core team who tested the system, but supplementary staff from other departments including Watershed Planning, Education, & Conservation Parks!
  - All Enforcement Officers
  - All TRCA Project Managers who lead TRCA projects
  - All affected administrators from across the organization
- Client training will follow.



# Communication Planning

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- Website updates for process and service changes
- Applicant Portal design and integrations
- Partner awareness sessions and testing participation
- Client training planning



# GOING LIVE

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- **PARES Goes Live on January 31<sup>st</sup>!!**
- A Soft launch is planned so we can work out the glitches and give staff experience
- Active projects will have been transferred to PARES with open files available
- Staff will upload new projects and commence interactive PARES reviews with the technical team; SharePoint will be abandoned for plan review!
- Comments will be issued to clients through PARES
- Clients will be encouraged to respond in PARES



# So, What's Next?

- Re-engage our external Governance Team in February 2024
- Select clients to be part of our external testing team
- Develop client training materials
- Plan a formal launch for Spring 2024
- Initiate future integrations ... This is just the beginning of what PARES will be able to do for TRCA!

Future Integrations	Planned Scope of Work
Laserfiche Integration Enhancements	Ricoh Canada support to enhance Laserfiche integration
ArcGIS Version 10.7 Integration	Enhanced GIS integration services and architecture upgrades
Map Production	Map production for screening automation
Dayforce Integration	Enhanced time and activity tracking for planning functions
Business World Integration	Integration of sales revenues to corporate financial system
External Client Integration Model (Municipal, Agency, Other)	Scoping and Planning, and future development of integrations to partner municipalities and agencies to streamline planning communications and reviews
Internal Client Integration and Enhancements (Property Acquisitions, Leases and Disposals, Capital Projects, Portfolio Management, Accounting; Restoration and Infrastructure Portfolio Management)	Expansion of business processes to support additional TRCA services
Configuration & Customization (Future Needs)	Expansion of modules and system functions to improve internal business automation and administration
JIRA Process (ITRM)	Integration to internal work request systems for data requests, technical support and other ITRM functions
311 (Enforcement)	Enhancement of customer management and communication services.

**Thank you**