



# Supporting your vision

THE CORPORATION OF THE  
MUNICIPALITY OF BROCKTON

LAND USE DEVELOPMENT

PROCESS MANAGEMENT REVIEW

RFP NO. CAO 2020-01

FILE A

LEAD ENGAGEMENT PARTNER

BRUCE PEEVER

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OTHER KEY PERSONNEL

SANA MALIK

JERMAL FRANCIS

JULY 16, 2020

**Let's do this.**





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July 16, 2020

Ms. Sonya Watson  
Chief Administrative Officer  
The Corporation of Municipality of Brockton  
P.O. Box 68, 100 Scott Street  
Walkerton, ON, N0G 2V0

Dear Sonya,

On behalf of KPMG LLP (KPMG), thank you for providing us with the opportunity to provide consulting services to the Corporation of the Municipality of Brockton (the "Municipality") for a land use development process management review. Our proposal demonstrates why KPMG is the ideal choice for this project.

**We are Canada's leading municipal advisory and audit firm.** Our experience serving local governments is unparalleled. KPMG has a team of partners and professionals dedicated to providing advisory services to municipal governments and organizations. Our in-depth knowledge and experience enables us to provide clients with insights firmly grounded in understanding the operational challenges of the current municipal environment.

**Highly qualified, experienced team.** In assembling our team, we have selected professionals for their relevant technical qualifications, strong public-sector credentials, and successful track record of advising and leading local governments through change and transformation. **Our firm has undertaken multiple development process reviews allowing us to hit the ground running and leverage leading practices to the benefit of the Municipality.**

**Proven methodology and collaborative approach.** Our approach is grounded in a factual, analytical and transparent process, coupled with a commitment to working in close partnership with you every step of the way. We will meet with your people as appropriate to help them deepen their understanding of the reasoning behind our recommendations as we further our understanding of the Municipality and requirements in order to deliver tailored advice and develop solutions that address your facility and winter control needs.

We feel strongly about our capabilities to serve the Municipality and we will comply with all of the provisions in your RFP. If you have any questions about our proposal, or require additional information, feel free to contact us. We look forward to the next stage of the proposal process.

Sincerely,

S. Bruce Peever  
Lead Engagement Partner  
905-523-2224 | [bpееver@kpmg.ca](mailto:bpееver@kpmg.ca)

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## EMBEDDING RESILIENCE

Together, we are facing a truly unprecedented environment. The global coronavirus pandemic is affecting our families, our communities, and our way of life.

During this time, we truly appreciate how you are making operational changes and taking protective actions to limit the spread to limit the spread. We also wanted to update you on how we're approaching the situation at KPMG.

We're focused on the health and safety of our employees, families, and communities; and we are committed to continuing to support you by providing seamless experience during these difficult times. We have successfully migrated to 100% virtual operations. This transition was smooth and has allowed us to continue to offer value to our clients. These are challenging times, but we are in this together and we are confident in our ability to manage through this.

To read more about how we are embedding resilience at KPMG, click [here](#).



# Proposal form

The following Proposal Form shall be completed and included with the proposal.

For the Provision of: Municipal Modernization Funding –  
Land Use Development Process Management Review

Submitted by:  KPMG LLP

Firm Name

115 King Street South, 2nd Floor, Waterloo, ON N2J 5A3

Address Postal Code

## **Hereinafter Called the Proponent**

To: Municipality of Brockton

PO Box 68, 100 Scott Street

Walkerton, ON, N0G 2V0

## **Hereinafter Called the Municipality**

The Proponent declares that:

1. No person(s), firm or Municipality, other than the Proponent, has any personal interest in this Proposal or in the award for which this Proposal is made;
2. No officer or employee of the Municipality is or will become interested directly or indirectly as a contracting party, partner, shareholder, surety or in any portion of the profits thereof, or in any of the monies to be derived, therefrom;
3. This Proposal is made without any connection, comparison of figures, or arrangements with, or knowledge of any other Municipality, firm or person making a bid for the same and is in all respects without collusion or fraud; and
4. By signing this submission, I confirm I have read and understood the content and requirements of this proposal document;

## **Acknowledgement to receipt of Addenda**

This will acknowledge receipt of the following addenda and that the pricing quoted includes the provision set out in such addenda;

Addendum #	Date Received
------------	---------------

# \_\_\_\_\_

# \_\_\_\_\_

**Check here if no Addenda received ✓**

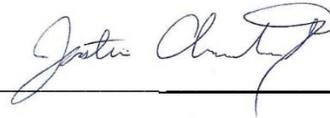
Lowest or Any Bid Not Necessarily Accepted

Date July 16, 2020



\_\_\_\_\_

Signature of Proponent



\_\_\_\_\_

Signature of Witness

By my signature, I hereby confirm I am a principal, or have been duly authorized by the

Principal/ Board of KPMG LLP, to sign on behalf

(Name of Firm)

of the above named.

# 4.2 Proponent information form

The following Proponent Information Form shall be completed and included with the proposal.

1 Proponent's Contact Individual:	Bruce Peever
2 Mailing Address:	115 King Street South, 2nd Floor Waterloo, ON N2J 5A3
3 Office Phone Number:	519-747-8800
4 Toll Free Phone Number:	866-246-9224
5 Mobile Phone Number:	289-259-4884
6 E-mail Address:	bpeever@kpmg.ca
7 Website	www.kpmg.ca
8 WSIB Account #	2397749( National); 2397749(Ontario)
9 HST Account #	12236 3153 RT0001

Proponent: Bruce Peever, KPMG LLP Date July 16, 2020



Signature: \_\_\_\_\_

# 4.3 Proponent's ability and experience form

The following Proponent's Ability and Experience Form shall be completed and included with the proposal.

## Proponent's Ability and Experience Form

Proponents shall provide information below on previous, similar projects that have been successfully undertaken by the Proponent's firm in the past three (3) years.

Contract/Project #1	Insert Information
Name of reference municipality	City of Markham - Development review process
Name of Contact and Telephone number	John Yeh, Manager, Strategy & Innovation, Development Services Commission  905-477-7000, Ext. 7922
Total Value (annual)	\$130,000
Description of Work	<p>Markham retained KPMG to conduct an assessment of its development review process. The purpose of the review was to ensure that the development review process is efficient; streamlined and effective; clear and transparent; and, supports excellence in the built environment. The volume, pace and complexity of development in Markham is increasing rapidly as the City transitions from lower to higher density growth.</p> <p>Our Final Report identified 18 recommendations to help Markham address these pressures and ensure that the development review process continues to provide the vital public goods that make the City one of Canada's most desirable communities.</p> <p>Our work included extensive stakeholder engagement, including three roundtables with industry representatives and broad staff engagement, from the Mayor and CAO to departmental leadership to management and frontline staff. After developing a robust evidence base to understand the strengths and pain points of the current development review process, we used co-design coupled with lean process improvement techniques to identify and detail improvement opportunities and a detailed implementation roadmap.</p>

Contract/Project #2	Insert Information
Name of reference municipality	City of Toronto - Development review process
Name of Contact and Telephone number	Bruce Hoang Director, Transformation Office 416-338-2165
Total Value (annual)	\$400,00
Description of Work	<p>The City of Toronto's Chief Transformation Office engaged KPMG to perform an end-to-end program review of Toronto's development application process. The purpose of the review was to ensure the City's process is effective and efficient; provides clarity, certainty and transparency to applicants and the public; and above all else produces good city-building results.</p> <p>This engagement included an extensive gap analysis comparing the City's current practices and capabilities to leading practices in project approvals and those in place in other jurisdictions. Our engagement team conducted numerous briefings and extensive relationship management throughout the review with senior parties, including the Mayor's Office, City Council, the Chief Planner and a core team of representatives from City Divisions, including Toronto Building.</p> <p>Throughout the engagement, we were able to build a strong collaborative and consultative relationship with the interdivisional staff team leading the project.</p>

Contract/Project #3	Insert Information
Name of reference municipality	Brantford - Development review process
Name of Contact and Telephone number	Aaron Wallace Director, Corporate Initiatives and Community Strategies  519-759-4150 Ext. 5962
Total Value (annual)	\$119,000
Description of Work	<p>The City of Brantford retained KPMG to undertake a Development Building Process review in response to concerns expressed by the public and development community. The overall objective was to identify opportunities to create a streamlined and efficient development process.</p> <p>Our work included a comprehensive documentation review and stakeholder consultations (including over 20 interviews with development community and 4 interview with local boards/agencies) to develop and in-depth understanding of the current state Development Building Process. The engagement team also conducted a high level leading practice review of municipal development and engineering approval process as well as a review of fees, cost recovery levels, security deposits and refund policies.</p>

Proponent: Bruce Peever, KPMG LLP Date July 16, 2020



Signature: \_\_\_\_\_

# 8.2 Company background

## COMPANY PROFILE

KPMG LLP, a Canadian limited liability partnership established under the laws of Ontario, is the Canadian member firm affiliated with KPMG International Cooperative (KPMG International), a Swiss entity. KPMG is a global network of professional firms providing Advisory, Audit, and Tax services. KPMG International's member firms have more than 219,000 people worldwide, operating in 147 countries.

## AREAS OF EXPERTISE

In selecting an external consultant for this Project, the Municipality wants a firm and team that has deep experience performing similar reviews and a methodology to examine the Municipality in a holistic fashion. KPMG is the firm you can trust to deliver. We have demonstrated knowledge and experience in service delivery reviews in Ontario, in other Canadian provinces, and elsewhere around the globe. Relevant engagements are described below.



REVIEW OF THE DEVELOPMENT PROCESS



DEVELOPMENT REVIEW PROCESS ASSESSMENT



DEVELOPMENT PROCESS REVIEW



SERVICE DELIVERY REVIEW



SERVICE DELIVERY REVIEW



ORGANIZATIONAL REVIEW OF BYLAW SERVICES



CONSTRUCTION PROJECT MANAGEMENT PROCESS REVIEW



SERVICE REVIEW



SERVICE INVENTORY



SERVICE DELIVERY REVIEW



SERVICE DELIVERY REVIEW



SERVICE DELIVERY REVIEW



HUMAN & SOCIAL SERVICES PROCESS REVIEW



SOCIAL SERVICES PROCESS REVIEW



PROGRAMS AND SERVICES REVIEW



ORGANIZATIONAL REVIEW

KPMG's size and global resources – and the breadth of our client base – allow us to support significant investments in our methodology, tools, training and technology and to deploy international experience, all of which will benefit the Municipality.

## SCOPE OF WORK

We understand that the purpose of this proposal is to explore opportunities to enhance value to public, interested parties and local developers and ensure developments occur in a structured and consistent manner while adding value to the long-term growth of the community.

## KEY DELIVERABLES

KPMG has built a methodology that caters to your key deliverables. We will:

- Review best practices for a development friendly municipality
- Provide input and recommendations on data sharing review to improve efficiencies between upper and lower-tier
- Provide detailed recommendations and recommended changes to implement “shovel-ready” improvements
- Provide recommendation on the skill sets, organizational structure and human resource requirements to support a growing community and to ensure the delivery of high quality customer service for residential development with adherence to legislative, administrative and engineering requirements.
- Provide recommendation on the preferred software applications to support on-line building applications in a lower-tier municipality that may connect with upper-tier platforms.
- Provide recommendations on Affordable Housing Incentive Programs that could be considered and implemented to support attainable housing alternatives in Brockton.

## PROPOSED TEAM

We carefully staff our engagements with professionals selected for their relevant technical qualifications, strong credentials, and successful track record in helping clients overcome a variety of challenges and capitalize on opportunities. Our team’s roles and experience are demonstrated on the following pages. Their **detailed CVs** have been included in **Appendix A**. We have included the **references** on page 5.





**S. Bruce Peever**

Lead Engagement Partner

T: 905-523-2224

E: [peever@kpmg.ca](mailto:peever@kpmg.ca)

**Role:** As a Lead Engagement Partner, Bruce will have responsibility for the successful delivery of this project and will ensure your complete satisfaction for the services provided. Bruce will help ensure that the Municipality receives the full benefit of our resources on a timely basis and will participate in the development of all deliverables and key presentations to the project stakeholders.

**Relevant experience:** Bruce is a Partner in the Public Sector practice. He works with cities, colleges/universities and other public sector entities across eastern Canada helping them drive performance improvement and innovation by cutting through the complexity of their work.

Bruce's extensive experience in organizational and business process reviews, includes such projects as the City of Brantford Service Delivery Review, City of Brantford Development Process Review, Region of Waterloo Service Delivery Review, Waterloo Townships Service Delivery Review, IKEA Project Management Process Review, Township of Woolwich Organizational Review and Town of St. Mary's Organizational Review.



**Sana Malik**

Engagement Manager

T : 905 523 6914

E: [sanamalik@kpmg.ca](mailto:sanamalik@kpmg.ca)

**Role:** Sana will serve as the Engagement Manager for the Municipality. In this role, she will be involved in the day-to-day project delivery, stakeholder consultation, current state assessment, identification of improvement opportunities, opportunity analysis, as well as providing general project support.

**Relevant experience:** Sana is a Senior Manager with KPMG's Internal Audit, Risk and Compliance practice, based in Hamilton. Prior to joining the Hamilton office, Sana worked with the City of Hamilton with the City Auditor's office where she performed operational, compliance and value for money reviews.

Sana recently led the **Development Process Review** for the City of Brantford. KPMG was engaged by the City of Brantford to review the City's development processes from the planning stages through to construction and to provide a report detailing recommendations that will enhance the City's planning, engineering and building functions. The project involved benchmarking of the municipality against other Ontario municipalities; conducting process mapping workshops, identifying areas of improvement and providing realistic recommendations for the short and long term.



**Jermal Francis**

Engagement Consultant

T : 905 523 2254

E: [jermalfrancis@kpmg.ca](mailto:jermalfrancis@kpmg.ca)

**Role:** Working closely with Bruce and Sana, Jermal will be involved in the documentation review, stakeholder consultations, comparator analysis and supporting the team on general project deliverables.

**Relevant experience:** Jermal is a Senior Consultant in KPMG's Risk Consulting practice based in Hamilton. He has experience in governance assessments, business transformation, business process and compliance reviews. He holds a Bachelor of Business Administration with a specialization in accounting from the University of Windsor and is a Certified Internal Auditor (CIA).

Jermal's experience includes working on projects such as McMaster Student Union Organizational Review, Grand River Conservation Authority Business Plan, Retail & Manufacturing Compliance Review and Internal Controls over Financial Reporting (ICFR) for a large manufacturing organization.

Jermal also worked on the Development Process Review for the City of Brantford. Jermal was instrumental in mapping process flows of high level application processes and developing recommendations for key pain points.

# 8.3 Methodology

## PROJECT METHODOLOGY

Our approach to the Land Use Development Process Management Review is divided into five phases, each focused on the accomplishment of specific, tangible objectives and activities. The **Major Project Elements** of the RFP listed below are incorporated in our methodology and reflected in the **Environmental Scan** and **Current State Analysis** phase in logical sequence.

1. Evaluation of Current Planning Approval Process and Development Consultation process managed by Brockton in relation to municipalities of similar size
2. Evaluation of systems and of software used by lower-tiers that would benefit Brockton and that would support data transfer between lower-tier and County system.
3. Process Assessment for Current Workflow Management with Outputs
4. Evaluation of Affordable Housing Programs that may be suitable for implementation in Brockton

The following sections provide a brief description of each phase and its associated activities.

### PHASE I: PROJECT START-UP

This phase lays a strong foundation for the project through the facilitation of introductory and kickoff meetings with key project contributors.

KPMG will spend a brief, but necessary, period of time at the beginning of the project to confirm the scope, establish expectations, and validate our approach with the Project Manager. This meeting will also serve to confirm project deliverables and confirm timelines. These elements will be drafted into a formal project charter document for internal and external audiences. We will also seek to establish weekly or bi-weekly project status meetings with the Project Manager. KPMG will submit bi-weekly status update reports to the Project Manager in order to track progress and proactively address any foreseen risks that may impact the project. KPMG will then facilitate a kick-off meeting to review and confirm key elements of the project charter with senior management. The purpose of the kick-off meeting is to orient senior management to key project elements, including: approach, milestones, timeline, project structure, communication plan and consultation/ engagement plan.



### DELIVERABLES:

- Confirmed Project Charter and established status reporting structure
- Project Schedule/Gantt Chart
- Stakeholder Engagement Plan
- Project Kick-off Meeting

## PHASE II: ENVIRONMENTAL SCAN

This phase is important in developing a common understanding of the current state from which perspective everyone can begin to view potential opportunities for the future. It is also the stage where we begin to identify opportunities for improved approval processes.

### DOCUMENTATION REVIEW

KPMG will complete a comprehensive documentation review which will include, but is not limited to, the following:

- Detailed organizational structure charts and staffing levels
- Strategic plans and business plans
- Budgets and financial statements
- East Ridge Development Guidelines
- Municipal Services Review
- Operational/Organizational Review
- Site Plan/Subdivision Agreement Templates
- Relevant documents that provide insight into the processing of building and development applications
- Other documentation which will provide us with an understanding of the development needs and challenges facing the City

We will work closely with the Project Manager to make sure the list of documentation for review is complete.

### STAKEHOLDER CONSULTATION

KPMG will meet with key building and development stakeholders for the City (e.g. CAO, Senior Management Team, County of Bruce Planning staff, staff in the Building, Planning and Engineering departments) to understand the current operating environment and obtain their perspectives in order to:

- Understand the roles and responsibilities currently within the City's land use development process
- Assess strengths, weaknesses, opportunities and threats (SWOT) related to the land use development process
- Uncover possible innovation opportunities
- Further identify and gain insight on issues relating to the City's land use development process

For the purposes of this proposal, we have assumed 15 interviews and will work closely with the Senior Management Team to identify the appropriate participants and consultation approach. We anticipate the interviews will be 45 minutes. We will develop interview guides that will form the basis of these conversations. The interview guides will be reviewed with the Project Manager prior to interviews and distributed to interview participants in advance.

### JURISDICTIONAL SCAN

In our experience, clients benefit tremendously by learning about the experiences of other jurisdictions. In this phase, we seek to build on the municipality's current jurisdictional knowledge by conducting a high level leading practice review of municipal development planning application processes. Our review will include a scan of five (5) comparator municipalities on their development planning processes and average service levels within Ontario, including best practices and performance indicators for service level standards. We will also provide insights into the unique **customer service elements, current structure, online presence, flow of information/data and technologies/software** used by comparator municipalities. We will identify specific areas of interest where the benchmarking data suggests other municipalities are providing different service levels, or have different cost levels or revenue levels. Altogether, this jurisdictional review will assist in the identification of key trends and patterns in development planning application review processes and improvements that can be applied to the Municipality of Brockton.

## **DELIVERABLES:**

- 15 Interviews (45 minutes each)
- Leading practices in building & development approval
- Summary of Findings (presented in Phase III)

## **PHASE III: CURRENT STATE ANALYSIS**

In order to understand the current state of performance for land use development process, KPMG will analyze key information related to the process. This analysis will include the following:

- An in depth end to end land use development process review
- Analyzing the current structure and flow of information between the Municipality and County
- Understanding the roles and responsibilities associated with various activities
- Analyzing the fee structure for various applications
- Review of on-line presence and ability of the public to find information about residential developments and Municipal land available for sale in the community specifically East Ridge Business Park
- Workflow review including the identification of key issues, gaps and service levels
- The current service level standard
- Provincial requirements and potential legislative barriers to change
- Regulatory impacts - bylaws/policies affecting the service
- Resources required to provide the service (funding, staffing, etc.)
- Staffing model involved in delivering the service (full time versus part time, number of staff )
- Financial trends and impacts

The above analysis will allow us to build concise professional information related to the development process in Brockton and development in East Ridge Business Park. It is our expectation that this analysis will identify opportunities for improving responsiveness in the development process and serve as the foundation for the business process mapping.

## **PROCESS MAPPING**

Employing lean six sigma methodology, KPMG will map and evaluate the current workflow management at the municipality by mapping a representative sample of development applications from the pre-consultation stage through to completion. This involves a review with County planning staff and municipal staff of current workflow management and recommended changes arising from a role and structure review.

Further, this mapping will assess the relative value of the different elements of development planning and engineering review processes, as well as, building review e.g. examine pre-consultation, complete application requirements, fee submission, circulation to other departments, planning review, engineering review, building review, agency comments, recommendations, decisions, appeals, engineering approvals. The process mapping will identify opportunities for process improvements and will allow KPMG to develop detailed recommendations for configuration enhancements to Brockton's workflow management system that can increase the value to clients while ensuring fees structures, human resources, technology improvements and growth demands have been incorporated.

For the purposes of this proposal we have assumed two (2) half day working sessions facilitated by our team involving front line and supervisory staff from the County and the Municipality.

## **EVALUATION OF AFFORDABLE HOUSING PROGRAMS**

KPMG will review the current state of Affordable Housing Programs in Brockton. We will then conduct a review of affordable housing programs that would provide value added propositions to proposed developments and offer a partnership that would support more attainable housing alternatives for local residents within new developments and develop a clear concise document in this regard.

At the end of this phase, we will prepare and present an interim report to Senior Management.

#### **DELIVERABLES:**

- Current State Analysis
- Two half day process mapping working sessions
- Hard copy and digital documents of concise professional information related to the development process in Brockton and development in East Ridge Business Park
- Evaluation of Affordable Housing Programs
- Interim Report

### **PHASE IV: DEVELOPMENT OF OPPORTUNITIES, RECOMMENDATIONS & IMPLEMENTATION PLAN**

#### **OPPORTUNITY DEVELOPMENT**

KPMG will prepare a long list of opportunities for improvements in the Land Use Development Process. These opportunities will stem from work completed in the previous phases and incorporate best practices from other development friendly municipalities. This will include opportunities to:

- Identify specific software or technology that could be employed to improve processes and that would support data transfer between the lower-tier and County system. Some **Digital Transformation Strategy** options KPMG will review include
  - Use of an electronic online submission system (such as ePlan) - we will provide examples of other municipalities using such systems, their experiences and cost ranges
  - Connecting the development project applications to the GIS platform with the intent of making all development information known to the development community
  - Enhancing the online presence through the City's webpage; we will provide areas that need strengthening based on our jurisdictional scan, which would be most useful to the end user
  - Upon understanding the City's current technology use and requirements, we will recommend other software technology best suited for the City's internal workings such as Amanda, Sharepoint etc.
- Improve online presence to gain public interest, for developers and general public, focussing on land for sale in the East Ridge Business Park;
- Digitize or modernize processes to improve responsiveness and efficiency;
- Develop new internal/external groups or committees to optimize the process;
- Improve alignment and collaboration between staff and other key process stakeholders;
- Improve skill sets, organizational structure and human resource requirements to support the process
- Improve documentation related to fees/costs;
- Provide options on Affordable Housing Incentive Programs that could be considered and implemented to support attainable housing alternatives in Brockton;
- Improve communication and information sharing between key stakeholders;
- Support local development initiatives and ongoing communications related to development.

We will then conduct a working session with the municipality's project team to present and validate the key improvement opportunities. We will also discuss implementation across each of the identified opportunities.

#### **RECOMMENDATION AND IMPLEMENTATION PLAN DEVELOPMENT**

Based upon all the work completed in previous phases, KPMG will develop specific recommendations around the Land Use Development Process to streamline and improve the overall responsiveness and customer experience for service users in the development community. Detailed recommendations and recommended changes to

implement “**shovel-ready**” **improvements** will be provided. Specifically, KPMG will provide recommendations related to:

- Priority actions for improvement
- Identification of who is responsible for priority actions
- Time frame for improvement, and
- Key measures of success.

The recommendations identified for implementation are generally grouped between immediate, short-term, medium term and long-term recommendations. The plan will also prioritize the recommendations according to ease of implementation and impact. The recommendations provided by KPMG will be developed considering:

a) The **Value to Applicants** such as:

- One point of contact for development applications, permits regardless of the type of development
- Ability to fill out and submit applications and fees online
- Ability to determine what land is available for sale in Brockton and seek out timely information
- Ensure minimal referrals back and forth between local and County staff
- Assurance of competitive planning & development fees related to municipalities of a similar size
- Assurance of following the same process with consistent standards for each development
- Easy to find information through a solid web presence with easy to access information
- Development checklists for ease of process and to ensure seamless transition regardless of staffing changes
- Key focus on customer service as a top priority

b) The **Value to General Public** interested in development proposals:

- Intuitive and user-friendly web presence and information sources for viewing current residential developments and available Municipal lands for sale on a map or from a web page with supporting documents, current status, upcoming meetings, etc.
- Easy access to appropriate fees and charges that are being allocated to developers and interested purchasers
- Opportunity for education about the Provincial Policy Statements and their application in Brockton
- One source of information to provide understanding of timelines and length of process and approvals
- Key focus on improving user experience for improved customer service when seeking information.

KPMG will present the recommendations and implementation plan to the Project Team for their approval in a Summary Report.

#### **DELIVERABLES:**

- Opportunities for process improvement
- Working session to the Project Team to evaluate and validate opportunities for improvement
- Draft recommendations on changes to processes, resources, and/or responsibilities
- Summary report identifying Short-Term and Longer-Term Priorities with associated costing estimates

## PHASE IV: FINAL REPORT AND PRESENTATION

KPMG will summarize all of the work completed during the previous phases and develop a final report with an executive summary. The draft report will include recommendations for improving the development process, structural and financial considerations, and a summary of financial implications and risks to the City. The draft final report will be presented to the project team for review and feedback prior to being finalized. Once the final report has been validated based on project team feedback, KPMG will present the draft and final report to the City's Council.

### DELIVERABLES:

- Draft final report to senior management
- Draft final report and presentation to Council
- Final Report and presentation to Council
- All deliverables shall be provided in an accessible manner and consistent with Brockton's Branding Guidelines.
- Electronic copies of all data tables



# COVID-19 rider

1. During the engagement, each party shall keep the other party reasonably informed of any events which:

- i. relate to the notifying party and the COVID-19 situation;
- ii. are not existing or reasonably foreseeable at the date of this agreement; and
- iii. which will materially and adversely affect the notifying party's ability to perform its obligations under the engagement.

2. Each party will implement mitigation measures to enable the Services to be performed so far as reasonably practicable in the circumstances, including:

- i. reducing travel (particularly international travel) and in-person meetings to the minimum necessary level;
- ii. at the party's premises, implementing such infection control procedures as are recommended or required by official bodies in the applicable location;
- iii. implementing internal corporate policies which permit and encourage individual remote working, and technical systems to enable individual remote working; and
- iv. implementing telepresence, audio conference, videoconference, and other systems for collaborative working.

3. If, as a result of the global COVID-19 virus situation, performance by a party of its obligations under the engagement are rendered impossible or impracticable, the time for performance of such obligations shall be extended by such period as is reasonable in the circumstances, PROVIDED THAT the party in question is complying, and continues to comply, with its obligations pursuant to paragraphs 1 and 2 above.



# 8.4 Work plan/schedule

Our project schedule provides an outline of the scope of work to be performed and the approach to be utilized to accomplish the tasks as presented including relevant milestone dates.

Phase	Activities	August				September				October			
		Weeks 0	1	2	3	4	5	6	7	8	9	10	11
	Overall budget and schedule management												
	Regular meetings with the County Project Manager												
<b>I</b>	<b>Project Initiation</b>												
	Project kick-off meeting with Project Team												
	Develop Project Charter, Engagement Schedule												
<b>II</b>	<b>Environmental Scan</b>												
	Documentation Review												
	Stakeholder Engagement												
	Comparator Leading Practice Research												
<b>III</b>	<b>Current State Analysis</b>												
	Current State Analysis												
	Process Mapping												
	Evaluation of Affordable Housing Programs												
	Prepare and Present Interim Report												
<b>IV</b>	<b>Recommendations &amp; Implementation Plan</b>												
	Opportunity Development												
	Opportunity Workshop with project team												
	Recommendation Development												
	Implementation Plan Development												
	Summary report												
<b>V</b>	<b>Final Report and Presentation</b>												
	Prepare and present Draft Final Report to Senior Management												
	Presentation of Draft Report to Council												
	Incorporate feedback and Finalize Report												
	Presentation of Final Report to Council												

## WORKING TOGETHER

We anticipate that the service delivery review will attract the attention of the Municipality’s staff and community. Given the sensitivity of these projects within the community, we believe it is appropriate to conduct the Review in an open and transparent manner.

Embedded within our approach are aspects of our communication and change management strategy (consultation with staff representatives, presentations at open meetings of Council, development of potential organizational structures reflecting changes to staffing levels). The following are suggested methods of working together. We will work with the Municipality to best determine the most effective meetings during these unprecedented times (please see Covid-19 rider) in order to meet your timelines.

Our approach to managing communication is as follows:

	Freque <sup>n</sup> c	Approximate Dates	Suggested Method	Accompanying Documentation
<b>Project Kick Off Meetings - Project Sponsor and Project Team</b>	Once	Week of 17 <sup>th</sup> August	Virtual	Project Charter
<b>Status Meetings</b>	Bi-weekly	Ongoing	Teleconference	Status Report
<b>Stakeholder Engagement</b>	10	August 24 <sup>th</sup> - September 4 <sup>th</sup>	Virtual	Interview Guide
<b>Interim Report</b>	Once	Week of 7 <sup>th</sup> September	Virtual	Interim Report
<b>Working Session - Review Opportunities</b>	Two	Week of 14 <sup>th</sup> September	In-Person	Working Session Presentation
<b>Present Draft Final Report to Management</b>	Once	1 <sup>st</sup> October	In-Person	Draft Final Report
<b>Present Draft Final Report to Council</b>	Once	13 <sup>th</sup> October	In-Person	Draft Final Report
<b>Final Report</b>	Once	21 <sup>st</sup> October	In-Person	Final Report
<b>Present Final Report to Council</b>	Once	27 <sup>th</sup> October	In-Person	Final Report

Consistent with the RFP, the following chart breaks down the resources that will be required of the Municipality:

Group	Resource requirements
Project Sponsor	<ul style="list-style-type: none"> <li>– Attendance at Phase I project initiation meeting</li> <li>– Attendance at scheduled project management meetings</li> <li>– Attendance at relevant functional team meeting(s)</li> <li>– Review and feedback on all KPMG deliverables</li> <li>– Arrangement of meeting facilities, including public input sessions</li> </ul>
Functional team members	<ul style="list-style-type: none"> <li>– Participation in functional team meetings, including discussion on organizational structure, resource requirements, services and service levels and processes</li> <li>– Review of KPMG deliverables relating to functional team scope of responsibilities</li> </ul>
Department Heads	<ul style="list-style-type: none"> <li>– Attendance at relevant functional team meeting(s)</li> <li>– Participation in individual interviews (if requested)</li> <li>– Review and feedback on all KPMG deliverables</li> </ul>

**COMMUNICATION**

In our experience, projects benefit from a strong project management plan that provides for continuous communication between KPMG and our client as to the status of the engagement. Regular communication allows for issues to be identified and addressed as they arise (rather than waiting till the delivery of a report) and ensures that the Municipality understands the progress of our engagement. This is particularly important for projects that have high public profiles, involve multiple work efforts running concurrently or which extend over several months. The key aspects of our proposed project management plan include:

- The development of a critical path and project schedule that will be used to assess the progress and status of our review, which will be incorporated into the project charter
- Conference calls with the Project Manager every two weeks to review the overall progress of the study, discuss issues arising from our study and factors that may influence project timing.

**PROPOSED COMMUNICATION METHODS**

The Municipality will remain informed and encounter no surprises through our commitment to regular, open and proactive communication. As your strategic advisor, we will be available to you on a high- priority basis. **Sana Malik**, Project Manager, will be your primary point of contact. We will return your phone calls promptly, and communicate with you continually and proactively. We will establish an environment of continuous communication and rapid response, making sure there are “no surprises” for you during the engagement and delivery of our services. We know that meeting timelines and responsiveness are important to you and we will make this a priority for our team.

**ADDITIONAL QUALIFIED RESOURCES**

A key differentiating feature of KPMG is our ability to draw on a wide range of qualified and experienced professionals in Canada who enable us to better absorb disruptions and to bring additional staff or expertise to a project when necessary. Nationwide, our Advisory Services practice includes nearly 150 partners and 750 client service professionals, with just about half of them working from the GTA and Hamilton. If at any time KPMG is unable to provide our proposed personnel, we will provide a replacement person with equivalent qualifications and experience. Further, should it be determined that one or more professional staff, other than those proposed, would bring value to a task, the availability of this individual will be brought to the attention of the project authority who can then decide how best to proceed. In all cases, we will work with you to make sure appropriate resources are presented.

## QUALITY ASSURANCE STANDARDS

KPMG is committed to providing its clients with professional services of the highest quality. During our tenure, we will meet your deadlines, provide staff continuity and be available to offer assistance and advice. We believe in the importance of accountability to develop a long-term relationship with the Municipality, and to do so we build quality control in all our internal processes.

We set out to accomplish our goal of providing the highest quality service to all our clients in three ways:

**First**, we put senior people in the field for effective project management. This also gives us more flexibility to fine tune our fieldwork to adapt to ongoing changes in your operations.

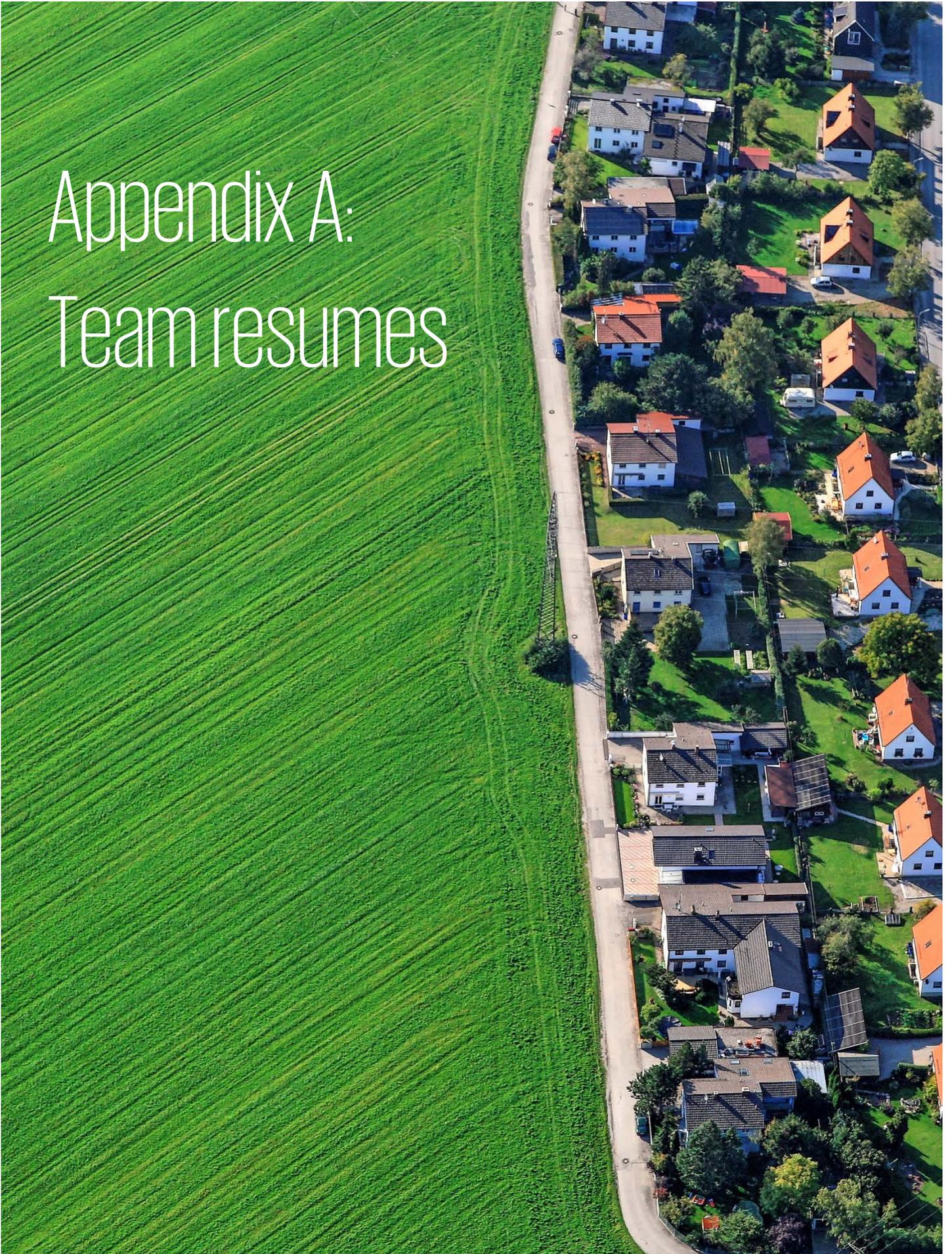
**Second**, our firm's services and technical review policies represent a further means of checking that we meet our clients' needs and maintain a high level of technical excellence. KPMG's quality control procedures include:

- An annual service review, based on interviews or questionnaires with senior staff, to measure your satisfaction with our team's performance
- A file review conducted by a team member more senior than the person doing the work
- Annual office reviews performed by our national department of professional practice.

**Third**, we have developed a Client Feedback Review that allows you to assess and grade our team's performance against your expectations, and identify any areas for service improvement. Individual members of the team are also evaluated at least once a year against our performance measurement system used to promote our core values – Clients, People and Knowledge – at all levels of the firm.



# Appendix A: Team resumes





## Bruce Peever

Engagement Partner and Project Lead

KPMG LLP  
21 King Street West  
Hamilton, ON L8P 4W7

Tel: 905-523-2224  
bpeever@kpmg.ca

### Function and specialization

Specializes in municipal organizational reviews and service reviews

### Representative clients

- City of Brampton
- City of Burlington
- City of Hamilton
- City of St. John's
- City of Toronto
- City of Waterloo
- City of Windsor
- Halifax Regional Municipality
- Region of Waterloo
- Toronto Transit Commission
- Town of Oakville

### Education, licenses & certifications

- Bachelor of Arts, Bishop's University
- Master of Arts (Political Science), Wilfrid Laurier University
- M.B.A., Queen's University
- Certified Manager ICMA-CM
- Certified Management Consultant

## Background

Bruce is a Partner in the Public Sector practice. He works with cities, colleges/universities and other public sector entities across eastern Canada helping them drive performance improvement and innovation by cutting through the complexity of their work.

Prior to KPMG, Bruce was an accomplished public sector executive with over 17 years of experience with a number of different sized Canadian municipalities. He has had direct service delivery and managerial responsibility for a wide-range of municipal portfolios including 13 years as a chief administrative officer (CAO).

## Professional and industry experience

Bruce is a leading authority on municipal organizational reviews and service reviews in Canada and has a wide portfolio of work in this area.

Bruce's interests are largely in the areas of governance design and relationships, financial analysis, organizational assessment, design and effectiveness, economic development, and service delivery review. He has a particular interest and experience in technology, innovation and the transformation of public sector service delivery. Coupled with his operational experience, Bruce offers a unique expertise in the delivery of public sector services.

## Select experience

- **Development Review Process – City of Brantford** – Partner for an in-depth review of the development review process. KPMG was engaged by the City of Brantford to review the City's development processes from the planning stages through to construction and to provide a report detailing recommendations that will enhance the City's planning, engineering and building functions. The project involved the benchmarking of the municipality against other Ontario municipalities; conducting process mapping workshops, identifying areas of improvement and providing realistic recommendations for the short and long term
- **County of Wellington Service Delivery Review** - Lead on the review of services at the County and Township levels for the County of Wellington. KPMG was asked to examine how services were delivered in Wellington County and uncover opportunities to reduce the cost of municipal service delivery through service level modification, alternative service delivery and shared services agreements between the two levels. Service Profiles were developed for each of the member municipalities and County to establish a common understanding of the current state. Leveraging this knowledge, KPMG and the Project Team developed over 80 opportunities for improved service delivery and increased efficiency.
- **Region of Waterloo Services Review (2019)** - Lead on the Services Review for the Region of Waterloo. KPMG completed a comprehensive service delivery review for the Region of Waterloo in 2015. In 2019, the Region determined that there was a need to update the 2015 Service Review using the Audit and Accountability Fund grant. The overall objective of the Project was to update the 2015 Service Review and identify creative and innovative solutions

that are realistic and practical for implementation to achieve greater efficiency, effectiveness and cost savings in service delivery. Accordingly, KPMG updated the Region's service profiles and categorized its services into mandatory, essential, traditional and discretionary. KPMG then identified those traditional and discretionary services where the Region's cost differs from its peers. Finally, KPMG provided recommendations for changing service levels and delivery models in order to achieve budget savings in the most efficient and effective manner. As a result of the Service Review update, 20 opportunities were identified for Regional Council's consideration.

- **City of Brampton, Service Review** – Lead on the service review of the City's operations. KPMG was engaged by the City of Brampton to undertake a service delivery review to assess the City's current services and how they are delivered to the Brampton's citizens in order to understand their efficiency, effectiveness, and impact. The project involved the benchmarking of the municipality against other Canadian municipalities; the refinement of service profiles; an assessment of current services and delivery approaches, the identification and investigation of alternative service delivery methods and the development of new opportunities and directions for the City's municipal services. As a result of our work, ten top opportunities were identified that were subject to a deeper dive in a second phase of work.
- **Town of Oakville, Service Inventory Review** – Lead on the service inventory review of the Town's operations. KPMG was engaged by the Town of Oakville to undertake a service delivery review to assess the Town's current services and how they are delivered to the Town's citizens in order to understand their efficiency, effectiveness, and impact. The project involved benchmarking of the municipality against other Ontario municipalities, development of service profiles using the Municipal Reference Model, assessment of current services and delivery approaches, the identification and investigation of alternative service delivery methods and the development of new opportunities and directions for the Town's municipal services.
- **Town of Whitby, Service Delivery Review** – Lead on the service delivery review of the Town's operations. KPMG was engaged by the Town of Whitby to undertake a service delivery review to assess the Town's current services and how they are delivered to the Town's citizens in order to understand their efficiency, effectiveness, and impact. The project involved the benchmarking of the municipality against other Ontario municipalities; the development of service profiles using the Municipal Reference Model; an assessment of current services and delivery approaches, the identification and investigation of alternative service delivery methods and the development of new opportunities and directions for the Town's municipal services.
- **City of Waterloo – Organizational Review** – Lead consultant on the City of Waterloo Organizational Review. KPMG was engaged by the City of Waterloo to undertake an organizational review called 2013 Forward with five primary objectives: The City's key business areas are aligned with future needs of the community; Operational activities are demonstrably efficient, effective, and make appropriate use of resources; Staffing levels are appropriate for the current and future level of service demand; Organizational structure provides efficient and effective service delivery; Employee culture contributes to the

overall organization success. Using a comprehensive engagement plan, workshop program, and organizational design methodology, KPMG assisted the City with the development of a new organizational structure that ensures efficient and effective service delivery for 2013 Forward.

- **Halifax Regional Municipality, Facilities Management Review** – Lead on the operational review of HRM's facilities management department. KPMG was asked to conduct an operational review of HRM's Municipal Facilities and Maintenance Operations. HRM was experiencing difficulty in managing its 225+ facilities and understanding the deferred maintenance associated with its facility assets. KPMG assisted the internal project team with the assessment and development of a maintenance and operations structure to improve the quality, efficiency and management of facility services within the municipality. This involved extensive consultation with stakeholders/clients, analysis of financial results/performance data and a series of working sessions with the internal project team to collectively arrive at a preferred recommended structure for the business unit as well as a series of recommendations to improve its performance.
- **Guelph Public Library, New Main Branch Business Case** - Led the development of a business case for the development of a new public library main branch. The overall goal of the project was to recommend an optimum site and building plan based upon the service delivery model, demand profile and financial resources available to the City of Guelph and the Public Library. The business case for a new main library facility involved the following deliverables:
  - To Determine the case for change and establish the need for new library infrastructure investment
  - Prepare a financial model estimating the future operating cost of a new main branch
  - Conduct an economic impact analysis of a new main library branch
  - Facilitate public engagement to garner feedback from the community.

The business case provided the necessary foundation for the development of detailed architectural plans and recommendations to improve the overall effectiveness and efficiency of the current service delivery model for library services over the next 30 years. This assignment was conducted during 2017 and 2018.

- **St. John's Sports & Entertainment, Operational Review** – Led the operational review of the City's convention centre and arena. KPMG was engaged by the City of St. John's to conduct a review of the operating and ownership model for the City's Mile One Arena and the St. John's Convention Centre. The City was interested in obtaining an independent and objective view on alternative operating and ownership models for entertainment venues. KPMG was also asked to study other jurisdictions that have implemented or have considered implementing either a third part operating model or the outright sale of assets. KPMG conducted a thorough review of the finances and operations of the two venues and introduced the City to a variety of operating models. Following the analysis, KPMG prepared a series of recommendations on the scope and structure of a potential third-party

agreement as well as on the negotiable issues and positions the City could take to achieve its objectives.

- **Town of Oakville, Facility Management Review** – Lead on the operational review of the Town's facility management services. KPMG was engaged by the Town of Oakville to undertake a Facilities Management Review. The overall goal of the project was to assist the Town with a deep-dive into key aspects of facilities management programming and service standards, to undertake related research and to assist with the development of recommendations and an implementation plan for moving forward. KPMG, with collaboration of the Town's staff and leverage of industry leading practices, provided recommendations for developing a new facility management model and organizational structure that clearly defined the roles and responsibilities within the facility management functions and assisted the Town in the transformation of facility management.
- **Township of Woolwich, Organizational Review** – Lead consultant on the review of the Township's organizational structure. KPMG was engaged by the Township of Woolwich to undertake an organizational review. The overall goal of the project was to review the whole organization of Woolwich, as well as each department. The project was to identify an organizational structure that supports optimal levels of efficient and effective service delivery, continuous improvement opportunities and positions the Township for innovative service delivery. The Township was also seeking KPMG to review its core business areas, including service delivery structure and capacity, staffing levels and reporting relationships.

**Frontenac County, Comprehensive Review of Services and Organization**

Lead on the review of services and organization for the County of Frontenac. The County retained KPMG to examine the current state of the organization, identify opportunities for improved efficiency in service delivery and recommend options for restructuring the organization and governance systems. As a result of our work, 30 recommendations for improved service delivery were presented to County Council along with a revised organizational structure for the County.



## Sana Malik

Senior Manager

KPMG LLP  
21 King Street West  
Hamilton, ON L8P 4W7

Tel: 905-523-7001  
sanamalik@kpmg.ca

### Function and specialization

Specializes in in operational, financial and value for money audits in public, private and government organizations.

### Representative clients

- City of Brantford
- Region of Waterloo
- Canadian Association of University Business Officers
- City of Hamilton

### Professional associations

- Institute of Internal Auditors
- Association of Certified Fraud Examiners
- Association of Chartered Certified Accountants

### Education, licenses & certifications

- Bachelor of Commerce, McGill University
- Certified Internal Auditor
- Certified Fraud Examiner
- Certification in Control Self-Assessment

## Background

Sana is a Senior Manager with KPMG's Internal Audit, Risk and Compliance (IARCS) practice, based in Hamilton. Prior to joining the Hamilton office, Sana worked with the City of Hamilton as a Senior Internal Auditor where she performed operational, compliance and value for money reviews.

Within the community, Sana serves as the public member on the Audit Committee of the Halton District School Board.

## Professional and industry experience

Sana is a growth driven risk management professional with 16 years of broad based experience in the private and public sectors in organizations including Procter and Gamble, GSK, Chevron, BMO Bank of Montreal and the City of Hamilton. Sana has demonstrated experience in successfully managing and executing audits, consultations and forensic investigative work in large and complex environments.

Sana holds a Bachelor of Commerce (Finance) degree from McGill University and is also a Certified Internal Auditor (CIA), Certified Fraud Examiner (CFE) and has a Certification in Control Self-Assessment (CCSA).

## Business process reviews and projects

- **Review of Region of Waterloo's Children's Centre's:** Led a program and financial review of the Region's five Children's Centres. The review was intended to inform the future direction of the Children's Centres through information, analysis, commentary, recommendations and range of options. This involved extensive stakeholder engagement with staff, management, child care operators, community agencies, parents etc. The project resulted in development of service profiles for each of the five children centres and development of a range of recommendations based on opportunities identified.
- **Development Review Process – City of Brantford:** KPMG was engaged by the City of Brantford to review the City's development processes from the planning stages through to construction and to provide a report detailing recommendations that will enhance the City's planning, engineering and building functions. The project involved the benchmarking of the municipality against other Ontario municipalities; conducting process mapping workshops, identifying areas of improvement and providing realistic recommendations for the short and long term.
- **Development of statistical sampling approach - Canadian Association of University Business Officers:** Developed a statistical approach framework for transactional compliance testing. The framework outlined potential methods and methodologies that could be used by institutions in order to develop a statistical approach to internal compliance monitoring for their institution based on their own particular circumstances and in ways that would complement the Tri-Agencies new monitoring framework.
- **By-law Enforcement Audit Follow-up:** Led the follow-up audit for the City of Hamilton's by-law enforcement department. This audit involved identifying system (AMANDA) inefficiencies, identification of timing issues for follow up of citizen complaints, documentation management, review of the fees and charges laid by the department and provincial offence's notices issued. The project also included review of by-law policies and procedures and user access review.

- **Child Care Risk Assessment – City of Hamilton:** Lead the risk assessment for the Children’s Services Division which identified key risks that could significantly impact the success of the Division. Through collaboration, assessed and prioritized key risks and developed mitigating controls to increase the programs ability to achieve its strategic outcomes and minimize risks to the City.
- **Child Care Consultation – City of Hamilton:** Project lead for designing an audit guide and checklist to be used in assessing the compliance of child care operators with various City-administered grant requirements. Additionally, lead five operator assessments and provided recommendations to management for the deficiencies identified.
- **Fraud and Waste Hotline – City of Hamilton:** Project Manager for implementing the Fraud and Waste Hotline for the City. Developed the Request for Proposal, evaluation criteria for vendor selection, process flows, communication plan, and executed the formal launch of the Hotline. Also, performed intake and triage of the hotline complaints, and led complex investigations.



## Jermal Francis

Senior Consultant, Risk Consulting  
Internal Audit, Risk and Compliance (IARCs)

KPMG LLP  
21 King Street West  
Hamilton, ON L8P 4W7

Tel 905 523 2254  
Cell 416 705 9063  
[jermalfrancis@kpmg.ca](mailto:jermalfrancis@kpmg.ca)

### Function and Specialization

Jermal is a Senior Consultant in KPMG's Risk Consulting, with focus in Internal Audit Risk and Compliance.

### Representative Clients

- Grand River Conservation Authority
- McMaster Student Union Association
- City of Brantford

### Professional Associations

- The Institute of Internal Auditors

### Education, Licenses & Certifications

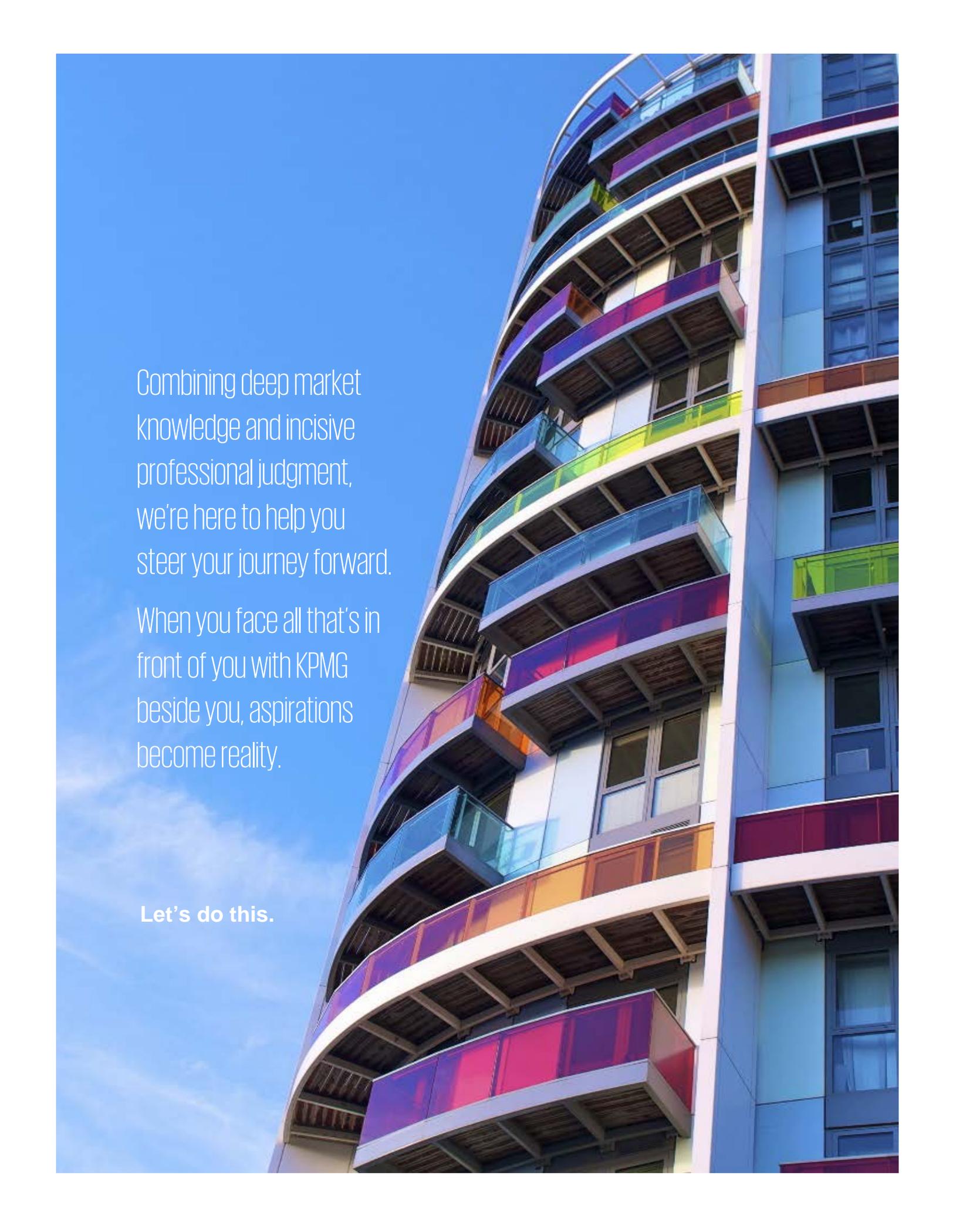
- Bachelor of Business Administration, Specialization, accounting, University of Windsor
- Certified Internal Auditor (CIA)

## Background

Jermal is a Senior Consultant in KPMG's Risk Consulting practice based in Hamilton and has a passion for building strong relationships with clients and fellow team members. Prior to joining KPMG, he was a member of the Internal Audit and Risk Advisory team at George Weston Ltd, Canada's largest food and drug retail business. He has experience in governance assessments, business transformation reviews, business process reviews and compliance reviews. He holds a Bachelor of Business Administration with a specialization in accounting from the University Of Windsor and is a Certified Internal Auditor (CIA).

## Professional and Industry Experience

- **Regional Municipality of Halton, COVID Return to Work Review** – A key engagement team member in conducting a review of the return to work plan for Halton Region through the development of department specific roadmaps, completion of an organizational risk assessment, policy review and environmental scan.
- **Internal Controls over Financial Reporting (ICFR)** – Assisted management of Andlauer Management Group and its subsidiaries with the establishment of an ICFR program and initial testing as a new publicly listed company.
- **McMaster Student Union, Organizational and Staffing Structure Review** - Participated in the review of the service delivery and staffing model for the McMaster Student Union. The objective of the review was to identify structural inefficiencies and duplication, uncover revenue generating opportunities and to streamline roles and responsibilities. Responsibilities include participating in client discussions, and assisting with documentation and report deliverables.
- **Grand River Conservation Authority Business Plan** – Assisted in the development of a progressive business plan for the organization and leading the completion of an environmental scan to benchmark the performance of the organization against its comparators.
- **City of Brantford Development Building Process Review** – A key engagement team member in conducting a review of the City's development building process to create a streamlined and efficient development process. Supported the engagement team on process mapping and delivery of general project activities.
- **Retail & Manufacturing Compliance Review** – A key engagement team member in conducting the compliance review for marketing, sales and finance functions at a large retail & manufacturing organization. Responsibilities included planning the engagements, conducting fieldwork and completing the final report.
- **Internal Controls over Financial Reporting (ICFR)** – For a large manufacturing organization, assisted management with its annual project to meet Canadian requirements established under National Instrument 52-109 ("NI 52-109"), with respect to certification of internal control over financial reporting ("ICFR"). Key engagement member and supervised junior staff during fieldwork and documentation.



Combining deep market  
knowledge and incisive  
professional judgment,  
we're here to help you  
steer your journey forward.

When you face all that's in  
front of you with KPMG  
beside you, aspirations  
become reality.

**Let's do this.**



**Let's do this.**

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# Supporting your vision

THE CORPORATION OF THE  
MUNICIPALITY OF BROCKTON

LAND USE DEVELOPMENT

PROCESS MANAGEMENT REVIEW

RFP NO. CAO 2020-01

**FILE B**

**LEAD ENGAGEMENT PARTNER**

BRUCE PEEVER

905-523-2224 | [BPEEVER@KPMG.CA](mailto:BPEEVER@KPMG.CA)

**OTHER KEY PERSONNEL**

SANA MALIK

JERMAL FRANCIS

JULY 16, 2020

**Let's do this.**



# 8.5 Costs

As professional advisors, we understand your need to maximize value for the fees you pay. We strive to keep fees at the lowest possible level consistent with high professional standards and top quality service.

We estimate professional fees for this assignment based upon the work plan to be **\$61,940 exclusive of HST**. Our professional fees are based upon the value of the service proposed and our understanding of your requirements. We will confirm the scope and details with you during the project kickoff meeting. As the project progresses, should any of these aspects change and affect our estimates, or if the scope of the project is different from that estimated, we will discuss these matters with you before incurring additional charges. Conversely, if our time is less than estimated, we will reduce our bill accordingly.

Our fees include all travel and routine administrative expenses such as long distance telephone calls, photocopies, fax charges, printing of reports, postage and delivery, and administrative team assistance.

The Municipality will be served from our **Hamilton offices** for this engagement. See the detailed chart below reflecting the pricing breakdown.

Project Team	B Peever	S. Malik	J. Francis		
Hourly rate	\$400	\$275	\$180		
<b>Project Phase</b>	<b>Hours</b>	<b>Hours</b>	<b>Hours</b>	<b>Total Hours</b>	<b>Cost</b>
<b>Phase I - Project Initiation</b>	<b>2</b>	<b>3</b>	<b>3</b>	<b>8</b>	<b>\$ 2,165</b>
Project kick-off meeting with Project Team	2	2	2	6	
Develop Project Charter, Engagement Schedule		1	1	2	
<b>Phase II - Environmental Scan</b>	<b>0</b>	<b>25</b>	<b>37</b>	<b>62</b>	<b>\$ 13,535</b>
Documentation Review		2	4	6	
Stakeholder Engagement		15	17	32	
Comparator Leading Practice Research		8	16	24	
<b>Phase III - Current State Analysis</b>	<b>0</b>	<b>30</b>	<b>44</b>	<b>74</b>	<b>\$ 16,170</b>
Current State Analysis		12	16	28	
Process Mapping		10	12	22	
Evaluation of Affordable Housing Programs		4	10	14	
Prepare and Present Interim Report		4	6	10	
<b>Phase IV - Opportunities, Recommendation and Implementation Plan</b>	<b>4</b>	<b>28</b>	<b>38</b>	<b>70</b>	<b>\$ 16,140</b>
Opportunity Development		12	16	28	
Opportunity Workshop with project team	2	2	2	6	
Recommendation Development		6	8	14	
Implementation Plan Development		4	6	10	
Summary report	2	4	6	12	
<b>Phase V - Final Report and Presentation</b>	<b>8</b>	<b>18</b>	<b>21</b>	<b>47</b>	<b>\$ 11,930</b>
Prepare and present Draft Final Report to Senior Management	4	12	16	32	
Presentation of Draft Report to Council	2	2	2	6	
Incorporate feedback and Finalize Report		2	3	5	
Presentation of Final Report to Council	2	2	0	4	
<b>Total</b>	<b>14</b>	<b>104</b>	<b>143</b>	<b>261</b>	<b>\$ 59,940</b>

## 4.1 PRICING PROPOSAL FORM

### Pricing Proposal Form

The following form shall be completed and included with the proposal.

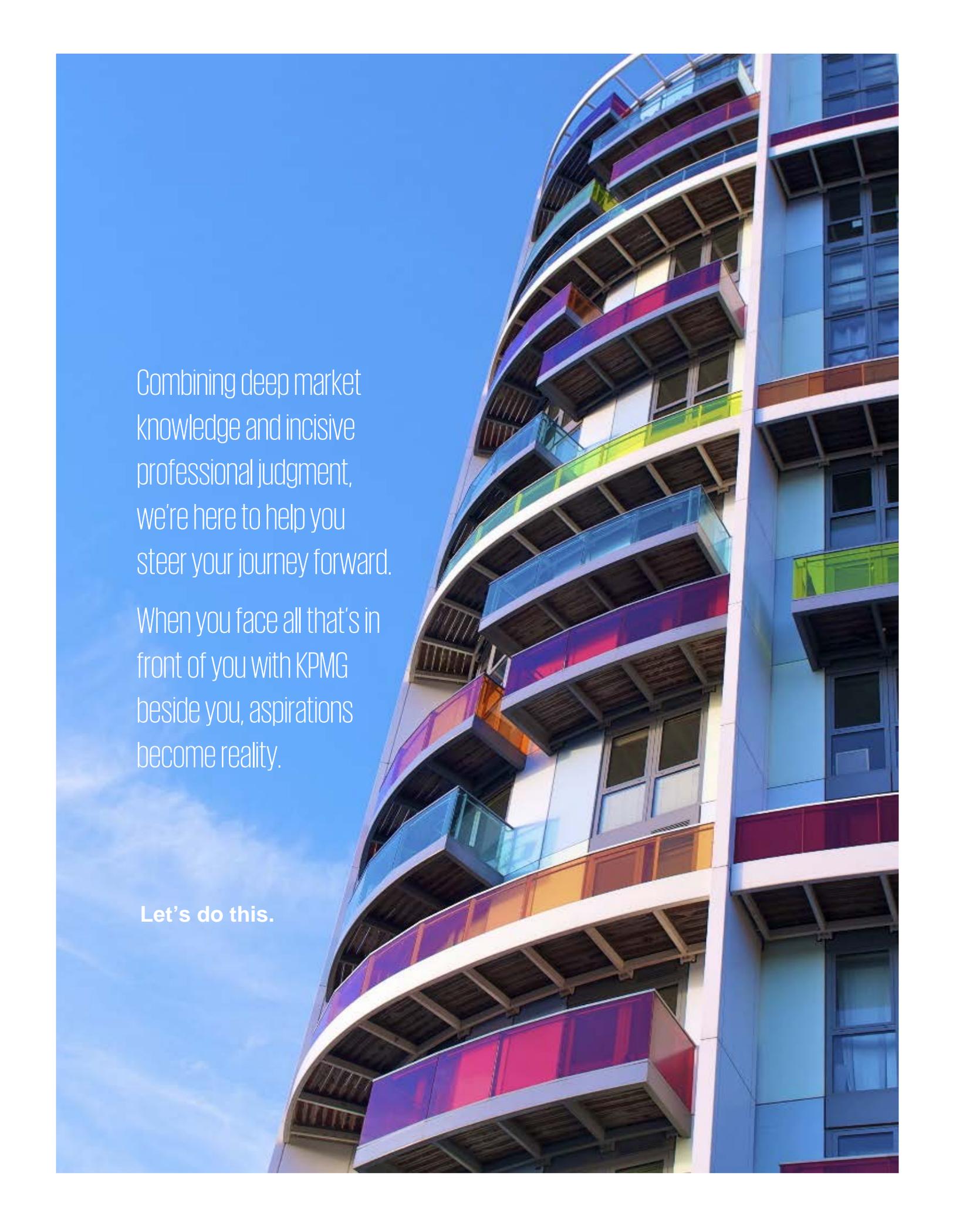
The price bid shall include for all professional fees, meetings, sub-consultant's charges, if any, and for all disbursements for mileage, meals, printing, equipment rental rates, associated office disbursements and any other activity relating to the completion of the Project. **The lump sum fee submitted shall not be exceeded without the prior written authorization of the Municipality.**

Description	Fee (Excluding HST)
Task 1 – Municipal Modernization Funding - Land Use Development Process Management Review Lump Sum Fee	\$59,940
Travel (Upset Limit)	\$ 2,000
<b>Total</b>	<b>\$61,940</b>

Proponent: Bruce Peever, KPMG LLP Date July 16, 2020



Signature: \_\_\_\_\_



Combining deep market  
knowledge and incisive  
professional judgment,  
we're here to help you  
steer your journey forward.

When you face all that's in  
front of you with KPMG  
beside you, aspirations  
become reality.

**Let's do this.**



**Let's do this.**

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