

# BRIEFING

Page 1 of 2

Item # 5.2.2.

**Chief Financial Officer's Briefing to  
Priorities and Finance Committee  
2020 July 14**

**ISC: UNRESTRICTED  
PFC2020-0769**

## **Policy Review Project Final Report**

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### **PURPOSE OF BRIEFING**

This final report outlines the outcomes of the Policy Review Project as directed by Council in 2018 November. This project achieved its goals and was completed \$115,000 under budget. The results will improve The City's policy environment, approach to policy management and lead to better policy which drives better services.

### **SUPPORTING INFORMATION**

#### **Background:**

On 2018 November 6, Councillor Demong presented an application to the Council Innovation Fund requesting a withdrawal of \$525,000 for a Policy Review pilot project (PFC2018-1300). It was intended to fund a pilot to review policies to ensure they enhance process and outcomes for citizens/customers by improving linkages between policy and services. On 2019 April 2, Administration outlined the proposed project scope to improve value and develop a method that can be applied to future efforts in the pursuit of these benefits (PFC2019-0160). To achieve these goals, the project adapted a reliable and proven continuous improvement method, the Zero-Based Review (ZBR), as its foundation. The adapted-ZBR approach was used to understand The City's policy ecosystem and develop recommendations to improve policy management overall.

Engagement with both external customers and internal stakeholders was critical to identify current barriers and opportunities for improvement, as well as align this project with other policy-related initiatives currently underway. While the focus was primarily on Council Policy, the totality of policy at The City was taken into consideration and better understood as part of the project. Exploration of different tools helped understand the boundaries between policy types. This was achieved through two pilots (Tiering & Securities system; and Social Well-Being Policy) and a review of The City's current policy environment by an external consultant (KPMG).

#### **Results:**

A summary of project outcomes can be found in the Policy Review Project Final Close Out Report (Attachment 1). Key results include:

1. Successful completion of two pilots reviewing The City's Tiering & Securities system and the Social Well-Being Policy.

The two pilots identified and resolved issues acting as barriers to outcomes for citizens/customers and will have lasting impact for the organization. The review of the Tiering & Securities system resulted in process changes with immediate positive impact on the development industry by freeing millions of dollars from onerous security requirements. The results of this pilot were presented to the Standing Policy Committee on Planning and Urban Development on 2020 March 4 (PUD2020-0285). The review of Social Well-Being Policy

# BRIEFING

identified changes to the policy that will help streamline The City's policy landscape, remove duplication, and make it easier to apply policy to decision making.

## 2. Development of a Policy Management Framework.

KPMG evaluated The City's policy ecosystem and found differing internal opinions on the role, function and definitions of policy. A Policy Management Framework was developed based on KPMG's analysis of The City's current policy state and maturity assessment. The pilots, Social Well-Being in particular, proved valuable in test of concepts for the Framework which defines what Council Policy is, how it is built, and how it is managed at The City. This will provide clear governance, roles and responsibilities for Council Policy; articulate how Council Policy fits with other tools used by The City; outline how The City manages and maintains its suite of Council Policies; and identify processes and resources that support Council Policy work and decision making.

Implementation planning will commence following ALT approval of the Framework (expected this month), including an assessment of required resources. Implementation will require changes to the use of Council Policy and tools for management, development and review. This will ensure existing Council Policy is evaluated, and future Council Policy crafted, from an integrated, customer-focused view.

## 3. A strategic approach to ongoing policy and service review.

Finally, learnings from the pilots show proof of concept of the adapted ZBR method. As policy maturity increases in the organization, review of policy-service connections will continue to have value on an as-needed basis while the Policy Management Framework is implemented and established over time. Not intended as a new, standalone initiative, opportunities for policy and service reviews will be considered via the SAVE program to enable coordination and prioritization of these ideas against others. As per PFC2020-0284, Council directed all improvement initiatives into SAVE to avoid competing priorities and dilution of effort; any proposed work of this ZBR-like nature would be 'approved' by SAVE. The need for a dedicated program to resolve policy-service issues can be reevaluated once SAVE ends.

## **ATTACHMENT**

1. Attachment 1 – Policy Review Project Final Close Out Report