

The Large Site Rezoning Process

A Planning and Consultation Process For Rezoning Large Residential Infill Sites in Mature Neighbourhoods

Final Report



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The City of Edmonton
Planning and Development Department
Smart Choices Program

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Executive Summary

1 Study Background and Objectives

The City Planning and Development Department, as part of its Smart Choices Program, initiated this consulting project to develop a new planning model for the rezoning of large residential infill sites in Edmonton's mature neighbourhoods. The rezoning of these sites is governed by the existing DC2 rezoning process.

The City has identified a number of issues with the current process, in which the public consultation activities are led by the applicant. These issues include:

- minimal requirements for public consultation;
- public consultation occurs too late in the rezoning process;
- City staff do not get involved until late in the process;
- inaccurate information is being made available to the community;
- consultation efforts are duplicated; and,
- overall, the process results in delays to rezoning applications.

As part of its overall objective to encourage sustainable development in Edmonton, the City wishes to foster residential infill projects in mature neighbourhoods. The objective is to create a new planning and consultation process for DC2 rezoning applications that will lead to infill projects that are supported by the community and achieve the City's objective of sustainable development.

For the purposes of this study, the recommended "Large Site Rezoning Process" pertains only to DC2 rezoning applications for residential infill on large sites in mature neighbourhoods.

The proposed process has been developed based on consultation with the community and development industry, input from City staff, a review of processes in other cities, and the experience of the Consultant undertaking the review.

2 Consultation Process

The Public Involvement Program implemented as part of this study included: meetings with the Urban Development Institute; an introductory meeting with the Edmonton Federation of Community Leagues (EFCL) Planning Committee, workshops with community members from mature neighbourhoods across the City; one-on-one meetings with representatives of six Community Leagues that have been involved in rezoning proposals for large sites within their neighbourhoods; and a meeting with representatives of Community Leagues in mature neighbourhoods from across the City.

In addition, meetings were held with City staff from Departments involved in the planning and development process and with the Joint Working Committee on Stakeholder Involvement in Planning and Development Processes.

3 Key Issues Identified

Through the Public Involvement Program the following key issues were identified with respect to the current process:

- a) The development industry and the community groups both expressed concerns that:
 - There are few up-to-date neighbourhood plans or other plans in place to provide policy direction to staff or applicants; and,
 - The lack of plans creates uncertainty for both the development industry and the community.
- b) The community groups raised concerns that:
 - There is inadequate involvement by City staff in the rezoning process;
 - The developer should not manage the consultation process;
 - The community should be involved earlier in the process; and,
 - The community needs technical support in working with the developer.
- c) The development industry raised concerns that:
 - They need to know that the residents they are working with represent the broader community;
 - The City should provide leadership in resolving issues between the developer and the neighbourhood; and,
 - There is a need to ensure that the process addresses the current problems with delays in scheduling projects for Public Hearings.

4 Principles Underlying the Proposed Process

Based on the study and consultation process, principles were established that were used to guide the development of the proposed process. The principles relate to:

- a) The role of staff in the process, including leading the public involvement process;
- b) The preparation of technical studies and the sharing of the information contained in those studies;
- c) The role of the community in the rezoning process; and,
- d) The need for certainty in the process.

5 The Proposed New Planning Model

The proposed new model identifies five phases in the process, and new initiatives are recommended in each phase. The proposed process is set out in the charts in Attachment 2. In summary, the key initiatives proposed in each phase include:

a) Phase One, Pre-Application Phase

Phase One represents a new step in the process in which, once it is determined a DC2 rezoning is required in lieu of a conventional rezoning:

- A Preliminary DC2 Rezoning Application is submitted to staff as a basis for determining if a planning study is required prior to submission of a final DC2 rezoning application;
- A Development Review Group (DRG), led by the Planning and Development Department, and comprised of senior staff from all relevant Departments is created; the DRG will provide advice to applicants, determine technical study requirements, ensure input from all stakeholders, provide advice to the Planning and Development Department on the need for planning studies such as Site Vision and Context Plans, and coordinate work between departments;
- A Site Vision and Context Plan may be required prior to consideration of a final rezoning application.

b) Phase Two, Preparation of a Final Rezoning Application

Phase Two involves only the preparation of the final rezoning application and the related Public Involvement Program. Phase Two represents a new approach in that the rezoning application is prepared and finalized by the applicant in consultation with City staff and the community, as opposed to the applicant finalizing the rezoning proposal first and then presenting it to the community. Phase Two may be initiated directly after completion of the Preliminary Rezoning Application, or after completion of the Site Vision and Context Plan, if one is required. The following initiatives are proposed in Phase Two:

- The Planning and Development Department manages the Public Involvement Program, and facilitates the public consultation process;
- The community has a defined role in the process. Meetings at key stages of the process are prescribed, and the opportunities for input to the process are identified; the intent is not that the community must “sign off” on an application or support it, but that it has the opportunity to provide input and develop a position on an application;

- A Community Working Group, to be selected by the community, is proposed to represent the residents in discussions with the City and the applicant.

c) Phase Three, Review of the Final Application

Phase Three involves submission of a final application and its review by the community and staff. The following initiatives are proposed as part of this phase:

- Supplementary submission requirements, that define additional information required for Large Residential Infill Sites;
- A final community-wide meeting, facilitated by the City, to review the final application;
- An opportunity to review the final draft staff report, on the part of the community, applicant, and Ward Councillors; and,
- An opportunity for final written comments to be submitted by the community, with technical support from staff to prepare them, if required.

d) Phase Four, Public Hearing

The new initiative proposed in this phase is that a representative of the Community Working Group be given the opportunity to make a presentation at the Public Hearing on behalf of the Group with no specific restriction on the amount of time they will have to present.

e) Phase Five, Zoning and Project Implementation

This phase includes the preparation of final agreements and construction of the project. The key issues dealt with in this phase relate to:

- Constructing the proposed development according to the DC2 zoning approved through the rezoning process; and,
- Consulting the community on an ongoing basis on any significant changes.

6 Implementation of the New Process

A number of issues are identified in this report related to implementation of the new process, particularly the impact on the Administration and its ability to implement the new initiatives that are proposed. These include:

- a) **Staff Resources:** The new model places significant requirements on the staff resources of the Planning and Development Department. It is unlikely that the new process will be successfully implemented without additional resources. The most significant impact on resources will stem from:

- managing and facilitating the Public Involvement Program; and,
 - preparing the Site Vision and Context Plans when required.
- b) **Fees:** It is proposed in the report that the cost of processing rezoning applications should be covered through the rezoning fees, including the additional cost of the proposed new initiatives.
- c) **Staff Training:** It is recommended that staff involved in the Large Residential Infill Sites process have strong skills in public consultation and facilitation, and also have a good understanding of City bylaws, plans, and processes. It may be that specialized training will be required for staff assigned to the review of rezoning applications for large sites.

7 Relationship to Planning and Design Guidelines for Residential Infill in Mature Neighbourhoods (the “Residential Infill Guidelines”)

In parallel with this study, the City is also preparing a study that proposes planning and design guidelines for Large Residential Infill Sites. If necessary, the proposed rezoning process can be dealt with by the City separate from the “Residential Infill Guidelines”. At the same time, the Guidelines are a potential cornerstone of the new rezoning process, in that the Guidelines will:

- assist in expediting the preparation of the proposed Site Vision and Context Plans;
- be a tool for the evaluation of rezoning applications by City staff; and,
- be a screen against which community groups can evaluate proposed developments.

8 Glossary of Terms

The various studies referenced in this report have lengthy titles. These titles clearly reference, for example, that the study or studies relate only to mature neighbourhoods or residential infill or large sites. For the purpose of readability, the titles have been shortened throughout the report. A brief Glossary of Terms has been added as Attachment 10.

A Introduction

1 Study Background

The City Planning and Development Department, as part of its Smart Choices Program, has identified the need to address the planning and consultation process related to the development of residential infill projects on large sites in Edmonton's mature neighbourhoods.

In recent years, the City of Edmonton has received a number of applications to redevelop large sites in mature neighbourhoods. These infill sites have ranged in size from approximately two hectares to more than ten hectares, and have involved the introduction of medium and high density residential development, including high rise towers, into low scale single family neighbourhoods.

To date, all of the Large Site Infill developments have been processed as DC2 applications, which is the provision in the City's Zoning Bylaw for site specific development control.

The current DC2 provisions in the Zoning Bylaw establish an applicant led process in which the developer of a site leads the public consultation process, and determines the proposed use and development of the lands. This process occurs in lieu of the City working with applicants and neighbourhood residents to deal with redevelopment related issues, and in lieu of City staff preparing comprehensive Area Redevelopment Plans that would give direction to rezoning specific sites. A chart summarizing the City's existing DC2 rezoning process is included as Attachment 1.

The current process has often led to conflict, delayed the progress of proposed projects, and potentially frustrated the City's ability to achieve other important objectives, such as more sustainable forms of residential infill development in its mature neighbourhoods. For the above reasons, the Smart Choices Program initiated this consulting project with the overall objective of creating a new planning model to govern DC2 rezoning applications on large residential infill sites.

It should be stressed that while the principles and processes proposed in this report may be applicable on a broader scale, the recommendations are intended to apply only to the rezoning of Large Residential Infill Sites in Edmonton's mature neighbourhoods.

2 Issues with the Current Process

City staff noted a number of issues that have arisen with the use of DC2

applications that relate primarily to the public consultation process and tend to occur on Large Residential Infill Sites where the scale and intensity of development may impact the adjacent neighbourhood. These issues include:

- a) Minimal requirements for community consultation prior to submission of the rezoning application;
- b) Consultation occurs too late in the planning process after the applicant has already invested heavily in the design of the development;
- c) City staff do not get involved until after a formal application is submitted;
- d) The late involvement of City staff can result in either a lack of information or inaccurate information being made available to the community; and,
- e) When the City does get involved, it may duplicate consultation work already completed by the applicant.

The dissatisfaction with the process may result in conflict between the community and the applicant, and can result in delays to projects. Given the potentially abbreviated public consultation process, much of the conflict may arise at the Public Hearing, after considerable time and expense have been invested. Alternatively, if a more meaningful consultation process is attempted late in the process, the community and developer may already be polarized and the process becomes difficult to reconcile.

3 Study Objectives

Consistent with the issues noted above, the study encompassed the following objectives:

- a) Confirmation of the issues associated with the current process;
- b) Consultation with the community and development industry on what improvements could be made to the existing process;
- c) Reviewing planning processes for major redevelopment projects in other Canadian cities;
- d) Preparation of a new “planning model” for major redevelopment projects on large sites in mature neighbourhoods;
- e) Identification, in the new model, of the distinct phases in the planning process for major redevelopment projects, and when stakeholders such as the community, City staff, and the applicant are to be involved in each phase; and,
- f) Documentation of the new process using flow charts.

4 Relationship to Planning and Design Guidelines for Residential Infill on Large Sites in Mature Neighbourhoods

The Planning and Development Department's Smart Choices Program has also commissioned a study to establish planning and design guidelines for Large Residential Infill Site development in mature neighbourhoods (the "Residential Infill Guidelines" study), which is being presented to the community and Council in parallel with this study.

The proposed Large Site Rezoning Process set out in this report could be implemented prior to approval of the Residential Infill Guidelines. The fundamental improvements to the process that are recommended do not rely on the Guidelines and the proposed rezoning process could still offer significant improvements to the current planning and consultation process.

At the same time, the Residential Infill Guidelines are linked to the proposed Large Site Rezoning Process and are referenced in this process as a key starting point for developers to prepare their proposals and for staff in determining their recommendations. They are also proposed as a baseline against which the community can evaluate DC2 applications during the public consultation process. The Guidelines also establish the definition of a Large Site, which assists in determining if the process should be applied.

More specifically, the Residential Infill Guidelines include the following recommendations that are related to the new planning and consultation process as proposed in this report:

a) Definition of Large Residential Infill Sites

The approximate size of Large Residential Infill Sites that will be directed to the Large Site Rezoning Process has been determined through the Residential Infill Guidelines study, and is approximately one hectare.

Application of the Residential Infill Guidelines in the neighbourhood context creates opportunities for infill that are dependent upon site size and surrounding land uses.

Generally, application of the Large Site Infill Guidelines results in the following:

- i) Mid Rise infill is feasible on sites of one hectare or larger; and,
- ii) High Rise infill is feasible on sites of approximately:
 - 3 hectares on the periphery of a neighbourhood; and,
 - 5 hectares within an existing neighbourhood.

Sites that are deemed by the City to fall within the definition of Large Residential Infill Sites will be subject to the Large Site Rezoning Process set out in this report. Thus, the Residential Infill Guidelines apply to the evaluation of rezoning applications for development on all sites within or on the edge of mature neighbourhoods that are one hectare or larger.

b) Evaluation of Rezoning Applications

The Residential Infill Guidelines will be used to evaluate DC2 rezoning applications on Large Residential Infill Sites as defined above.

B The Study Consultation Process

1 Overview of the Public Involvement Program

The Public Involvement Program implemented as part of this study included:

- a) Meetings with representatives of the Urban Development Institute;
- b) An introductory meeting with the Edmonton Federation of Community Leagues (EFCL) Planning Committee;
- c) Workshops with community representatives from mature neighbourhoods across the City;
- d) One-on-one meetings with representatives of six Community Leagues that have been involved in Large Residential Infill Site developments; and,
- e) A meeting with EFCL representatives from mature neighbourhoods across the City.

In addition, meetings were held with City staff from City Departments involved in the planning and development process and with the Joint Working Committee on Stakeholder Involvement in Planning and Development Processes.

The six Community Leagues that met with the Consultant are:

- Athlone
- Belgravia
- Ermineskin
- Hazeldean
- Malmo Plains
- Strathearn

The detailed comments made by those attending the workshops are available for review on the City's website. The key issues identified by community members who attended the workshop and the six one-on-one meetings with the consultant are included in the discussion below.

2 Issues Identified by the Community

The issues identified through the community-wide citizens meetings and individual Community League meetings were similar in many areas. In addition, the issues raised by the community generally reflected the City's concerns noted in the project Terms of Reference.

At the same time, it must be acknowledged that while they might agree on the issues, not all community members share the same views on what might be the

best solutions. However, it is believed that there is general support for the directions which are inherent in the recommended new process.

In summary, the citizens who attended the public consultation meetings identified the following key issues with the current process from the community's perspective:

a) Lack of Overall Planning

- There are often no overall plans in place that have been developed in consultation with the community to provide basic policy direction to infill development or to give a community certainty about what redevelopment is possible;
- Applicants for projects, due to the lack of plans being in place, create their own vision for how neighbourhoods should develop;
- City planning staff have not defined what represents good design, what densities and housing mix are expected or appropriate in a neighbourhood, what kinds of commercial uses should be provided, or how development proposals should be assessed.

b) Inadequate Involvement by City Staff in the Rezoning Process

- City planning staff do not attend the meetings early in the process;
- City staff who vet the developer's technical reports, such as traffic and shadow studies, do not advise the community as to the accuracy of the reports;
- City staff do not provide the community with their opinions on a development proposal;
- City staff do not assist the community in reviewing applications, which to most community members are very complex;
- City staff do not appear to be neutral, and often appear to be supporting the development before the community has been consulted and the application has been finalized.

c) The Developer Should Not Manage the Consultation Process

- The meeting agendas are set by the developer;
- Meeting notes and documentation of issues and concerns is done by the developer and can be biased;
- Very short notice is often given to residents about up-coming meetings;
- Community representatives are often given very short timelines to respond

to proposals;

- There should be independent facilitation of meetings;
- There should be independent technical resources provided to facilitate the process and community meetings and to assist communities with the process at the expense of either the City or the applicant; or, alternatively, City staff should take a professional, objective role in managing the process.

d) The Community Should be Involved Earlier in the Process

- The community needs to be involved earlier in the process before the developer is committed to a specific design;
- The applicant should discuss conceptual plans and options with the community before preparing final rezoning applications.

e) The Community Needs Technical Support in Working with the Developer

- City planning staff do not attend the meetings early in the process to interpret zoning, or advise residents about what is good planning;
- Neighbourhood residents are expected to suggest options for the developer;
- Neighbourhood residents are expected to negotiate with developers but do not have the skills, technical support, or time;
- Residents should have technical support from either City staff or an outside consulting resource.

3 Issues Identified by the Development Industry

Issues identified by the development industry included:

- a) The need for certainty of potential land use, which could be achieved through the preparation of Area Redevelopment Plans;
- b) The need to know that the community residents that they are working with represent the broader community;
- c) The need for City leadership in resolving issues between the developer and the neighbourhood;
- d) The need to ensure that the new process addresses the current problems with delays in scheduling projects for Public Hearings; and,
- e) The need to resolve the expectation that all issues will be addressed prior to a Public Hearing.

C Principles Underlying the Proposed Large Site Rezoning Process

The following principles were used to guide the development of the proposed Large Site Rezoning Process. The principles, which are grouped generally according to the elements of the process to which they are most relevant, are based on:

- The issues and directions identified through the Public Involvement Program;
- The issues identified by City staff;
- A review of practices employed by other Canadian cities which were reviewed as part of the study; and,
- The direct experience of the Consultant undertaking the study.

1 Role of Staff

- a) A decision needs to be made early in the process by staff as to whether or not a DC2 rezoning application is appropriate, or if planning and policy development is required before an application can be considered.
- b) DC2 applications will be used for all Large Residential Infill Site developments in mature neighbourhoods.
- c) In those cases where xcontext planning is required it should be completed by City Planning and Development staff (“Planning staff”) or by consultants under the City’s direction.
- d) Planning staff should be responsible for community consultation.
- e) To ensure an effective planning process, and ensure that the benefits to the City of rezoning are maximized, the City’s internal procedures must work well and all relevant departments must be involved in the rezoning process at the appropriate time.
- f) Technical studies completed by an applicant should be vetted by City staff and “signed off” prior to presentation to the community.
- g) All relevant staff should be consulted by the applicant early in the DC2 rezoning process, including staff in transit, parks and engineering.
- h) The costs of staff involvement in the rezoning process should be recovered through application fees.

2 Technical Studies

- a) The terms of reference for technical studies should ensure that staff, community and other stakeholder issues are addressed.

- b) All studies required to support a rezoning application should be completed prior to acceptance of the final application for processing.
- c) Background technical studies that are required by the City, such as traffic and shadow studies, should be available to the community.

3 Involving the Community

- a) While consensus between the City, applicant, and a neighbourhood may not always be achieved, Council can be assured that the appropriate opportunities for community input have been provided and community input has been considered.
- b) The local Community League should be the key contact between the City and the community, but the City should retain responsibility for ensuring that the broader community has the opportunity to be involved and informed.
- c) A sound, well managed public consultation process will reduce conflict, reduce the time frames required for rezoning applications to be dealt with, and improve the overall efficiency of the process.
- d) The community should be kept involved and informed, should be advised of amendments to applications, and should not be faced with uncertainty about the status of applications.
- e) The local Community League should participate in designating representatives to work with the City and the applicant that have the authority to “speak for” the community.
- f) A Community League should not incur “out of pocket” expenses in participating in the review of rezoning applications.

4 Relationship to Residential Infill Guidelines

- a) The Residential Infill Guidelines, as approved by Council, will be a fundamental tool for evaluating DC2 rezoning applications in the context of the adjacent or surrounding neighbourhood(s), along with any other relevant City policies and neighbourhood or area plans.
- b) All DC2 rezoning applications and subsequent staff reports to Council on Large Residential Infill Sites should include a statement of how the Residential Infill Guidelines and other plans and policies have been addressed.

5 Providing Certainty

- a) All DC2 rezoning applications should include a draft zoning bylaw that clearly demonstrates that the development will be constructed as proposed.

- b) All illustrative materials submitted with a rezoning application must match the specifics of the application and draft bylaw.
- c) An Applicant should retain the option of submitting a DC2 rezoning application for Council consideration that is not supported by the staff and/or the community, provided that they have adhered to the planning and consultation process.
- d) That upon final approval of the DC2 rezoning, the community should be consulted on any significant changes.

D Overview of the Proposed Large Site Rezoning Process

The recommended “new model” for planning Large Residential Infill Sites is set out in the flow charts in Attachment 2, “Rezoning Process for Large Residential Infill Sites in Mature Neighbourhoods”. These charts divide the process into five distinct phases. A brief description of each step in the process is provided on the charts.

Following is a summary of the five phases set out in the flow charts and a review of the key initiatives proposed in each phase. More detailed backup information on the key steps is included in the Attachments to this report.

1 Phase One: Pre-Application

Phase One begins when an applicant approaches the City to initiate a Large Residential Infill Site rezoning in one of Edmonton’s mature neighbourhoods, and ends when a decision is made on what process to follow. Phase One might be considered a new step in the planning and rezoning process. It is intended to provide consistency and discipline to the initial steps of the rezoning process for Large Residential Infill Sites. In some instances in Phase One, the proposed process may only “institutionalize” practices that are now done informally.

The key steps introduced in Phase One are the requirement for a preliminary rezoning application and, based on a review of the Preliminary Application, a decision by Planning staff on whether to accept the application for processing or to first require the preparation of a Site Vision and Context Plan.

In summary, as illustrated in the chart in Attachment 2, the Pre-Application phase of the proposed process is as follows:

- a) Based on a discussion with the Planning Department, the City will determine if the Large Site Rezoning Process is the appropriate approach or if a conventional rezoning process should be used.
- b) If it is determined that the Large Site Rezoning Process is appropriate, the applicant will be requested to submit a “Preliminary DC2 Rezoning Application”, and arrange to meet with the Development Review Group (DRG). The guidelines to decide if a Preliminary DC2 Rezoning Application is required are set out in Attachment 3; the Terms of Reference for the DRG are set out in Attachment 4.
- c) The Planning and Development Department will, after meeting with the applicant, and with the advice of the DRG, decide whether the applicant should proceed with a DC2 rezoning application under the Large Site Rezoning Process or whether the application should be preceded by the preparation of a

“Site Vision and Context Plan”. The Terms of Reference for the Site Vision and Context Plan are included as Attachment 5 and the criteria for determining if a Plan should be prepared are in Attachment 6.

A brief description of the new initiatives in Phase One follows:

a) Submission of a Preliminary DC2 Rezoning Application

The Preliminary Application should be submitted before staff take any action on the proposed rezoning. Preparation of this Preliminary Application, and the level of detail to be included, is not intended to be onerous. However, it will need to contain sufficient information on the proposed density of development, the built form, the characteristics of the site, land ownership and the context of the development site to permit staff to determine whether or not a DC2 rezoning application is appropriate and if the application should be preceded by the preparation of a Site Vision and Context Plan. The general content of a Preliminary Application is set out in Attachment 7.

b) Development Review Group

It is proposed that a Development Review Group (DRG) be created to deal with DC2 rezoning applications on Large Residential Infill Sites. The Terms of Reference for the DRG, including its membership and mandate, are included in Attachment 4. In summary, the DRG would be led by the Planning and Development Department, and would represent a cross section of senior staff from all City departments involved in the review of Large Residential Infill Site rezoning applications. Under the proposed process, the DRG is assigned the following functions:

- To provide input to the Planning and Development Department in determining the appropriate process that applicants should follow in applying for a rezoning to permit residential infill development, such as whether or not a Site Vision and Context Plan is required;
- To expedite the process by ensuring that the applicant is made aware early in the process of any specific issues that the City wishes to have addressed;
- To ensure that all departments and other stakeholders have early input to the process and that input is coordinated to help ensure that all services have been provided for and all requirements have been identified, such as transit, parks or other amenities;
- To ensure that all technical studies are requested early, and the Terms of Reference for the studies are appropriate (such as ensuring that the area covered by a traffic study is correct);

- To assist the applicant in addressing specific challenges faced by the site;
- To ensure that communication is maintained amongst all departments and between the applicant and the City.

The DRG could be involved in a number of planning initiatives; however, for purposes of this report, the Terms of Reference are restricted to the mandate required to implement the proposed new Large Site Rezoning Process.

c) Site Vision and Context Plan

As noted above, it may be determined based on the evaluation of the Preliminary DC2 Rezoning Application, that a Site Vision and Context Plan will be required prior to proceeding with preparation and submission of a final rezoning application.

The Terms of Reference to prepare the Site Vision and Context Plan are in Attachment 5. Criteria to decide if a Plan is required are in Attachment 6.

It is anticipated that application of the Residential Infill Guidelines will, in many cases, mitigate the need to prepare the Site Vision and Context Plan. The preparation of these plans should be reserved for those instances where benefits to the City and the development may be gained that could not be achieved through the application of the Residential Infill Guidelines and existing plans and policies alone.

The Residential Infill Guidelines are intended to permit flexibility in their application and particularly in the case of the Large Site Infill Guidelines, are largely “performance oriented”. However, there will be proposals in which “one size may not fit all situations”, and the unique circumstances or context of a specific site can be more appropriately addressed through a comprehensive planning process. That is to say, there may be infill sites which cannot achieve the Residential Infill Guidelines or instances in which the proposed development represents a significant departure from current patterns, and development of a vision for the site in the context of planning for the surrounding area may be necessary.

The preparation of a Site Vision and Context Plan is not intended to be onerous and it should be possible to complete it expeditiously. If, in the judgment of the General Manager of Planning and Development, a more comprehensive neighbourhood plan is desired, the General Manager may make that recommendation to Council.

Phase One ends with a decision on whether or not a Site Vision and Context Plan must be considered before proceeding with the preparation of a final

rezoning application. If a Site Vision and Context Plan is proposed and the neighbourhood is already in the Planning and Development Department's Work Program to receive planning services, the Department will provide an Information Report to Council. If the neighbourhood is not identified in the Departmental Work Program for the preparation of an Area Redevelopment Plan, staff will submit a report and request for funding to Council for approval. If a Site Vision and Context Plan is not required, the applicant may proceed to Phase Two of the process.

2 Phase Two: Preparation of a Final Rezoning Application

Phase Two begins with either:

- Submission of a second Preliminary Rezoning Application, revised as necessary to address the Site Vision and Context Plan if one was required as part of Phase One; or,
- Confirmation by the applicant that they wish to proceed with their original Preliminary Application if a Site Vision and Context Plan was not required.

Phase Two represents the time frame during which the applicant works with City staff and the community to develop a final rezoning application. It ends when the final application is submitted to the City. Phase Two represents a new approach to the process in that the rezoning application is prepared and finalized by the applicant in consultation with City staff and the community, as opposed to the applicant finalizing a rezoning proposal and then presenting it to the community and the City as a final application.

The key initiatives recommended in this Phase include:

- The assignment of responsibility to City Planning staff for management of the consultation process;
- The creation of a "Community Working Group" to represent the community in meetings with the City and the developer; and,
- The requirement that the City facilitate a public information meeting at the beginning of this Phase and a second public meeting to present the final draft of the application.

A brief description of the new initiatives in Phase Two follows:

a) City Planning Staff to Manage the Public Consultation Process

It is proposed that the City Planning and Development Department assume responsibility for managing the Public Involvement Program and community consultation process, including facilitating public meetings and assisting the

community in understanding the technical complexities of the process.

This role for Planning staff is proposed with the following objectives in mind:

- To address concerns that the consultation process on Large Residential Infill Sites should be led by people who are both independent of the developer and are able to address planning and regulatory issues;
- To address concerns about the lack of information or the misinformation being made available about planning issues and policies; and,
- Since it is intended that the DC2 rezoning applications on Large Residential Infill Sites be tested against the Residential Infill Guidelines, staff leading the process will need to be knowledgeable of the Guidelines and able to exercise the required judgment in the context of the Guidelines and the site under review.

It should be clarified that in assuming this responsibility, City staff must continue to fulfill their role as “objective professionals”. They must be guided by planning principles and Council policy and, in making recommendations to Council, must be giving independent planning advice within that framework. Staff are not the advocates for either the community or the developer.

Staff, in managing the community involvement program, will have the following objectives:

- To facilitate the process to ensure all community members are informed of the project and have the opportunity to participate;
- To assist community members in understanding the technical aspects of the application; and,
- To ensure that community input is documented and given consideration in the preparation of the final application by the applicant and in the staff review of the application.

As a result, when the matter is finally before Council, there may still be disagreement amongst the three parties, but there should be no room for dispute over whether or not the process was properly implemented.

Finally, it should be noted that the Planning and Development Department may choose to fulfill its responsibilities with respect to consultation through its own staff, or rely on the skills of other Departments for some aspects of the process such as engaging the Community Services Department to facilitate meetings.

b) The Community is Provided With a Defined Role in the Process

Throughout the proposed process, the community has a defined role. This is intended to ensure that the community is involved as required, and the time commitments and workload for community members are predictable and reasonable. The community will be consulted in the Pre-Application phase, but is not drawn into the process until Phase Two, when the decision is made to proceed with a rezoning. More specifically:

- In the Pre-Application phase, the Community League is contacted by the Planning and Development Department for their input on whether or not consideration of the application should be preceded by a Site Vision and Context Plan. Until it is determined what process is to be used, and until the applicant decides to proceed with a Preliminary Application, the community is not further involved.
- Specific Meetings are identified at particular points throughout the process. If necessary, additional meetings may be scheduled.

The Community League and the general public have specific opportunities to participate throughout the rezoning process. These opportunities are summarized in the Public Involvement Plan for Large Residential Infill Site Rezonings included as Attachment 11.

c) Community Working Group

It is intended that the Community League retain its role as the first point of contact with the community for the City. However, it is suggested that at the first meeting in Phase Two the community should appoint a Community Working Group composed of a broad representation across the neighbourhood. It is proposed that this Working Group be granted the mandate to act on behalf of the community in discussions with the developer. This is intended:

- To give clarity to the developer on who they are negotiating with in the community;
- To make the community aware of who is speaking for the overall neighbourhood; and,
- To provide the Planning and Development Department with consistent contact in the community.

In proposing this Working Group, three points must be clarified:

- i) First, the general public is included, and the proposed process provides for community-wide public meetings. The responsibility to ensure that these meetings occur is assigned to the Planning and Development Department.

- ii) Second, it should be clarified that the City is seeking a “sign off” on the community’s position on the application; it is not seeking a “sign off” or statement of complete agreement on the rezoning application. Consistent with the need for Planning staff to fulfill a professional role, the community is not being put in the position of having to “negotiate the development” with the applicant. Rather, with the assistance of staff, the community is involved in discussing the application, considering available options and putting forward an informed and clear position for the applicant to address during preparation of the final application, and for staff to address during their review of the final submission.

For clarity on this point, if a community is able to articulate its concerns with the assistance of Planning staff, and the applicant is able to resolve those concerns through a process facilitated by staff, then everyone will benefit. If resolution is fundamentally impossible because the community is simply opposed, then staff will need to put forward their professional recommendation for approval of the project with any conditions or recommend refusal.

- iii) Finally, it should be noted that while the proposed process sets out the key steps and milestones for community consultation, the number and timing of Working Group meetings, the creation of sub-committees of the Working Group, and other aspects of the process can be refined in discussions between the City, Applicant and Working Group as part of the overall process.

3 Phase Three: Final Application Review

Phase Three begins with the submission of the final application to the City, and ends with the submission of a report to Council recommending the rezoning for Public Hearing. The key initiatives in Phase Three include:

- a) A community-wide meeting to review the final application as submitted;
- b) The opportunity for the community, the applicant, and the Ward Councillors to review the draft report to Council being prepared by staff.
- c) The option for a meeting between staff and the Community Working Group to review the final draft of the staff report before it is submitted; and,
- d) Supplementary submission requirements are imposed at the final application stage for all applications designated to follow the Large Site Rezoning Process. These requirements, as set out in Attachment 8, should be merged with the Planning and Development Department’s existing DC2 submissions checklist.

4 Phase Four: Public Hearing

This phase encompasses the Public Hearing process and ends with a decision by Council on the rezoning application.

The new initiative proposed in this phase is that a representative of the Community Working Group be given the opportunity to make a presentation at the Public Hearing on behalf of the Group with no specific restriction on the amount of time they will have to present.

5 Phase Five: Implementation

Phase Five covers the balance of the development process, including the preparation of legal agreements and issuance of development permits. It ends with completion of construction of the project

Proposed improvements to current procedures in this phase include: a requirement for ongoing contact between the City Planning and Development Department and the community on any modifications to the proposed development through the development permit process; more emphasis on communication between the rezoning file Planner and the Development Officers; and more emphasis on ensuring that the Development Compliance Officers conduct ongoing inspections to ensure that each phase of the project is built in accordance with Council Direction and the approved development permits.

E Experience in Other Canadian Cities

As part of this study, a review was undertaken of the approach taken to the rezoning of large residential infill sites in other cities in Canada. The results of this review are set out in Attachment 9.

F Implementation of the Proposed Process

Implementation of the proposed rezoning process does have some significant implications to the Planning and Development Department, and to a lesser extent to other Departments involved in the development review process, particularly from the perspective of available resources. In light of the points noted below, it is recommended that the Planning and Development Department report back to Council with a review of additional resource requirements.

1 Staff Resources

a) Implementation of the Public Involvement Program:

Staff are already challenged by the current level of development activity in providing timely and thorough review of development proposals. With the added responsibility of managing and implementing the Public Involvement Program, additional resources will be required to avoid the risk of delaying the review of applications.

b) Preparation of Site Vision and Context Plans:

It is estimated that each of these plans that the City commits to prepare will require full time staff assignments through an approximate six month process. If the decision is made to rely on consulting assistance, it will still require supervisory and administrative time to manage the consultants.

c) Development Review Group:

The DRG will impose some time requirements on senior staff. However, it is believed that the DRG will represent a “productivity improvement”, and allow all departments to deal more effectively and efficiently with DC2 applications on Large Residential Infill Sites.

d) Bylaw Enforcement:

Some additional staff resources may be required in Bylaw Enforcement for increased inspection of projects on large infill sites to ensure compliance with approved DC2 provisions and the associated development permits.

2 Staff Training

It is important that the City staff who lead the Public Involvement Program are familiar with and understand the objectives and principles of this new rezoning process, the Residential Infill Guidelines, the City Zoning Bylaw, existing neighbourhood plans, and other applicable City bylaws and policies. These staff should also have the skills required to interact with the community and developers

in potentially difficult circumstances and to lead the consultation process.

Given the potential variations in experience, skills, and knowledge, it is proposed that the Planning and Development Department ensure that staff assigned to review the large site rezoning applications receive the required training and support. In the short term, it is recommended that a small team of experienced planners be identified to deal with applications on large residential infill sites in mature neighbourhoods, and that the initial training focus on this team.

In some circumstances, such as when a planning staff person may (by way of example only) lack facilitation skills, it may be possible to rely on staff from the Community Services Department for assistance.

3 Fees

It is recommended that the City review its rezoning application fees to ensure that the costs of improving the process are recovered.

A revised fee structure should address the additional costs that will be incurred in the following steps in the process:

- a) The Pre-Application phase, including the additional costs of processing the Preliminary Application;
- b) The costs of providing resources to manage the Public Involvement Program;
- c) The costs of preparing the Site Vision and Context Plans, noting that there may be a rationale for cost sharing these plans, depending upon the nature of the rezoning application and the boundaries of the plan area.

4 Application Time Frames

An estimate of the time required to complete the proposed new rezoning process, beginning with the submission of a finalized Preliminary Rezoning Application at the beginning of Phase Two, is set out along the bottom of the charts in Attachment 2.

However, the potential timing of the overall rezoning process is difficult to predict, given that the timing depends upon the complexity of the application and on the commitment and timing of the applicant in finalizing submissions, completing technical studies, etc., as well as City staff resources. In Phase Two in particular, assuming that staff are available to facilitate the consultation process, the timing will depend in large part upon the applicant.

The timing of the process prior to Phase Two will, of course, be significantly longer if preparation of a Site Vision and Context Plan is required. It is estimated

that approximately six months will be required to prepare these plans. However, the time required to complete Phase Two should be less in those instances where a Site Vision and Context Plan has been prepared in that the community will have already been involved, some background studies will likely have been prepared, and the basic parameters of the zoning application should already be defined.

With respect to processing times, it is also important that staff are able to track the progress of rezoning applications, and in particular to monitor the time required to process applications. This information assists in determining resource requirements, establishing a basis for fees and documenting the level of service being provided. It also helps in determining the amount of time required of staff and the applicant to review and refine applications. It is recommended that the City establish this capability within its existing POSSE file management system.

5 Evolution of the Process

The recommended process will need to evolve over time as staff gain experience with it. There may well be efficiencies that can be gained in the steps in the proposed process and specific requirements that can be better defined in the context of the City's overall submission requirements. The primary issue is that any refinements should reflect and be consistent with the principles set out in this Report.

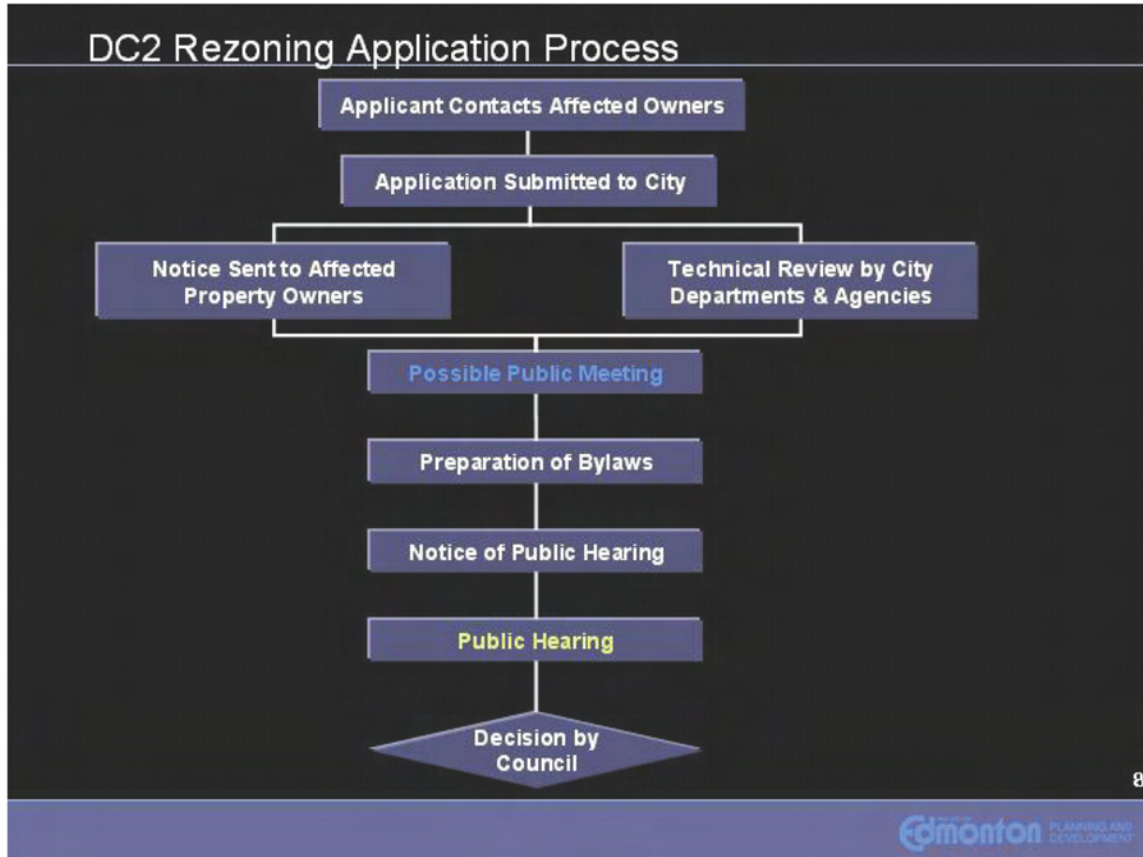
G Summary of Recommendations

Following is a summary of the recommendations that will require Council approval to implement the proposed Large Site Rezoning Process.

1. That the recommended process as set out in this Report, including the charts in Attachment 2, be approved.
2. That the Terms of Reference for the Development Review Group as set out in Attachment 4 be approved.
3. That the Terms of Reference for the Site Vision and Context Plan set out in Attachment 5 and the criteria for implementing the plan process set out in Attachment 6 be approved.
4. That the Involving Edmonton Public Plan for community involvement in Large Residential Infill Site Rezoning Applications, included as Attachment 11, be approved.
5. That the Planning and Development Department report back to Council with a revised fee structure to cover the cost of improving the service on DC2 rezoning applications for Large Residential Infill Sites at the following stages:
 - a) Pre-Application costs (DRG);
 - b) fees for preliminary DC2 rezoning applications;
 - c) fees to defray the cost of Site Vision and Context Plan preparation;
 - d) fees for review of final applications; and,
 - e) a general review of fees for costs of DC2 rezoning if staff provide facilitation.
6. That staff report back to Council with a review of additional resource requirements that will be required to implement the proposed process.
7. That a small team of experienced planners be identified to deal with applications on large residential infill sites in mature neighbourhoods, and that the initial training focus on this team.
8. That the City enhance its existing POSSE file management system to establish a tracking system which permits staff to:
 - a) monitor the progress of applications and where an application is in the process (for example, with staff for review or with the applicant);
 - b) audit specific rezoning applications to determine the amount of processing time taken by staff within the overall processing time;
 - c) audit the overall process to determine fee and resource requirements in order to maintain a certain level of service.

Attachment 1

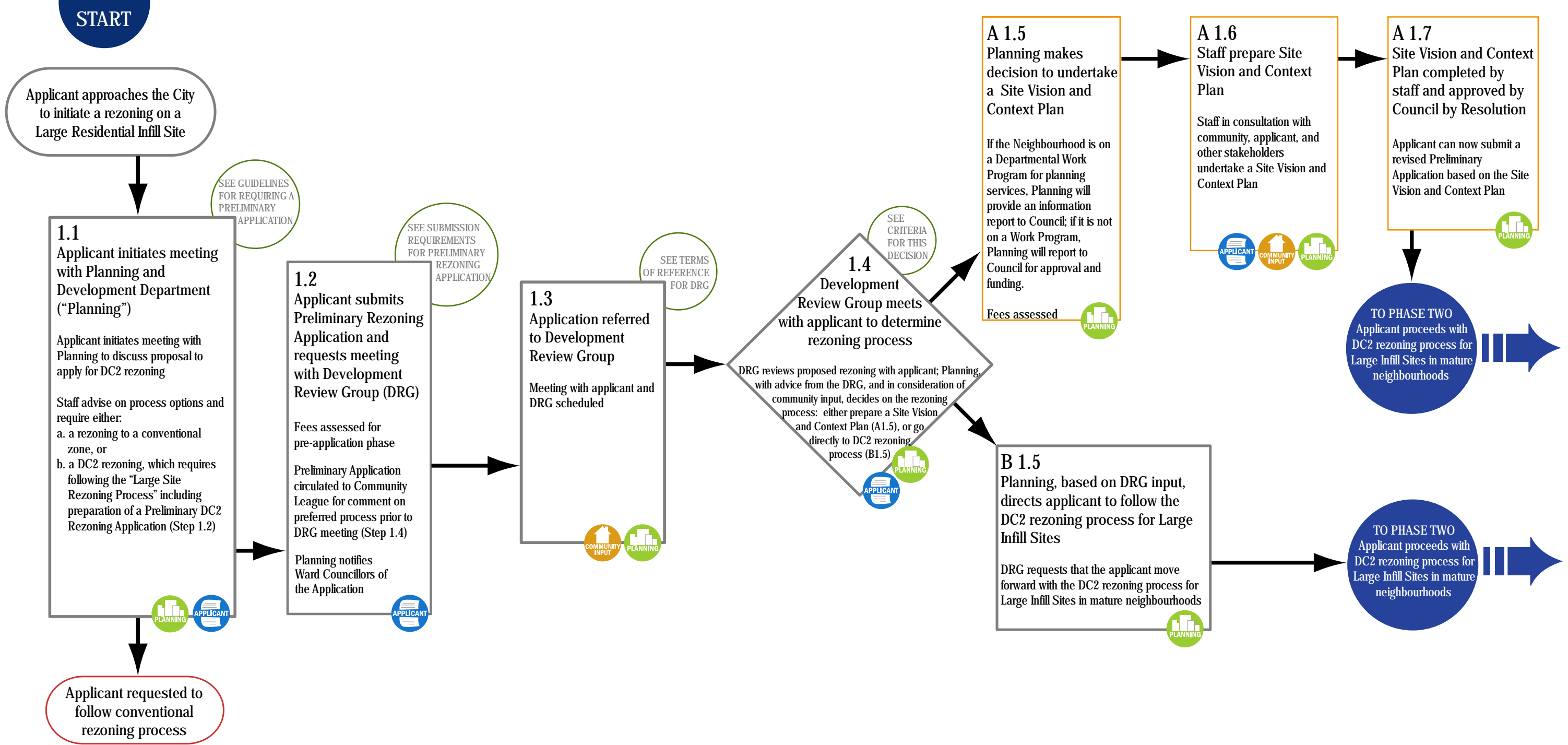
Chart Summarizing Edmonton's Existing DC2 Rezoning Process



REZONING PROCESS FOR LARGE RESIDENTIAL INFILL SITES IN MATURE NEIGHBOURHOODS

PHASE ONE PRE-APPLICATION

BEGINS: When the Applicant approaches the City to initiate a rezoning on a Large Residential Infill Site
ENDS: When the decision is made to follow the Large Site Rezoning Process or prepare a Site Vision and Context Plan



11.05.2008

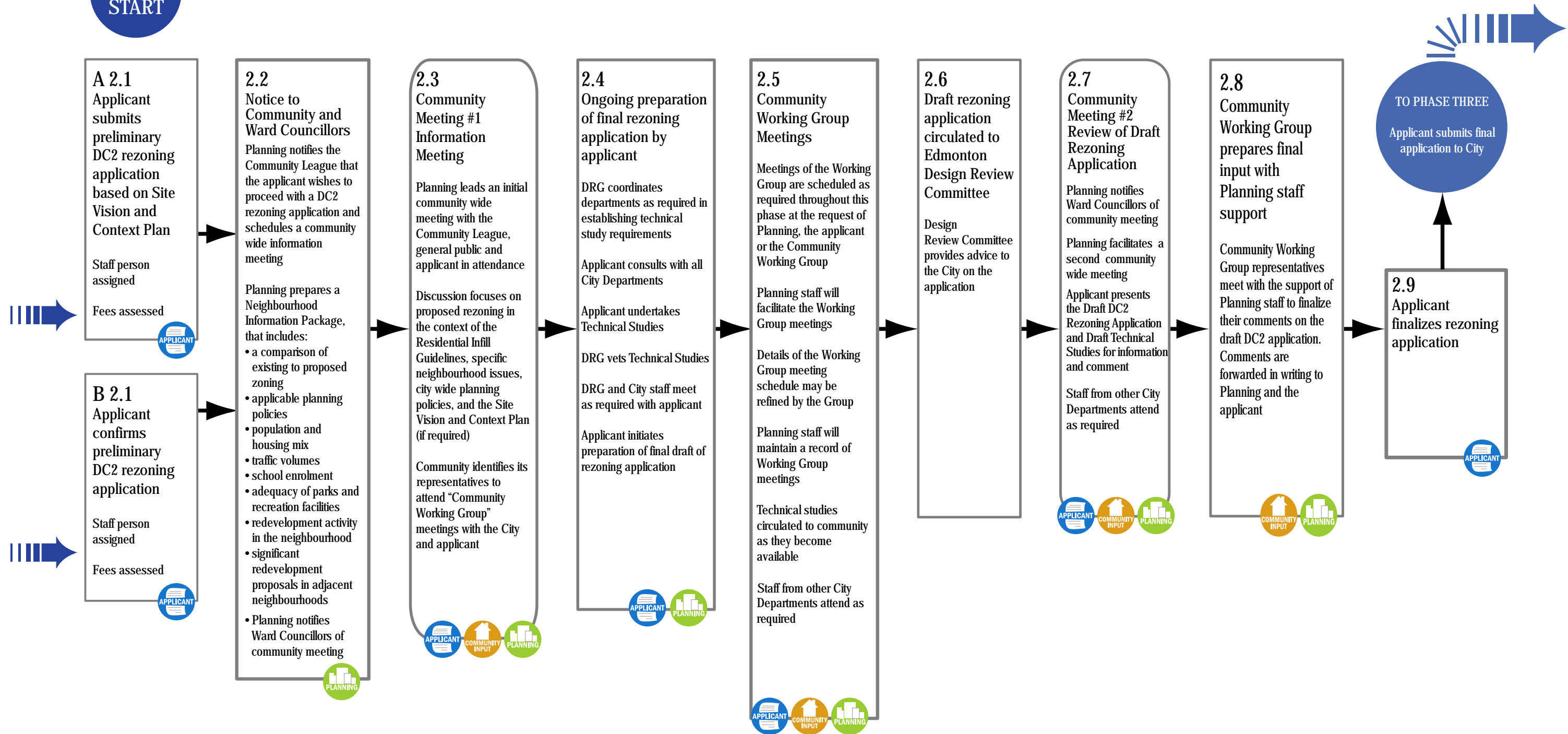
REZONING PROCESS FOR LARGE RESIDENTIAL INFILL SITES IN MATURE NEIGHBOURHOODS

PHASE TWO PREPARATION OF FINAL REZONING APPLICATION

2

BEGINS : When the applicant submits a Preliminary Application to Rezone a Site to DC2 using the "Large Site Rezoning Process"
ENDS : When a final DC2 rezoning application is submitted to the City Planning and Development Department

START



11.05.2008

Week



Developer prepares final rezoning application in this time period, in consultation with community Working Group and City Staff. DRG coordinates work as required. Time required will vary.

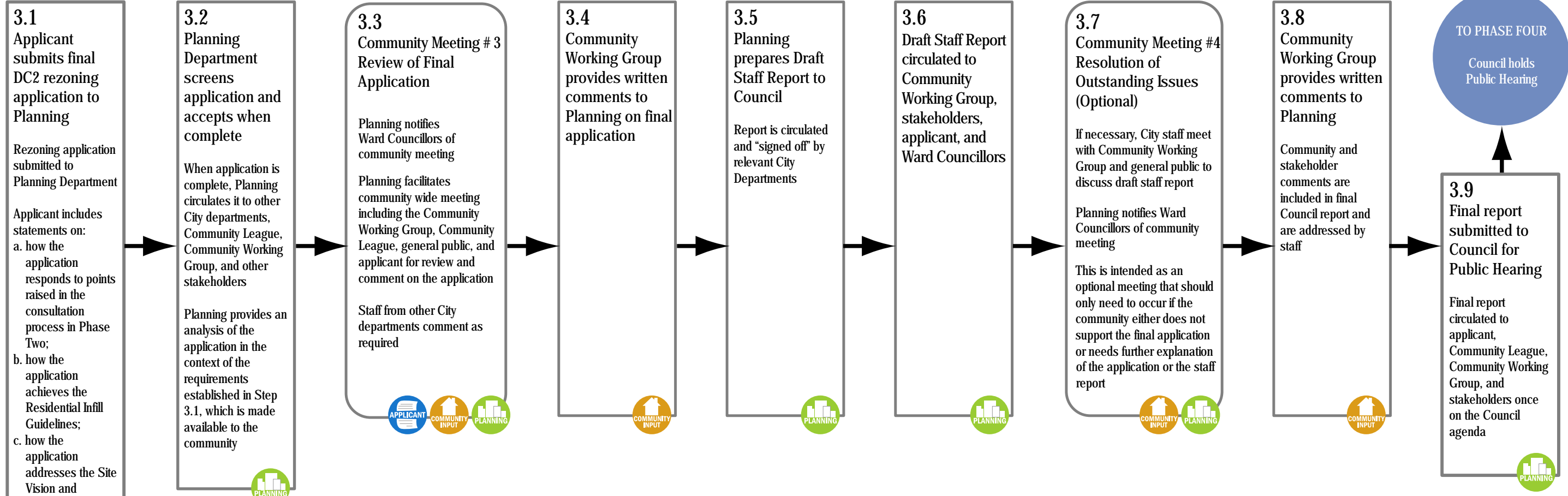
17

REZONING PROCESS FOR LARGE RESIDENTIAL INFILL SITES IN MATURE NEIGHBOURHOODS

PHASE THREE FINAL APPLICATION REVIEW

3

BEGINS : When the final DC2 rezoning application is received by the Planning and Development Department
ENDS : When the Planning and Development Department submits its final report to Council for Public Hearing



SEE SUPPLEMENTARY SUBMISSION REQUIREMENTS FOR LARGE SITE DC2 REZONING APPLICATIONS

11.05.2008

REZONING PROCESS FOR LARGE RESIDENTIAL INFILL SITES IN MATURE NEIGHBOURHOODS

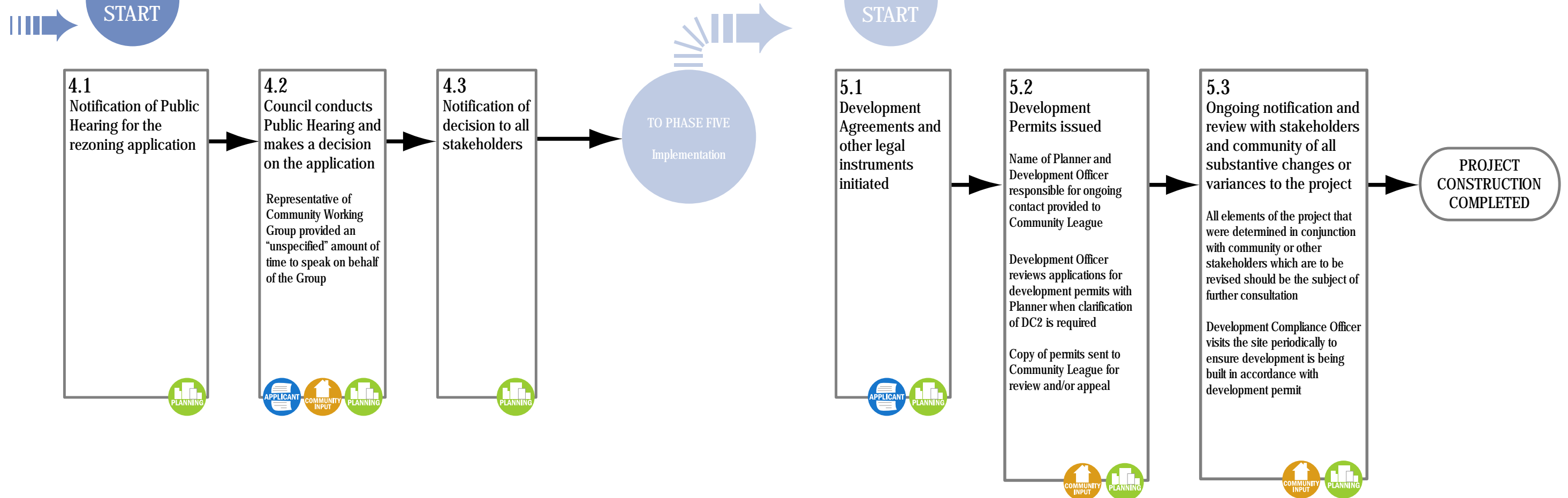
PHASE FOUR PUBLIC HEARING

BEGINS : When final staff report is submitted to City Council for Public Hearing with recommendations on the rezoning application
 ENDS : When Council makes a decision on the Application

PHASE FIVE IMPLEMENTATION

BEGINS : With final approval of rezoning bylaw
 ENDS : With completion of the project

5



11.05.2008

Attachment 3

Guidelines for Requiring “Preliminary DC2 Rezoning Applications” For Large Residential Infill Sites

Staff will use the following guidelines in determining whether or not a Preliminary Application is required when they have been approached by an applicant who is proposing to submit a DC2 rezoning for a Large Residential Infill Site in a mature neighbourhood.

A Preliminary Application will be required if the contemplated rezoning is under the DC2 provisions of the Zoning Bylaw, is on a Large Residential Infill Site within Edmonton’s mature neighbourhoods, and meets any of the following criteria:

1. The proposed rezoning meets the criteria set out as part of this proposed Large Residential Infill Sites Rezoning Process (Attachment 6) that may trigger the requirement for preparation of a Site Vision and Context Plan.
2. The site being considered for rezoning meets the definition of a Large Residential Infill Site as set out in the Residential Infill Guidelines, or due to the nature of the proposed redevelopment, will be subject to the Residential Infill Guidelines.
3. Overall, the proposed development is a complex one, and “challenges” the existing zoning provisions and/or the Residential Infill Guidelines.
4. The application involves the introduction of large scale buildings (mid rise and high rise) to a neighbourhood.
5. The applicant is contemplating a phased development program.
6. The proposed development may exacerbate the need for parks and other amenities in areas that are already deficient.
7. The development is a significant change from the existing policy directions for the neighbourhood or the current development patterns.

Attachment 4

Terms of Reference for the Development Review Group (DRG)

Overview

The Development Review Group is intended to provide a forum through which City Departments can efficiently coordinate the planning, community and stakeholder consultation processes and the review processes related to DC2 rezoning applications for Large Residential Infill Sites in Edmonton's mature neighbourhoods. This group is expected to ensure:

- Ongoing communication and coordination amongst City Departments;
- The timely participation of all Departments in planning for and reviewing rezoning applications for residential infill on large sites; and,
- Ongoing communication and coordination between the City and the applicant, and between the City and the affected community.

1. Mandate:

- a) To meet with applicants for the rezoning of Large Residential Infill Sites who have submitted a preliminary DC2 rezoning application and provide advice to the Planning and Development Department on the planning and community Consultation process required. (Planning will report to Council if a Site Vision and Context Plan or more comprehensive neighbourhood plan is proposed).
- b) To assist applicants by identifying issues to be addressed and working with the applicants to identify specific solutions.
- c) To ensure that all Departments have input to key DC2 applications on Large Residential Infill Sites in mature neighbourhoods.
- d) To coordinate interdepartmental activities and decisions on Large Residential Infill Site applications.
- e) To define the parameters of required technical studies.
- f) To coordinate the review of and vet technical studies submitted by applicants.
- g) Through Departmental representatives on the DRG, assign Departmental staff to specific projects.

2. Projects Eligible for Referral to the Development Review Group:

- a) Preliminary Applications that have been submitted at the request of the Planning and Development Department will be forwarded to the DRG for

consideration, if the application meets the criteria set out in Attachment 3.

3. Membership:

- a) All departments that participate in the technical review and community planning processes related to DC2 rezoning applications are to be represented on the Development Review Group, including Planning and Development, Engineering, Transportation, Transit, Community Services, and Parks.
- b) The DRG will ensure that other stakeholders, such as utilities, are involved early in the process, as required, and may invite them to attend the DRG as appropriate.

4. Structure:

The DRG will be chaired by the Manager, Planning and Policy Services Branch or his designate.

Attachment 5

Terms of Reference – Site Vision and Context Plan

Intent of the Site Vision and Context Plan

The intent of preparing a Site Vision and Context Plan is to establish a conceptual plan for the long term development of a neighbourhood.

The Plan will be initiated in response to a Preliminary Application for a DC2 rezoning on a Large Residential Infill Site that impacts a specific neighbourhood. The process is intended to be a consultative one between the community and the City, and to result in a Plan which is supported by both the community and the City. The applicant for the rezoning is to be involved in the process with the purpose of ensuring that if a project is generally desirable, the Plan reflects the general parameters of the proposal.

Boundaries of Site Vision and Context Plan Areas

1. Generally, the entire neighbourhood within which the site proposed for rezoning is located should be included in the study area. The boundaries of this area may be refined in consultation with the community if parts of the neighbourhood are unlikely to be impacted by the rezoning, and if approval of the proposed rezoning will not result in further redevelopment pressures or rezoning applications.
2. Areas adjacent to the neighbourhood in which the rezoning is proposed should be included within the study area if they are likely to be impacted by the redevelopment through traffic and parking impacts, shadowing, the introduction of large scale buildings, or if adjacent areas form part of the “context” of the site to be redeveloped as defined through application of the Residential Infill Guidelines.

Objectives and Scope of the Site Vision and Context Plan

The following objectives should be addressed in the Site Vision and Context Plan:

1. To define the extent of redevelopment to be permitted in the neighbourhood, and:
 - a) Where redevelopment will be permitted;
 - b) What forms of infill will be permitted in specific areas of the neighbourhood;
 - c) The built form that may be constructed, including where medium scale and large scale buildings may be permitted;
 - d) The densities that may be achieved;

- e) The phasing of redevelopment; and,
 - f) The housing mix to be achieved.
2. To determine any deficiencies in parks and other amenities that need to be resolved prior to, or through, the approval of a rezoning, including specifying how they will be resolved.
 3. To identify any overall traffic and parking issues that will be created or exacerbated by infill development and how they will be resolved.
 4. To identify key pedestrian streets, focal points, views, and essential connections to and through the site.
 5. To identify the impact on existing residents in the area to be redeveloped, including how any loss of affordable rental housing will be mitigated.
 6. To identify how the Residential Infill Guidelines, and other City policies, will be implemented.
 7. To identify any infrastructure issues that will be created or exacerbated by infill development and how they will be resolved.
 8. To identify any specific issue areas to be addressed and further detailed studies that may be required as part of the DC2 rezoning application process.

Community Consultation

1. The meeting and consultation process for Plan preparation will be agreed upon with the community as part of establishing the detailed Terms of Reference for the preparation of the Plan.
2. The planning and public consultation process will be led by the Planning and Development Department, who may rely on consultants and other City departments as required.
3. To support the community in the planning and consultation process, Planning and Development Department staff will prepare a background information package and “neighbourhood profile” which will include the following:
 - a) The Residential Infill Planning and Design Guidelines;
 - b) Applicable City wide policies and plans,
 - c) Available information relevant to the neighbourhood, such as:
 - a comparison of existing to proposed zoning
 - applicable planning policies
 - population and housing mix
 - traffic volumes
 - school enrollment

- adequacy of parks and recreation facilities
- redevelopment activity in the neighbourhood
- significant redevelopment proposals in adjacent neighbourhoods

Approval

The final Site Vision and Context Plan will be approved by City Council by resolution.

Attachment 6

Criteria to Determine if a Site Vision and Context Plan Is Required

A Site Vision and Context Plan may be required as a prerequisite to consideration of a Large Residential Infill Site DC2 Rezoning based on the criteria set out below.

In some cases, the Plan must be prepared when only one criterion is applicable; in other instances, the Development Review Group will consider a number of factors that may collectively contribute to the need for a Plan. In those cases where the Site Vision and Context Plan is not required, the balance of the requirements of the Large Residential Infill Site rezoning process will apply.

Given the additional resource requirements inherent in preparing a Site Vision and Context Plan, it is anticipated that their preparation will be reserved for those instances where benefits to the neighbourhood may be gained that could not be achieved through the Large Site Rezoning Process alone. For example, a Site Vision and Context Plan should not be necessary for the development of low scale buildings on a surplus school site or on a large site which is being redeveloped to similar built forms as those already existing on the site.

A Site Vision and Context Plan must be considered when any one of the following criteria apply to the site to be rezoned:

1. If an area of a neighbourhood is potentially suitable for infill redevelopment, but the ownership of the site is fragmented and the proposed rezoning only applies to a portion of the total area.
2. The DC2 rezoning will fundamentally change the direction of the neighbourhood by introducing large scale buildings into an otherwise predominantly low scale neighbourhood of single family homes or if it represents a specific change in direction of zoning or intensification of the neighbourhood which is contrary to an existing ARP.
3. Additional large site rezoning applications have been initiated in the same neighbourhood or in immediately adjacent neighbourhoods.
4. There are other large sites in the immediate vicinity which could be redeveloped.

A Site Vision and Context Plan may also be required by the City when one or more of the following criteria apply to the site to be rezoned:

1. The context of the development site in the neighbourhood provides for unique opportunities that are not accommodated by the Residential Infill Guidelines, and the applicant wishes to significantly vary the Residential Infill Guidelines.
2. The redevelopment would significantly change the mix and balance of housing

types in the neighbourhood.

3. There is a significant level of community concern raised as a result of the initial circulation of the Preliminary Rezoning Application.
4. There are other DC2 rezoning applications proposed in the area or there have been inquiries that indicate a general level of interest in infill redevelopment on large sites in the area.
5. The scale and intensity of development raise the potential for significant impacts on the adjoining neighbourhoods through increased traffic, shadowing, or the introduction of large scale buildings.

Attachment 7

Preliminary Applications for DC2 Rezoning

Submission Requirements

To address the requirements identified in the Large Site Rezoning Process, applicants are to include the following information as part of the Preliminary DC2 Rezoning Application. As a guide to determining the level of detail required, it should be noted that the Development Review Group will need sufficient information to determine whether or not to proceed with the DC2 rezoning, or alternatively, to require that a Site Vision and Context Plan be prepared. In addition, the Preliminary Application is to be used as a basis for community discussion in Phase Two of the Large Site Rezoning Process.

As a minimum, a Preliminary Application should include:

1. A detailed description of the site to be rezoned with maps illustrating the preliminary development program and the neighbourhood context.
2. An overview of the proposed building program, including the approximate number of units, built forms, phasing and tenure.
3. An initial statement of the neighbourhood context and how the Residential Infill Guidelines can be achieved.
4. Issues identified during preparation of the Preliminary Application.
5. A summary of any contacts with the adjacent community and issues that have been identified.
6. A review of relevant City policy and existing plans and how it is intended that the development will address them, including the rationale for any proposed amendments to an Area Redevelopment Plan.
7. The results of any background or technical studies completed in preparation of the Preliminary Application.

Attachment 8

Final DC2 Rezoning Applications for Large Residential Infill Sites Supplementary Submission Requirements

The following requirements for the Large Site Rezoning Process are intended to supplement those that would normally be required by the City as part of the submission of a DC2 rezoning application. It should be noted that some of these requirements are also included in the Large Site Infill Guidelines.

To address the requirements identified in this report, applicants are to include the following information in addition to other existing City requirements as part of the Final Rezoning Application:

1. The Final Application shall include statements on the following:
 - a) How the application achieves the Residential Infill Guidelines, and other relevant City policies;
 - b) How the application achieves the Site Vision and Context Plan, if one has been prepared; and,
 - c) How the final application reflects the outcome of the community consultation process conducted in Phase Two.
2. A detailed phasing plan that outlines the anticipated order and timing of the different phases in the development.
3. The following shall be included within the Bylaw:
 - a) For each Phase, three dimensional drawings to scale that clearly illustrate the form of development in each phase, including building envelopes, set backs, parks and amenity areas, and a general landscape plan to illustrate which areas are designated for hard surface treatments and planters, and which areas will be treated with soft landscaping, such as trees and shrubs.
 - b) For the first Phase of the development, a detailed site plan, detailed elevations of the buildings and a detailed landscaping plan prepared by a registered landscape architect must also be included.

Attachment 9

Planning and Consultation Processes Used in Other Cities For Rezoning Applications

As part of the study, a background review was conducted of a number of cities with respect to the processes followed for large site rezoning applications. The cities in Canada that were contacted included Calgary, Ottawa, Toronto, and Vancouver. Two US cities, Seattle and Portland, were also contacted.

The processes followed in all cities varied significantly due to a number of factors, including legislative requirements, political structures, community involvement issues, and the nature of development from the perspective of its focus on mature neighbourhoods or “greenfield” development.

Consequently, while there were no existing processes identified which would easily transfer to Edmonton, there were a number of common initiatives or directions that merited consideration in the Edmonton context, and in particular, support the need for the proposed directions in the new process proposed for Edmonton.

The review also confirms that the issues facing Edmonton in attempting to facilitate residential infill development are shared by other cities and that the approach proposed for Edmonton does not impose any unusually onerous requirements on the development industry that are not required elsewhere.

Following are some specific initiatives in other cities that relate to the different phases proposed in the new Edmonton model.

1. Pre-Application Phase:

Many municipalities now offer, and some require, a “Pre-Application” discussion by the applicant with staff. The City of Toronto now offers a “Pre-Application” step in the process. In the Toronto example, an application is submitted and circulated to staff for comment to the developer prior to a final application being submitted.

In some cases, such as in Vancouver, staff may at this phase provide an early indication to an applicant that their application may not be supported by staff due to existing policy or plans. In these cases, staff may also take an early report to Council to determine if there is sufficient support for the proposal to warrant a detailed review of an application. The City of Toronto encourages applicants to engage in a pre-application consultation with staff as it will ‘save time and money as they proceed through the review process’.

In some cities, such as Vancouver, a separate report is taken to Council

recommending whether or not an application should be referred to Public Hearing. If the proposal is seen as contrary to existing plans, and there is little political or community support to consider changing the direction of existing plans, the application may not be taken to Public Hearing. On the other hand, if an application appears to have merit, but represents a significant change in a community, Vancouver will initiate a “neighbourhood planning” process in order to determine the “vision directions” for the community prior to considering a rezoning application.

Overall, the pre-application phase offers an opportunity to:

- Assist the applicant in determining the issues that need to be addressed in a rezoning;
- Clarify the requirements of the City;
- Provide an early indication to the applicant regarding whether or not a rezoning is likely to be supported by staff;
- Determine if a neighbourhood planning exercise should be conducted first to establish a framework for a rezoning application.

2. Pre-Planning as a Basis for Rezoning Applications:

The commonly accepted approach to evaluating rezoning applications in mature neighbourhoods is to judge the application against a “policy framework” established within a City’s “general, municipal development plan” and neighbourhood plans. However, a municipal development plan may not provide sufficient detailed guidance to support an application in a mature neighbourhood. Also, if a neighbourhood plan has not been prepared or is out of date, or a proposed development is inconsistent with the policy directions in a plan, then there is little policy direction within which to establish a context for a large site rezoning application.

In those circumstances, the option is for the City to undertake a new neighbourhood plan. However, preparation of a traditional neighbourhood or area redevelopment plan can be very time and resource intensive.

One relevant model is that of the City of Vancouver, which has prepared “community vision” plans for a number of its neighbourhoods. Within the community vision plans, “vision directions” are established. These vision directions may include policy directions for a neighbourhood, such as a direction to identify more housing locations near shopping centres. However, site specific rezonings to implement the vision direction will not be entertained until more detailed “area planning” has occurred in consultation with the affected

neighbourhood to define, for example, the acceptable options for the form and density of housing. Following the preparation of the plan, which is prepared by the City, a rezoning that is consistent with the plan will be considered.

3. Early Notification to Communities:

Most cities now require early notification to communities of proposed rezoning applications. There is a mix of approaches, with some cities doing as Edmonton now does, relying on the applicant to provide notice to residents, seek their input, and document and present it to the City. In some cases, such as at the City of Ottawa, early public consultation by the applicant is encouraged; however, if it is not undertaken by the applicant, the City may undertake it later in the process.

4. Development Review Group:

Few cities appear to have formalized “development review groups”, although the City of Toronto promotes a meeting that “may” include other staff from a number of City divisions. The intent of the meeting is to “identify issues of concern and concurrence, guide the context of the application submission (reports, studies, drawings, etc.) and identify the need for any further applications or approvals”.

It is the experience of the consultant that cross departmental staff groups comprised of key senior staff are one of the most powerful tools available to a municipality to facilitate complex developments while maximizing the benefits to the City and the affected neighbourhood.

5. Development Being Built in Conformance with Approved Plans:

A concern at the community level in Edmonton is that applications are approved following extensive consultation, but the project is not constructed according to the approvals. This issue is in part an enforcement problem, and in part reflects the need for projects that are phased over time to adjust the development to reflect a changing market. This was also identified as an issue with the Toronto process, and is not an uncommon problem in many cities. Assuming adequate enforcement, the primary issue is one of continuing to maintain contact with the affected stakeholders and consulting with them on significant changes.

Attachment 10

Glossary of Terms

Current DC2 Rezoning Process – refers to the existing direct control rezoning process used in the City of Edmonton, as provided for in the current Edmonton Zoning Bylaw.

Large Residential Infill Site – means those sites in mature neighbourhoods that are generally over one hectare in size and are proposed for residential infill development and, therefore, must be considered under the Large Site Rezoning Process. The definition of Large Residential Infill Sites and the Planning and Design Guidelines governing their development are set out in the Residential Infill Guidelines.

Large Site Infill Guidelines – refers to the section of the Residential Infill Guidelines which deals specifically with planning for the development of Large Residential Infill Sites.

Large Site Rezoning Process – means this study, the “Planning and Consultation Process for Rezoning Large Residential Infill Sites in Mature Neighbourhoods”; also referred to as the “New Planning Model for the Redevelopment of Large Sites in Mature Neighbourhoods”. It is noted that this process applies only to large sites as defined in the Residential Infill Guidelines.

Preliminary DC2 Rezoning Application – means the preliminary rezoning application which is to be submitted to the City prior to an applicant proceeding to develop a final rezoning application. The submission requirements for the Preliminary Application are set out in the Large Site Rezoning Process.

Residential Infill Guidelines – means the “Basic Planning and Design Guidelines for Residential Infill in Edmonton’s Mature Neighbourhoods”. These Guidelines relate to all forms of residential infill on all sites in mature neighbourhoods, and also include planning and design guidelines specific to Large Residential Infill Sites in mature neighbourhoods.

Site Vision and Context Plan – refers to a plan to be prepared in certain circumstances prior to the City considering a DC2 rezoning application. The terms of reference for the Plan are included in Attachment 5, and the criteria to determine if a Site Vision and Context Plan is required are set out in Attachment 6 of the Large Site Rezoning Process.



Involving Edmonton Public Plan

Project: Large Site DC2 Rezoning Applications for Residential Infill in Mature Neighbourhoods

Department/Branch Responsible: Planning and Development Department

Project Manager: _____

Consultant (if applicable): _____

Draft or Final Plan: Final

Other city participants or partners: All Depts. involved, including Transit, Parks, Engineering, Fire, Police, Utilities

The Public Involvement Input Commitment is:

To provide the community with a defined role in the planning and consultation process for the rezoning of Large Residential Infill Sites in Edmonton's mature neighbourhoods (the Large Site Rezoning Process). This commitment includes:

1. the City will manage and facilitate the public consultation process for Large Site Rezoning applications to ensure that all community members are informed of the proposed rezoning and have the opportunity to participate;
2. the City will assist community members in understanding the technical aspects of the rezoning application;
3. the City will ensure that community input is documented and considered as part of the application review, and presented to Council as part of the staff report.

Staff and community members are referred to the complete report outlining the "Planning and Consultation Process for Rezoning Large Residential Infill Sites in Mature Neighbourhoods", (the "Large Site Rezoning Process") which outlines the steps in the process, and specific commitments at those steps; it is available on the Planning and Development Dept. Website.

This plan has been vetted through the Public Involvement Readiness Test (p. 57)

Sign off

Background: Summary of Worksheets I and II

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|---|---|--|--|--|--|
| Description of the overall project or initiative: | The Large Site Rezoning process responds to DC2 rezoning applications on large sites in Edmonton's mature neighbourhoods for purposes of residential infill development. The process may, depending upon the application and the context of the site, also require preparation of a Site Vision and Context Plan prior to processing of a rezoning application. | | | | |
| The decision being made is: | Approval or refusal of the DC2 rezoning application. If a Site Vision and Context Plan is required, staff will report to Council. | | | | |
| Decision makers | City Council will make the final decision on the rezoning application based on recommendations from the Planning and Development Department, and the input received from the community and other stakeholders. | | | | |
| The scope (impact, and complexity) of this decision is: | Major projects being developed in mature neighbourhoods may impact on adjacent residents and neighbourhoods and on the City's ability to effectively deliver services. At the same time, residential infill development will contribute to achieving the City's sustainability objectives. | | | | |
| The timeline for this decision is: | The Large Site Rezoning Process is implemented when applications that meet the criteria for using the process are received. The time required to process the application will depend upon the complexity of the application, and whether or not a Site Vision and Context Plan is required. | | | | |
| The public is being involved because: | Community understanding and support is important to the successful implementation of residential infill development projects. Involvement of the community in the review of rezoning proposals is intended to reduce conflict between neighbourhoods and developers, to reduce delays in the review of applications, and to ensure that proposals contribute to the sustainability and livability of the broader neighbourhood. | | | | |
| Level of involvement: | This process predominantly fits in Information Sharing and Consultation. | | | | |
| | Information Sharing | Consultation | | Active Participation | |
| | <ul style="list-style-type: none"> Sharing information to build awareness | <ul style="list-style-type: none"> Testing ideas or concepts to build knowledge | <ul style="list-style-type: none"> Collaborating to develop solutions to build commitment | <ul style="list-style-type: none"> Sharing decision making to build ownership | <ul style="list-style-type: none"> Delegating decision making to build responsibility |



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|---|--|
| <p>The specific information being sought is:</p> | <ul style="list-style-type: none"> • Early community input to DC2 rezoning applications, including the identification of any neighbourhood issues related to the application such as impact on community amenities, traffic and parking, concerns about shadowing or loss of views and impact on the availability of affordable housing • Community comment on potential solutions to mitigate the issues, or improve the benefit of the development proposal to the broader community and/or City • A final community position on the proposed application |
| <p>How will information be used in the decision making?</p> | <ul style="list-style-type: none"> • To ensure that all key issues are considered in reviewing DC2 rezoning applications • As input to staff in preparing recommendations to Council • As input to Council when they consider whether to approve an application with or without conditions, or to refuse the application. |

Public Involvement Methods Strategy

| <i>Summary of Worksheet IV and Stakeholder Identification Strategy/ Public Involvement Methods Strategy</i> potential Participants | Proposed Level of Involvement (Information Sharing, Consultation, or Active Participation) | Involvement Strategy |
|--|--|---|
| <p>Members of Community Leagues and the general public in neighbourhoods for which DC2 rezoning applications on Large Residential Infill Sites have been submitted, or residents of adjacent neighbourhoods who may be affected.</p> | <p>Information Sharing, Consultation</p> | <ul style="list-style-type: none"> • Consultation on proposed DC2 rezoning applications on large sites through the use of: <ul style="list-style-type: none"> ○ community wide public meetings ○ ongoing working meetings with “Community Working Groups” ○ Community to identify representation on the Working Group • On rezoning proposals that may have a significant impact on a neighbourhood, the City may initiate a Site Vision and Context Plan process in consultation with affected neighbourhoods. |



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| | | <ul style="list-style-type: none"> • The Large Site Rezoning Process sets out: <ul style="list-style-type: none"> ○ the minimum number of community wide meetings to be held at specific points throughout the process • Community Working Group meetings that are intended to ensure that an opportunity for ongoing input is provided to the Community <ul style="list-style-type: none"> ○ the criteria for determining the planning process, and hence the level of involvement of the community ○ the types of information to be provided to the community ○ the role of City staff in assisting the community in participating in the process |
|--|--|---|

Special Outreach Strategy

See Tips for Outreach (p. 15)

| Public requiring Outreach | Strategy |
|---|--|
| <p>Affected neighbourhoods, and residents of adjoining areas who may not be aware of the development proposal, or those who may be affected in the longer term if a rezoning application is approved.</p> | <p>The City Planning and Development Department is assigned the responsibility of ensuring that all affected neighbourhoods are involved in the community wide meetings and in determining whether or not a Site Vision and Context Plan preparation process is required prior to processing the rezoning application.</p> |

Resource Strategy

Summary of Public Involvement Resource Strategy

Public Involvement Budget

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|-------------------------------------|--|
| Staff/Contractors | Staff will need to seek Council support for additional resources to implement the Public Involvement Program; it is proposed that the fee structure for rezoning applications be revised to provide the source of funds. Some activities, such as plan preparation, could be contracted out and some activities such as meeting facilitation could be assigned to other departments. |
| Technical information and materials | Included in Departmental budgets |
| Communication | Costs of notification to be included in identification of total estimated resource requirements to implement the process |
| Logistics | Costs of logistics to be included in identification of total estimated resource requirements to implement the process |
| Participant Expenses | N/A |

Staff time for

| | |
|----------------------------------|---|
| Event planning and participation | Costs of event planning and participation to be included in identification of total estimated resource requirements to implement the process. |
| Special meetings | Costs of special meetings to be included in identification of total estimated resource requirements to implement the process |
| Communication with stakeholders | Costs of stakeholder communication to be included in identification of total estimated resource requirements to implement the process |
| Display preparation | Costs of display preparation to be included in identification of total estimated resource requirements to implement the process |

Data Management Strategy

(Link to Data Tracking Template) See Data Management Tips

| Information gathered | How it will be recorded/managed/integrated into planning considerations |
|--|--|
| Comments from stakeholders at the specific points of consultation identified in the Large Site Rezoning Process will be recorded by staff. | <ul style="list-style-type: none"> The comments will be considered during the development of the final application by the developer, and by staff in reviewing the final application. The final application is to address community and stakeholder comments and the final report to Council is to include a statement by staff as to how the input was addressed. |

Communication Strategy

Communication Strategy Template, Working with Stakeholders and Communication Process Tips, Process Tools and Methods

| Target Audience | Key Messages and timing | Information Sharing Tool |
|--|---|--|
| EFCL , Community Leagues, General Public | <ul style="list-style-type: none"> there will be opportunity for early community input on DC2 applications; there are defined opportunities for public input throughout the process; City staff will lead and manage the public involvement program for DC2 rezoning applications on large infill sites in mature neighbourhoods; technical studies and requirements to be fulfilled by the applicant will be coordinated City wide through a senior staff Development Review Group there are defined criteria for determining whether or not pre-planning is required prior to considering a rezoning application | <ul style="list-style-type: none"> Meetings with representatives of Community Leagues and the general public in mature neighbourhoods; Use of the City and EFCL websites; Use of EFCL newsletter. |
| UDI | <ul style="list-style-type: none"> same messages as above | <ul style="list-style-type: none"> Meetings with UDI Executive Use of UDI website |

Evaluation Strategy

Process Evaluation Strategy, Evaluation and Monitoring Tips

| | |
|---|---|
| <p>What are the indicators of success for the public involvement process?</p> | <ul style="list-style-type: none"> • Support for the process by the public and developers when it is applied to specific rezoning applications • a reduction in conflict around consideration of rezoning applications and the resultant delays • the development industry is satisfied with and participates in the revised process |
| <p>What will we measure or evaluate about the public involvement process?</p> | <ul style="list-style-type: none"> • community satisfied that input has been considered in the review of rezoning applications • Council able to make decisions on rezoning applications on basis that all stakeholders have had an opportunity to participate fairly in the planning and consultation process |
| <p>When and how</p> | <ul style="list-style-type: none"> • Staff will raise the question of the level of satisfaction with the process with the involved stakeholders at the end of each rezoning application process. |
| <p>What will we do with the results of the evaluation?</p> | <ul style="list-style-type: none"> • The level of satisfaction with the process on individual applications will be noted in the report to Council. • Improvements will be made to the process on an ongoing basis as a result of feedback from stakeholders who are involved in the review of DC2 rezoning applications which are subject to the process. |