CITY OF CALGARY
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IN COUNCIL CHAMBER

JUL 24 2017

ITEM: _PUD2017-0601_ ISC: **UNRESTRICTED**
Urgent Business REVISED PUD2017-0601
CITY CLERK'S DEPARTMENT

UPDATE ON URBAN DESIGN REVIEW PANEL TERMS OF REFERENCE

EXECUTIVE SUMMARY

On 2017 June 26, Council referred Report PUD2017-0528 back to Administration for further discussion with stakeholders and industry with specific reference to concerns raised in a joint letter received 2017 June 22 from BILD Calgary Region and NAIOP Commercial Real Estate Development Association. Council directed that Administration incorporate any amendments which arise from these discussions into the Urban Design Review Panel Terms of Reference, the Urban Design Review Protocol, and the Implementation Plan, and return the revised documents to the 2017 July 21 Regular Meeting of the SPC on Planning and Urban Development Committee. The project Working Group, including new representation from NAIOP, carried out further stakeholder engagement to review and resolve the concerns expressed in the June 22 letter, resulting in a number of revisions to the three documents. A summary of the revisions is attached. These changes were circulated to the Stakeholder Group as well as to the membership of BILD Calgary Region and NAIOP, who have indicated their support for the clarifications and for the overall project intent, and their willingness to participate in monitoring and measuring the success of the new process.

ADMINISTRATION RECOMMENDATION(S)

That the SPC on Planning & Urban Development recommend that Council:
1. Approve the revised Terms of Reference for the Urban Design Review Panel;

2. Receive the revised Urban Design Review Protocol and revised Implementation Plan for information; and

3. Direct Administration to evaluate expanding the Urban Design Review Panel's mandate to include Outline Plans, and report back in a future monitoring report through the Standing Policy Committee on Planning and Urban Development no later than Q1 2019.

And further, that this Report be forwarded to the 2017 July 24 meeting of Council as an item of Urgent Business.

RECOMMENDATION OF THE SPC ON PLANNING AND URBAN DEVELOPMENT, DATED 2017 JULY 21:

That Council:

1. Approve the revised Terms of Reference for the Urban Design Review Panel;

2. Receive the revised Urban Design Review Protocol and revised Implementation Plan for information; and

3. **That Council direct Administration to bring back a Report, through the Standing Policy Committee on Planning and Urban Development, that identifies and evaluates what, if any, design gaps currently exist in new outline plans, and determine, in conjunction with the development industry and stakeholders, how best to address that gap, and redundancies that may exist among the organizational bodies involved in the review process, no later than 2019 Q1.**

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Excerpts from the Minutes of the Regular Meeting of the SPC on Planning and Urban Development, Held 2017 July 21:

> "And further, that the **Revised** Report be forwarded to the 2017 July 24 meeting of Council as an item of Urgent Business."

PREVIOUS COUNCIL DIRECTION / POLICY

On 2017 June 26, Council directed "that Report PUD2017-0528 and all relevant materials, be referred to Administration for further discussion with stakeholders and industry to review these amendments and return to 2017 July 21 Regular Meeting of the SPC on Planning and Urban Development Committee."

On 2017 March 20, Council received the Urban Design Review Framework Document for information, and directed "Administration to revise the Terms of Reference for the Urban Design Review Panel and provide a more detailed implementation plan with stakeholder input, including the Industry/City Process Improvement Working Group, and return through the SPC on Planning and Urban Development to Council no later than 2017 July."

On 2016 June 20, Council directed "Administration to consult with interested stakeholders and report back to Council, by 2017 March, through the SPC on Planning & Urban Development, with an update on the process changes initiated, and recommendations to further improve urban design outcomes."

On 2015 July 27, Council directed "Administration to conduct further consultation with interested stakeholders, and members of the NextCity Advisory Committee, and to return to Council through the SPC on Planning and Urban Development, no later than Q2 2016."

On 2004 September 13, Council adopted the current Terms of Reference for the Urban Design Review Panel, subsequently amended 2007 October 23.

BACKGROUND

On 2017 March 20, Council accepted for information the Urban Design Review Framework, and directed Administration to revise the Urban Design Review Panel (UDRP) Terms of Reference and develop an Implementation Plan with stakeholder input. The result of this was a revised Terms of Reference (Attachment **2**), together with a separate Urban Design Review Protocol (Attachment **3**) detailing the design review process and the roles and responsibilities of both the Panel and the City Wide Urban Design Team. The accompanying Implementation Plan (Attachment **4**) described a staged introduction of the revisions, identified the process steps for various application types, proposed changes to enhance report clarity, and outlined training and monitoring goals. These documents were developed through a series of engagement sessions with previously engaged key stakeholders, and with members of the Industry/City Process Improvement Advisory Committee.

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The resulting documents, reflecting the results of this engagement, were presented to SPC on PUD on 2017 June 14. The recommendation of PUD was to approve the revised Terms of Reference for UDRP, to receive the Urban Design Review Protocol and Implementation Plan for information, and to further direct that Administration evaluate expanding the Urban Design Review Panel's mandate to include Outline Plans and report back in a future monitoring report through PUD no later than Q1 2019. At Council on 2017 June 26, there was discussion around the letter (referenced above) provided on June 22 (Attachment 1) and there was concern that there were still issues which BILD Calgary and NAIOP, on behalf of their membership, felt were not satisfactorily resolved. This resulted in Council's direction to refer the report back to Administration.

INVESTIGATION: ALTERNATIVES AND ANALYSIS

Council's 2017 June 26 direction to Administration to conduct further engagement with Industry arose from concerns raised in the letter received June 22, jointly signed by BILD Calgary Region and NAIOP. The letter indicated support for the intent of achieving better urban design, and for having design discussions earlier in the process, but made suggestions and/or raised concerns regarding a number of issues, including (in summary):

- Requesting that UDRP comments be sent directly to applicants
- Requesting that UDRP include applicants in all discussion of their files
- Limiting Administration's role in advising UDRP without the applicant present
- Reinforcing the Applicant's role in explaining the design rationale and context
- Clarifying the roles of the applicant and Administration in resolving conflicting advice
- Suggesting specific ideas around outreach to industry and measuring success

Stakeholder Engagement, Research and Communication

The Working Group, assembled during the previous phases of the project and containing representation from UDRP, CPC, Calgary Approvals Coordination, BILD Calgary and CPAG process experts reconvened for an additional two meetings. A representative of NAIOP, as a co-signatory to the June 22 letter, was invited to join the group. During this phase, one additional stakeholder workshop was held specifically to review the issues identified in the June 22 letter and to reach agreement on appropriate revisions to the UDRP Terms of Reference and associated documents. All 100 previously identified stakeholders were invited to this session, as well as invitations coordinated by BILD Calgary Region and NAIOP to specific members of their respective groups. Detailed discussion of the issues and clarification of the reasons for the concerns occurred in the stakeholder workshop and subsequent Working Group meeting. This resulted in consensus on further refinement of the wording and consequent edits to the Urban Design Review Panel Terms of Reference (Attachment 2), the Urban Design Review Protocol (Attachment 3), and the Implementation Plan (Attachment 4). A summary of the agreed to amendments to the three associated documents is included (Attachment 5).

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Strategic Alignment

The Municipal Development Plan (MDP) promotes site and building design that contributes to high quality living environments and attractive, walkable, diverse neighbourhoods and communities (MDP 2.4.2), and coherent and collaborative design of streets, building interfaces and public spaces (MDP 2.4.3). Improvements to the design review process, including more effective involvement by UDRP resulting in improved urban design outcomes, will support these objectives. The proposed design review process refinements align with the ongoing initiatives of Calgary Approvals Coordination.

Social, Environmental, Economic (External)

Social

Making recommendations and decisions on urban design earlier in the process creates a more transparent process for all stakeholders. An urban design review process that involves the right expertise at the right points of the development approval process with the right information will help result in improved urban design of benefit to all Calgarians.

Environmental

No implications identified.

Economic (External)

Earlier recommendations on urban design will result in greater transparency and clarity for all stakeholders. It will also lead to improved development outcomes. Consistent early discussion of significant design issues will avoid costly changes and additional time spent later in the process.

Financial Capacity

Current and Future Operating Budget:

Current and Future Operating Budget:

Internal process improvements will be part of Planning and Development's existing operating budget and completed through internal resources.

Current and Future Capital Budget

No implications identified.

Risk Assessment

Changes to the scope and mandate of UDRP could result in higher application circulation volume, additional pressure on staff to manage the volume, and pressure on UDRP to perform more frequently and more quickly; increasing the Panel size could lead to challenges attracting the required number of qualified panelists.

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REASON(S) FOR RECOMMENDATION(S):
Through engagement, Administration and Industry have resolved the concerns expressed in the June 22 letter, and reached consensus on revisions to the Urban Design Review Panel Terms of Reference and accompanying Protocol and Implementation Plan. The revised documents will clarify and enhance the design review process through providing greater clarity of roles and administrative consistency while maintaining the "peer review" function of UDRP. Industry has agreed to participate in monitoring the outcomes which will inform decision making around continuous improvements to the process. Overall the proposed enhancements to this process will create more opportunities for dialogue around City design and policy with the objective of achieving superior design outcomes.

ATTACHMENT(S)
1. BILD/NAIOP 2017 June 22 Letter to Calgary City Council
2. Urban Design Review Panel Terms of Reference
3. Urban Design Review Protocol
4. Implementation Plan
5. Summary of Amendments as Agreed to By All Parties

BILD/NAIOP 2017 JUNE 22 LETTER TO CALGARY CITY COUNCIL

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City of Calgary, Planning & Urban Development   June 22, 2017
The City of Calgary
PO Box 2100, Station M
Calgary, AB T2P 2M5

Attention: Members of Council

Re: **SPC for PUD – June 14, 2017 | PUD 2017-0528:**
        Urban Design Review Panel Terms of Reference, Protocol and Implementation Plan

The item noted above comes before Council on June 26th as part of the consent agenda. On behalf of the members of BILD Calgary Region and NAIOP, we request that Council lift the item from the consent agenda for further consideration, so that

1. Our requests from our June 12, 2017 letter presented at PUD can be re-considered; and
2. The recommendation arising from that discussion regarding outline plans, be amended.

The specifics of these requests are detailed in the close of our letter.

Our members are supportive of a process that supports good urban design. We agree that having design discussions earlier in the process can be beneficial. However as presented, this item will add uncertainty, time and cost, and not achieve the mutual benefit of a collaborative UDDRP process. The changes we are requesting would serve to strengthen the original intent of this initiative, making the process easier for our members to adopt and ensuring that the UDRP process as envisioned will be of value in influencing better design.

A number of members from both BILD and NAIOP who followed the PUD meeting came forward afterwards, concerned that Committee did not get the applicant's perspective on the new UDRP process being piloted. Some things do work better: UDRP input shifted earlier in the process, and applicants are now allowed to present their projects to UDRP, where previously they were not. However, some issues remain which could be addressed fairly simply, and members did not want to miss this opportunity to ask for those considerations.

Feedback from those who recently experienced the new UDRP process noted that it still:
- Adds more cost than value to their projects;
- Promotes judgement of an application over discussion on design;
- Remains quite regimented (although better than previously when applicants could not present at all);
- Does not encourage applicants to take full ownership of their design story, sometimes leading to misinformed discussion amongst UDRP;
- Includes a question period, but questions appear more to be opinions and tend to be negative in nature;
- Provides little to no opportunity for constructive discussion, feedback or problem-solving between applicants and UDRP;
- Has a closed portion at the start of the meeting between Administration and UDRP only, specifically excluding the applicant;
- Has 'in camera' portions at the close of the meeting, followed by final comments and no ability for further discussion (except with Administration through the approval process, or future re-assessment by UDRP if allowed);
- Provides minimal value and little influence on the applicants' design endeavors.

However, most agreed that with the changes requested in the June 12, 2017 BILD letter, the opportunity exists to make this a value-driven process around design, rather than a process-driven mechanism that will increase costs without additional benefits.

BILD/NAIOP 2017 JUNE 22 LETTER TO CALGARY CITY COUNCIL

While we do not feel that the changes requested detract from the intent and purpose of UDRP as envisioned, we understand that asking for these changes may require additional discussion and consideration with Administration. Accordingly, we would support Council direction to refer the amendments back to Industry and Administration, to be brought back to the next Council meeting through PUD.

Outline Plans:

This issue is a critical one for our members, generating strong feedback. Members from both NAIOP and BILD feel that the recommendation put forward at Committee will trigger efforts costing all parties time, money and energy without achieving the intended effect.

Our members understand the importance of well-designed outline plans. All outline plans currently undergo a rigorous review process with Administration, which includes the City Wide Urban Design team. New outline plans conform to MDP principles and existing design policies, and many new outline plans have not had opportunities to be built yet. Outline plan design is primarily driven by policy, grading and servicing considerations, as well as alignment of priorities and requirements across departments (transportation, transit, parks, water resources, etc.). The current composition of UDRP would need to accommodate those skillsets, plus we would need re-assessment of the role/function of urban planners in CPAG, CWUD, and CPC across the approval process.

We are open to exploring and identifying what design gaps might be evident in current outline plans, and then addressing those gaps through an appropriate process. We do not believe that it should be a foregone conclusion that UDRP should be the tool that is used to address a currently undefined issue. We request that the proposed recommendation be amended to read:

> "That Council direct Administration to bring back a report through the Standing Policy Committee on Planning and Development that identifies and evaluates what design gaps currently exist in new outline plans, if any, and determine, in conjunction with Industry and stakeholders, how best to address that gap, no later than Q1 2019."

BILD Calgary Region / NAIOP Joint Request

Administration has noted that no further changes can be accommodated without political direction. As a result, both associations are appealing to Council for a re-consideration of the process improvements BILD forwarded in the June 12th letter (attached) and presented to PUD, and ask that:

1a. The Urban Design Review Panel Terms of Reference, Urban Design Review Protocol and Implementation Plan, be amended per Attachment A, OR

1b. A referral of the item by Council, with direction to Administration to work with Industry on the proposed amendments in Attachment A; and

2. That the recommendation made at the June 14th Standing Political Meeting of Planning and Urban Development regarding outline plans, be amended as noted above.

Yours Truly,

Guy Huntingford
CEO, BILD Calgary Region

Chris Ollenberger
Chair, Government Affairs, NAIOP

c.c. Stuart Dalgleish, General Manager Planning & Development, City of Calgary
Matthias Tita, Director Community Planning

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ATTACHMENT 'A' – Urban Design Review Panel (UDRP) – recommended amendments
SPC for PUD – June 14, 2017 | PUD 2017-0528:

The following are recommended amendments and revisions to the Urban Design Review Panel Terms of Reference document, the Urban Design Review Protocol document, and the Implementation Plan. BILD CR and NAIOP believe that these changes will allow for smoother adoption of the UDRP process, leading to less frustration and better outcomes for all parties.

Please note that all amendments show black-line deletions, and additional text in red.

Requested amendments to the Urban Design Review Panel – Terms of Reference

1. Requested amendments to the Terms of Reference:
   a. In point 3.6 of the Terms of Reference, revise the second bullet point:

   "Summarizes Panel commentary utilizing an established template and sends directly to the applicant, with copies to the Chief Urban Designer and the file manager within two days of the meeting."

   b. In point 7.0 "Record of Meetings":

   "Comments of the Urban Design Review Panel are directly conveyed to the applicant and noted by the Chair or Deputy Chair and formalized within an established template after the conclusion of the meeting ~~with the assistance of Administration as required~~.

   Reason for requested changes:
   Better connection between UDRP and applicant. Allows for UDRP comments to be communicated directly to the applicant rather than streaming them through Administration. This would be particularly effective during the pre-application process and help reinforce the role of UDRP as an independent, 3rd party assessor. Comments would still be copied verbatim to Administration and kept on file.

2. Requested amendment to the Terms of Reference:
   Under point 5 of the Terms of Reference "Code of Conduct"; add the following:

   "Members of the Urban Design Review Panel will conduct their assessments in a collaborative and transparent manner with the applicant, without separate or in-camera discussions."

   Reason for requested change:
   Keeps applicant included in all aspects of their design review. Ensure that UDRP protocol is clear in expecting that assessments and work conducted through the panel is done in an open and transparent manner.

ATTACHMENT 'A' – Urban Design Review Panel (UDRP) – recommended amendments - continued
SPC for PUD – June 14, 2017 | PUD 2017-0528:

3. Requested amendment to the Terms of Reference:
   Under point 3.7 of the Terms of Reference, "Attendance by Non-Members:

   "The meetings are not open to members of the public; however, applicants are ~~encouraged~~ required to present and address questions of the Urban Design Review Panel (further detail of the conduct of Panel meetings is set out in the Urban Design Review Protocol). In the case of a pre-application meeting, the Urban Design Review Panel will not assess the application without the applicant or their representatives present."

   Reason for requested change:
   Recognize the main purpose of UDRP is to influence the applicant and/or their representatives towards better urban design – thus attendance should be mandatory; otherwise the UDRP assessment is not a good use of the Panel's time.

4. Requested amendment to the Terms of Reference:
   Under point 3.7 "Attendance by Non-members"

   The Chief Urban Designer or designate (non-voting) will be available at Panel meetings to:
   - ~~Present applicable urban design policy/guideline context to the Panel, relevant design documentation such as streetscape studies.~~ Present relevant process considerations as applicable.

   The ~~File Manager/Project Planner~~ applicant and/or their representative (non-voting) will be available to:
   - Present the relevant planning and physical context of the proposal, the project's history, the policy context, and relevant process considerations.
   - Answer questions raised by the Panel.

   Reason for requested change:
   Reduces red tape, requires applicant/representative ownership and accountability on the urban design story related to their project, and uses the majority of the Panel's time on design discussion, not policy matters (which should be owned by the City Wide Urban Development Team and addressed through the approval process). Current process creates inefficiencies and incurs unnecessary costs– requiring the applicant to inform staff to inform UDRP, when the process could more efficiently facilitate direct discussion between applicant and UDRP.

Requested amendments to the Implementation Plan

BILD Calgary Region requests that Administration include the additional items in the Implementation Plan as outlined further below, as they will help provide indicators of success or identify areas for improvement.

1. Requested revision to the Implementation Plan:
   Under Section 2.3.1 "Stakeholder outreach - development industry, "what they need" – add:
   a. The differentiated value, roles and responsibilities of UDRP/CWUD/CPC as they go through the process;
   b. The selection criteria (what applications get selected for UDRP and why)
   c. The process (what happens when selected, expectations of each group within that process)
   d. How to successfully get through to an approval
   e. The cumulative value/impact to industry (through monitoring and reporting)

   Reason for requested change:
   These have been identified as "what the development industry needs" in terms of understanding and adopting the new UDRP process.

2. Requested revision to the Implementation plan:
   Under Section 3 "Metrics & Monitoring" – add:
   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:
      i. 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' (if applicable – see requested changes to Protocol document)

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<u>ATTACHMENT 'A' – Urban Design Review Panel (UDRP) – recommended amendments - continued</u>
<u>SPC for PUD – June 14, 2017 | PUD 2017-0528:</u>

Requested amendments to the Urban Design Review Protocol document:

1. <u>Requested amendment to the Urban Design Review Protocol:</u>
   Under Section 5.1 Administration roles and Responsibilities – Presentation – add:
   Planning File Manager / City Wide Urban Design:
   - The Planning file Manager will be available at Panel meetings to present an overview of the application if requested by the applicant or UDRP, including relevant planning policy and any issues raised previously by CPAG or the Community that were not raised as part of the applicant's presentation and require UDRP consideration.

2. <u>Requested amendment to the Urban Design Review Protocol:</u>
   Under Section 5.2 – Conduct of Panel Meetings – delete as shown:
   2. The City Wide Urban Designer has five minutes to present ~~urban design policy considerations~~, comments previously given to the applicant and outline urban design-related reactions and concerns.

   <u>Reasons for requested changes:</u>
   Allow the applicant to take direct responsibility for presenting their design story to UDRP, reinforce UDRP's role in commenting on design outside of City policies. Emphasize the City's role in commenting on whether design meets policy through the approval process rather than at UDRP meetings.

3. <u>Requested amendment to the Urban Design Review Protocol:</u>
   Under Section 5.2(6) – delete and add:
   "Following the presentations and discussion with the applicant and Administration, the Panel will review drawings and discuss merits and issues of the project ~~"in camera",~~ with all members present.

   <u>Reason for requested changes:</u>
   While the Municipal Government Act provides for opportunities for Council and Council committees to meet "in camera", it is perceived that deliberations of the UDRP, when made in public, serve to support the Panel's primary role in providing design guidance to applicants. Applicants benefit from the deliberations of the Panel. Comments from the Panel are not binding for any party. As the Panel is providing recommendations to both the CPC and to the applicant, all parties benefit from the transparency provided by a public forum.

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ATTACHMENT 'A' – Urban Design Review Panel (UDRP) – recommended amendments - continued
SPC for PUD – June 14, 2017 | PUD 2017-**0528**:

4. Requested amendment to the Urban Design Review Protocol:
Remove section 5.2(6) "~~A vote is held at the end of each project review to determine the Panel's position on the project. The vote only relates to the design issues discussed during the review and is not connected to The City's development approvals process.~~"

Reason for requested change:
Voting whether to endorse a project or not creates the impression that the URDP is in the position to tacitly approve or deny projects. Under section 1.1, the purpose of the URDP is to provide "input to the application review process by contributing additional expert opinion to the design discussion." This can be accomplished by providing comments and feedback to the applicants instead of voting to endorse the project.

Urban Design Review Panel Terms of Reference

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Urban Design Review Panel Terms of Reference

Purpose of the Urban Design Review Panel

The Urban Design Review Panel, created in 2004 by resolution for a 3 year trial period, was established as an independent urban design advisory body on a permanent basis by Council resolution in 2007 (report C2007-71). The objective of the Urban Design Review Panel (the Panel) is to encourage the achievement of design excellence by focusing on the architecture and urban design issues of development applications. The Panel provides "best practice" design guidance which recognizes the complex relationship between streets, buildings and the spaces between them while responding to use, context and climate.

Input from the Panel will be requested on select applications, outlined in the accompanying Urban Design Review Protocol. Administration will engage Urban Design Review Panel at the earliest stage to ensure the provision of urban design guidance at the most effective point in the project design process as well as the timely review of applications to meet existing Corporate Planning Applications Group (CPAG) timelines.

1.1 Mandate

The Panel's mandate is to provide independent, professional design advice, from an urban design and architecture perspective, on public and private development and major redevelopment proposals through pre-application enquiries development permit applications and development liaisons on sites citywide with significant impact on the public realm.

Comments from the Panel are provided as peer review expert advice, directed to staff, the applicant and the development authority, and intended to encourage best practice approaches to development specific to a site's context that support the goals of the Municipal Development Plan. Advice from the Panel is to assist the applicant and their design team by identifying areas for improvement to support the realization of better design outcomes.

The advice of the Panel is in addition to the in-depth urban design review conducted by City Wide Urban Design, specialists in urban design within Administration, as part of the application review process. Urban design comments from both the Panel and City Wide Urban Design will be received by the planning file manager for inclusion in reports to the applicant, to the Development Authority for decision or for recommendation to Council. City Wide Urban Design will work in collaboration with the Panel, assisting them in understanding the policy and guideline context of specific applications as requested without directing the Panel's recommendations. The effectiveness of the Panel, as an adjunct to internal design review, is in their ability to comment through the lens of current design practice and, in some cases, more broadly than existing policy may allow. Any conflicts that arise will be clearly identified and resulting recommendations described in the appropriate reports.

During the preliminary stages of the CPAG process involvement of the Panel is voluntary, as is the pre-application enquiry process generally. However it is strongly recommended to applicants to request early engagement with City Wide Urban Design and the Urban Design Review Panel to support the identification and resolution of urban design issues at the beginning of the design process when they are more easily resolved. Appropriate applications will receive review by the Urban Design Review Panel during the development permit phase if not engaged earlier in the process.

Urban Design Review Panel Terms of Reference

The Panel's advice is not binding, but is nonetheless an important benchmark for the assessment of quality development proposals and should be considered for the benefit of creating a quality urban environment.

Periodically the Panel may, based on their application review experience over time, wish to comment or make recommendations to the Development Authority for regulatory or guideline changes that may be outside the scope of applications but should be considered for the benefit of creating a quality urban environment. These recommendations will be made through separate submissions by the Panel which do not tie the recommendations to specific applications.

2. Definitions

a. "**Urban Design**" means the practice of giving form, shape and character to the arrangement of buildings, or whole neighbourhoods, or the city. At the more detailed level, it involves the shaping of the external spaces between buildings, and the design of their detail and finishes to respond to use, context, climate, and building form (*Urban Design Framework*, City of Calgary, 2011).

b. "**Public Realm**" means all external areas of the city (on public or private land) to which the public has regular access. This includes, for example, sidewalks, squares, plazas, as well as +15 bridges, walkways and associated outdoor spaces (*Urban Design Framework*, City of Calgary, 2011).

c. "**Development Authority**" means a planning authority provided by council bylaw to exercise development powers and perform duties on behalf of the municipality, and may include one or more of the following: A designated officer; a municipal planning commission; any other person or organization (*Municipal Government Act,* Province of Alberta, 2017).

d. "**Concept Review**" means the phase in a project's evolution equivalent to the architect's services in Pre-design Phase described by the Royal Architectural Institute of Canada, prior to the traditional building design services which assist the client in establishing a functional program, which describes various criteria and data for a project, including design objectives, site requirements and constraints, spatial requirements and relationships, as well as the project scope (*A Guide to Determining Appropriate Fees for the Services of an Architect*, The Royal Architectural Institute of Canada, 2009).

e. "**Schematic Design Phase**" means the phase in a project's evolution equivalent to the architect's services in Schematic Design Phase described by the Royal Architectural Institute of Canada, wherein the architect shall review the program requirements furnished by the client and characteristics of the site; review alternative approaches to the design of the project, and prepare design documents that illustrate the scale and character of the project and how the parts of the project functionally relate to each other (*A Guide to Determining Appropriate Fees for the Services of an Architect*, The Royal Architectural Institute of Canada, 2009).

f. "**Design Development**" means the phase in a project's evolution equivalent to the architect's services in Design Development Phase described by the Royal Architectural Institute of Canada, wherein, based on client approval of schematic design documents, the architect shall prepare design development documents consisting of drawings and other documents to describe the size and character of the entire project, including the architectural, structural, mechanical and electrical systems, materials and such other elements as may be appropriate (*A Guide to Determining Appropriate Fees for the Services of an Architect*, The Royal Architectural Institute of Canada, 2009).

3. Panel Structure and Expertise

3.1 Classification

The Urban Design Review Panel is classified as an Interest Group as defined in the Council Policy on Governance and Appointments of Boards, Commission and Committees (CP2016-03).

3.2 Eligibility of Public Members

The Urban Design Review Panel is comprised of 12 members and one adjunct member (see below), nominated by their professional associations. As well, BILD Calgary Region and NAIOP will each nominate from within their membership one registered design professional from any of the Associations referred to below. The complete list of nominations will be considered by Council who will appoint the Panel members, by resolution, at the annual Organizational Meeting of Council.

The Panel will consist of:
- Five Architect members of the Alberta Association of Architects, four of which have specific expertise in at least one of the following categories: Urban design; high-rise design; commercial building design; civic building design; accessible design; sustainable design; large scale development projects. No more than one architect member may be non-practicing.
- Three members of the Alberta Association of Landscape Architects with expertise in diverse landscapes representing the public realm.
- Two members of the Association of Professional Engineers, Geologists and Geophysicists of Alberta with expertise in multi-modal transportation, complete streets and tactical urbanism.
- Two members of the Alberta Professional Planners Institute with expertise in urban design.

    In addition:
- One recognized Heritage Conservation Architect, adjunct member (available on call to participate as requested on specialized files).

3.3 Selection Criteria

Panel members are selected for their individual experience and qualifications, and are expected to be leaders in their professions, with experience in delivering high quality design outcomes.

Urban Design Review Panel Terms of Reference

The Panel overall should represent a broad range of experience which, in addition to urban design should include high-rise design, commercial building design, civic building design, accessible design, sustainable design, and experience with large scale development projects. The Chief Urban Designer and Urban Design Review Panel Chair will review the list of nominations provided by the Professional Associations and submit a short-list recommendation which will be considered, together with the entire list, to inform Council's decision, in accordance with Council Policy CP2016-03. No more than one member of any particular firm may be allowed to sit on the Panel at the same time.

3.4 Quorum

Any seven members (50% +1) can constitute a quorum during a regular Panel meeting. In the case of additional meetings attended by a sub-panel (see section 6.6), three members who appropriately represent the Panel make up may constitute a quorum.

3.5 Duties of Panel Members

- To regularly attend meetings of the Urban Design Review Panel. In accepting appointment to the UDRP, the Panel member acknowledges that they have suitable flexibility to attend regularly scheduled Panel meetings.
- To know and understand Council policy.
- To understand the approval process for land use and development applications and to ensure that Panel commentary is provided within CPAG review timelines.
- To conduct a thorough review of submission materials prior to each Panel meeting.
- To provide the applicant with impartial, professional advice on proposed designs with respect to improving their impact on the city's physical environment.
- To consider, in providing design guidance, the *Thirteen Elements of Urban Design* as described in the Calgary Municipal Development Plan and set out in Part 4 of this Terms of Reference.
- To assist in the recruiting of new Panel members through active promotion of The Panel, its work, and its importance to the design review process at The City of Calgary.
- Adjunct members will be willing to be available as requested to participate in the review of items related to their expertise.

3.6 Duties of Panel Chair

The Panel Chair and Vice-Chair are chosen by the Panel members from amongst their members annually at the first meeting following the Organizational Meeting of Council. The Chair may delegate these responsibilities to any of the Panel members if necessary. General duties of the Chair are defined in the Council Policy on Governance and Appointments of Boards, Commission and Committees (CP2016-03). Additionally the Chair:

Manages the meeting to ensure the Meeting Procedures are adhered to and that comments from the Panel are consistent with its mandate and objective to provide direction from an urban design perspective.

Summarizes Panel commentary utilizing an established template and sends directly to the File Manager, copy to the Chief Urban Design, within two to five days of the meeting. The File Manager will communicate this commentary, <u>unedited</u>, to the applicant, as soon as possible.

Urban Design Review Panel Terms of Reference

Represents the Panel when Urban Design Review Panel representation is required outside of regular Panel duties, including being periodically available to address questions of clarification. The Vice-Chair assists in these duties in the absence of the Chair.

3.7 Attendance by Non-members

The Applicant and/or their representative (non-voting) will be available to:
- Present the overall design rationale and physical context of the proposal, and, as relevant, the project's history.
- Answer questions raised by the Panel.

The Chief Urban Designer or designate (non-voting) will be available at Panel meetings to:
- Provide applicable urban design context at the request of the Panel.
- Provide any previous urban design direction given on the project and/or site.
- Advise the Panel with regard to potential policy conflicts arising from their comments.
- Answer other questions raised by the Panel.

The File Manager/Project Planner (non-voting) will be available to:
- Present the relevant planning context of the proposal and relevant process considerations as requested by the Panel.
- Answer questions raised by the Panel.

No member of Council or Administration may be appointed to the Panel. The meetings are not open to the members of the public; however, applicants will be requested to present the project and address questions of the Urban Design Review Panel (further detail of the conduct of Panel meetings is set out in the Urban Design Review Protocol).

Administration will arrange venues and agendas, and distribute submission materials to the UDRP members.

4. Appointment Term

Panel members will be appointed on a volunteer basis for a term of two years, which may be renewed up to two times. Individual term expirations will be staggered to ensure an orderly transition of the new members.

5. Code of Conduct

Members of the Urban Design Review Panel must complete a *Declaration* form upon their appointment to The Panel which states that they will abide by the *Code of Conduct for Citizen Members Appointed to Council Established Boards, Commissions and Committees* (CC045). Members of the Urban Design Review Panel will conduct their assessments in a collaborative and transparent manner with the applicant.

6. Assessment Process

6.1 Scope of Work

The scope and nature of the criteria used may vary with the size or special circumstances of a project. The intent for the Panel is to identify design issues and appropriate urban design principles to consider, not to propose specific design solutions. It is incumbent upon the applicant to provide clarifications when questioned by the Panel and propose potential solutions.

Design review by the Panel can be accessed for the following purposes:
- Preliminary discussions with developers and City Wide Urban Design at the concept development phase, preferably during preliminary project discussions, on large, complex or development proposals, focusing on identifying issues for improvement to achieve better design outcomes.
- Subsequent advice and review if an application has varied significantly from its original intent or in cases where further design review by the Panel has been recommended.
- Design recommendations to the development authority or Council based on the design merits or challenges of development proposals brought forward for decision.
- Review and provide advice to Administration with regard to significant planning and design issues, not associated with specific applications, which may impact multiple sites or have broad policy impacts.

The Panel will focus their design advice on the application in front of them and provide design guidance appropriate to the proposed project type with clear reference to those areas of the proposal which they feel deficient and reasons why.

6.2 Urban Design Principles

The Municipal Development Plan includes a set of guiding urban design principles that contribute to achieving excellent design outcomes, referred to as *Thirteen Elements of Urban Design,* which inform City policy and against which all project applications are to be measured (MDP 2.4, Urban Design Review Protocol Section 3). The Urban Design Review Panel will review how each project addresses the principles within the context of best practices of contemporary urban design.

6.3 Project Review Stages

Recognizing that some design issues are not resolved at the pre-application stages and that some often remain to be resolved once a formal application has been submitted, projects within the Urban Design Review process may be seen twice by the Panel, as follows:

Pre-Application/Schematic Design Advice
The first design discussion, intended to align with Pre-Design or Schematic Design phase, should be scheduled early enough during the initial functional design stages, or during policy development, to afford the possibility of significant changes, if advised by the Panel.

Urban Design Review Panel Terms of Reference

Development Permit/Design Development Review

The second (final) review is intended to occur after revisions have been made, and is intended to focus on design details at the outset of the development permit process. If an applicant does not engage in schematic design review at pre-application stages, full schematic and design development review by the Panel will occur at this time. A proposal will not be requested to be seen by the Panel three or more times.

6.4 Panel Position

The Panel will strive to reach consensus to determine its position on the project at the end of each project review. The Panel may vote to determine its position; the position relates only to the design issues discussed during the review and is not connected to the City's development approvals process. Panel positions include "endorse" and "further review recommended". A project which receives "endorse" would likely not be requested to be seen a second time by the Panel; in the case of "further review recommended" the Panel will decide whether a subsequent presentation to the Panel is requested or whether any further review will be handled internally only by City Wide Urban Design.

6.5 Frequency of Meetings

Urban Design Review Panel meetings will be held every two weeks throughout the year on Tuesday afternoons commencing at 1:30 pm. Special meetings may be convened when necessary to handle high file volume or to hold discussion sessions on topics of interest or concern. (See below)

6.6 Additional Sessions

The Panel may establish a sub-panel, if required to accommodate exceptionally high file volume within CPAG timelines, to assist the Panel in the performance of its duties. Each sub-panel will consist of half of the representatives of each of the above-noted member groups, and will meet bi-weekly, on alternating weeks, at the regular meeting time. Any three members who appropriately represent the make-up of the Panel can constitute quorum.

6.7 Training / Update Sessions

Annually upon appointment of new panel members, an introductory information session will be provided by the Chief Urban Designer and Panel Chair. Panel members may also be requested to attend periodic update sessions on urban design projects and issues. These may include attendance by other city groups such as Calgary Planning Commission, and will be organized by City Wide Urban Design.

7.0 Record of Meetings

Comments of the Urban Design Review Panel are noted by the Chair or Deputy Chair and formalized within an established template after the conclusion of the meeting with the assistance of Administration as required. No new material or information will be introduced into the comments that were not discussed in the open portion of the meeting.

Urban Design Review Protocol

Contents

Appendices

1. Introduction

1.1 Benefits of Urban Design Review

The Urban Design Review Panel (the Panel) provides independent peer review by practitioners experienced in a variety of relevant professional disciplines. This input contributes to the application review process by contributing additional expert opinion to the design discussion. In doing so, it assists in fulfilling Council's Municipal Development Plan goal of achieving urban design excellence through encouraging better urban design outcomes which add significant value to the city in economic, social, and aesthetic terms.

The Panel process has the potential to minimise time delays by identifying and supporting the resolution of complex issues early in the design process. Together with the option of discussions with City Wide Urban Design beginning as early as the concept design stage, the urban design review process is structured to provide for early identification of project challenges and expectations and consistent recommendations throughout the process.

Benefits of Urban Design Review Panels include:

- Bringing an additional source of design expertise to further complement the skills of the project team.

- Providing "arms length", best practice design review from an external professional perspective.

- Raising the profile of urban design by supporting Council, industry and communities in requiring more attention to design quality as it benefits the public realm.

- Providing decision makers with the confidence that they have thorough, thoughtful, and credible, recommendations on the design aspects of a project.

- Identifying project challenges at an early stage, when significant design changes can be made with relative ease and economy.

- Putting projects in perspective of the larger, city-wide picture.

- Offering opportunities to those involved in application review for continued learning, especially how to assess good design.

2. Current Urban Design Review Resources

Recognizing the importance of excellence in urban design, Calgary has two specific sources for urban design advice that are accessed during the application process:

2.1 City Wide Urban Design

This group was created in 2008 with professional architecture and urban design expertise, to provide design guidance and leadership in a number of ways, including:
- Providing ongoing review of applications, including land-use, pre-application, and development permit applications for new projects and major redevelopments city-wide;
- Working with the various business units represented within the Corporate Planning Applications Group (CPAG) process and can address urban design related questions raised during the process and at the time of decision.

In addition, other urban design related responsibilities of City Wide Urban Design include:
- Creating urban design guidelines for various contexts which inform the design review process;
- Providing guidance to various City departments regarding policy and guideline development where urban design content is required;
- Collaborating city-wide on the concept design and project management of public realm, public art, and infrastructure projects which impact the public realm;
- Consulting directly with various external stakeholders, including business and community groups and professionals, to ensure clarity around expectations and objectives regarding public realm design.

2.2 The Urban Design Review Panel (UDRP)

This group was established in 2003 to act as a peer review group of experienced design and planning practitioners who provide non-binding, 'best practice' expertise regarding urban design. They are an external volunteer group, nominated by their respective professional associations and appointed by Council, whose current approved mandate is to:
- Review, from an urban design perspective, new development and major redevelopment proposals within specific areas, including Centre City, Business Improvement Areas (BIA), Transit Oriented Development (TOD) areas or as referred to it by the Development Authority.

This document, together with the revised Terms of Reference, introduces changes to the Urban Design Review Panel mandate to expand their scope and include a broader range of application types and geographic areas from with project circulations may be drawn.

3. Elements of Urban Design

Section 2.4 of the Municipal Development Plan includes a set of guiding urban design principles that contribute to achieving excellent design outcomes, referred to as *Thirteen Elements of Urban Design,* which inform city policy and against which all project applications are to be measured.

The Urban Design Review Panel will review how each project addresses these principles within the context of best practices of contemporary urban design.

3.1 Thirteen Elements of Urban Design

- **Creativity:** Encourage innovation; model best practices

- **Context:** Optimize built form with respect to mass and spacing of buildings, placement on site, response to adjacent uses, heights and densities

- **Connectivity:** Achieve visual and functional connections between buildings and places; ensure connection to existing and future networks

- **Integration:** Facilitate the conjunction of land-use, built form, landscaping and public realm design

- **Accessibility:** Ensure clear and simple access for all types of users

- **Scale:** Define street edges, ensure heights and building mass respect context; pay attention to scale

- **Safety:** Achieve a sense of comfort and create places that provide a sense of security at all times

- **Quality:** Encourage the use of durable and long lasting materials and details that will provide a legacy rather than a liability

- **Animation:** Encourage active uses; pay attention to details such as signage and way finding; add colour, wit and fun

- **Flexibility:** Develop planning and building concepts which allow adaptation to future uses, new technologies

- **Diversity:** Promote designs accommodating a broad range of users and uses

- **Sustainability:** Be aware of lifecycle costs and ecological footprints; incorporate sustainable practices and materials

- **Orientation:** Provide clear and consistent directional clues for urban navigation

4. Review by Urban Design Review Panel

The Chief Urban Designer (or designate) will be responsible, in collaboration with the Planning File Manager and the applicant, for determining which applications are referred to the Panel for review. The following application types may be referred to the Panel for review. In some cases the capacity and availability of UDRP may limit applications referred to those of higher complexity and impact.

4.1 Application Types

Pre-application enquiries, development permit applications, development liaisons, and Direct Control land use amendment applications with design content that meet any of the following criteria:

- Applications that will result in a development permit referral to CPC for information, recommendation or decision.

- Development applications located within a defined TOD area, (both BRT and LRT), Main Street area, or Centre City.

- All projects applying for the Exceptional Design bonus.

- City of Calgary capital projects, including significant buildings, parks and open space development, streetscape improvement projects and infrastructure projects city-wide with significant urban design impact, excluding maintenance projects.

- Development applications located on prominent sites in gateway locations with significant urban design content or impact.

- New or revised City developed urban design guidelines and urban design components of City policies and guidelines.

Additional projects of significant complexity may be referred to the Urban Design Review Panel at the request of the Planning File Manager and the discretion of the Chief Urban Designer or designate and depending on the capacity of the Panel at the time.

Applicants may request a review with Urban Design Review Panel even if their project is not deemed to meet the criteria for review. In these cases the capacity and workload of Urban Design Review panel will be taken into account and a priority assigned. Applicants should be aware that such requests may take longer to accommodate.

5. Panel Review Process

The objective of the recommended process is to:
- Establish and help ensure a consistently applied and transparent design review process for specific application types.
- Ensure clearly stated and well-documented commentary detailing issues discussed.
- Enable applicants to know as early in the process as possible the design principles and expectations against which their application will be evaluated.

5.1 Administration Roles and Responsibilities

Screening
City Wide Urban Design:
- Through the Chief Urban Designer, makes the final decision regarding urban design circulation.
- By the initial CPAG Team Review meeting, the Urban Designer assigned to the file shall advise the File Manager of the decision and available dates for the Panel if required. The File Manager will inform the applicant of the Urban Design decision, finalize the Panel date and inform the appropriate people.

Communication
City Wide Urban Design:
- Provides urban design principles and establishes urban design expectations to the Planning File Manager and the applicant during preliminary discussion.
- Advises of the need for UDRP review and directs the applicant to the Complete Applications Requirement List (CARL) which includes UDRP specific requirements; supplies the list of recommended additional submission requirements if necessary.
- Identifies specific Panel members required for review based on the scope of the project being evaluated, any special elements, and potential conflict of interest.

The Administrative Assistant will notify members one week prior to each meeting.

Submissions
Planning File Manager:
- UDRP submission packages should be submitted to the Planning File Manager one week prior to the targeted panel presentation date. In the case of very large and complex file types, additional explanatory material may be required.
- Pre-application files do not require additional materials above what the Complete Applications Requirement List (CARL) states. However additional materials may be submitted by the applicant. Those materials should be submitted to the Planning File Manager one week prior to the targeted panel presentation date. Suggested (but not required) supplementary material will be provided by the File Manager. (see Appendix 1)
- City Wide Urban Design will review the submission materials for completeness in advance of confirming the panel review date.
- The Administrative Assistant will notify the applicant, File Manager, Chief Urban Designer and the Panel of the meeting date and time, send the complete submission materials package to Panel members, and prepare the meeting agenda.

Urban Design Review Protocol

<u>Presentation</u>
Planning File Manager/City Wide Urban Design:

- The Planning file Manager will be available at Panel meetings to present an overview of the application if requested by the applicant or UDRP, including relevant planning policy and any issues raised previously by CPAG or the Community that were not raised as part of the applicant's presentation and require UDRP consideration.
- As advisor to the Panel, the Chief Urban Designer or designate will be available at Panel meetings to present applicable urban design policy/guideline and Municipal Development Plan context to the Panel, provide any previous urban design direction given on the project and to answer questions/provide clarification to the Panel as needed.

<u>File Management</u>
Planning File Manager/City Wide Urban Design:

- City Wide Urban Design Team, through the File Manager, stewards the project through resolution of Panel design recommendations throughout the Design Development Phase.
- If a project migrates significantly from its original intent, the Chief Urban Designer may request an additional review meeting.

<u>Representation</u>
The Chief Urban Designer/City Wide Urban Design:

- Will be available to clarify (in addition to the presentation of the File Manager) the recommendations of both City Wide Urban Design and UDRP at CPAG and Calgary Planning Commission meetings.
- Ensures that UDRP is kept informed of report content and process outcomes.

5.2 Conduct of Panel Meetings

For each item under consideration, the Chair shall use the following process to conduct reviews:

1. The Planner has five minutes to present, in the presence of the applicant, the project's history, the planning context, policy context, and relevant process considerations.
2. The City Wide Urban Designer has five minutes to present urban design context including comments previously given to the applicant and outline urban design-related reactions and concerns.
3. The Applicant has ten minutes to outline the design intent of the project and how the proposal responds to its surrounding context, with particular emphasis on how the *Thirteen Elements of Urban Design* have been addressed (refer to Section 4).
4. Following the presentations, the Panel will ask questions for clarification before discussing the proposal. The Panel Chair will provide a summary of the discussion at the end of each period.
5. During the discussion and review processes, the Panel Chair is to ensure that the application review stays on track and comments from the Panel are consistent with its mandate and objective.

Urban Design Review Protocol

6. Following the presentations and discussion with the applicant and Administration, the Panel will meet separately to craft a clear and coordinated written response. This discussion will typically be conducted without the applicant present, however a verbal summary of the content of the discussion may be provided by the Chair of the Urban Design Review Panel upon request.
7. The Chair will ask each Panel member to comment based on the merits of the project, to define issues yet to be resolved through the application and to give advice on the specific questions raised.
8. Panel positions include:
   i) *Endorse*
   ii) *Further Review Recommended.* The proponent may be requested to return to a future Panel meeting with the comments addressed. In some cases the Panel may not request a second presentation, but request that City Wide Urban Design follow up on the recommended revisions and inform the Panel of the outcome.

Note: From time to time, based on the information provided, other meeting formats may be appropriate. In this case the Chair will seek agreement from the applicant to vary the meeting procedures.

After the meeting:
9. The Chair will review the notes taken at the meeting for accuracy and completeness, making any appropriate revisions to ensure a succinct, final recommendation and brief accompanying comments for the project, to be sent to Panel Members and the Chief Urban Designer.
10. The final advisory UDRP comments will be forwarded to the Planning File Manager and to the City Wide Urban Design Team following the Panel meeting, sometimes in as few as two days but no later than five days, to ensure they are included in the Detailed Team Review (DTR1) document.
11. It will be incumbent on the applicant to advise City Wide Urban Design of the actions taken as a result of these recommendations at subsequent stages of the application review process.

Urban Design Review Protocol

Appendix A - Presentation Materials

Project presentation material should be submitted by the applicant to the Planning File Manager, at least one week in advance of the meeting, to the satisfaction of the Chief Urban Designer (or designate). An incomplete package may be refused by City Wide Urban Design or the Panel.

Pre-Application/Schematic Design Review:

Application materials for pre-application review are not required to exceed what is required on the Complete Applications Requirement List (CARL); however, the applicant is welcome to provide additional materials in support of their design rationale, including:

1. Description of the proposal, including as detailed a planning and urban design "rationale" as possible at this stage.

2. Conceptual Site Plan and/or Context Plan.

3. Other materials as deemed relevant at the discretion of the applicant dependant on the advancement of the project.

Additional materials should be in the form of 16 complete, stapled sets of plans in 11" x 17" format.

Development Permit/Design Development Review

Sixteen (16) complete, stapled sets of plans in 11"x17" format are required for presentation to the UDRP. Each package shall include the following:

1. Project brief including a planning and urban design "rationale" which describes the urban design approach (address *13 Elements of Urban Design* – maximum one page).
2. Location key plan and context plan with site analysis showing relationship of the site to surroundings to capture key urban design relationships significant to the project, including transit stations, pedestrian and cycle paths and street networks, parks and open spaces, landmark buildings, etc..
3. Photographs that illustrate existing site conditions and surrounding context.
4. Site plan that demonstrates connectivity to the elements above.
5. Main floor plan, landscaping plan, sections as developed.
6. Massing diagram/renderings in context with adjacent massing to illustrate building bulk, height and setbacks.
7. Elevations as developed, showing neighbouring buildings.
8. Interior floor plans as relevant to public realm, including dimensions of all public sidewalks, arcades and terrace elevations site plan, floor plan, elevations and relevant sections.
9. Large scale perspective drawings, showing views of the first 3 storeys and the pedestrian realm, set within existing streetscape.

Urban Design Review Protocol

10. Coloured renderings of the building, sufficient to describe the building in its context to the urban realm and to give a sense of the building as a whole, with an emphasis on street level views.
11. Detailed description, images and samples of the proposed cladding materials including all glazing types.
12. Detailed landscaping plan indicating planting, paving materials, street furniture, lighting, proposed public art locations if applicable. Relevant cross-sections as required to identify the landscape relationship through the site.
13. Parking plan, including bike parking, should be provided if it is at grade or is incorporated within the public realm.
14. Shadow study as per specific development permit application requirements.
15. Project data sheet.

Land Use Amendment (Direct Control, with significant urban design content)

Applicants are required to submit the significant elements of a Land Use Amendment that are required by the City of Calgary, including:

- Existing site conditions
- Proposed site plan or master plan
- Pedestrian and vehicular circulation through the site and connecting to surrounding networks
- Massing plan showing building heights
- Concept landscape plan

Appendix B - Urban Design Review Panel Members
2016-2017

Member	Role	Current Appointment	Expiry Year
Janice Liebe (chair) Architect, DIALOG	Representative, nominated by the Alberta Association of Architects	2013	2017
Brian Horton (Vice-Chair) Urban Planner, O2 Planning + Design Inc.	Representative, nominated by the Alberta Professional Planners Institute	2011	2017
Robert LeBlond Architect	Representative, nominated by the Alberta Association of Architects	2016	2018
Philip Vandermey Architect, Spectacle Bureau of Architecture and Urbanism	Representative, nominated by the Alberta Association of Architects	2015	2017
Chad Russill Architect, Systemic Architecture Inc.	Representative, nominated by the Alberta Association of Architects	2016	2018
Terry Klassen Landscape Architect, Matrix Landscape Architecture Ltd.	Representative, nominated by the Alberta Association of Landscape Architects	2016	2018
Yogeshwar Navagrah Landscape Architect, Navagrah Landscape Architecture + Urban Design	Representative, nominated by the Alberta Association of Landscape Architects	2016	2018
Bruce Nelligan, Engineer, Watt Consulting	Representative, nominated by the Association of Professional Engineers, Geologists and Geophysicists of Alberta	2012	2018

Panel Advisors

- Chief Urban Designer and/or City Wide Urban Design representative
- Planning File Manager (changes depending on project being discussed)
- Administrative Assistant

Implementation Plan

Contents

Implementation Plan

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.
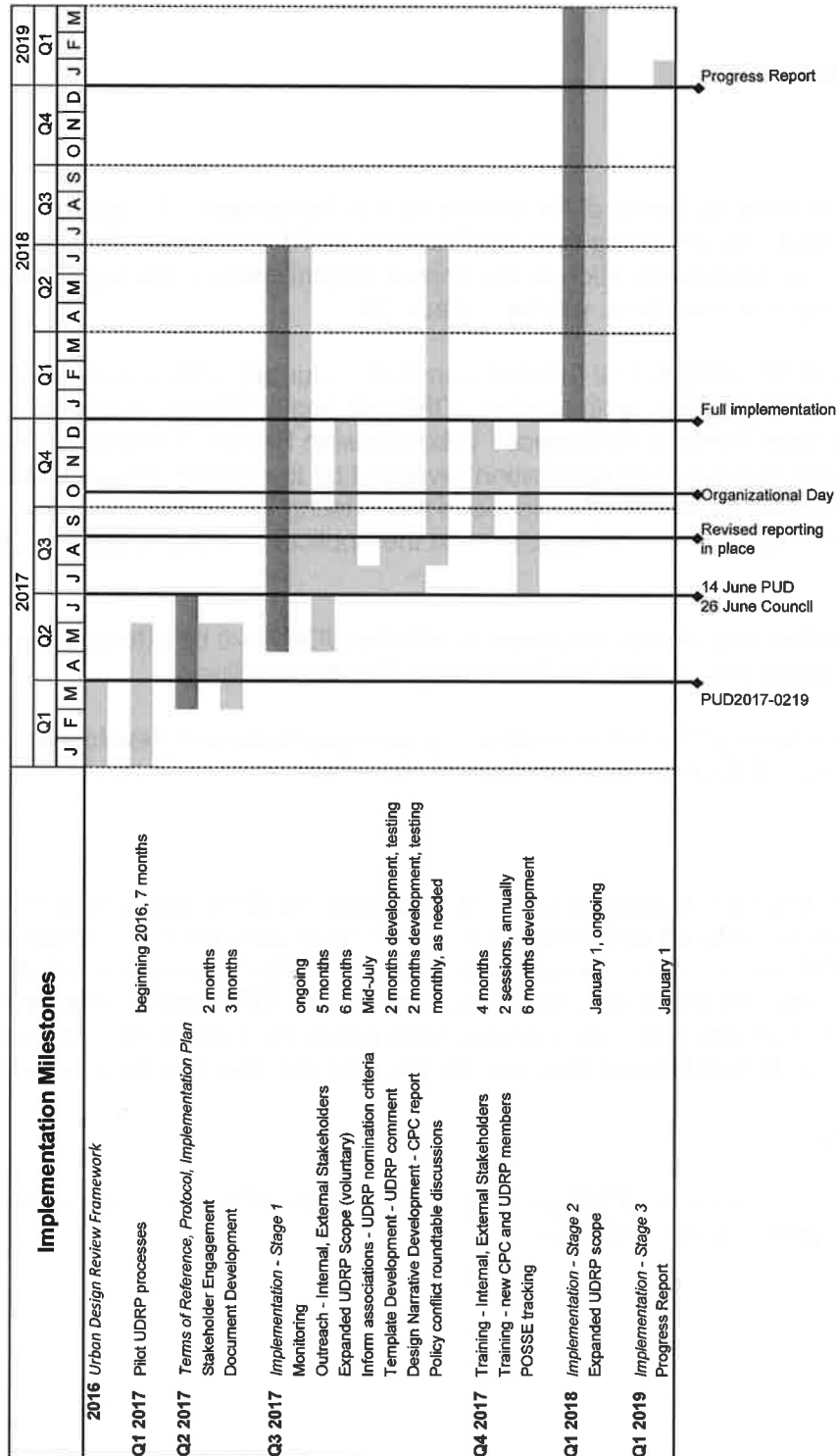
Implementation Plan

Implementation Milestones

Milestone	Detail
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–Q4), 2018 (Q1–Q4), 2019 (Q1), months J F M A M J J A S O N D.

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

Figure 1: Implementation Timeline
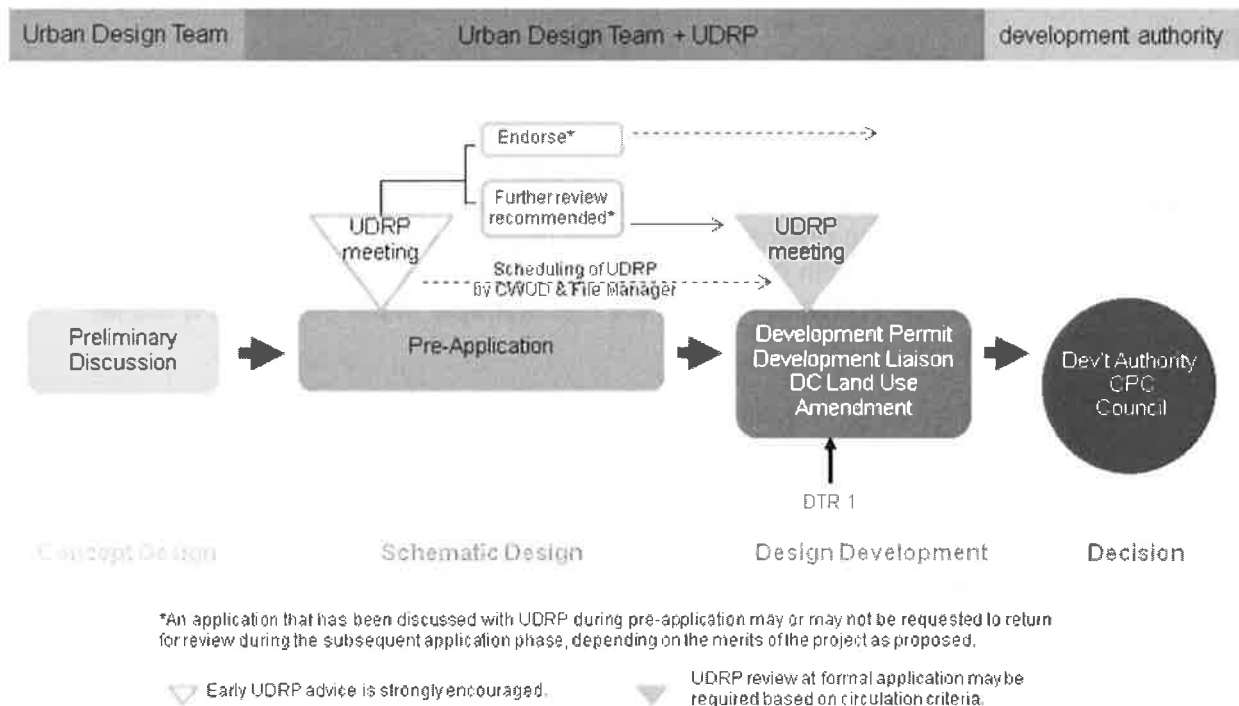
Implementation Plan

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.

Implementation Plan

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.

Implementation Plan

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.

Implementation Plan

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).

Implementation Plan

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.

Implementation Plan

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.

Implementation Plan

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

Implementation Plan

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

Implementation Plan

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.

Implementation Plan

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.

Summary of Amendments
as Agreed to By All Parties

Urban Design Review Panel Terms of Reference		
Section	**Issue raised:**	**Proposed amendments:**
3.2 Eligibility of Public Members	Desire expressed for Development Industry involvement in the nomination of panel members. (Not included in letter; raised through engagement)	The Urban Design Review Panel is comprised of 12 members and one adjunct member (see below), nominated by their professional associations. As well, BILD Calgary Region and NAIOP will each nominate from within their membership one registered design professional from any of the professional associations referred to below. The complete list of nominations will be considered by Council who will appoint the Panel members, by resolution, at the annual Organizational Meeting of Council.
3.3 Selection Criteria	Clarification requested with regard to UDRP Panel member nomination and selection process; there was concern that a "shortlist" would be created and Council would not be provided the entire list of nominees. Not the intent; the text provides additional clarification. (Not included in letter; raised through engagement)	Panel members are selected for their individual experience and qualifications, and are expected to be leaders in their professions, with experience in delivering high quality design outcomes. The Panel overall should represent a broad range of experience which, in addition to urban design should include high-rise design, commercial building design, civic building design, accessible design, sustainable design, and experience with large scale development projects. The Chief Urban Designer and Urban Design Review Panel Chair will review the list of nominations provided by the Professional Associations and submit a short-list recommendation which will be considered, together with the entire list, to inform Council's decision, in accordance with Council Policy CP2016-03. No more than one member of any particular firm may be allowed to sit on the Panel at the same time.
3.6 Duties of the Panel Chair	Suggestion that communicating UDRP comments directly to applicants would foster better connection; File Manager to maintain communication; UDRP chair/vice available for clarification if necessary.	"Summarizes Panel commentary utilizing an established template and sends directly to the File Manager, copy to the Chief Urban Design, within two to five days of the meeting. The File Manager will communicate this commentary, unedited, to the applicant, as soon as possible." Represents the Panel when Urban Design Review Panel representation is required outside of regular Panel duties, including being periodically available to address questions of clarification.

Summary of Amendments
As Agreed To By All Parties

Urban Design Review Panel Terms of Reference		
Section	**Issue raised:**	**Proposed amendments:**
3.7 Attendance by Non-Members	Suggestion made that applicants were not given opportunity to present; text was strengthened to clarify the roles of each involved and to emphasize the applicant's central role in explaining their design rationale and decisions.	The Chief Urban Designer or designate (non-voting) will be available at Panel meetings to: • ~~Present~~ Provide applicable urban design ~~policy/guideline~~ context ~~to~~ at the request of the Panel. ~~relevant design documentation such as streetscape studies.~~ "The meetings are not open to members of the public; however, applicants will be requested to present the project and address questions of the Urban Design Review Panel (further detail of the conduct of Panel meetings is set out in the Urban Design Review Protocol). The File Manager/Project Planner (non-voting) will be available to: 1. Present the relevant planning ~~and physical~~ context of the proposal, ~~the project's history, the policy context~~ and relevant process considerations as requested by the Panel. 2. Answer questions raised by the Panel. The Applicant and/or their representative (non-voting) will be available to: 1. Present the overall design rationale and physical context of the proposal, and, as relevant, the project's history. 2. Answer questions raised by the Panel.
5.0 Code of Conduct	Additional emphasis on transparency and open discussion with applicants requested.	**added:** "Members of the Urban Design Review Panel will conduct their assessments in a collaborative and transparent manner with the applicant."
7.0 Record of Meetings	Assurance requested with regard to consistency between comments made during meetings and the final written comments.	"Comments of the Urban Design Review Panel made during the course of the meeting will be noted by the Chair or Deputy Chair and formalized within an established template after the conclusion of the meeting with the assistance of Administration as required. No new material or information will be introduced into the comments that were not discussed in the open portion of the meeting."

Summary of Amendments
As Agreed To By All Parties

Urban Design Review Protocol		
Section	**Issue raised:**	**Proposed amendments:**
4.1 Application Types	Desire expressed for greater opportunities for applicants to access UDRP (not included in letter; raised through engagement)	**Following:** "Additional projects of significant complexity may be referred to the Urban Design Review Panel at the request of the Planning File Manager and the discretion of the Chief Urban Designer or designate and depending on the capacity of the Panel at the time..." **Added:** "Applicants may request a review with Urban Design Review Panel even if their project is not deemed to meet the criteria for review. In these cases the capacity and workload of Urban Design Review panel will be taken into account and a priority assigned. Applicants should be aware that such requests may take longer to accommodate. ".
5.1 Administration Roles and Responsibilities	More detail requested regarding Administration's role; desire expressed to maintain independence of UDRP comments	Planning File Manager / City Wide Urban Design: The Planning file Manager will be available at Panel meetings to present an overview of the application if requested by the applicant or UDRP, including relevant planning policy and any issues raised previously by CPAG or the Community that were not raised as part of the applicant's presentation and require UDRP consideration.
5.2 Conduct of Panel Meetings	More clarity requested regarding the procedures of UDRP; concern that discussions were occurring between UDRP and staff which did not include applicant; It was felt that term "in camera" implied confidentiality; intent is to provide time for UDRP to pull together coordinated written comments.	5.2(2) The City Wide Urban Designer has five minutes to present urban design context including ~~policy considerations~~, comments previously given to the applicant and outline urban design-related reactions and concerns. 5.2(6) Following the presentations and discussion with the applicant and Administration, the Panel will meet separately ~~review drawings and discuss merits and issues of the project "in camera"~~ to craft a clear and coordinated written response. This discussion will typically be conducted without the applicant present, however a verbal summary of the content of the discussion may be provided by the Chair of the Urban Design Review Panel upon request.

Summary of Amendments
As Agreed To By All Parties

Urban Design Review Protocol		
Section	**Issue raised:**	**Proposed amendments:**
5.2 Conduct of Panel Meetings (continued)		~~5.2(8) "A vote is held at the end of each project review to determine the Panel's position on the project. The vote only relates to the design issues discussed during the review and is not connected to The City's development approvals process."~~

Implementation Plan		
Section	**Issue raised:**	**Proposed amendments:**
2.2.1 Status of UDRP Comments	Concern expressed about lack of clear authority regarding design comments and where the responsibility lay for resolving conflicts between the various sets of design comments. Text reinforces difference between policy and advisory, and clarifies that File Manager has task of communicating.	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.
2.3.1 External Stakeholder Outreach	Additional ideas with regard to effective outreach, monitoring and measurement of the success of the process offered by Industry.	Development Industry, "what they need" : **Added:** a. The differentiated value, roles and responsibilities of UDRP/CWUD/CPC as they go through the process; b. The selection criteria (what applications get selected for UDRP and why) c. The process (what happens when selected, expectations of each group within that process) d. How to successfully get through to an approval e. The cumulative value/impact to industry (through monitoring and reporting) Section 3 "Metrics & Monitoring":

Summary of Amendments
As Agreed To By All Parties

Implementation Plan		
Section	**Issue raised:**	**Proposed amendments:**

	Additional ideas with regard to effective outreach, monitoring and measurement of the success of the process offered by Industry.	**Added:**
		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:
		    i. 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'