Implementation Plan

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1. Introduction

Understanding urban design is a critical component in the creation of a healthy, vibrant, and attractive city. Local and international experience has demonstrated that using independent design review panels, comprised of leading professionals from a mix of disciplines, to complement urban design expertise within Administration, is an effective method to contribute to the creation of safe, comfortable and interesting places through the successful design of the complex relationship between streets, buildings, and the spaces between them, while responding to use, context and climate.

In order to make the most effective use of the external expertise provided by the Urban Design Review Panel, and to foster a collaborative result, the *Urban Design Review Framework* proposed a model of Collaborative Design Expertise (*Urban Design Review Framework*, Engagement Results: The Preferred Scenario), which was by far the most strongly supported process model tested during the stakeholder engagement. Analysis of the results of both the research and engagement strongly suggest that, as in other cities, Calgary should be moving toward a more collaborative model of urban design review which prioritizes design discussions early in the application process in order to realize a number of key benefits identified by stakeholders:

- Reduce time delays by identifying and supporting the resolution of complex issues early on in the design process.
- Consistently bring an additional source and mix of design expertise to further complement the skills of the CPAG team.
- Identify project challenges at an early stage, when significant design changes can be made with relative ease and economy.
- Provide decision makers with the confidence that they have the best recommendations on the design aspects of a project.

The Implementation Plan provides a description of how the proposed changes to urban design review practice at the City of Calgary will be introduced, including:

- The integration of UDRP processes with existing City application processes.
- The reporting of UDRP recommendations to applicants, administration, and Calgary Planning Commission.
- The outreach and training strategy for external and internal stakeholders.
- Potential metrics to monitor the success of the program.

The Implementation Plan is intended to be a living document. It provides detail around the implementation of changes to urban design review processes as described in the Urban Design Review Panel revised Terms of Reference, Urban Design Review Protocol and the *Urban Design Review Framework,* and demonstrates that the process is viable within existing City processes and timelines. This Plan should be updated, as needed, to respond to issues arising.

2. Implementation

Stage 1

Upon adoption, the revised Terms of Reference will be forwarded to the appropriate professional associations, informing their 2017 call for UDRP nominees. The results will be forwarded to Council for consideration at the annual Organizational meeting. The expanded Panel, including the new members, will be in place Q4.

Simultaneously with the adoption of these documents, voluntary implementation of the expanded scope of applications going to the UDRP will begin. Where circulation to the UDRP is suggested by the new Terms of Reference / Urban Design Review Protocol the applicant will be advised of a request to have their application reviewed by the UDRP. Projects that would be reviewed by the UDRP, as identified in scope of the existing Terms of Reference, will continue to be referred to the UDRP for comment, prior to the applicant receiving the first Detailed Team Review.

Pre-application (schematic design discussion) with the UDRP will be offered as a voluntary service, to occur within the 35 day Pre-Application Enquiry timeline.

This approach has been piloted on a number of pre-applications and development permit applications since 2016 October with positive results.

Stage 2

Stage 2 will commence 2018 January 01. The expanded mandate, application types and geographic criteria considered appropriate for UDRP input, outlined in the Urban Design Review Panel Terms of Reference and accompanying Protocol, will be fully implemented. By this time, administration will be fully trained in identifying appropriate UDRP candidates, providing required early direction and processing applications within the prescribed timelines. As well, new members of UDRP will be recruited and familiarized with the new requirements.

Progress Report

A progress report to Council of UDRP process and practice will occur upon conclusion of the first year of full implementation, 2019 Q1.
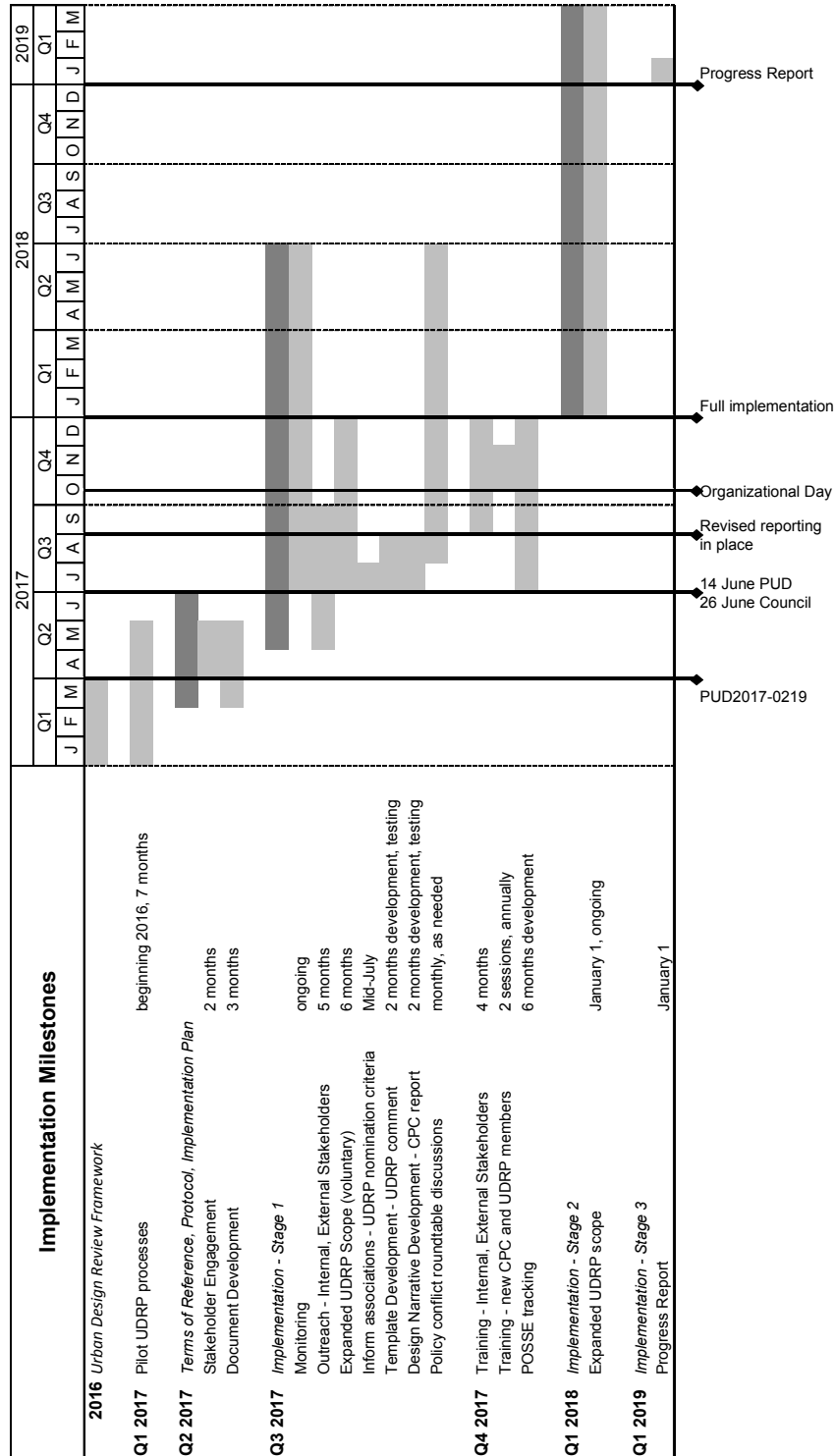
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Implementation Milestones

Period	Milestone	Duration/Notes
2016	*Urban Design Review Framework*	
Q1 2017	Pilot UDRP processes	beginning 2016, 7 months
Q2 2017	*Terms of Reference, Protocol, Implementation Plan*	
	Stakeholder Engagement	2 months
	Document Development	3 months
Q3 2017	*Implementation - Stage 1*	
	Monitoring	ongoing
	Outreach - Internal, External Stakeholders	5 months
	Expanded UDRP Scope (voluntary)	6 months
	Inform associations - UDRP nomination criteria	Mid-July
	Template Development - UDRP comment	2 months development, testing
	Design Narrative Development - CPC report	2 months development, testing
	Policy conflict roundtable discussions	monthly, as needed
Q4 2017	Training - Internal, External Stakeholders	4 months
	Training - new CPC and UDRP members	2 sessions, annually
	POSSE tracking	6 months development
Q1 2018	*Implementation - Stage 2*	
	Expanded UDRP scope	January 1, ongoing
Q1 2019	*Implementation - Stage 3*	
	Progress Report	January 1

Timeline columns: 2017 (Q1: J F M, Q2: A M J, Q3: J A S, Q4: O N D); 2018 (Q1: J F M, Q2: A M J, Q3: J A S, Q4: O N D); 2019 (Q1: J F M)

Milestone markers:
- PUD2017-0219
- 14 June PUD / 26 June Council
- Revised reporting in place
- Organizational Day
- Full implementation
- Progress Report

Figure 1: Implementation Timeline
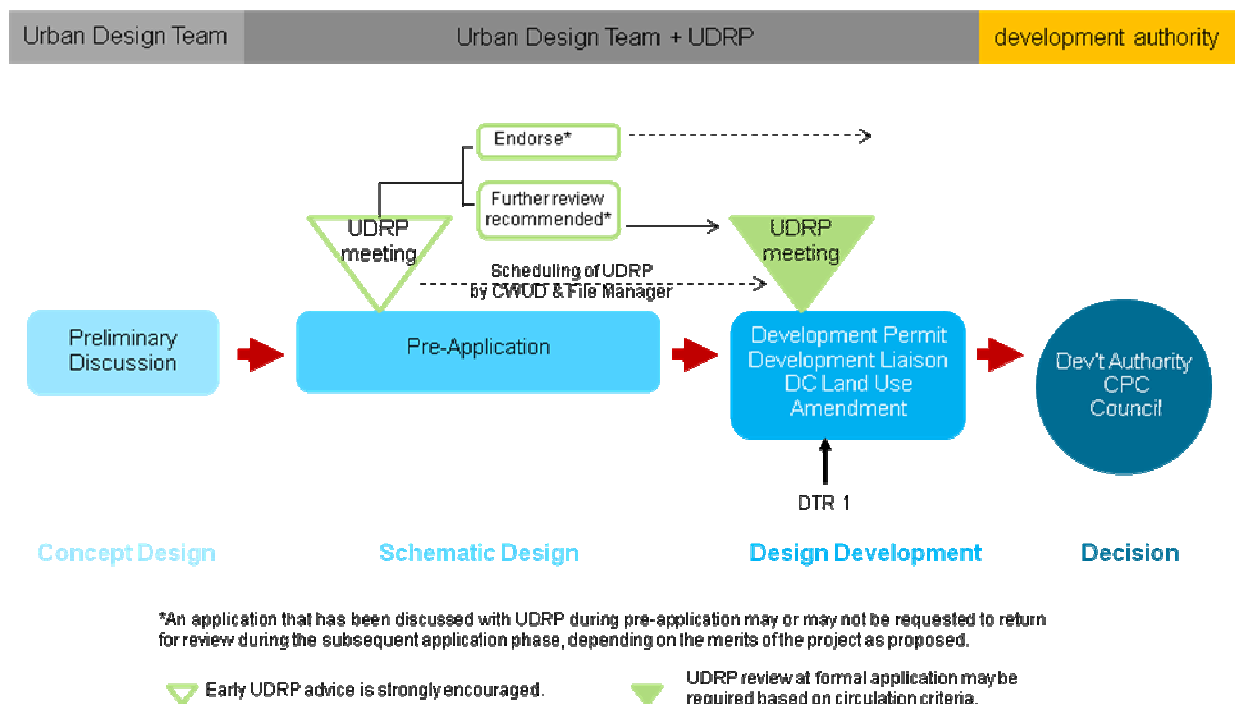
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2.1 Application Process Descriptions

At the direction of Calgary City Council, Administration has undertaken work to explore ways to achieve higher quality building site and landscape design outcomes through improvement to urban design review process. A clear, effective design review process must:

1. Provide for design input at the most effective point,
2. Make the best used of local design expertise, and
3. Support informed design decision-making.

Early engagement and a formal Pre-Application Enquiry process are strongly encouraged to ensure that design expectations are communicated at the earliest possible time and that design discussions occur at the most effective point in each project's process. Applicants who choose to not take advantage of the early design review will still receive review by City Wide Urban Design and/or Urban Design Review Panel through formal Development Permit or Land Use Amendment processes, and be expected to meet urban design expectations despite the disadvantages of receiving input later in the application and design processes.

Figure 2: *Urban Design Review Path: alignment with CPAG processes* below aligns the stages of urban design review processes with typical industry standard project stages and CPAG processes to illustrate the intent to ensure that these discussions occur before project designs are fixed. The aim will be to resolve significant urban design issues prior to Detailed Team Review (DTR) #1.

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Figure 2: Urban Design Review Path: alignment with CPAG processes

2.1.1 Urban Design Review Phases

Urban design advice and review may be accessed across three phases of project development:

> Phase 1. Preliminary discussions (concept design), typically with Planning and City Wide Urban Design only, will provide high level principle-based guidance, informing applicants of potentially significant issues and expectations.

> Phase 2. Pre-Application (schematic design) discussions are more formal, include the other CPAG disciplines, and can provide more detailed policy, guideline, site context and local issue information.

> Phase 3. Applications falling within the revised application types list included in the Urban Design Review Protocol.

Phases 1 & 2 are voluntary, as are all pre-application enquiry processes, and strongly encouraged as a valuable means to obtain urban design input early and within existing CPAG timelines.

2.1.2 Preliminary Discussions (Concept Design Stage)

Early design discussions are the most meaningful way to impact the design outcomes. This is the point where a developer has decided to act on a property but where development aspirations themselves are still conceptual. This allows the applicant the opportunity to review and respond to urban design comments prior to formalizing the design and submitting a formal application.

There are two ways in which these preliminary discussions can occur:

1. Preliminary conversations: An applicant may request very early advice with regard to planning and design policy and guideline expectations surrounding a specific site. The intent is to alert applicants early to potentially significant issues and expectations. These conversations may involve both planners and urban designers and notes may be taken which would be retained and passed on to the File Manager in the event that a formal application is made.

2. Planner Only Pre-Application Enquiry: Similar to Preliminary Conversations, but can be more formally established as part of an application process. Relevant policy, guidelines, land use, streetscape design principles, contextual sensitivities, and community expectations are some of the issues which may be discussed. Comments and specific advice or direction will be recorded and formal process tracking can commence at this stage. This tracking is not yet in place but is in progress with Calgary Approvals Coordination.

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2.1.3 Pre-Application Process (Schematic Design Stage)

The intent of the Pre-application Process is to allow for early design input advice within the CPAG pre-application context, ahead of an applicant moving to and beyond the Schematic Design stage. UDRP and City Wide Urban Design will provide advice on the particular policies and site context opportunities that could assist in creating a unique and attractive development.

Proposed Process:
1. Application Submission (Day 0):
    An applicant submits materials and fee for a paid Pre-Application at the 3rd floor counter as per the standard process. Early design advice will be based on information provided with Pre-application Enquiry submission, according to the CPAG Complete Application Requirement List (CARL).

2. Team Distribution (no later than Day 6):
    Relevant files will be identified for UDRP review by the Chief Urban Designer or delegate and distributed to the File Manager with that notation attached.
    The File Manager will distribute the file to the CPAG team and City Wide Urban Design for comment along with other specialists, as needed.

3. Applicant Notification (no later than Day 7):
    The File Manager will contact the applicant to request permission for a UDRP review (to be received in writing/email confirmation). Up to two dates, depending on UDRP meeting schedule, will be offered to the applicant. Any voluntary additional supporting submission materials the applicant has prepared will be provided one week ahead of the agreed upon UDRP date.

4. UDRP Review (no later than Day 21):
    The UDRP meeting will occur between Day 7 and Day 21. UDRP will advise if a UDRP meeting during the Development Permit process can be waived by endorsing the project, or will advise of materials required for further review. This information will become part of the submission requirements for subsequent application phases and UDRP review.

    After the UDRP meeting, UDRP will have a minimum of two days to submit comments to the UDRP Administrative Assistant who will file them for UDRP tracking as well as forward them to the File Manager for inclusion in the Pre-application report back to the applicant.

5. CPAG Team Review and Draft Comments to Applicant (no later than Day 21):
    The CPAG Team will populate the Pre-application Assessment Form with draft comments. The File Manager will also include the UDRP recommendations.

6. Meeting with Applicant and CPAG Team (including CWUD Team Rep) (no later than Day 28)

7. Pre-Application Assessment Form Provided to Applicant (by Day 35):
    CPAG comments including UDRP comments will be provided to the Applicant by the File Manager.

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2.1.4 Development Permit Process

Urban Design Review Panel review will occur on relevant files types within appropriate locations through the Development Permit process.

The key aspects of the process are that:
- UDRP submission materials are identified on Complete Application Requirement Lists (CARL) with recommendation to go through the Pre-application process or contact Chief Urban Designer or delegate directly to confirm UDRP path.
- The Applicant has three weeks to prepare a UDRP package after being notified on day seven, through the Initial Team Review (ITR) of the CPAG application process.
- UDRP will be available to meet every week if application volumes require.
- Detailed Team Review 1 is due as per current requirements.

Proposed Process:
1. Application Submission (Day 0):
   An applicant submits a Development Permit (without a UDRP set) at the 3rd floor counter as per standard process.

2. Confirmation of UDRP Requirement (no later than Day 5):
   The file will be brought to a Coordinator for the geographic region it's within and they would identify if the file is a candidate for a UDRP review and flag it to the Chief Urban Designer or delegate to confirm.

3. Initial Team Review (no later than Day 7):
   At team distribution the Coordinator and Urban Designer will identify that UDRP review is required. At ITR the File Manager will distribute the file to the CPAG team and circulate to City Wide Urban Design for comment along with other specialist circulations.
   On the same day the File Manager will contact the applicant via the ITR form to advise that a UDRP review is required and that they have 14 days to prepare a package.

4. Applicant UDRP Package Submission (no later than Day 20):
   A UDRP package is due from the Applicant 14 days after requested (Day 20). If a package is not submitted, the application will be placed on hold.

5. UDRP Review (no later than Day 30)

6. UDRP Comments Due (no later than Day 32):
   After the UDRP meeting, comments will be provided to the File Manager.

7. File Manager Produces DTR 1 (Day 35):
   DTR 1 comments including UDRP comments will be provided to the Applicant. The file will proceed with standard CPAG Development Permit process (amended plans DTR 1 response provided by applicant, DTR 2, or decision by Administration).

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2.1.5 Land Use Amendment Process

Direct Control Land Use Amendment applications with design content, as indicated in the criteria listed in the UDRP Protocol, will be candidates for UDRP review, identified at ITR and following a similar process to that described above for Development Permit processes. Given that Development Permit processes have a shorter, more compressed timeline than Land Use Amendments, there are no issues anticipated with implementing a UDRP review process for this application type.

2.1.6 Policy Document Process

The design guideline components of Area Redevelopment Plans may be brought to UDRP, at the discretion of the Chief Urban Designer. Given that the timelines for policy projects are a minimum of one year, a UDRP review will not impact project timelines.

2.2. Reporting Urban Design Review Panel Advice and Recommendations

2.2.1 Status of UDRP Comments

As noted in their Terms of Reference, the Urban Design Review Panel (UDRP) was established by Council as an independent urban design advisory body. UDRP is intended to provide advice to Administration, the Applicant and the Approving Authority reflecting current urban design best practices in the context of the goals of the City's *Municipal Development Plan* (Thirteen Elements of Urban Design). As an advisory body, any comments provided by UDRP are to be interpreted as advisory in nature. However Administration strongly encourages applicants to carefully consider and, wherever possible, incorporate UDRP advice in the interest of achieving higher quality design outcomes. Where there are conflicts between the guidance of Administration and UDRP, an applicant will be expected to address the comments of Administration which are based on Council approved City policy, and strongly encouraged to, as far as possible, address the comments of UDRP. The File Manager will provide clear direction with regard to those areas of conflicting direction where policy must be adhered to or where there is room for relaxation and/or interpretation to achieve a superior design outcome. In every case UDRP recommendations will be taken into consideration by both Administration and the Applicant. Rationale will be provided by the applicant for those instances where UDRP advice cannot be accommodated.

A process and template will be developed in Q3, 2017 to capture recurring misalignments of City policy and best practice advice raised through the UDRP review process. The Chief Urban Designer will elevate these issues for resolution.

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2.2.2 Describing the Design Narrative

In implementing the *Urban Design Review Framework*, Administration recommends a number of process changes to provide a clear, complete, credible accounting of the design review process and associated reasons for recommendations, thus enabling the Approving Authority to be more informed about the design review process history to consider when exercising their authority to approve reject/recommend:

i) All Administration reports to Calgary Planning Commission should be accompanied by an applicant's submission which shall include a detailed planning and urban design rationale.

Currently, applications heard by Calgary Planning Commission are not consistently presented with an up to date applicant's submission. Some applications (such as land use amendments) are submitted with an applicant's submission; however, this may or may not be updated after submittal of a file. Development Permit applications are not required to have an applicant's submission, as such members of CPC may not be aware of the history of a project from start to finish from the applicant's perspective.

Administration recommends that, in order to fulfill the *Urban Design Review Framework* objective of clarity and consistency in reporting on design review processes, all files which go to Calgary Planning Commission will include a detailed and up to date applicant's submission. This will provide the specific perspective of the applicant on planning and urban design intentions and issues. As required, it may also provide the applicant's viewpoint with regard to issues and challenges faced. The *Complete Applications Requirement List* (CARL) will be amended to include this as a submission requirement.

ii) All Administration reports to Calgary Planning Commission should be expanded to more clearly address architecture and urban design.

In order to ensure that Calgary Planning Commission is provided with the complete design story of an application, Administration recommends that specific discussion about design is consistently embedded in all Administration reports to CPC. Such report writing could cover the history of the project, a summary of negotiations relevant to design as well as expanding on any items in the applicant's submission as necessary. Comments provided by City Wide Urban Design (CWUD) would be included within this "design narrative" which, woven together with all other CPAG inputs, would explain the complete design review process as a component of the overall report and recommendation. This should include any explanation of challenging urban design expectations and, in some cases, of conflicting comments from UDRP and the resulting response.

iii) All Administration reports to Calgary Planning Commission which have been reviewed by Urban Design Review Panel (UDRP) should contain the UDRP comments in their entirety as an Appendix to the Administration CPC report.

Currently there is inconsistency in reports seen by Calgary Planning Commission, with regard to the approaches taken by Administration to reporting both City Wide Urban Design (CWUD) and UDRP comments.

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In order to provide Calgary Planning Commission with a clear understanding of the entire design review process within the context of policy and bylaw considerations together with the non-statutory and advisory nature of the UDRP, Administration recommends that UDRP comments be included in their entirety as an Appendix to the CPC report.

Administration believes that the above three measures would enable a more complete design story to be told, providing clarity and consistency to the background material provided and fostering greater confidence in the resulting recommendations. Enhancing Calgary Planning Commission's understanding of the many design aspects of the application discussed and addressed prior, and of any conflicts and challenges, should reduce time spent in providing explanation during CPC sessions. This greater clarity and confidence in the recommendation should, in turn, reduce risks for applicants by enabling Calgary Planning Commission to act with a fuller understanding and more readily endorse a proposal.

Revised reporting of UDRP recommendations to CPC will be developed with Legislative Services, and implemented 2017 September.

2.3. Information and Advocacy

A Communications Strategy has been prepared to provide information to internal and external stakeholders regarding:

1. The importance of urban design and achieving the objectives of urban design in building a great city.
2. The changes/what is different from the current process.
3. How this impacts their work and how to navigate the process.
4. How they can provide feedback on applications related to urban design.

This information, along with relevant information regarding the Urban Design Review Framework project, is available to all internal and external stakeholders via a project hub on Calgary.ca.

Outreach to inform internal and external stakeholders began May 2017, and is on-going. Information sessions with internal and external stakeholders will supplement the formal training program as the need arises. Training materials will be developed upon Council approval of this and associated documents, and delivered in Q3/Q4 of 2017.

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2.3.1 External: Stakeholder Outreach

Who they are	What they need	Approach
Urban Design Review Panel		
Industry experts who provide independent urban design and architecture advice on select applications, as referred by Chief Urban Designer	• To understand the CPAG process and their role as an advisory body to applicants, administration, and CPC. • To know the City policy and guideline framework relevant to projects brought forward for advice/review	• Annually, upon appointment of new panel members, an introductory information session will be provided by the Chief Urban Designer and Panel Chair • Panel members are requested to attend periodic update sessions on urban design projects, organized by City Wide Urban Design team • Planner and City Wide Urban Design member will provide policy and guideline framework for each project review
Development Industry		
Architecture, planning and design firms, as well as smaller and larger scale developers, and BILD Calgary, working in Greenfield and Established Areas	• To understand the steps, the triggers, what they need to know to ensure applications meet good urban design standards prior to submission • To understand roles and responsibilities of urban design input within the application review process • Clearly established and communicated expectations, and timelines for specific application types • Staff contact information -The differentiated value, roles and responsibilities of UDRP/CWUD/CPC as they go through the process; -The selection criteria (what applications get selected for UDRP and why) -The process (what happens when selected, expectations of each group within that process) -How to successfully get through to an approval -The cumulative value/impact to industry (through monitoring and reporting)	• Urban Design Review Framework hub on Calgary.ca • Information/presentations to professional organizations, to be determined in consultation with stakeholders and Communications

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Citizens		
Calgarians who are interested in urban design, citizens who are in proximity to developments that require review by the UDRP or may require additional urban design review	• To understand the importance of urban design in building a great city • To be aware of principles of good urban design • To be aware of the triggers for what applications, projects and initiatives require urban design review	• Urban Design Review Framework hub on Calgary.ca
Federation of Calgary Communities, Community Association Planning Representatives		
Members of this group are more heavily involved in planning initiatives and community engagement, and therefore understand the planning process more deeply than general citizenry	• Education on urban design and what changes are being implemented • Why it's important • How it impacts planning initiatives • What part of the process do FCC/community association planning representatives fit into; when is there an opportunity for community feedback	• Urban Design Review Framework hub on Calgary.ca • Information/presentations to professional organizations, to be determined in consultation with stakeholders and Communications

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2.3.2 Internal: Staff Training

A formal Training and Development Program in association with Change Management will be prepared following Council direction, following the Training and Development process:
- Identify Training and Development requirements
- Secure Training and Development resource
- Collaborate with Training and Development to develop training and content schedule
- Collaborate with Training and Development to develop content for RoboInfo

Who they are	What they need	Approach
City Wide Urban Design		
Urban design specialists within CPAG	• To understand and participate in collaborative relationship and new processes for UDRP, including triggers for review	• Team workshops and discussion • Training provided through Knowledge Management
Community Planning, City of Calgary employees		
Community planning staff, coordinators and managers, CPAG members overall, Planning Legislative Services, project leads on m-item projects, Parks, Transportation, Real Estate & Development Services, Facility Management	• To be informed of and understand any processes that are in place where UDRP / City Wide Urban Design is involved • To understand roles and responsibilities of UDRP / City Wide Urban Design • When and how they get involved • How UDRP works and triggers for review • Information on changes to CARL lists • City Wide Urban Design contact information	• Urban Design Review Framework hub on Calgary.ca • Training provided through Knowledge Management • Roboinfo
PSTs, 311 staff	• information on new process changes • information on changes to CARL lists • City Wide Urban Design team contact information	• Roboinfo
CPC, Council, Advisory Committees		
Calgary Planning Commission members and future members, Next City Advisory Committee, other committees that impact urban design and processes	• Information on new process changes • To understand the responsibilities and role of Administration • To understand the role of UDRP • To understand the importance of urban design review • City Wide Urban Design team contact information	• orientation sessions when new members are appointed
Elected members of Council, the Mayor and their staff	• To understand what the City Wide Urban Design team does • How they can support larger files and provide information to Council on applications	

3. Metrics and Monitoring

Administration is developing performance measures to determine the effectiveness of the process refinements suggested within the *Urban Design Review Framework, the revised Terms of Reference, the Urban Design Review Protocol and the Implementation Plan*. A monitoring program is being developed to begin Q3 2017.

Ongoing monitoring is planned to determine the effectiveness of the Urban Design Review Framework, and is intended to provide direction to make adjustments to UDRF implementation as considered necessary:

a. Post-UDRP meeting feedback – applicant, UDRP members, CWUD staff, CP staff.
   a. Was the information provided appropriate for the review?
   b. Are meeting processes and procedures effective and efficient?
   c. Has early engagement with CWUD/UDRP been beneficial?
   d. Do you feel that the process has been valuable in terms of achieving improved built outcomes?

b. Post-application survey.
   a. Were the comments provided by City Wide Urban Design and UDRP beneficial to applicants?

c. Report back project outcomes to UDRP.
   a. Communicate CPC discussions and outcomes related to urban design input.
   b. Review UDRP impact through review of built projects.

d. Suggested by Industry:
   a.Impact of UDRP on decisions/revisions made by applicant;
   b. How often the pre-app option is utilized by an applicant;
   c. Impact on timelines:
      1. with/without pre-app
      ii. with/without UDRP review
      iii. which targets are being met
   d. How many applications get 'endorsed' in the pre-app, vs. 'endorsed with conditions', vs. 'another UDRP review required'

Metrics are aligned with the guiding principles of the *Urban Design Review Framework* document, the current Business Plan and forthcoming MDP metrics. The metrics will be based on POSSE tracking, which is expected to be in place Q4 2017, and may include the following:

1. How many projects/applications are referred to UDRP?
   a. Total volume.
   b. Percentage of stream 4 PEs, DPs, LOCs, DLs, M-items identified on the Municipal Matrix.

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2. How many UDRP/CWUD comments are acted on by applicants, resulting in project refinements or redesign in a Development Permit submission and/or DTR response?
   a. Track rate of integration for comments issued at PE.
   b. Track rate of integration for comments issued at DP.

3. What is the impact of design comments on the decisions made by the development authority?
   a. Track amendments or referrals at Calgary Planning Commission (CPC) on design issues to compare those that receive early Urban Design input vs those that receive UDRP input after DP submission.
   b. Track amendments or referrals at Calgary Planning Commission (CPC) on design issues to compare UDRP recommendation of "endorsement" or "further review recommended".

4. UDRP review occurs in established CPAG timelines.

5. DTR1 includes all Urban Design/UDRP comments.

The results of metrics and monitoring will be reported to Council Q1 2019.