

Scope of Work – Urban Design Review Framework Monitoring Program

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1.0 Background

The Urban Design Review Framework (Framework) project (PUD2017-0601) explored design review protocols and processes, and proposed revisions to achieve better built outcomes. In 2017 July, Council approved a number of improvements to urban design review processes that were identified through best practice review and consultation with internal and external stakeholders.

The next step for this work is to monitor the outcomes resulting from these changes to ensure their effectiveness, and to identify opportunities for further improvement, including identifying and eliminating any unproductive redundancies that may remain in roles, functions and processes. As well, data collected during this monitoring program will be used to inform Administration's quality development project.

2.0 Purpose

The purpose of this document is to identify business metrics, key performance indicators, and monitoring tools to collect information regarding the effectiveness of changes to urban design review. The document describes each tool's purpose and methodology, and assigns responsibilities for data collection, analysis and reporting.

3.0 Context

The Framework project focused on the following main objectives:

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

On-going monitoring of urban design review processes will help Administration understand the impact of urban design review and provide direction for future policy and process refinements. Administration will report back to Council with the results of the monitoring program Q1 2019, in conjunction with other Council-directed urban design work.

4.0 Stakeholders

During this monitoring phase, Administration is collecting information from internal and external stakeholders currently participating in urban design review processes. This includes Administration, Urban Design Review Panel, Calgary Planning Commission, community representatives and applicants.

Communities with recent development (2014 onwards) will be asked to participate in post-occupancy surveys in order to establish a baseline.

5.0 Methodology

Administration and stakeholders identified relevant business metrics and key performance indicators through engagement on the Framework. The goal of the monitoring program is to ensure that all parties are contributing to a valuable process by:

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- identifying opportunities to improve effectiveness and efficiency;
- streamlining processes where possible;
- eliminating activities of limited value;
- identifying whether any process redundancies exist, and
- Identifying areas of unclarity or disagreement over expectations of quality design.

Potential redundancies may only become apparent through the data collection and analysis, allowing for refinements to occur if necessary throughout the study.

Urban design review monitoring began in Q3 2017. Along with recording the volume of urban design work, timelines, Administration began to record design-specific questions and issues raised by Urban Design Review Panel, Administration Design, Community Planning/CPAG experts and applicants. This information is charted against existing policy and guideline objectives, particularly the Thirteen Elements of Urban Design included in the Municipal Development Plan.

As well, responses to surveys regarding experiences with urban design review processes and practices are being collected, and perceptions of the need for / value to repeated design comments will be recorded.

Business Metrics Overview

For the purposes of this work, business metrics are defined as quantifiable measures used to track and assess the status of business processes. Data from 2015 onward will be analyzed to establish benchmarks and understand progress of City Wide Urban Design and the Urban Design Review Panel.

Business metrics to be monitored include:

1. the number of projects by application type referred to City Wide Urban Design and Urban Design Review Panel.

Key Performance Indicators Overview

For the purposes of this work, key performance indicators are defined as metrics that target critical performance. The following data from Q3 2017 onward is being collected:

1. the number of urban design comments acted on by applicants through iterations of a design, including resubmissions;
2. the impact of urban design review on established CPAG timelines;
3. the impact of urban design comments on decisions by the development authority, including Calgary Planning Commission and Council;
4. the impact of these changes on submission quality and overall design quality during the monitoring period, and
5. post-occupancy survey of the public realm quality of built projects (to be developed Q1/2 2018). i.e. did the review process result in quality urban design outcomes and meet quality objectives.

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Monitoring Tools

Monitoring tools include:

1. Comment tracking/ comparison against 13 Elements of Urban Design
2. Post-Urban Design Review Panel meeting surveys; and
3. Project outcome report back to Urban Design Review Panel.

Section 10.0 below describes each metric, indicator and monitoring tool, its purpose, the tasks involved in using each, and assigns each task to various groups or individuals.

Administration will analyze these metrics and monitoring tools, along with the results, on an ongoing basis to determine feasibility, usefulness and alignment with policy goals and the work of other internal groups.

6.0 Timelines

The monitoring program began September 2017 and will continue through 2018. Analysis of the data collected and a description of changes undertaken and recommended will be included in a Report to Council Q1 2019.

7.0 Deliverables

Deliverables will include:

- a summary and analysis of results for each Business Metric, Key Performance Indicator and Monitoring Tool as outlined in Section 10.0 below
- recommendations for any changes, if required, as result of the monitoring program, including, but not limited to:
 - process refinements, including those required to correct any remaining redundancies in the review process;
 - further design tools, policies or amendments to existing policies, and
 - other items as identified through the monitoring program.

8.0 Budget and Funding

No additional budget is needed to conduct this work.

9.0 Risks

An in-depth monitoring program will require considerable staff time to manage the collection and analysis of qualitative information; the quality and availability of the data is variable and the actual time requirement will be difficult to predict. Immediately measurable factors, such as the number of projects reviewed annually, will require fewer resources to produce, but may be of lower value to affected stakeholders.

Should process redundancies or gaps become apparent as a result of the monitoring program, further refinements to urban design review may be required, some of which may require further engagement and/or Council approval.

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10.0 Business Metrics, Key Performance Indicators and Monitoring Tools

1. Business Metric 1: Number of projects / applications referred to Urban Design Review Panel / City Wide Urban Design
2. Key Performance Indicator 1: Number of Urban Design Review Panel / City Wide Urban Design comments acted on by applicants
3. Key Performance Indicator 2: Impact of urban design review timelines on established CPAG timelines
4. Key Performance Indicator 3: Impact of urban design comments on decisions made by the development authority, including Calgary Planning Commission and Council
5. Key Performance Indicator 4: Post-occupancy survey of public realm quality of built projects
6. Monitoring Tool 1: Comment tracking / comparison against 13 Elements of Urban Design
7. Monitoring Tool 2: Post-Urban Design Review Panel meeting feedback surveys
8. Monitoring Tool 3: Project outcome report back to Urban Design Review Panel

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Business Metric 1: Number of projects / applications referred to Urban Design Review Panel / City Wide Urban Design

Purpose: This metric is intended to:

- track the number of applications reviewed by Urban Design Review Panel and City Wide Urban Design;
- ensure the appropriate resources and staffing are assigned to urban design related work; and
- track the frequency of use of voluntary urban design processes.

Specific items that will be tracked are:

1. Total volume of Urban Design Review Panel and City Wide Urban Design circulations
2. Percentage of Community Planning pre-application enquiries, development permits, land use amendments, M-items identified on the Municipal Matrix circulated to Urban Design Review Panel and City Wide Urban Design
3. How often the early advice option for early Urban Design Review Panel discussion at pre-application enquiry stage is utilized by applicants
4. How often potential candidates for Urban Design Review Panel review are identified at early stages (pre-application enquiry or initial team review document)

| Tool | Task | Completed by | Timing |
|--|--|---|-----------|
| POSSE tracking | Record total number of stream 4 pre-application enquiries, development permits, land use amendments, relevant M-items | Business Analytics | Quarterly |
| | Identify all medium-high complexity applications | Business Analytics | Quarterly |
| | Identify total volume and volume by application type referred to City Wide Urban Design for review | Business Analytics | Quarterly |
| | Identify total number referred to UDRP for review | UDRP Administration | Quarterly |
| Pre-Application Enquiry / LOC Assessment form analysis | Identify those projects where UDRP involvement is recommended early in process | CWUD | On-going |
| | Identify those projects where UDRP involvement is recommended at early stages and declined by applicant vs accepted by applicant | CWUD | On-going |
| | Compare time to UDRP review for those applications with early notification to those without in UDRP Monitoring spreadsheet | UDRP Administration, Business Analytics | quarterly |

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Key Performance Indicator 1: Number of UDRP/CWUD comments acted on by applicants

Purpose: This metric is intended to:

- track the value added to projects (measured in terms of change) by urban design review;
- indicate if urban design direction is provided at a time in the evolution of a project that it can be acted on;
- identify and address recurring conflicts with City policy that undermine best practice urban design outcomes, and
- Assess improvements to the quality of submissions based on the degree of response.

Specific items that will be tracked:

1. Rate of integration for comments issued at pre-application enquiry
2. Rate of integration for comments issued at development permit
3. Recurring conflicts with City policy that limit best practice urban design outcomes

| Tool | Task | Completed by | Timing |
|---|---|---------------------------|---|
| Urban design comment and applicant response tracking tool (for items going to CPC for recommendation /decision) | Input City Wide Urban Design comments issued for application in spreadsheet | CWUD team member | as CWUD review is completed |
| | Identify comments included in Detailed Team Review (DTR) or other direction to applicant | CWUD team member | upon issue of DTR |
| | Track applicant response – “revision made” or “no change” | CWUD team member | as application progresses |
| | Record UDRP comments issued for application in spreadsheet | CWUD team member | upon issue of UDRP comments |
| | Track applicant response – “revision made” or “no change” | CWUD team member | upon receipt of Applicant’s Response to UDRP comments |
| Policy Conflict attachment to UDRP Comment Template | Record instances where City Policy or practice appears to conflict with best practice urban design outcomes | UDRP chair or member | upon completion of UDRP review/discussion comments |
| | Input responses in spreadsheet, analyze results | UDRP Administration | upon receipt of comments |
| | Share trends, propose resolution to recurring conflicts with City Wide Urban Design, Community Planning, CPAG, Urban Design Review Panel, Development Oversight Committee, CPC and Council as appropriate | David Down Dawn Clarke | quarterly |

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Key Performance Indicator 2: Impact of urban design review timelines on established CPAG timelines

Purpose: This performance indicator is intended to:

- ensure urban design review occurs within established CPAG timelines;
- evaluate most relevant target timelines;
- assist with Urban Design Review Panel scheduling;
- document urban design review impact on process timelines;
- identify/quantify time savings in overall application approval time for those projects that take advantage of early design input opportunities;
- identify opportunities to further refine urban design review processes;
- evaluate time savings gained by receiving early advice, and
- identify links between timeline/time savings and overall application quality.

This indicator will illustrate the impact of urban design review on application timelines:

1. With/without urban design involvement at early stages. Work on identifying applicable milestones to develop this metric is underway.
2. With/without Urban Design Review Panel involvement

| Tool | Task | Completed by | Timing |
|---------------------------------|--|----------------------------|-----------|
| POSSE tracking | Identify all medium and high complexity files and average days from submission to approval | Business analytics | quarterly |
| | Identify all of above which had CWUD/UDRP/both advice at Pre-Application Enquiry or Land Use Amendment Application | Business analytics CWUD | quarterly |
| | Track development permit days from submission to approval for each | Business analytics CWUD | quarterly |
| | Track project days from pre-application enquiry submission to project approval for each | Business analytics CWUD | quarterly |
| POSSE tracking, CWUD records | Compare UDRP meeting date with CPAG milestones “prior to Detailed Team Review 1 (DTR1)”, “post DTR1” or “applicant’s preferred date” | CWUD | On-going |
| | Identify “applicant requested” UDRP dates or delays | UDRP Administration | On-going |

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Key Performance Indicator 3: Impact of urban design comments on decisions made by the development authority, including Calgary Planning Commission and Council

Purpose: This performance indicator is intended to:

- illustrate the frequency that urban design recommendations are supported in decisions by the development authority;
- evaluate and quantify the value added to the public realm at approval stage by urban design inputs;
- monitor the effectiveness of City Wide Urban Design and Urban Design Review Panel and make refinements where necessary;
- verify if a more robust design discussion and more thorough design reporting lends itself to more certainty and predictability at decision, and to higher quality outcomes.

Specific items that will be tracked:

1. How often applications are ranked as “endorse” vs “further review recommended” by Urban Design Review Panel
2. The impact of urban design direction at CPC, specifically:
 - a. urban design recommendations discussed at CPC / nature of the discussion
 - b. frequency that recommendations from Urban Design Review Panel / City Wide Urban Design result in recommendations for change at CPC, and frequency that CPC recommendations reinforce the Urban Design Review Panel / City Wide Urban Design recommendations
 - c. number of amendments or referrals at CPC on design issues to compare those that receive early Urban Design input vs those that receive UDRP input after development permit submission

| Tool | Task | Completed by | Timing |
|--------------------------------------|---|---|-----------------------|
| UDRP comment template | Record ranking for all UDRP discussions, reviews in UDRP monitoring spreadsheet | UDRP Administration | monthly |
| | Analyze frequency of outcomes; overall and by application type in UDRP monitoring spreadsheet | UDRP Administration | monthly |
| CPC urban design discussion tracking | Record urban design commentary at CPC | CWUD assigned to application | Following CPC meeting |
| | Enter urban design discussion points in spreadsheet | CWUD assigned to application | Following CPC meeting |
| | Analyze results – are recommended urban design solutions supported, disagreed with or further refinements preferred | CWUD assigned to application | Following CPC meeting |
| | Compare UDRP ranking with CPC assessment | CWUD assigned to application UDRP Administration | Following CPC meeting |

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Key Performance Indicator 4: Post Occupancy Survey of Public Realm Quality of Built Projects

Purpose: This performance indicator is intended to:

- quantify the quality of the public realm according to urban design elements generally perceived as subjective;
- measure the success of the integration of urban design on built outcomes, and
- assist in the development of consistent understanding/definitions of quality outcomes.

Specific questions are to be developed to relate urban design ratings to measurable physical features based on literature review and best practice research.

| Tool | Task | Completed by | Timing |
|-----------------------|---|--|---------------|
| Post-occupancy survey | Develop survey | CWUD, UDRP, Community Planning Experts, Industry Experts | Q2 2018 |
| | Establish baseline – 2014 CWUD/UDRP reviews | | Q2/Q3 2018 |
| | Establish baseline - send survey to applicant, community association, CWUD, UDRP, Councillor for items approved from 2014 onwards | UDRP Administration | Q3/Q4 2018 |
| | Input responses in spreadsheet, analyze results from baseline work | UDRP Administration | Q4 2018 |
| | Compare results with built projects reviewed by CWUD/UDRP in 2018. | UDRP Administration | 2019 |
| | Repeat approximately every 4 years or when key process/policy changes occur, compare results | UDRP Administration | Every 4 years |

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Monitoring Tool 1: 13 Elements of Urban Design comment tracking

Purpose: Tracking the use of urban design elements throughout the application review process is intended to:

- monitor use of Municipal Development Plan *13 Elements of Urban Design* at Urban Design Review Panel and Calgary Planning Commission to understand the overall functionality and relevance of the 13 Elements and whether they are the right elements for Calgary;
- quantify key areas of attention by both the Urban Design Review Panel and Calgary Planning Commission;
- identify the elements of urban design that are understood and well applied in applications;
- identify the most common design problems and areas of misunderstanding for applicants;
- identify any gaps or overlaps, eliminate unnecessary redundancies, and ensure that any remaining overlaps are productive and reinforcing; and
- inform future urban design policy development and process improvements, including the development of consistent definitions and direction with regard to quality outcomes.

| Tool | Task | Completed by | Timing |
|-------------------------------|--|---|--------------------------------|
| urban design keywords | Develop urban design keyword list to codify and organize urban design discussion | CWUD | complete |
| urban design comment tracking | Input CWUD comments in spreadsheet for all applications with urban design review to be seen by CPC (applications from Q3 2017 forward) | CWUD assigned to application, Administration | As CWUD reviews are completed |
| | Input UDRP comments in spreadsheet (applications from Q3 2017 forward) | CWUD assigned to application, UDRP Administration | As UDRP comments are received |
| | Compare overlap between CWUD and UDRP comments | CWUD team member | upon issue of UDRP comments |
| | Record urban design commentary at CPC | CWUD assigned to application, David Down | During each CPC session |
| | Input urban design commentary from CPC in spreadsheet (applications from Q3 2017 forward) | CWUD assigned to application, David Down | Within one week of CPC meeting |
| | Codify and organize urban design discussion according to keywords | Dawn Clarke | On-going |
| | Analyze results | Dawn Clarke | On-going |
| | Report relevant trends to UDRP, CWUD, applicants, CP, DOC, CPC | David Down Dawn Clarke | On-going, monthly |

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Monitoring Tool 2: Post-Urban Design Review Panel meeting feedback surveys

Purpose: This monitoring tool is intended to collect feedback on the value and effectiveness of Urban Design Review Panel processes as experienced by those most impacted. Issues and opportunities for improvement raised by applicants or the Panel are shared on a regular basis to enable continuous process improvements, including identifying specific training and outreach needs.

Specific questions include:

1. Rate your satisfaction with the presentation/discussion materials submitted by the applicant for review of this project.
2. Rate your satisfaction with the information presented by the File Manager and Applicant.
3. Do you feel that the timing of Urban Design Review Panel discussion is appropriate to enable recommendations to be incorporated into the project?
4. Do you feel that you will be able to incorporate some or all of the comments provided by the Urban Design Review Panel?
5. Do you feel that the comments provided by the Urban Design Review Panel will contribute to a more successful built outcome?
6. Do you feel that there is enough information available about relevant policy to enable Urban Design Review Panel to give context to the project?

| Tool | Task | Completed by | Timing |
|------------------|--|--|---|
| Applicant survey | Email survey to applicant | UDRP Administration | 1 week after UDRP meeting, along with UDRP comments |
| | Collect applicant responses via email | UDRP Administration | On-going |
| | Input responses in spreadsheet, analyze results | UDRP Administration | On-going |
| | Share trends with CWUD, UDRP, DOC to inform ongoing process refinements | David Down Dawn Clarke | Monthly, or as trends become apparent |
| UDRP survey | Complete survey header for each item to be reviewed by UDRP | UDRP Administration | Prior to each UDRP meeting |
| | Collect responses after each review is complete | UDRP Advisor | During UDRP meeting |
| | Input responses in spreadsheet, analyze results | UDRP Advisor | During UDRP meeting |
| | Share relevant trends with applicants, CWUD, CP, DOC to inform ongoing process refinements, revise outreach components as required | David Down Dawn Clarke CP managers | Monthly, or as trends become apparent |

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Monitoring Tool 3: Project outcome report back to Urban Design Review Panel

Purpose: This monitoring tool is intended to:

- inform the Panel of urban design related discussion and decisions made at Calgary Planning Commission and Council;
- respond to Urban Design Review Panel's request to be informed of the results of their input;
- identify general trends to be shared with affected stakeholders as appropriate; and
- assist Urban Design Review Panel in refining their processes and in responding to applicant input.

| Tool | Task | Completed by | Timing |
|--------------------------------------|---|--|----------------------------|
| CPC urban design discussion tracking | Record urban design commentary at CPC | CWUD assigned to application, David Down | During each CPC session |
| | Input urban design discussion points in spreadsheet | CWUD assigned to application, David Down | Within one week of session |
| | Analyze results | Dawn Clarke | On-going |
| | Report relevant trends to UDRP, CWUD, applicants, CP, DOC | David Down Dawn Clarke | On-going, monthly |