

PROJECT EVALUATION TOOL
FOR
COMMUNITY ASSOCIATIONS

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Summary

Communities have become increasingly active in the development process. They are empowered by different levels of government and by residents to express their opinion about developments in their community. Community associations rely on volunteers with little or no background in development, to review, assess and comment on the development. The study provides a tool to help volunteers with a qualitative assessment of project. It focuses on one building type - narrow lot infill housing in the inner city - since it is the most pervasive and provocative type of development in most established neighbourhoods.

This instrument requires the reviewer to divide a fixed maximum number of points between a set of established *Evaluation Criteria*. The points require a "trade-off" based on the relative merit of each Characteristic to the community. Each Criterion is further subdivided into *Qualitative Characteristics*. Each development proposal is reviewed using these Criteria and Characteristics. Points are then assigned for each quality of the proposed project. The relation between the maximum score per Characteristic and the assigned score for the project is a measure of the compatibility between the values of the community and the proposal. The *Compatibility Index* is a summary of this relationship. It permits the community to arrive at a decision on the worthiness of a project based a quantitative analysis. The Project Evaluation Tool is amply illustrated with various examples of each different features to provide a visual checklist of the characteristics from life.

Résumé

«Instrument d'évaluation des projets à l'intention des organismes communautaires»

Les collectivités participent de plus en plus activement à l'aménagement de leur territoire. Elles se voient confier, par les différents paliers de gouvernement et par les résidents, la responsabilité de commenter les projets d'aménagement qui les concernent. Les organisations communautaires dépendent de bénévoles, qui ont peu ou pas d'expérience dans ce domaine, pour examiner, évaluer et critiquer les propositions. L'étude fournit à ces bénévoles un instrument leur permettant de procéder à l'évaluation qualitative d'un projet. Elle s'intéresse surtout à un type de construction, soit la construction intercalaire sur une parcelle étroite dans le centre des grandes villes, parce qu'il s'agit du mode d'aménagement le plus fréquent et le plus menaçant dans la plupart des quartiers établis.

Pour utiliser cet outil, l'évaluateur doit répartir un nombre maximum de points entre un ensemble défini de critères d'évaluation. La méthode comporte un échange de points entre les différentes caractéristiques selon leur mérite respectif pour la collectivité. Chaque critère est ensuite partagé en caractéristiques qualitatives. Chaque proposition d'aménagement fait donc l'objet d'une évaluation fondée sur ces critères et ces caractéristiques. Le projet reçoit alors des points pour chacune des qualités qu'on lui reconnaît. Le rapport entre la note maximale par caractéristique et la note reçue par le projet donne une mesure de la compatibilité de la proposition avec les valeurs de la collectivité. L'index de compatibilité constitue une synthèse de ce rapport. Il permet à la collectivité de prendre une décision sur la valeur du projet fondée sur une analyse quantitative. Chacun des éléments de cet instrument d'évaluation fait l'objet de nombreux exemples, ce qui permet de disposer d'une liste de vérification des caractéristiques que l'on rencontre dans la réalité.



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INTRODUCTION

Need for this study

The author of this paper has been involved in the community participatory process for the past five years, both as a representative of the community and of client groups. During this time it became evident that the municipal process of development approval, while outwardly straightforward, can confound the uninitiated.

Community associations often set up a development review panel or committee for their community. These committees usually rely on volunteer help. A few may include planning or design professionals. However most volunteers have little or no experience in urban design, planning or development.

Infill housing is a generic term that applies to any residential development that is built within an existing housing stock, and was much discussed in the seventies as a means of rejuvenating inner city neighbourhoods. Narrow lot infill¹ development is a more recent phenomenon in some urban centres. Consequently it is not unusual to find resistance from established residents. This is usually based on a lack of understanding of the potential of this type of development. Opposition is usually motivated by perceptions about reduction of property values, an increase in on-street parking, shadowing, absentee landlords, and incompatibility with the established pattern of single-family housing stock already on the block².

This evaluation tool is intended to help increase understanding by indicating important attributes, and placing a value to the community on them. This may help communities demand a better development.

Scope of Project

This Project Evaluation Tool³ has been developed to deal with narrow lot single-family detached infill housing. This limitation is partly to satisfy the funding criteria, and partly to provide an instrument that is suitable for immediate use. With minor modifications the scope of this instrument can be modified for other housing types, by altering the blend of attributes. The concept can also be adapted to other project types, such as commercial developments, but the attributes need to be substantially redefined.

Layout

Chapter Two of this document gives background information from the literature on the importance of participation in the public approval process. Chapter Three describes the idea of trade-off methodologies as information collection tool.

Chapters Four and Five are the foundation of this document. Together they form the Project Evaluation Tool. Reviewers wishing to use the Project Evaluation Tool immediately may skip to these chapters.

COMMUNITY PARTICIPATION IN URBAN PLANNING DECISIONS

Communities and Neighbourhoods

A lot has been said about the importance of the neighbourhood in urban life. Greely (1977, 45) argues that they are a good thing. They " . . . make important contributions to urban life and in their absence the city becomes dehumanized . . . " He also argues that social policy should ensure that the old ones are not destroyed, and not stand in the way of new ones. The boundaries of the neighbourhood are the boundaries of an important segment of one's life. It represents one's turf, the place where one lives with one's family and friends. It is the place where one goes to be "safe", where one will be with one's own kind. Suttle argues that neighbourhoods counteract the personal anonymity of urban life. For some segment of the psycho-physical environment one does not need to be on the alert for signals and cues that suggest danger, hostility, dislike, indifference, contempt (Greely, 1977). The neighbourhood simply is a place where contemporary humans live, experience and organize the physiological and psychological rhythms of their lives, rhythms that are enmeshed with that of the physical place (Greely, 1977).

Communities are made by people, neighbourhoods by buildings and spaces. The relationship is explained admirably by Greely:

"Buildings, of course, no matter how colourful, how beautiful, or how historic, can never be as important as people; and the preservation of neighbourhoods cannot be more important than the successive human communities that inhabit them. But buildings and neighbourhoods do more than just house the people and their community, they also reinforce and celebrate human ingenuity and community resources. *A city which is careless with its homes and its neighbourhoods really does not care about its people and its*

communities.^{4"} (Greely, 1977).

The Role of the Neighbourhood in People's Lives

Physical settings contribute to (personal) development in direct and extensive ways. Proshansky and his associates (quoted in Rivlin) see place-identity as a "... sub-culture of self-identity consisting of cognitions about the physical world in which the individual lives." The significance of the enduring albeit changing contributions of place to the sense of self identity. Other authors argue that whatever the choices, and however little time is spent at home or in the home neighbourhood, the setting and structure contribute to the person's sense of self, if only as a place from which the person aspires to escape. With repeated use and the establishment of social networks, the familiarity of an area can set in place deep roots that connect people to settings, creating powerful sentiments for a place as well as its inhabitants. Even when conditions change, these ties are difficult to break because, for the elders, the setting has become a part of their own lives and identity (Rivlin). Shumaker and Taylor (1983) (also quoted in Rivlin) have defined attachment as a "... positive affective bond or association between individuals and their residential environment."

The Participatory Process

In a democracy, the degree of public participation in urban planning decisions is always a contentious issue. Individuals and groups feel they have a right to be at least involved in decision on issues that they perceive will affect their lives. The industry and the governments argue that although the public has a right to be heard they are the ones having the legal authority, responsibility and liability to act for the common good. Government gets its right by virtue of being an elected body, and the industry by virtue of their experience and by accepting the risk inherent in any development (Perks, 1979).

The participatory process levels out the playing field, so to speak. Community groups counteract the power wielded by the development industry. It has grudgingly come to accept the roles of community representation, though some may still think of them as misinformed, self-righteous groups who cause them delays in getting the project off the ground. Some believe that participation beyond that of elected representatives is superfluous. Some communities have gained much power and try to wrest as much from the developer as possible. Not all decisions taken in the communities' favour have been right. However public participation has also at times exposed ignorant and disgraceful politics (Perks, 1979).

There is also concern about the overall efficacy of this involvement. Does it in the end produce a better product? Is the point of view of the community association indeed represent the community's wishes? Studies in other countries have shown that the effectiveness of this involvement may extend beyond the built

product, and that it affects the self-esteem of the individual in the political process (Churchman, 1987).

All Canadian provinces provide for some form of public participation either as public hearings or appeals in planning enactments and municipal procedures. Municipalities usually supplement these requirements with bylaws that grant opportunities for individuals to be heard on land use-policy issues.

Developments are constantly being proposed throughout urban centres, either by private enterprise or by some level of government. Controversial ones arouse segments of the community. However these are uncommon events in the life of a community.⁵

Community organizations although not usually affiliated to a political party, can be threatening. They can embarrass public leadership and publicize self-interested council politics in a more pronounced fashion than can the politics of independent candidates. Moreover it threatens to loosen the grip of the property industry over urban administrators, since the focal point of most participatory issues is the plans of developers not the plans of the people (Perks, 1978).

The Development Approval Process

Most urban centres in Canada designate types of uses permitted in areas of the city. Although the terminology may vary, all have some form of decision making process that allows debate on **Reclassification of Land-Use**, or on the granting of a **Development Permit**. Usually this involves a public debate preceded by a public advertising process.

Neighbourhoods are permitted by law to form community associations as non-profit societies. They are usually run by a volunteer board of directors elected from the residents of the neighbourhood. These associations run programmes and events for the community such as day-care, sports leagues and seniors dances. More recently community associations have been forming planning committees to scrutinize urban design issues in the community, such as new developments and traffic concerns.

On more routine projects that conform to existing land-use distributions, community associations are given the chance to comment on the development permit application. In some administrations, the community receives a copy of the application automatically, and is expected to comment on it after suitable review. The commentary is not taken lightly. Although the final decision is made by the administration, there usually is some form of appeal to a quasi-judicial body that will listen to the appeal and make a final decision. The opinion of the community association is usually requested at this meeting.

Community Associations and the Development Approval Process

People choose to move to a neighbourhood for many reasons. Besides the lot and the building, they pay for the amenities that come with the area such as bus routes, schools, convenient shopping, parks etc.. This gives them the right to speak on issues that would change those amenities. When these residents elect their community association leaders, they expect them to speak on their behalf. They entrust them with the responsibility of watching over those amenities.

Community Associations also exist as non-profit organizations entrusted with the responsibility of providing services in a community not usually provided by other organizations. As funding deteriorates, governments will rely more on grass roots involvement. Community groups are being consulted more by local governments. For it to be effective in the development review process, a community association must show:⁶

Responsibility: The reviewers must be aware that a review of a proposal for development (whether private or public) involves the expenditure of resources by everyone involved, especially the parties applying. This effort has to be respected. The community must also show fairness. Consistency in reviewing criteria also shows a sense of responsibility.

Understanding: One common complaint that developers have is that community associations do not understand the development review process, or are not competent to comment on the project. It is therefore very important for the association's reviewers to understand their limitations and capabilities set by the process. There is nothing that destroys the credibility of a community more than when a developer is asked to include features that are not within the development scope or within the legal requirements of the application.

Education: Interaction between various communities increases credibility. It provides the exchange information on different issues, forges alliances, and provides a forum for discussion of common problems and solutions.

Ethics: Reviewer members must be aware of potential conflicts of interest. An undeclared conflict of interest by any member will quickly destroy the credibility of the rest of the group.

Communication: Open communication between the developer, the city administration, the politicians and the community is very important.

METHODOLOGY

Gaming Theory and Research Methodology

Gaming is an approach to problem solving that engages a real life situation compressed in time so that the essential characteristics of the problem are open to examination (Sanoff, 1978). Simulation games have been used extensively for research, for teaching purposes and for fun. Some also define a fourth type called a learning game where the individuals playing the game are not controlled but play freely to extract something for themselves (Bowen, 1978).

The application of urban simulation games to a variety of problems has grown enormously since the early sixties. However, in spite of the significant amount of publications in this field, only a handful of games has directly address the urban environment (Robinson, 1987). As Ira Robinson puts it " . . . the utility of such games, for social and especially for urban or environmental design research has largely been ignored, in the various texts and guides on gaming methods." (Robinson, 1987).

Early urban simulation games were developed to convey to students in urban related fields the complex ideas associated with urban systems - their characteristics and processes. This coincided with a change in teaching attitude that reinforced problem solving and involvement among learners (Robinson, 1987). Urban simulation games permitted the "players" to take on different roles and see the consequences (bad) or payoffs (good) of their actions. Environmental games provide a way to engage people in discussion designed to help them to discover their personal differences while the discussion focuses on a particular set of ideas (Sanoff, 1979). The spread in popularity of this approach was aided by the advances in computer technology, by its ability to manipulate larger data bases in a shorter time.

Trade-off Game Method

There is a special type of urban simulation game known as a "trade-off game" whose primary purpose is to identify and quantify (where possible) the trade-off preferences of different groups in a population for various attributes of the environment. Most of these games have been developed for research and data collection. Many of them have been used to simulate public participation and a few have been developed mainly for this purpose. The information and data derived from such games can be used for research purposes in a variety of planning, design and decision making situations (Robinson).

Trade-off games are not games in the literal sense of this word as it is generally used in the literature on gaming. In these games there is essentially one player, the respondent being interviewed or playing the game. Moreover the result of the player's decision does not cause a new situation to which he must respond and make a new decision. Each is a game only in a sense that the respondent's decision depends on the interviewer's actions or questions. However the interviewer's actions are independent of the respondent's decision. The constraint of the player's decisions does not come from the action of an opponent, but are built into the game. Although decision choices are made individually by the player, it is possible to repeatedly alter these choices until some sort of compromise is reached. It is perhaps this feature that gives some justification for calling it a "game". In each game, trade-offs occur in which the player incurs a loss to achieve a greater gain. The result is that the player with conflicting goals, makes "moves" or decisions that ultimately help him to win (Robinson, 1987, 124).

The Idea of Trade-offs

Trade-offs are a fact of everyday life. Underlying the idea of trade-offs is the recognition that resources are limited and that unfortunately not all needs and desires can be met. Choices must be made and priorities have to be established (Robinson, 1987). The idea of trade-offs implies compromises, exchanges, or substitutability between multiple - often mutually exclusive - goals. It reflects the need to give up or sacrifice something to gain something else. In housing, priorities for the public may be different from the priorities for the designer.

Choosing one alternative over another involves assessing the direct or real costs of the alternative, and the indirect or opportunity costs which are the costs or benefits foregone by not choosing some other alternative.

Benefits of Trade-off Games

There are four distinct advantages of the Trade-off Game for planners and environmental designers:

1. They are an excellent learning mechanism, better perhaps than most urban

2. They have immense advantages for getting people involved and participating in the planning and design process;
3. They are a better way of identifying and measuring where possible preferences lie, . . . compared with traditional research;
4. The data derived from such games are a valuable research tool in a variety of planning, design and policy making situations (Robinson, 1987,146).

Selection of Attributes

The attributes chosen to describe the simulation must have:

Degree of Realism: On the one hand it must be absolutely realistic, or the respondents may not take the game seriously, and not provide meaningful responses. (Robinson, 1987,155)

Reality of costs: ranking on preference relies on cost so they must be as close as possible to reality.

"**Existing** as well as **preferred levels of quality** should be identified in order to determine the direction and magnitude of desired change. Thus to ask a person in the abstract what they most desire might provide quite a different ranking and often a less realistic one, than to inquire about their preferences in terms of improving their existing situations. This point to the utility of starting with the **attribute** levels that are currently available, used, or experienced by individuals so that respondents can use their existing situations as a bench mark" (Robinson, 1987)."

This shows the magnitude and direction of the change involved in the compromise.

Bias: In deciding the price for an attribute, the cost established should not prejudice the quality of the attribute in the eyes of the respondent.

"The difficulty (of complexity) can be minimized . . . by offering respondents the opportunity to reexamine their choices after their initial trade-offs are made (Robinson, 1987)."

The number of attributes varies in past games from a minimum of 4 to a maximum of 34. The greater the number of attributes, the greater is the difficulty in administering the game.

"The trade-off instrument should have enough attributes to ensure that important ones are represented for at least major population groups to be investigated Both quantitative and qualitative attributes are to be included.

"Determination of the specific attributes to be studied . . . can be assisted by a review of the literature, open ended pilot surveys of the population groups, and expert opinion, brainstorming, or even simplified versions of the Delphi technique" (Robinson, 1987,153).

In spite of this realism, different respondents still might hold different interpretations of the attributes.

4

THE PROJECT EVALUATION TOOL

Assumptions

This instrument is designed to assist anyone involved in the community development approval process. It is based on the assumption that no development is ideal. Therefore any evaluation should acknowledge the limited resources available on the project and measure it accordingly. No developer has unlimited resources to fulfil all the community's requirements and desires. At the same time communities must strive to obtain the best development.

Specificity To Infill Housing

This Project Evaluation Tool was developed specifically for inner city single family narrow lot infill houses in an attempt to make the study more manageable. Infill housing is any single family residential development that is built within an existing housing stock. This project is intended to help increase the understanding of this building type and increase the fit between the new projects and the existing urban stock.

Variations on the Instrument

Other projects, such as larger lot infills and small commercial and institutional projects can also be measured by this instrument. Bigger projects introduce a level of involvement that may require the help of professionals in assessing it. While most of the evaluation criteria may apply, others would have to be added. Moreover the graphic material would have to be replaced.

Reviewers should consider this a working document. It is intended to be expanded, condensed or altered to suit the needs of each community as needed.

Description of the Project Evaluation Tool

The following evaluation instrument has two components: the **Evaluation Criteria** and the **Qualitative Characteristics**.

The Evaluation Criteria fall into three broad categories: **Site Development**, describing the development around the building, **Massing and Form**, describing the building, and **Detailing and Materials** dealing with the details of the building. In addition, a section on **Bylaw Information** precedes the evaluation instrument to help place the application within the framework of the bylaw. More information on how this review fits in the approval process is described in Appendix A.

The **Qualitative Characteristics** are quality levels for each characteristic. Each Evaluation Criterion is assigned a maximum of three quality levels, for example good, better, best. Each quality level is described in written form and graphically with a built example. It is recommended that the reviewer or group start with these quality characteristics and then replace them with images from their community experience.

The examples in this document are intended to cover the various elements of a project thoroughly⁷. A community may wish to replace or delete some of them to suit their needs, experience and time constraints. Given practice with this document, the graphic material may eventually become redundant. However it is recommended that it not be discarded and that it be passed down from generation to generation of reviewers, embellished, expanded or altered.

Using the Project Evaluation Tool

This evaluation instrument resembles more a game than a checklist or questionnaire. The game is intended to be played in a different way than leisure games, although scores are kept (see chapter three for a comparison with the other games). In this game there are no winners. It can be played by one person or by a group of people such as reviewers appointed by the community association.

Overview

This instrument (see chapter 5) is used in the following way. Start by filling in the bylaw information requirements and summary of compatibility. Then proceed on the Evaluation Characteristics.

Step 1: Choose a fixed number of points to represent the maximum total score of the all the Evaluation Criteria in Chapter 5. This total number of points may be arbitrary⁸. The number, once chosen, cannot be changed.

Step 2: Split this number among all the Criteria. This represents how much each Evaluation Criteria (for example, Street Character) means to you in relation to the other. The total must equal the number in Step 1. If possible the breakdown should be related to the relationship between the real costs of the items. On the other hand, the community may want to put more emphasis on roofs than on, say, wall texture.

If it is found that the total of all numbers exceed the value chosen, at this point the "trade-off" of criteria begins. This trade-off is an indication of how important that criterion is to the community in relation to the others. If it is changed from review to review then the reviewer/s cannot compare values between each project. *Write the numbers assigned to each criteria down in the box next to each Evaluation Criteria labelled Max. Score.*

Now go through each **Qualitative Characteristic** and divide the Max. Score number for each of the three characteristics. This time the numbers do not need to add up to the Max. Score. Rather the best characteristic must be the Max. Score, with lower values assigned to the others. The worst characteristic gets the worst mark⁹.

Step 3: Run a Pilot Test

Select a project from the past that the community feels was a good project and test it with this instrument. The purpose of this test is to ensure that the Max. Score assigned for each Criteria is a reflection of the values of the community. If the distribution of numbers is correct, then the "good" project would be assigned Max. Score numbers on all criteria. If not, then the reviewer/s may want to revisit the Max. Score numbers and reassign them.

Step 3: Evaluate the project.

Upon receipt of a development permit application, usually consisting of drawings showing plans and elevations for the project, review the project using the Criteria in the next chapter. Assigned a score depending on which of the three quality levels are chosen. *Write this number in the Assigned Score box by the characteristic.*

Step 4: Fill in Compatibility Index

Fill in the Assigned Score in the summary sheets. Add up the Assigned Scores and compare them to the total Max. Score. The Compatibility Index is a summary of all the Evaluation Criteria and how they rate against a "good project". It summarizes the degree of compatibility between the desired distribution from the pilot test and the achieved distribution for the project being reviewed. The summary

of the four criteria simplifies the decision making. The community may want to assign a "passing mark" to be met by a development before giving approval. This could be based on the ratio between the Max. Score and the Assigned Score totals. The higher the mark, the higher the standard of development measured by that community's standard. *Fill in the Compatibility Index Summary Sheet and attach it to the file.*

5

PROJECT EVALUATION TOOL EVALUATION CRITERIA

Bylaw Information

The official bylaw document normally carries a longer list of requirements. This simplified checklist is intended to help the reviewer assess quickly how the proposed development conforms to the basic bylaw requirements. Since the requirements vary from municipality to municipality, the bylaw document should be consulted and the list in this section amended as required. Non-conformity with the bylaw requirements normally requires a bylaw relaxation before approval can be given.

Building type

The evaluation criteria in this document only applies to narrow lot single family houses. The other categories, shown in parentheses are included for information only.

Land Use Zoning Designation

Indicate applicable land-use designation. This is for information only¹⁰

Single Family Housing	<input type="checkbox"/> RR1 <input type="checkbox"/> R-1 <input type="checkbox"/> RS-1 <input type="checkbox"/> RS-2
Low Density Housing	<input type="checkbox"/> R-2 <input type="checkbox"/> R-2A
Multifamily Housing	<input type="checkbox"/> R-MH <input type="checkbox"/> R-M1 <input type="checkbox"/> R-M2 <input type="checkbox"/> R-M3
	<input type="checkbox"/> R-M4 <input type="checkbox"/> R-M5 <input type="checkbox"/> R-M6 <input type="checkbox"/> R-M7

Indicate whether proposed development is a permitted use¹¹ under land-use category.

Land Use Zoning Rules¹²

These are development rules that govern the project. The following only deals with the most vital information. Refer to bylaw.

Compare the application information with the bylaw requirements and show whether they conform or not.

	Conforms	Does Not Conform
Front Yard	<input type="checkbox"/>	<input type="checkbox"/>
Side Yard	<input type="checkbox"/>	<input type="checkbox"/>
Rear Yard	<input type="checkbox"/>	<input type="checkbox"/>
Building Height	<input type="checkbox"/>	<input type="checkbox"/>
Lot Width	<input type="checkbox"/>	<input type="checkbox"/>
Lot Depth	<input type="checkbox"/>	<input type="checkbox"/>
Lot Area	<input type="checkbox"/>	<input type="checkbox"/>
Lot Coverage	<input type="checkbox"/>	<input type="checkbox"/>
Parking	<input type="checkbox"/>	<input type="checkbox"/>
Other Regulations	<input type="checkbox"/>	<input type="checkbox"/>

Compatibility Summary - Bylaw Information

	Yes	No
Land Use Designations	<input type="checkbox"/>	<input type="checkbox"/>
Land Use Rules	<input type="checkbox"/>	<input type="checkbox"/>
Overall Compatibility	<input type="checkbox"/>	<input type="checkbox"/>

Notes

Site Development

This section deals with the development around the building, landscaping and other exterior site features.

Lot

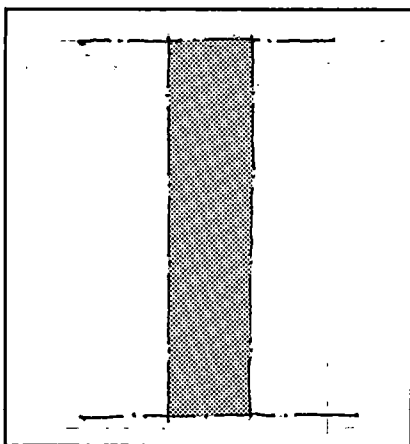
Lot Shape

☐

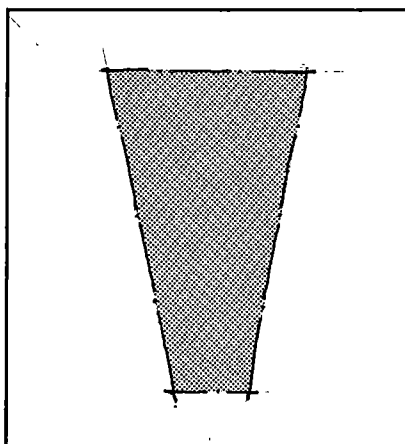
Max. Score Assigned Score

☐

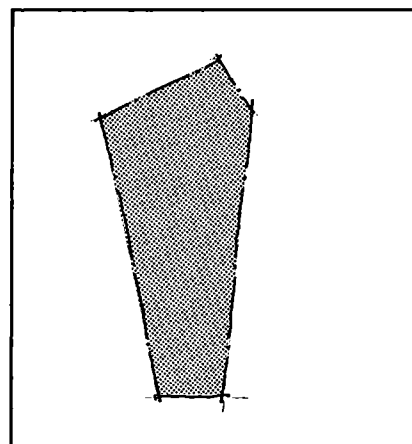
Lot shape may be a factor in this development assessment if it is a difficult site to develop. A difficult site requires a more considerate assessment. Identify lot shape.



☐ Regular



☐ Pie shaped



☐ Irregular

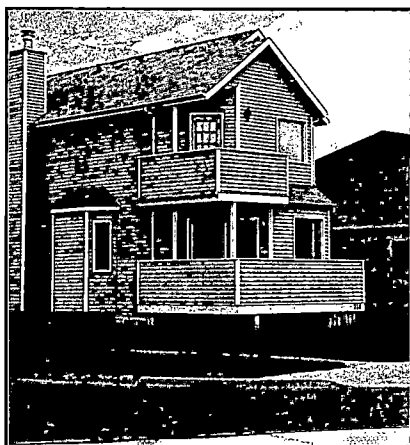
Location on the Block

☐

Max. Score Assigned Score

☐

Corner lots are more prominent therefore require more attention. Developments on cul-de-sacs are usually more exclusive. Identify where the location is on the block.



☐ Corner



☐ Middle



☐ Cul-de-Sac

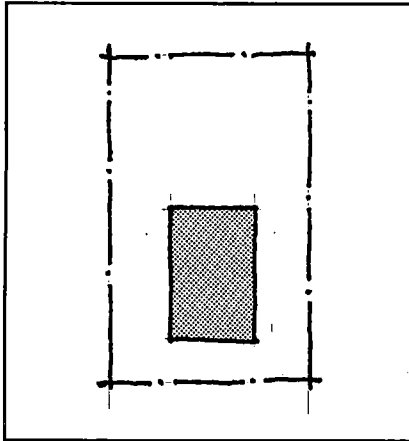
Lot Coverage: Relationship of Built to Unbuilt Space

☐

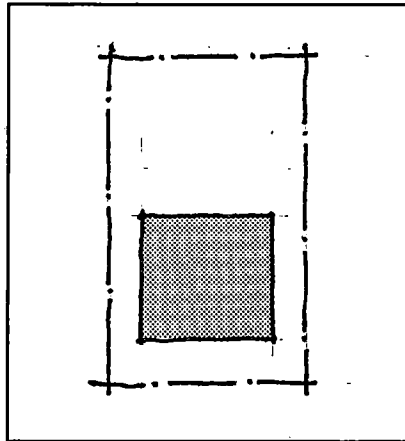
Max. Score Assigned Score

☐

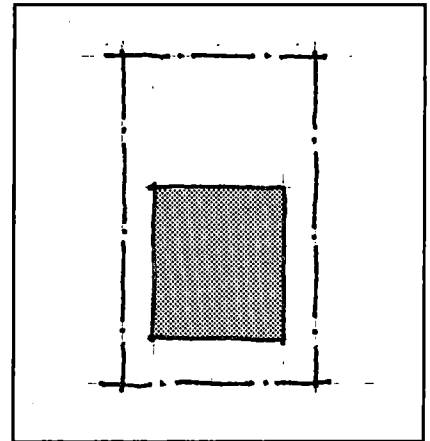
This reflects the amount of outdoor area left after development. A large site coverage usually results in large buildings. Large buildings on small lots or next to small buildings are usually detrimental (see the section on scale). Identify the site coverage ratio by dividing the lot area by the footprint area of all the buildings on the site.


☐

Low (less than 20%)


☐

Normal (between 20% and 30%)


☐

High (30% to 45%)¹³

General Landscaping

Treatment of Natural Features

☐

Max. Score Assigned Score

☐

Does this project augment the existing natural features on the site, such as berms, mounds, changes in grade etc.?

No Picture Required¹⁴

No Picture Required

No Picture Required

☐

A lot

☐

Some

☐

Not at all

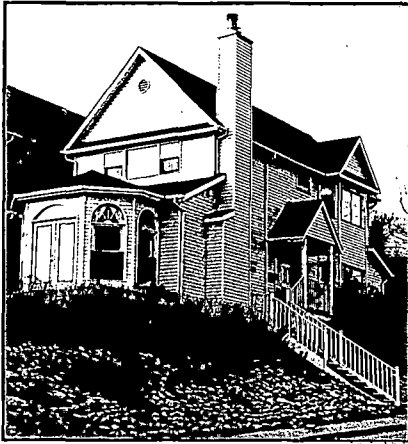
Grade

☐

Max. Score Assigned Score

☐

Grade changes across the site make the development more difficult to deal with. It also may raise the building higher. Assess the lie of the land across the site at the building face.



☐ Raised



☐ Flat



☐ Lowered

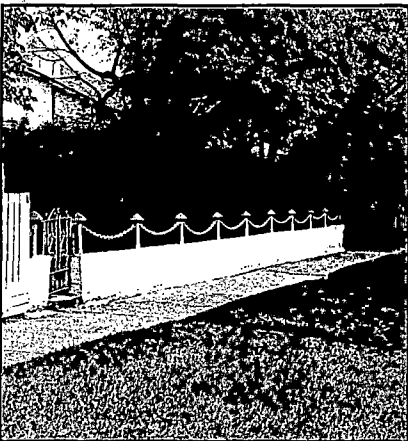
Treatment of Boundary with Neighbours

☐

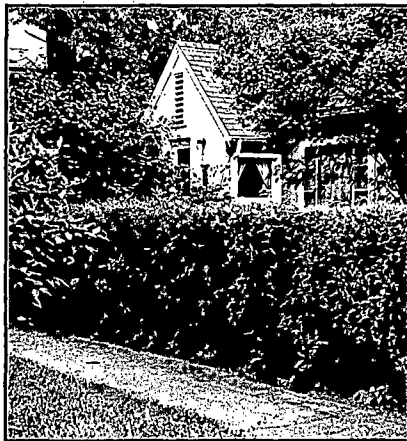
Max. Score Assigned Score

☐

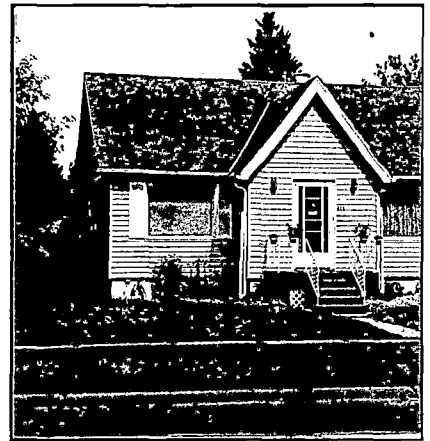
The expression of the property line at the front and sides, is an important characteristic of the development. Determine the type of boundary.



☐ Fences



☐ Shrubbery



☐ None

Soft Landscaping Development

Treatment of Existing Landscaping

☐

Max. Score Assigned Score

☐

Does the development keep existing trees, grass areas, etc.?



☐ All kept



☐ Some Kept



☐ None Kept

New landscaping

☐

Max. Score Assigned Score

☐

Determine the quantity of new landscaping.



☐ Dense



☐ Adequate



☐ Sparse

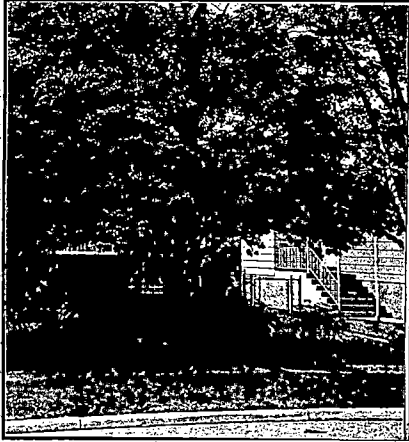
Relationship of Landscaping to Building

☐

Max. Score Assigned Score

☐

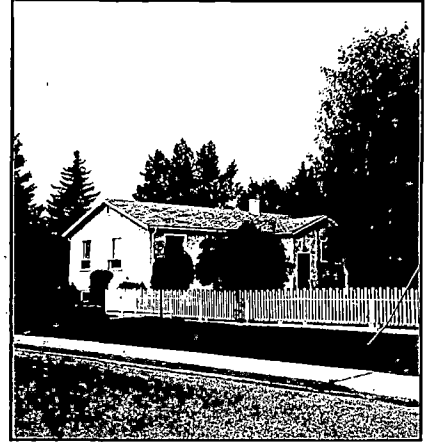
Landscaping that is close to the building will eventually hide the building.
(Sometimes this may be beneficial).

☐

Close To Building

☐

None

☐

Away From Building

Hard Landscaping

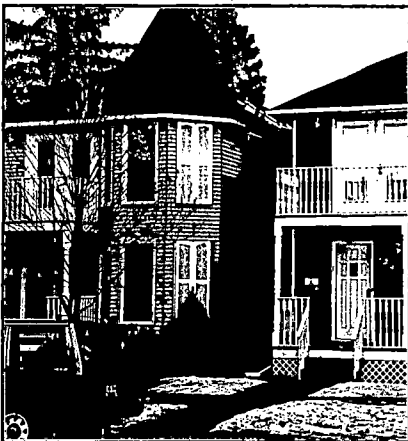
Pathways

☐

Max. Score Assigned Score

☐

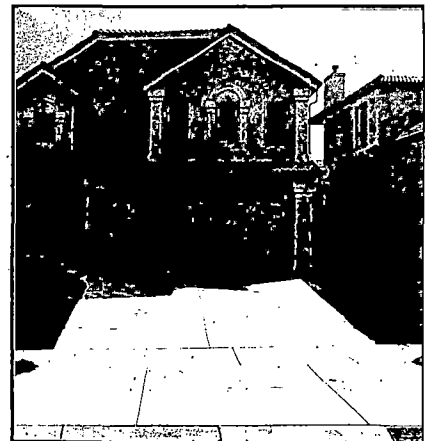
Warm materials are traditionally understood to be natural materials such as stone, brick, wood etc.. Cold materials are usually manufactured materials such as metal, concrete etc.. Materials that mimic natural ones (such as interlocking concrete pavers) are more likely to be warm than cold.

☐

Warm Materials

☐

None

☐

Cold Materials

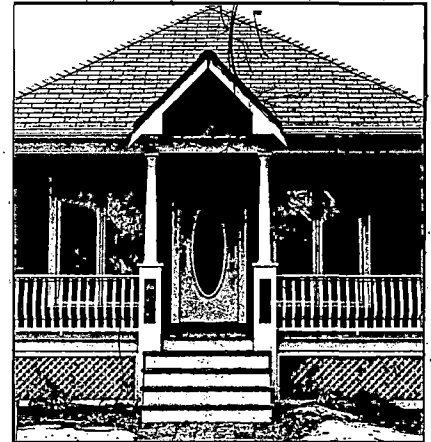
Porches Decks and Patios

☐

Max. Score Assigned Score

☐

Decks and patios make the relationship of the building to the exterior more friendly since they bring human activity outside.

☐

Small

☐

None

☐

Large

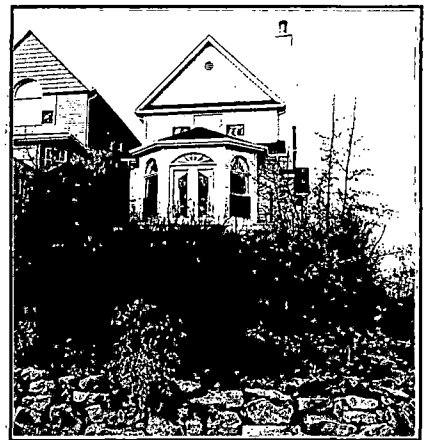
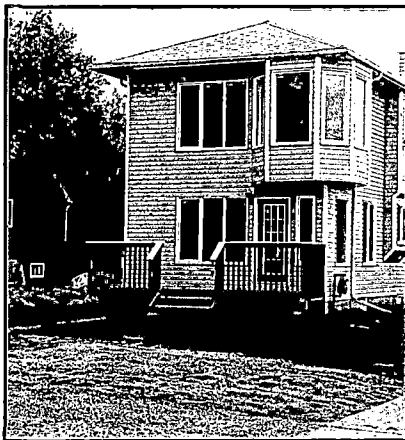
Outdoor Activity Spaces

☐

Max. Score Assigned Score

☐

Determine the amount of Outdoor Activity Areas other than Decks and Patios

☐

None

☐

Small

☐

Large

Environmental Criteria

Climate, safety and privacy attributes are very important to the neighbours and the street.

Shading

☐

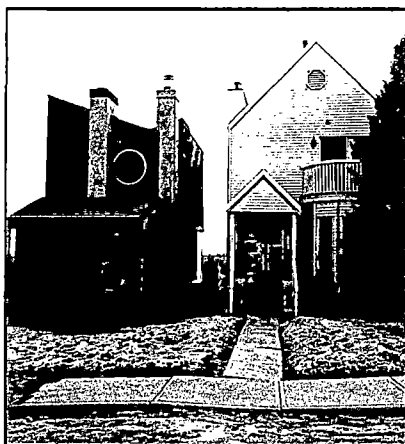
Max. Score Assigned Score

☐

Shading on the street and neighbouring lots are detrimental. Snow takes longer to melt in shaded areas. Shadowing cools buildings causing a greater use of energy to keep the interiors warm.



☐ Severe



☐ Some



☐ None

Wind Protection

☐

Max. Score Assigned Score

☐

Observe the direction of winter and summer winds. Also look for the orientation of the entrances and of outdoor areas. Observe any sheltering by building projections, landscaping, trees, etc.. Does the development improve conditions on the street and neighbours or make them worse?

No Picture Required

No Picture Required

No Picture Required

☐ Improves

☐ No Effect

☐ Makes It Worse

Safety

☐

Max. Score Assigned Score

☐

Buildings may create spaces around them that are out of sight to a passerby or owners. Under certain conditions it may make the development unsafe. In other conditions high visibility from the building may improve safety in the area. Look for visibility from the street or neighbours, "dark" areas etc..

No Picture Required

No Picture Required

No Picture Required

☐

Improves

☐

No Effect

☐

Makes It Worse

Privacy

Street

☐

Max. Score Assigned Score

☐

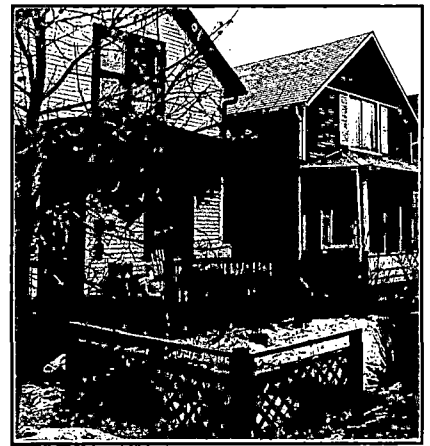
Bylaws usually do not allow high fences onto the street. Buildings that are set back on the site may be using distance to achieve privacy. Privacy from adjacent roadways, public paths on higher ground, etc. may be a factor in the way the building is located on the site. Determine the desired level of privacy from the street to the building after this project is built.


☐

Very Private


☐

Private


☐

Not Private

Neighbours

☐

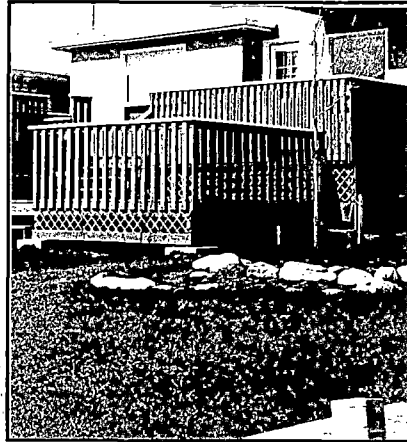
Max. Score Assigned Score

☐

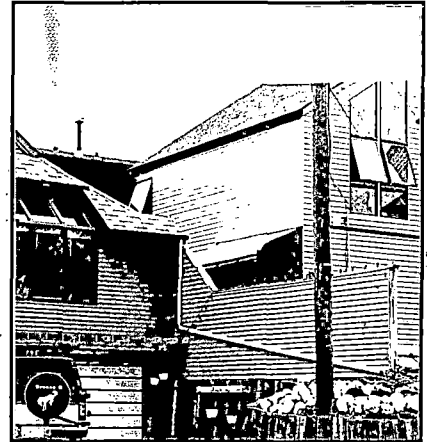
Narrow lot infills are usually higher than and closer to adjoining houses. Consequently, the location of balconies, decks, windows doorways and entrances, in relation to those on the neighbouring building are very important. Together they determine the degree of infringement on the neighbour's privacy. Determine how the new development affects privacy of neighbours.


☐

Not Private


☐

Private


☐

Very Private

Required Parking

This does not apply to street parking. Covered parking on the street side may conflict with street character of adjoining properties. Determine the location of on-site required parking.

Front

☐

Max. Score Assigned Score

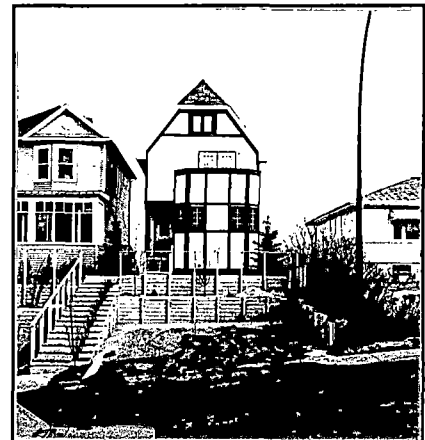
☐

☐

Covered


☐

None


☐

Open

Back

☐

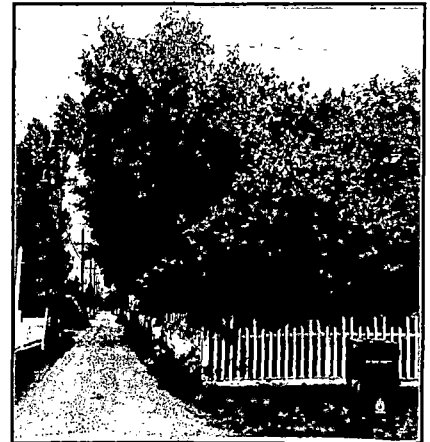
Max. Score Assigned Score

☐

☐ Covered



☐ Open



☐ None

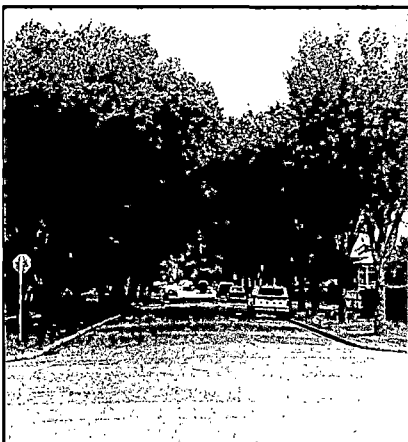
Street Character

This section determines the compatibility of the development with an existing street character. Determine the existing "street character". How does the development change the character of the street?

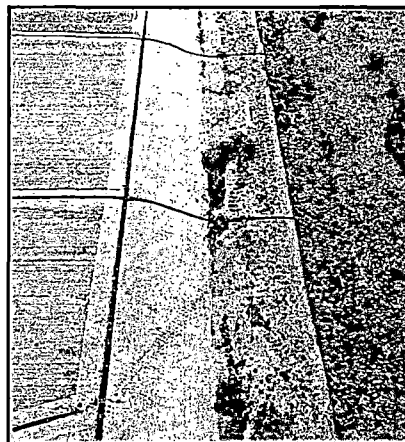
Type of Sidewalk

☐

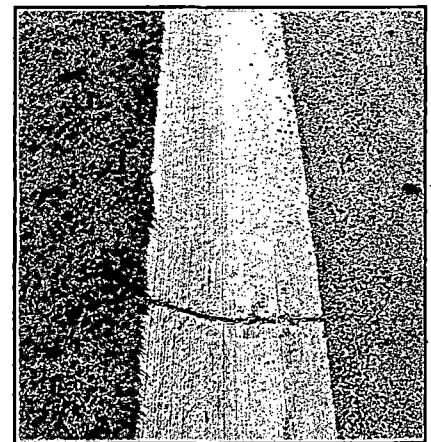
Max. Score Assigned Score

☐

☐ Grassed and Treed
Boulevard



☐ Sidewalk with Curb
and Gutter



☐ Curb and Gutter Only

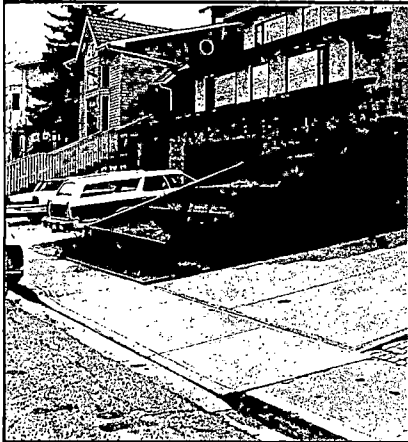
Front Drives on Existing Street

☐

Max. Score Assigned Score

☐

Wide front drives leading to a garage at the front of the are usually a suburban solution, since suburbs are usually laneless. Inner city laneless lots may require this solution. Investigate compatibility of this solution with existing developments on this street.



☐ Many

☐ Some

☐ None

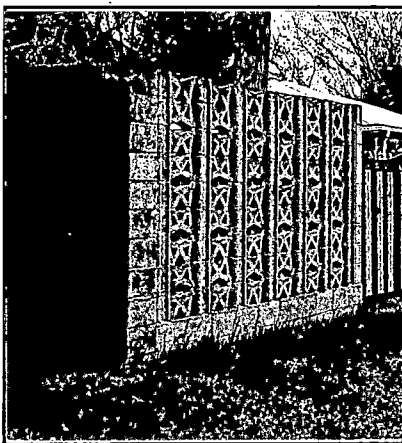
Edge Treatment at Property Line of Adjacent Properties.

☐

Max. Score Assigned Score

☐

Soft implies shrubbery .Hard implies fences (Do not confuse this with Landscaping Characteristic earlier).



☐ Soft

☐ Hard

☐ None

Relationship of Building Height to Surrounding Buildings.

Max. Score Assigned Score



☐ Higher



☐ Same



☐ Lower

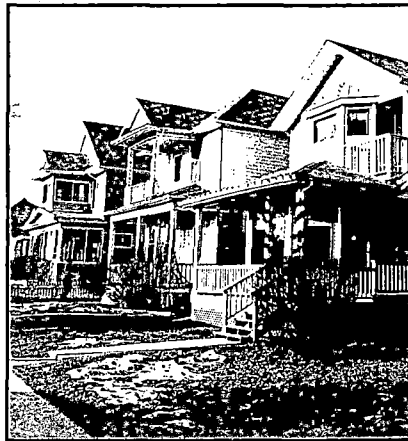
Alignment of Building Fronts

Max. Score Assigned Score

Relationship of location of new building face to other buildings on the block.



☐ Set Back



☐ In Line



☐ Forward

Views To the Building

☐

Max. Score Assigned Score

☐

A development on a prominent site will have a greater impact on the community then on a less prominent site.

☐

Prominent

☐

Ordinary

☐

Non-Existent

Views From the Building

☐

Max. Score Assigned Score

☐

Does the development make use of any views from the site in the way it is located on the site? Does the project impede any views?

No Picture Required

No Picture Required

No Picture Required

☐

Enhances Views

☐

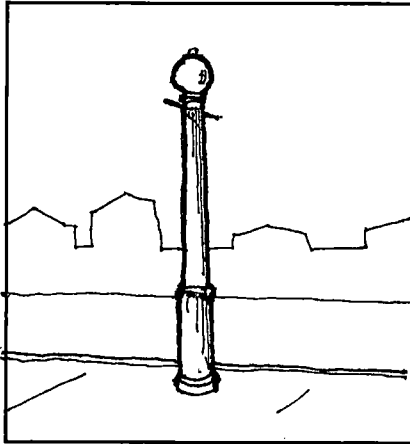
Same Views

☐

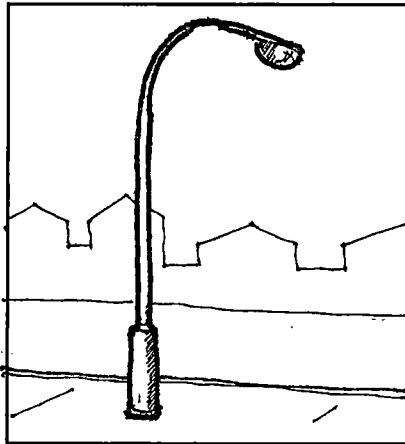
Impedes Views

Street Furniture

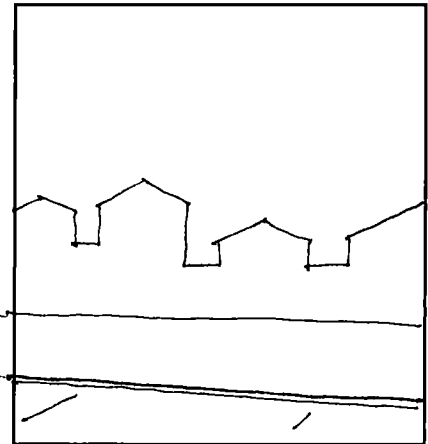
<input type="checkbox"/>	Max. Score	Assigned Score	<input type="checkbox"/>
<p>Street furniture refers to lamp standards, benches and other similar additions that may occur with the development. These may enhance the project and the street.</p>			



☐ Special



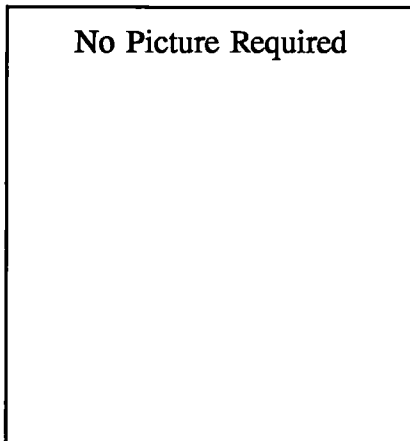
☐ Regular



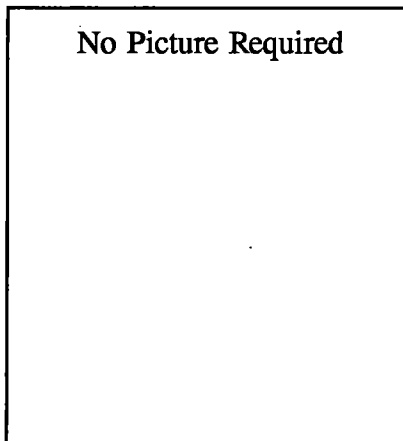
☐ Non-Existent

On-Street Parking

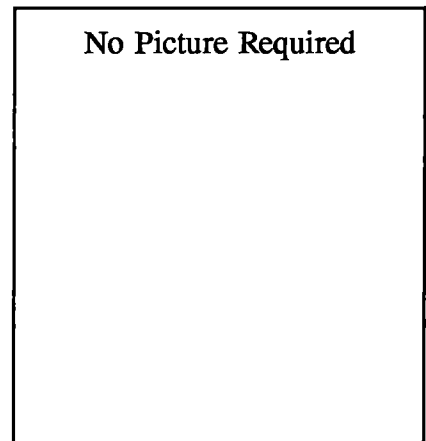
<input type="checkbox"/>	Max. Score	Assigned Score	<input type="checkbox"/>
<p>Higher density developments cause a change in on-street parking conditions. Although the site may have adequate parking at the rear, there is a tendency to park on the street during the day. Narrow lot infills do not provide space for more than one vehicle on the property frontage.</p>			



☐ Public



☐ Timed Restriction



☐ Residents Only

Friendliness of Building

☐

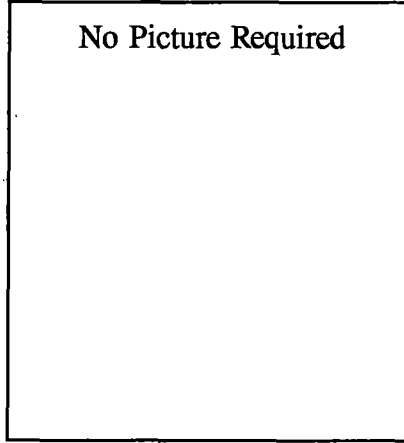
Max. Score Assigned Score

☐

Friendliness is a human trait that is sometimes project over to inanimate objects. A "friendly" building is one that extends aspects of the human traits on people approaching it, such as a feeling of welcome, easy access, safety etc, all combined together. This characteristic is usually increased with windows on the street, front doors visible from the street.



☐ Friendly

☐

☐ Unfriendly

Heritage Value

☐

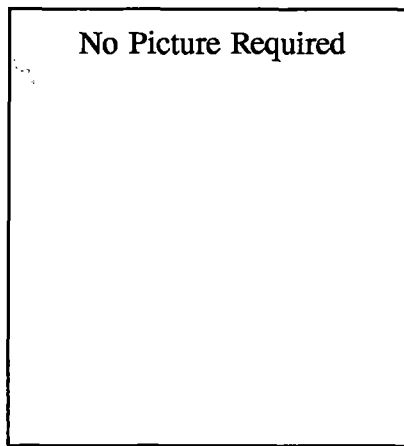
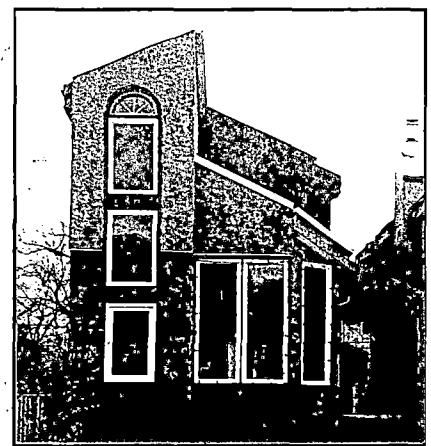
Max. Score Assigned Score

☐

Most infill developments will have no heritage value. This criterion only applies to those developments that may evoke a heritage style, especially those that are required to do so in conformance to an Area Redevelopment Plan.



☐ Some

☐

☐ None

Compatibility Summary - Site Development

	Max. Score ↓	Assigned Score ↓
Lot		
Lot Shape	_____	_____
Location on Block	_____	_____
Lot coverage	_____	_____
General Landscaping		
Treatment of Natural Features	_____	_____
Grade	_____	_____
Treatment of Existing Landscape	_____	_____
Soft Landscaping Development		
Treatment of existing landscaping	_____	_____
New Landscaping	_____	_____
Relationship of Landscaping to Building	_____	_____
Hard Landscaping		
Pathways	_____	_____
Porches Decks and Patios	_____	_____
Outdoor Activity Spaces	_____	_____
Environmental Criteria		
Shading	_____	_____
Wind Protection	_____	_____
Safety	_____	_____
Privacy		
Street	_____	_____
Neighbours	_____	_____
Required Parking		
Front	_____	_____
Back	_____	_____
Street Character		
Types of Sidewalks	_____	_____
Front Drives on Existing Street	_____	_____
Edge Treatment at Property Line of Adjacent Properties	_____	_____
Relationship of Building Height to Surrounding Buildings	_____	_____
Alignment of Building Fronts	_____	_____
Views to Building	_____	_____
Views From Building	_____	_____
Street Furniture	_____	_____
On Street Parking	_____	_____
Friendliness of Building	_____	_____
Heritage Value	_____	_____

COMPATIBILITY INDEX (Assigned Score/Max. Score)	
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Massing and Form

Massing

Massing refers to how the building blocks (such as rooms, roofs etc.) lie on top of one another.

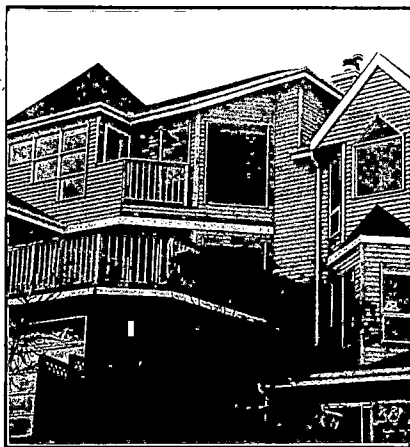
Number of Roofs

The roof is a major building elements. Use this section to determine the effect on the development.

Max. Score Assigned Score



☐ One



☐ Two



☐ Many

Slopes of Roofs

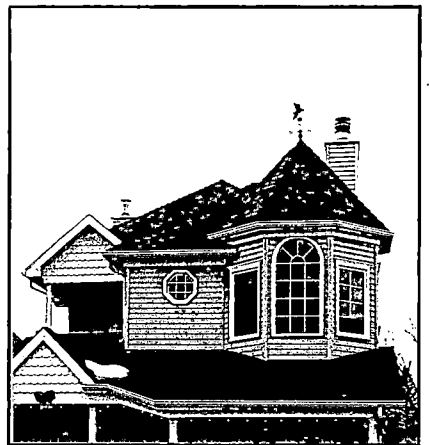
Max. Score Assigned Score



☐ All Same Direction



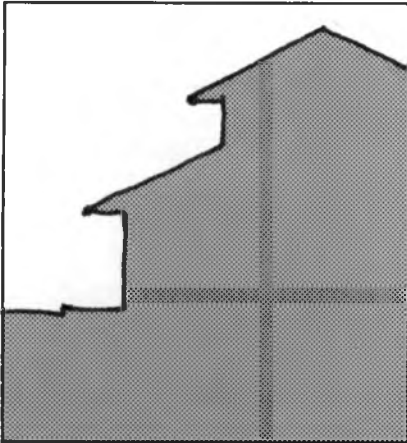
☐ Flat



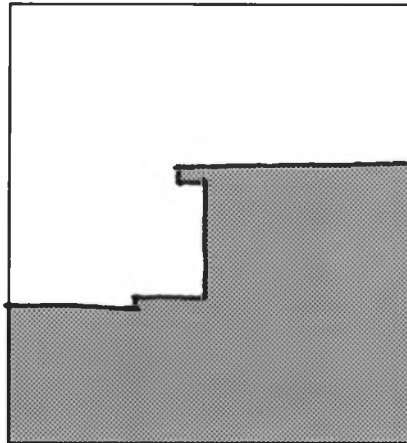
☐ Different Directions

Stepping of Roofs

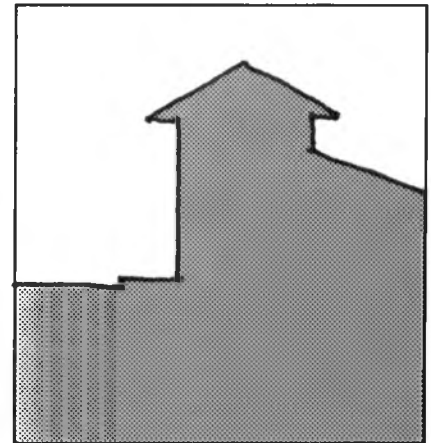
Max. Score Assigned Score



☐ Ascending



☐ Flat



☐ Descending

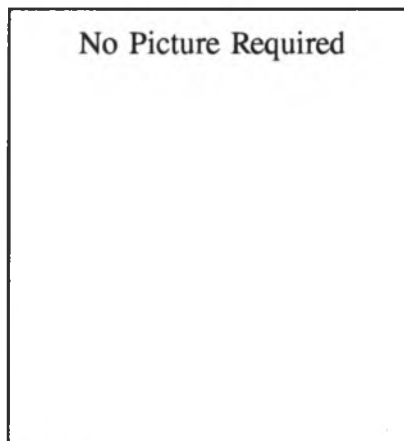
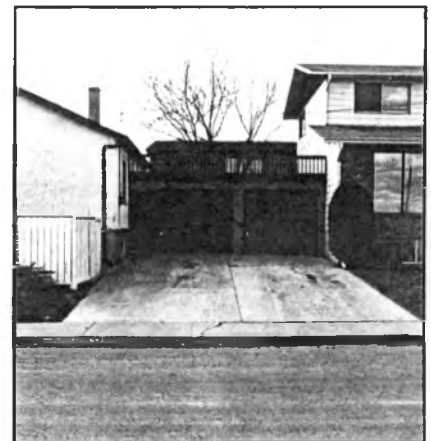
Skyscape

Max. Score Assigned Score

Refers to the profile of the roof against the sky. Varied roof lines are usually more desirable than single straight roof lines. Determine the skyscape.



☐ Varied

☐

☐ Straight

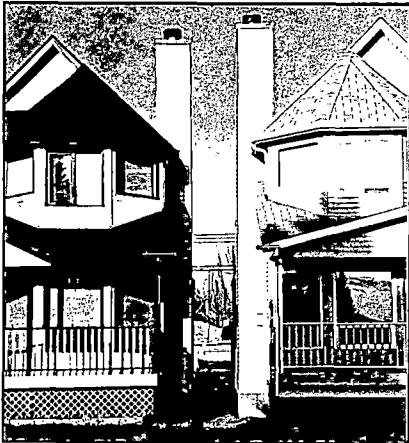
Relationship to Adjacent Roofs

☐

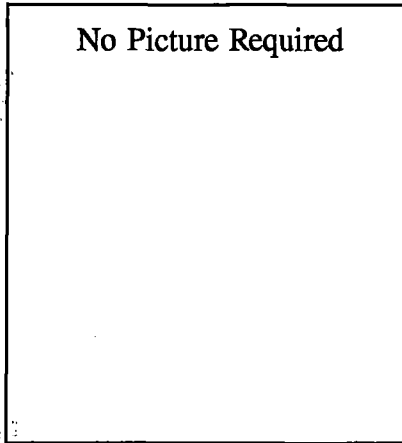
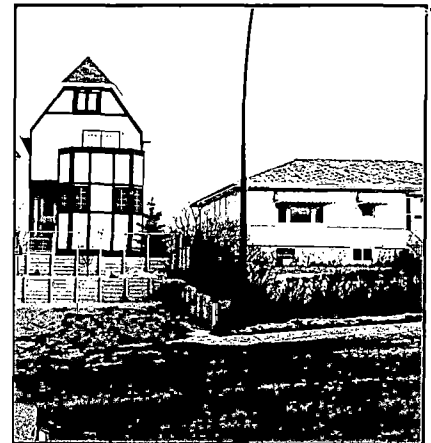
Max. Score Assigned Score

☐

Determine the relationship of new roofs to adjacent buildings.

☐

Same Height

☐☐

Different Height

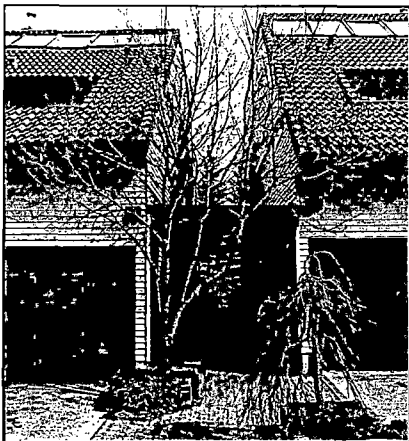
Connected Buildings

☐

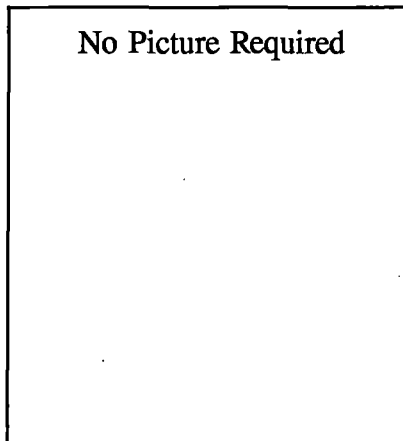
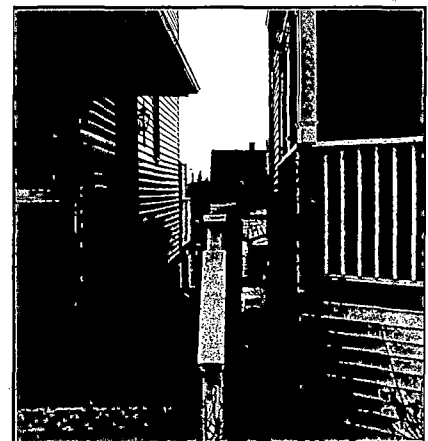
Max. Score Assigned Score

☐

This section only applies to the spaces between buildings. Some developments improve on the use of this space, by creating courtyards, etc..

☐

Useable space
Between Buildings

☐☐

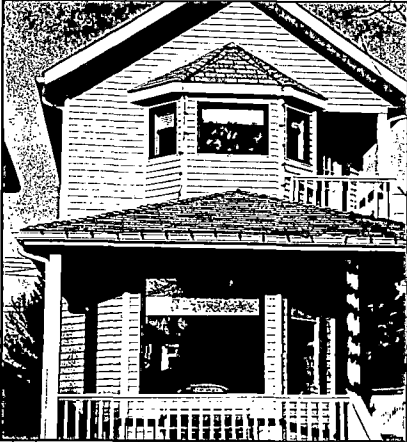
No Useable space
Between Buildings

Form

Form relates to the visible aspect, the external or outward appearance of the building.

Building Style

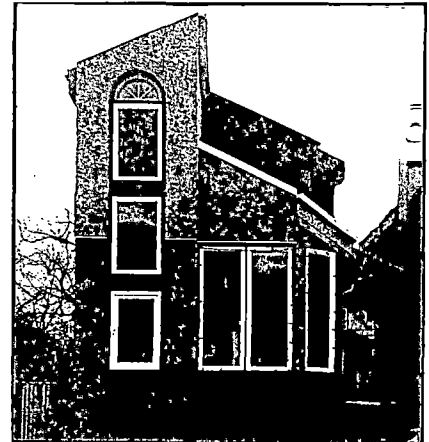
Max. Score Assigned Score

☐

Traditional

☐

Contemporary

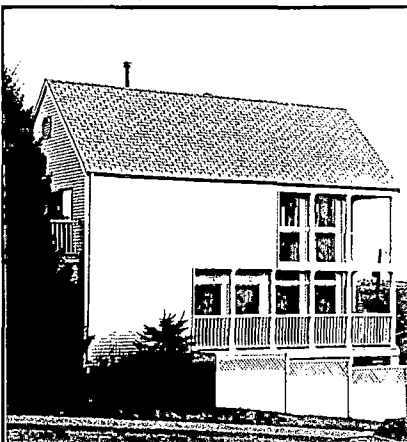
☐

Unusual

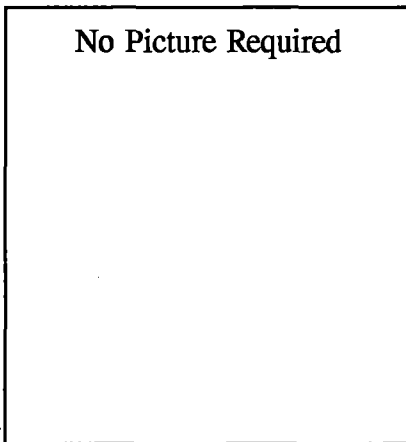
Sense of Order

Max. Score Assigned Score

Integration of parts in whole. Symmetry is one type of sense of order. Window locations that look balanced on the elevation is another. Determine the sense of order.

☐

Ordered

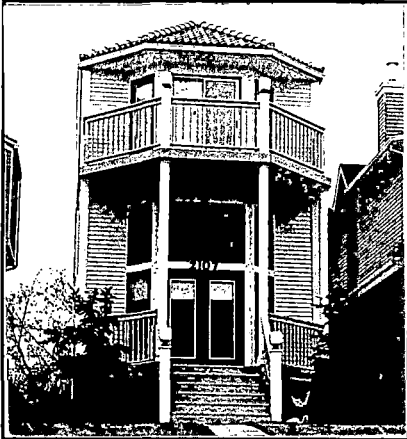
☐☐

Haphazard

Proportions

Max. Score Assigned Score

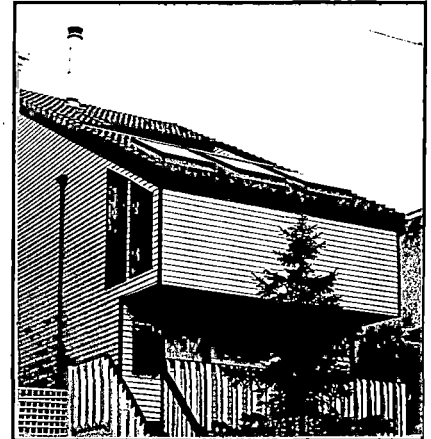
Use this to identify the proportions of the proposed building. Proportions are defined as the relationship between the vertical and horizontal dimensions.

☐

Vertical

☐

Balanced

☐

Horizontal

Doors and Windows

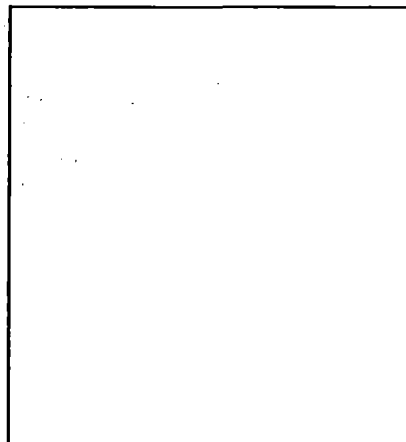
Use this category to determine the effect of the building openings on the facade

Proportions

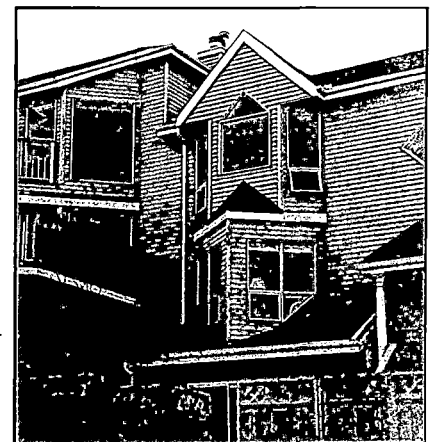
Max. Score Assigned Score

☐

Similar

☐

None

☐

Haphazard

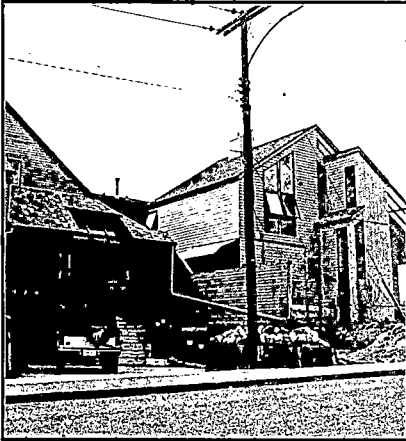
Compatibility of proportions with adjacent Buildings

☐

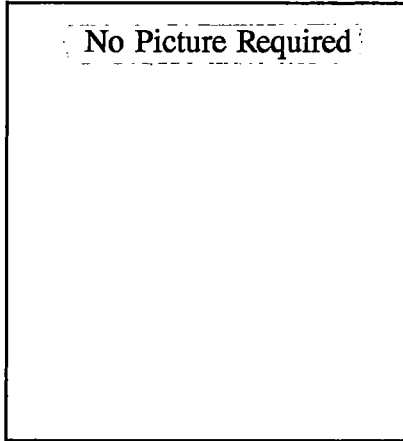
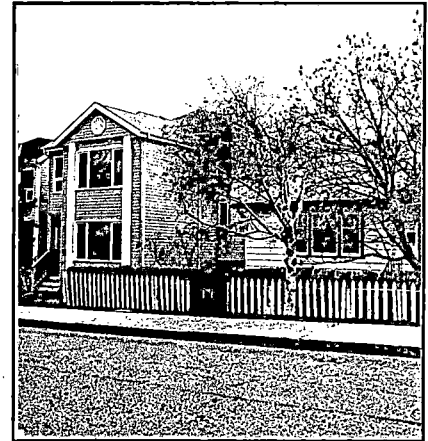
Max. Score Assigned Score

☐

Determine compatibility with adjacent buildings.

☐

Compatible

☐☐

Incompatible

Scale

Scale is the relative or proportionate size or extent between the new development and adjacent buildings.

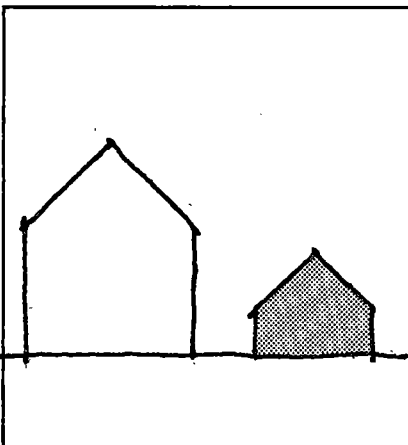
Relationship to adjacent buildings

☐

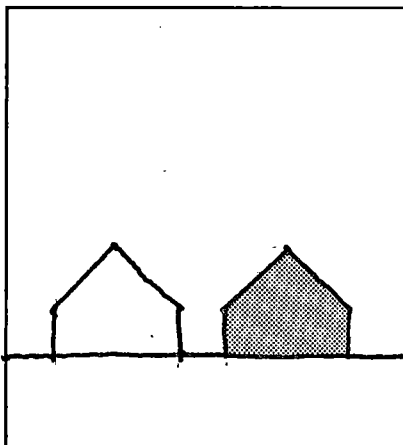
Max. Score Assigned Score

☐

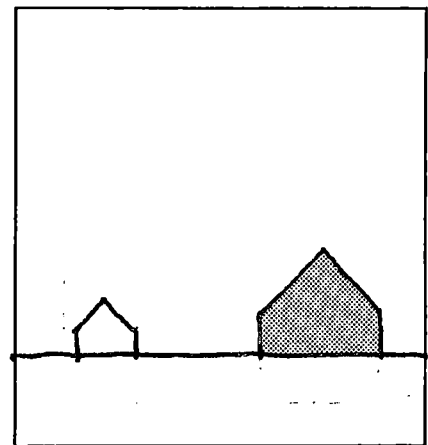
Determine the relationship between the new development and adjacent building

☐

Small

☐

Same

☐

Larger

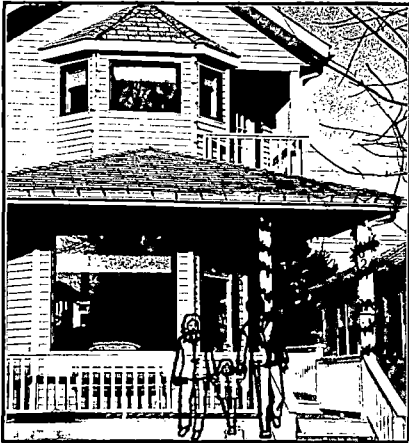
Relationship to People

☐

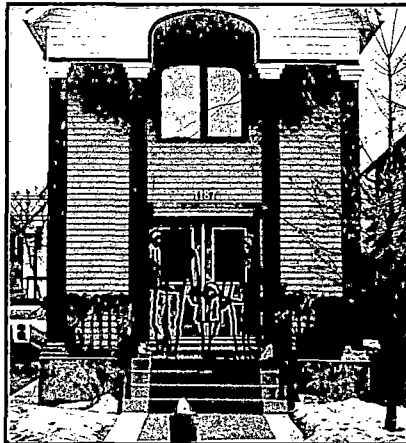
Max. Score Assigned Score

☐

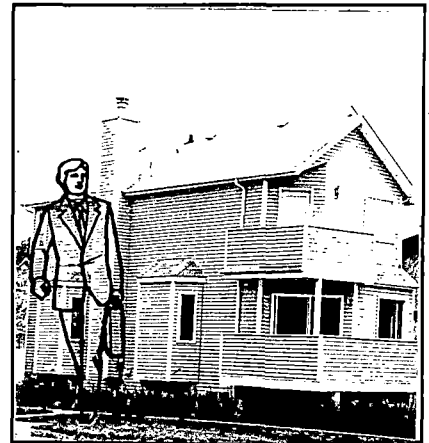
A building which is too large in relation to human beings may be overpowering. Conversely if it is too small it may look better suited for children than for adults.



☐ Overpowering



☐ Comfortable



☐ Diminutive

Other

☐

Max. Score Lot Shape Assigned Score

☐

Insert any other feature here.

☐☐☐

Compatibility Summary - Massing and Form

Max. Score Assigned Score

Massing

Roof Shapes
Slopes and Roofs
Stepping
Skyscape
Relationship to adjacent Roofs
Connected Buildings

Form

Building Style
Sense of Order
Proportions
Doors and Windows
Proportions
Compatibility of Proportions with adjacent Buildings

Scale

Relationship to Adjacent Buildings
Relationship to People

COMPATIBILITY INDEX (Assigned Score/Max. Score)	
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Notes

Detailing and Materials

This section refers to the detailed construction of the building, the materials it is built of, and how the various building elements such as doors and windows, handrails are built in detail.

Detailing

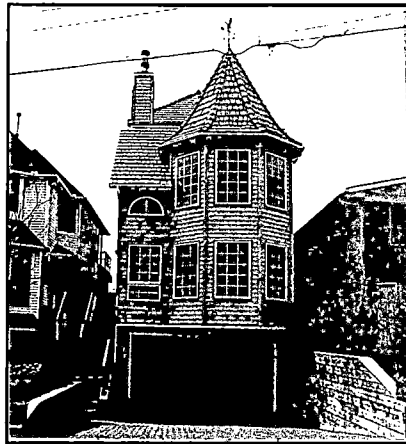
Doors and Windows

☐

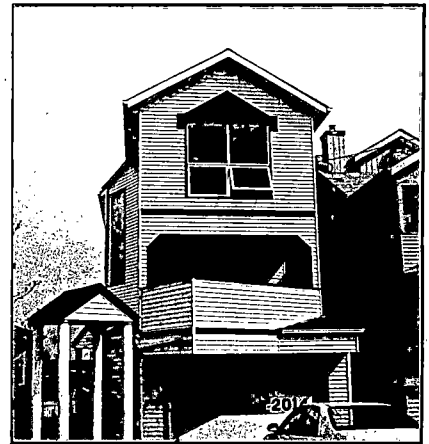
Max. Score Assigned Score

☐☐

Highly Decorated

☐

Some Decoration

☐

No Decoration

Main Entrance

☐

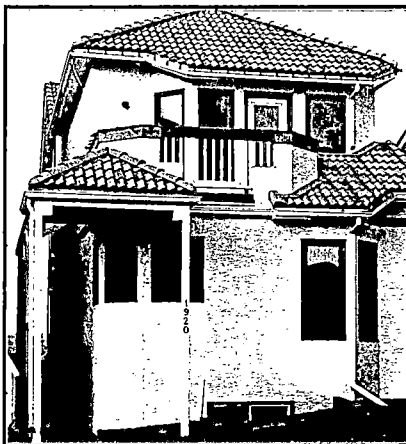
Max. Score Assigned Score

☐

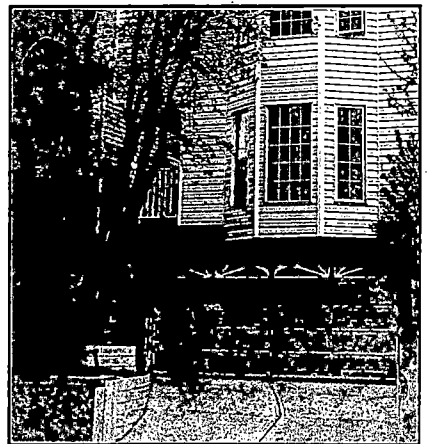
The main entrance is an important building feature.

☐

Prominent

☐

Visible

☐

Tucked Away

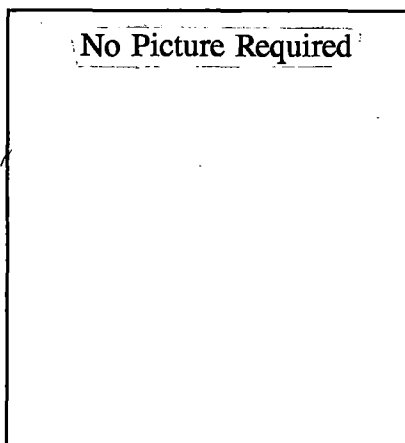
Stair Seats and Porches

☐

Max. Score Assigned Score

☐

☐ Yes



☐



☐ No

Other Building Elements

Look for articulation of expression and craftsmanship in detailing of items such as handrails, fascias, trim, chimneys, etc..

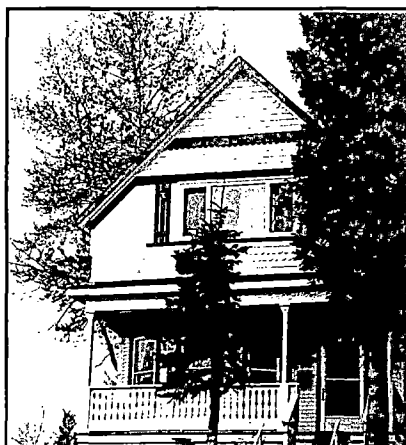
Roof Eaves

☐

Max. Score Assigned Score

☐

☐ Projecting



☐ Normal

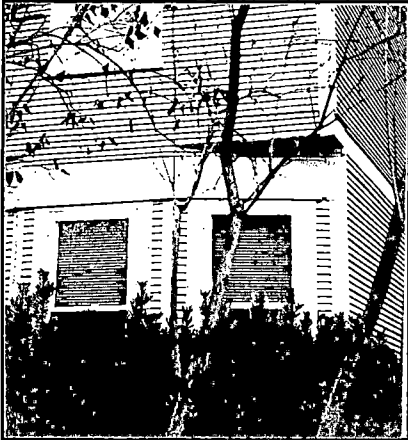


☐ None

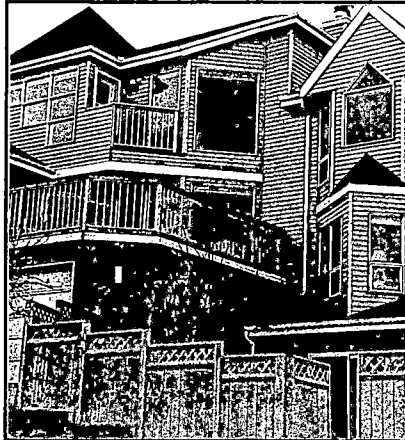
Building Trim

Max. Score Assigned Score

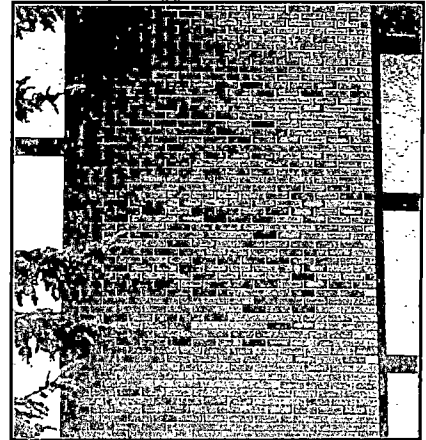
Building Trim describes features around windows, doors etc.



☐ Prominent
Other



☐ Normal



☐ None

Max. Score Assigned Score

Insert any other feature here.

☐☐☐

Materials

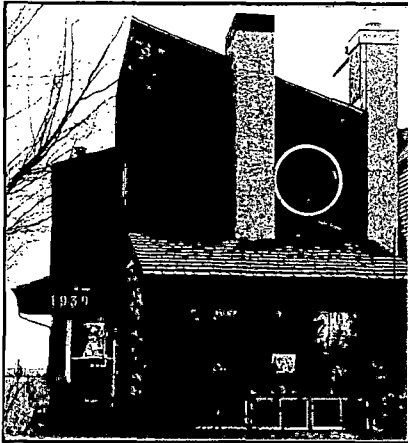
Type

☐

Max. Score Assigned Score

☐

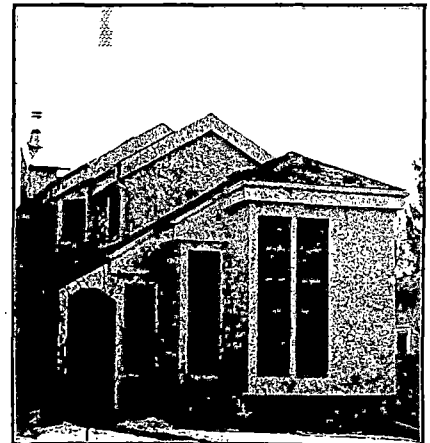
Warm materials are traditionally understood to be natural materials such as stone, brick, wood etc.. Cold materials are usually manufactured materials such as metal, concrete etc.. Materials that mimic natural ones are more likely to be warm than cold.



☐ Warm



☐ Neutral



☐ Cold

Texture

☐

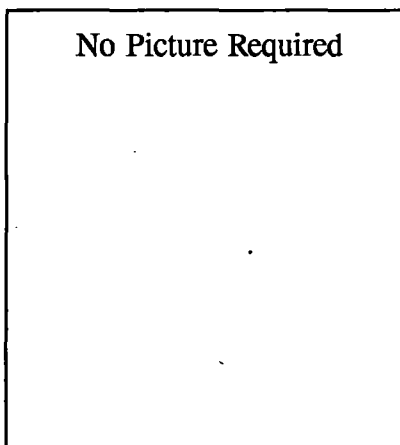
Max. Score Assigned Score

☐

Texture refers to the roughness or smoothness of the materials on the smaller scale. On the larger scale it also refers to the appearance of roughness from a distance. For example, from a distance, siding may give a rougher appearance to the exterior than stucco.



☐ Rough

☐

☐ Smooth

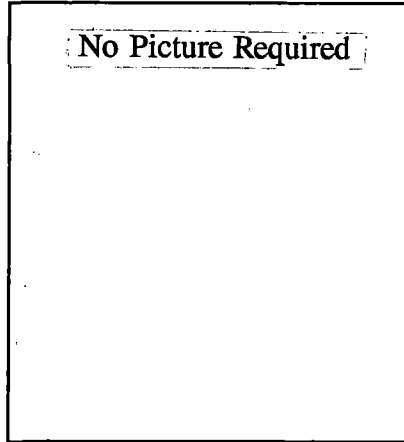
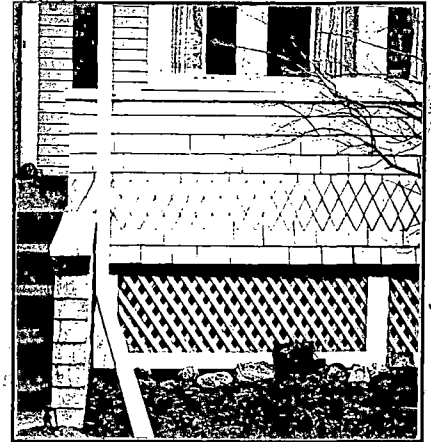
Durability

Max. Score Assigned Score

This can be judged by the level of maintenance required of the material. For example brick requires little maintenance, and will last a long time with little effort. A wood product would not last a long time with the same effort.



☐ Permanent

☐

☐ Impermanent

Compatibility of materials with adjacent buildings

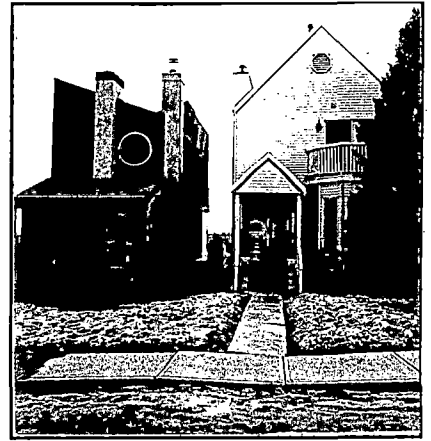
Max. Score Assigned Score



☐ Compatible



☐ Indifferent



☐ Incompatible

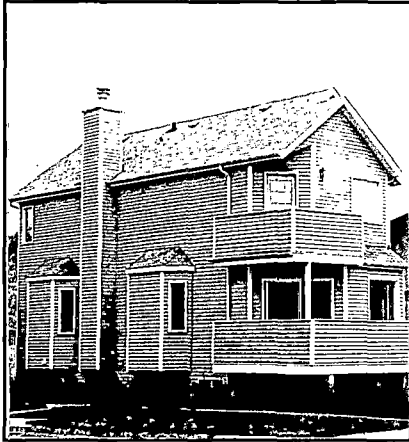
Combination of materials

☐

Max. Score Assigned Score

☐

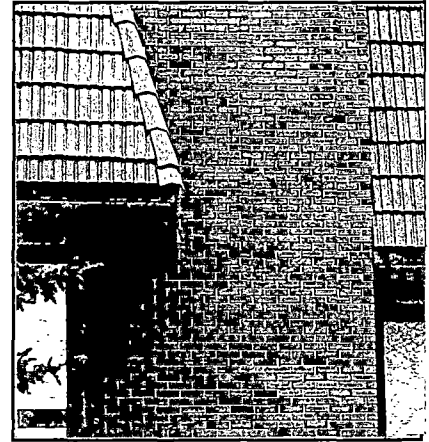
The use of many different materials may give a feeling of uncertainty and haphazardness.



☐ One



☐ A Few



☐ Many

Colour

☐

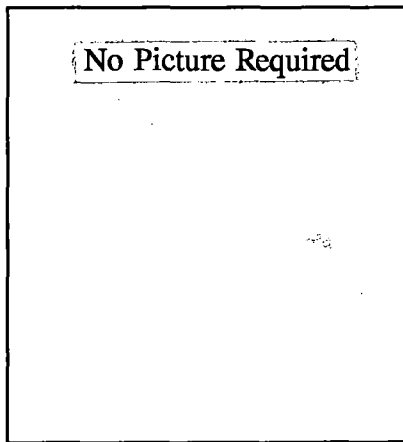
Max. Score Assigned Score

☐

Impact of colour schemes on street. The "no colour" category applies to buildings that are using the natural colour of the materials.



☐ Bright Colours



☐ No Colours



☐ Neutral Colours

Compatibility Summary - Detailing and Materials

Max. Score Assigned Score

Detailing

Doors and Windows
Main Entrance
Stair Seats and Porches
Other Building Elements
 Roof Eaves
 Building Trim
 Fascias

Materials

Type
Texture
Durability
Compatibility of Materials with Adjacent Buildings
Combination of Materials
Colour

COMPATIBILITY INDEX (Assigned Score/Max. Score)	
--	--

Notes

COMPATIBILITY INDEX SUMMARY

Project Name:

Project Address:

Reviewer:

Date:

	Max. Score	Assigned Score	Ratio
Bylaw			
Site Development			
Massing and Form			
Materials and Detailing			
COMPATIBILITY INDEX			

Signature

Notes

Copy this sheet and attach it to the documentation with the project.

CONCLUSIONS

This study was developed to assist community associations and other non-professional groups involved in the review and assessment of developments. It identifies one building type, narrow lot infill housing in the inner city. It outlines specific characteristics of this type and creates a method to assess its value to the community. The method permits a more qualitative assessment and identifies priorities for the community.

Volunteer effort is usually limited. This review process may initially take longer than the "gut feeling" approach. However, the returns are longer lived. The "picture book" approach saves time in comparison, and points to examples that can be used during a meeting. But more importantly it is an education tool to define what is important to the community.

It is by no means the end of the assessment process. The process of public participation is more complex and involves residents immediately affected by the projects who do have the time to perform this assessment. However, the community can be better prepared to defend its position.

Although this tool can be used by itself, the review process requires a knowledge and understanding of drawings, and of the limitations of what a community association can or is allowed to do. These are essential ingredients in a comprehensive, knowledgeable and thorough review process¹⁵. This instrument is only one way to achieve that.

Notes

1. Narrow lot infill housing is here defined as housing on narrow subdivided lots, usually on 25 foot frontage.

2. Based on a letter of protest from the majority of residents on a street opposing the first narrow lot infill on the street.

3. The words "tool" and "instrument" in of this document are used interchangeably. They are always used to mean the Project Evaluation Tool.

For the sake of simplicity, the bylaw definitions used in this document are those in the Land Use Bylaw 2P80 of the City of Calgary. Bylaw requirements are usually very similar in the large urban centres.

4. Italics by this author

5. Perks argues that in community participation, success tends to breed counterpolitics by the public agencies. This may result in a token consultation with the communities.

6. The following criteria were developed by the author with the Mount Pleasant Community Association Planning and Land Use Committee in Calgary. It was felt that for the community to do its work well, it had to develop a set of values by which to operate. These criteria were debated at length and finally synthesized into easier language.

7. By necessity, the Evaluation Criteria and the Qualitative Characteristics chosen for this project reflect the bias of the researcher. The choice is based on the authors experience as an architect and his lengthy involvement with community associations. Others are encouraged to reflect their own biases, based on other elements specific to the neighbourhood.

8. Multiples of 100 usually make it easier to identify what percentage of the total is available for each characteristic. The maximum number of points allowed may vary from one community to another.

9. Some Qualitative Characteristics are neither "good" nor "bad". They explain different conditions of the same attribute. The reviewer must determine whether the characteristic is harder to deal with than the next and therefore may require more discretion. Sometimes only two qualities are used to describe the characteristic.

10. These are residential Land-Use Designations from the City of Calgary Land Use Bylaw. Substitute other designations as they may apply.

11. Bylaws sometimes distinguish between *permitted* and *discretionary* uses. The latter are usually allowed at the discretion of the planning authority.

12. In Calgary narrow-lot infill houses are considered a discretionary use, i.e. they are only allowed at the discretion of the authority having jurisdiction. Therefore only the Discretionary Use Rules are shown here. In other jurisdictions, other use rules may be substituted.

13. The limit set by the City of Calgary is 45%. Substitute maximum limit as required.

14. Some of these frames are purposely left blank. This is done when the characteristics can be adequately described in words, is difficult to find, or is up to the reviewer to fill in.

15. Communities are urged to invest in books or other documentation to help their members learn to read drawings, since this is usually the only means of communication between a developer and a community on the project. Most small developers will not provide three dimensional renderings or models. In addition their submissions may be minimal and hard to decipher even by the very experienced.

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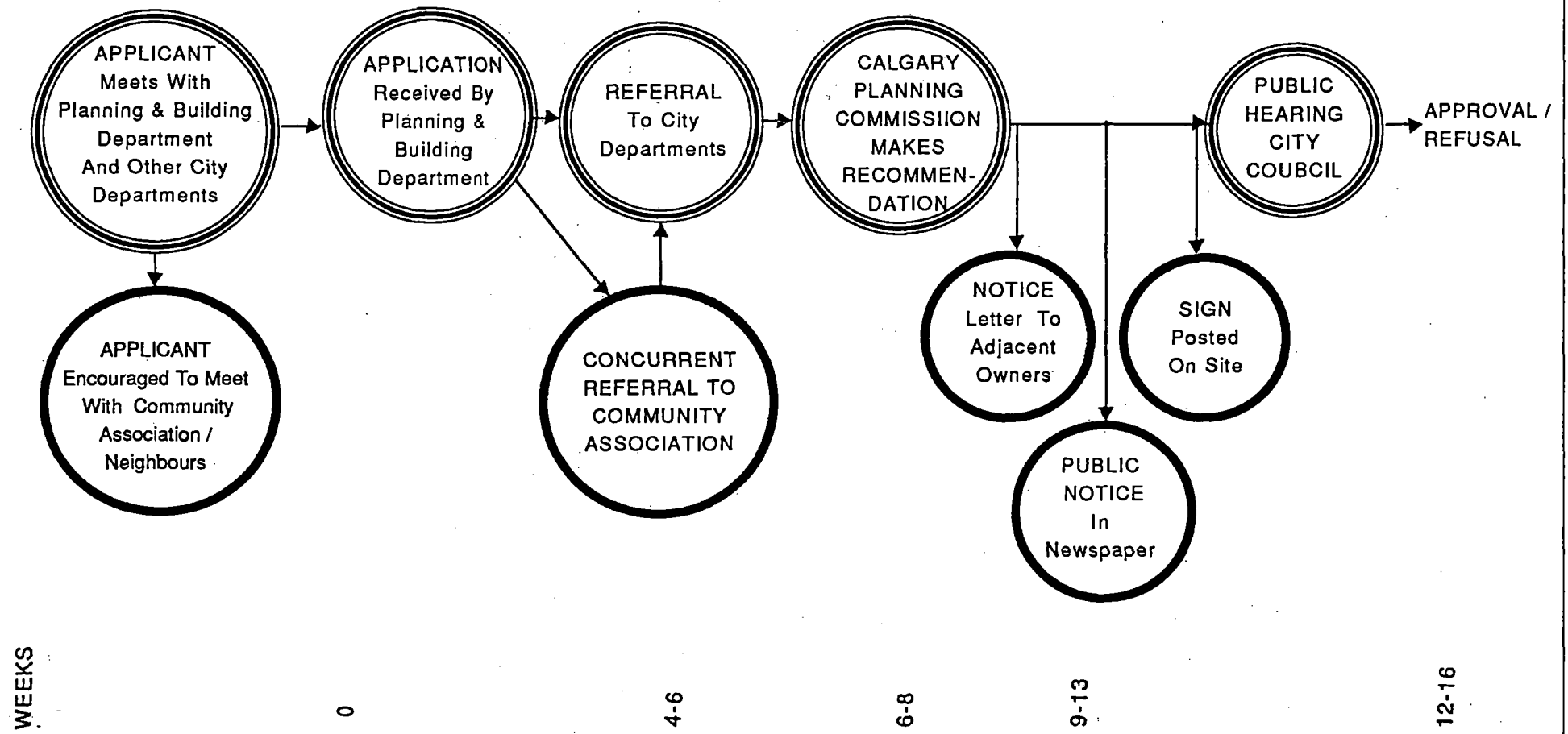
William T. Perks and Ira M. Robinson eds. Urban and Regional Planning In A Federal State - The Canadian Experience. Dowden Hutchinson and Ross, Inc., Stroudsburg Pennsylvania, 1979.

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APPENDIX A - APPROVAL PROCESS

LAND USE RE-DESIGNATION PROCESS



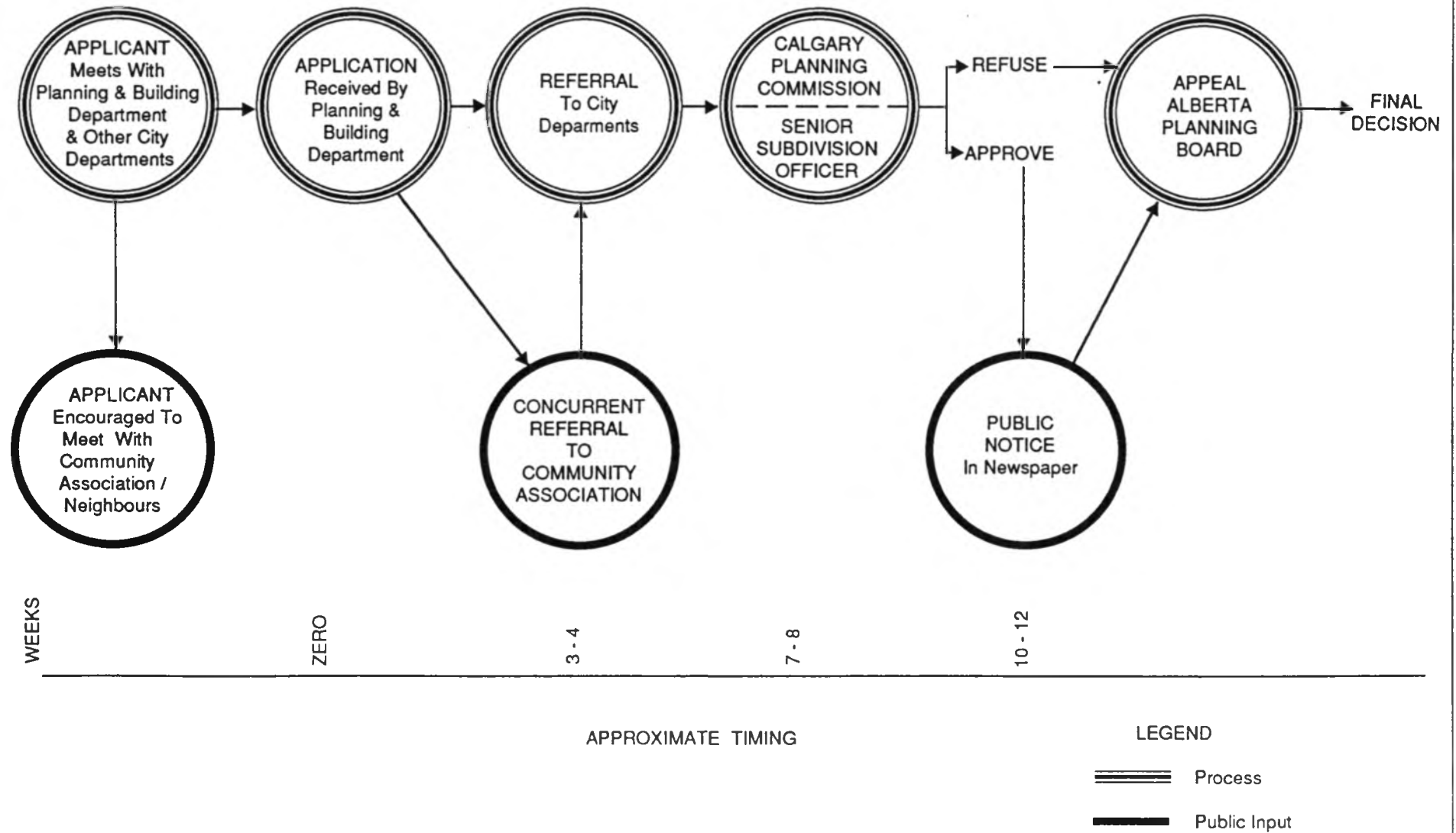
APPROXIMATE TIMING

LEGEND

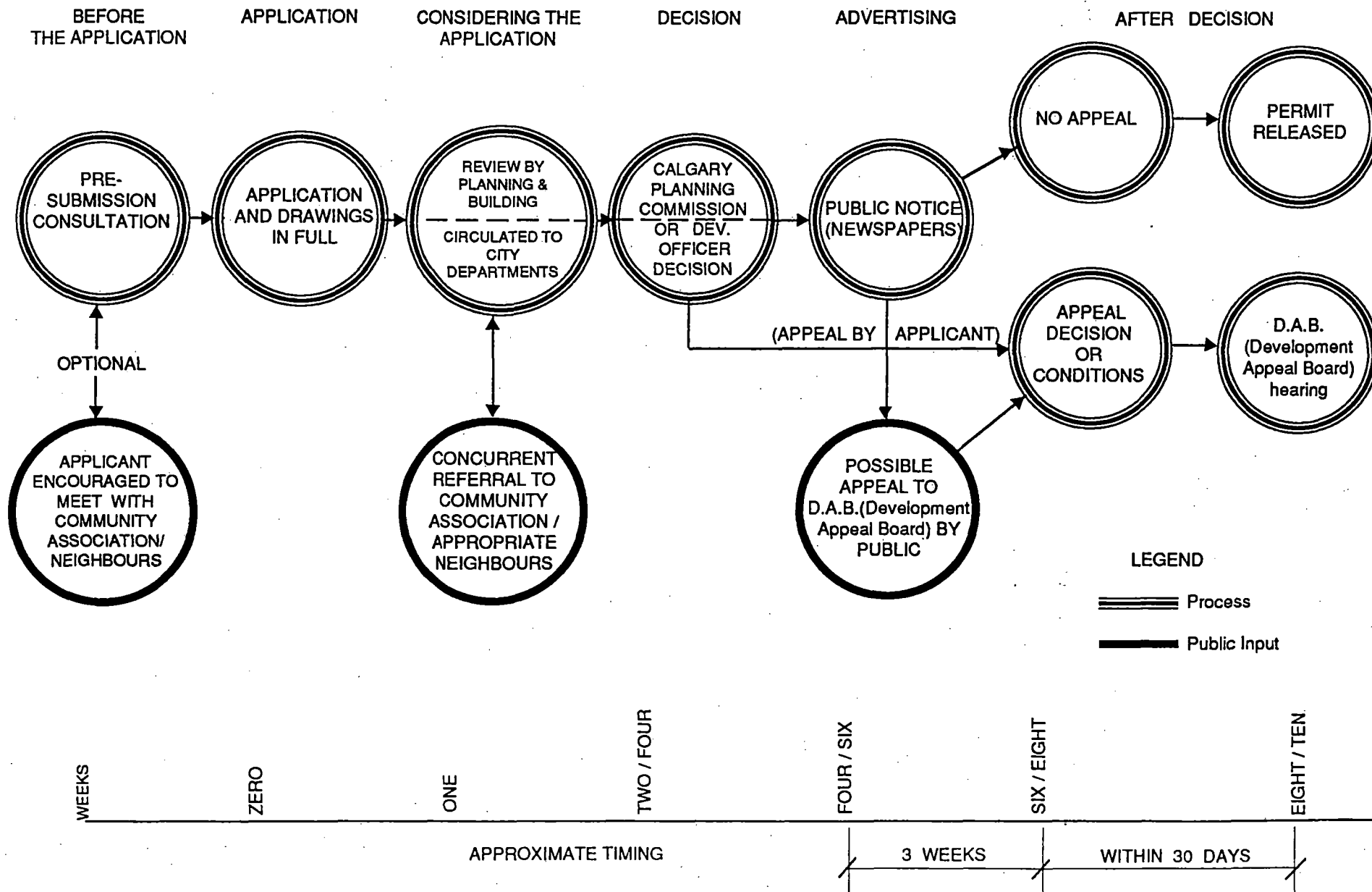
==== Process

— Public Input

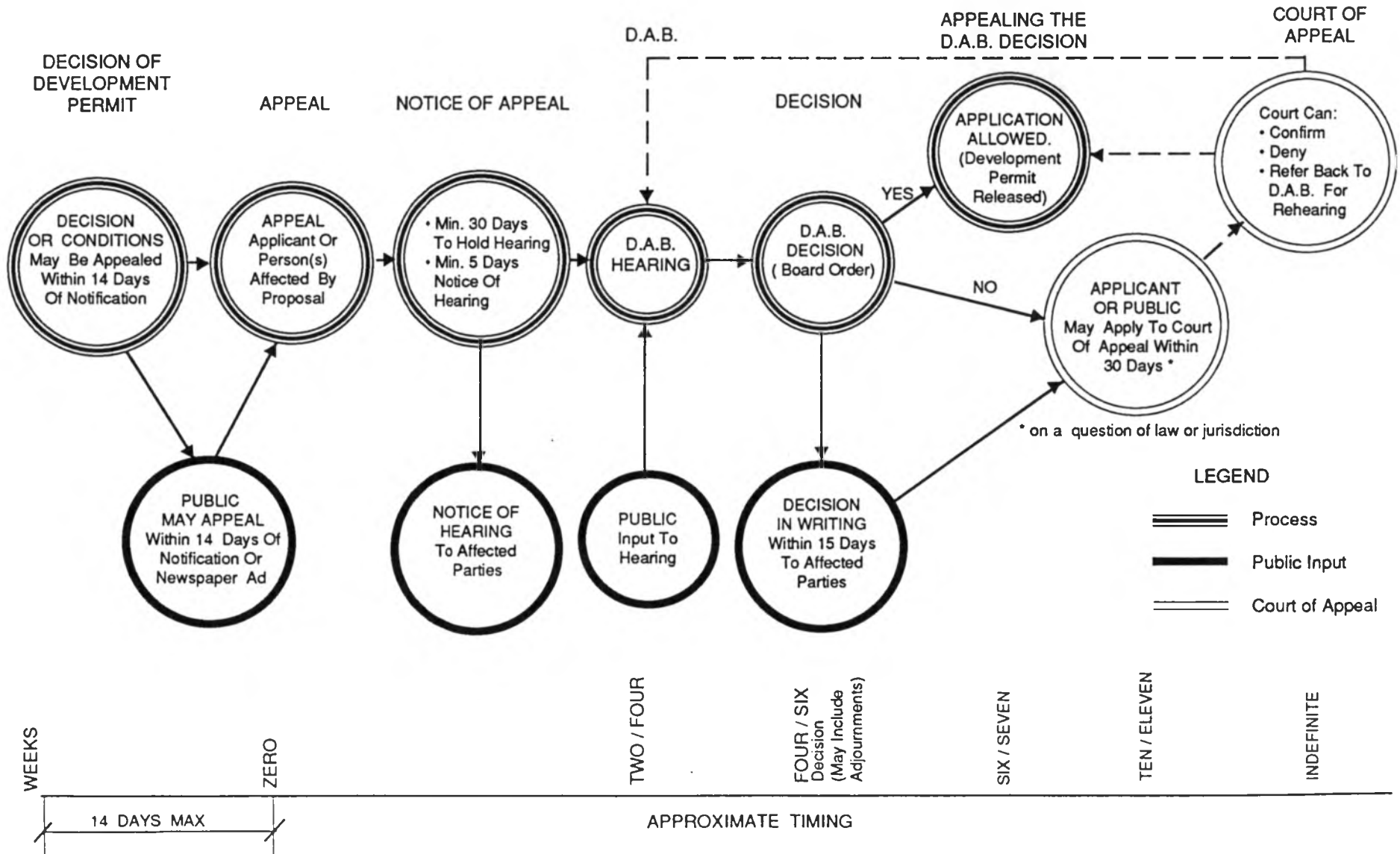
SUBDIVISION / OUTLINE PLAN PROCESS



DEVELOPMENT PERMIT PROCESS

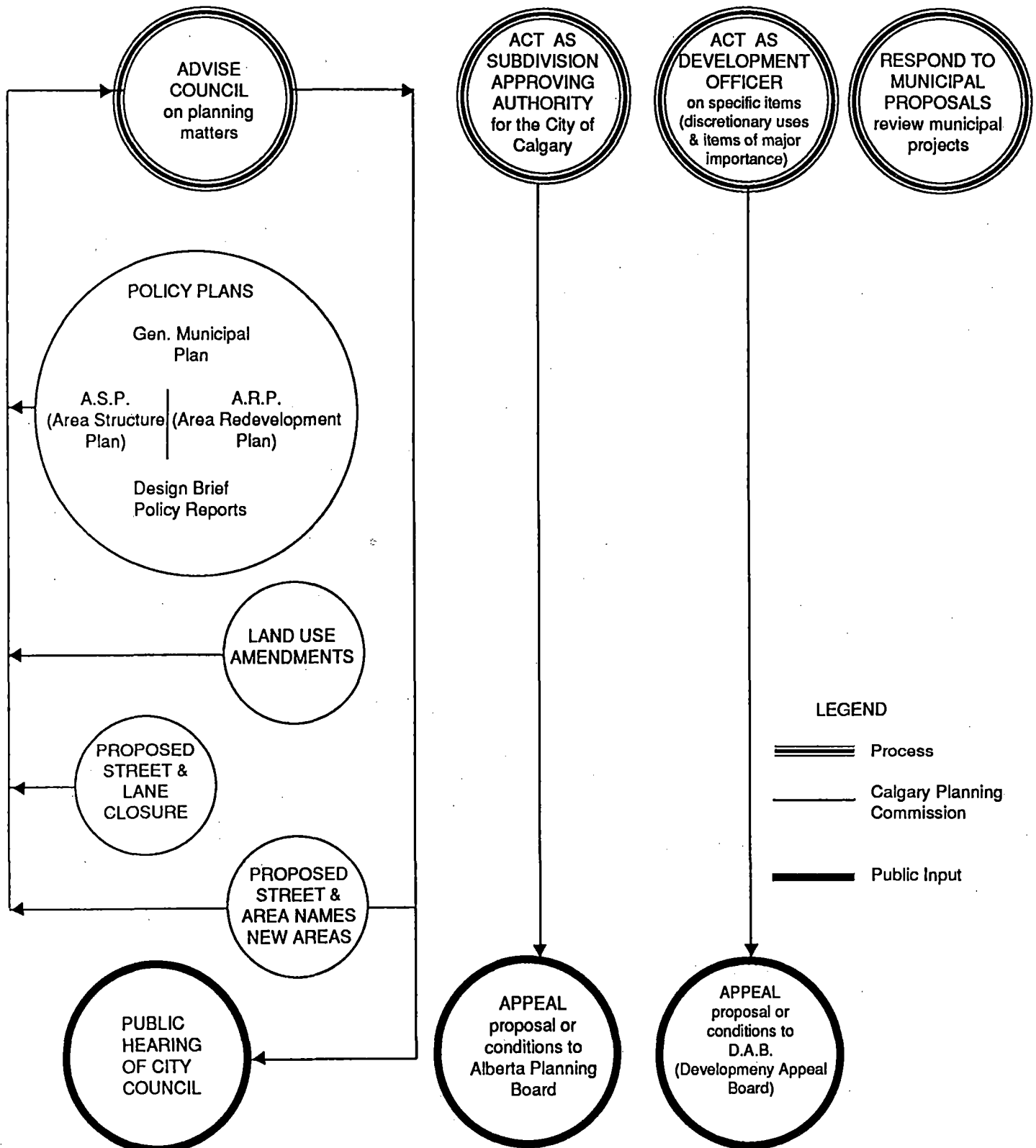


DEVELOPMENT APPEAL BOARD PROCESS

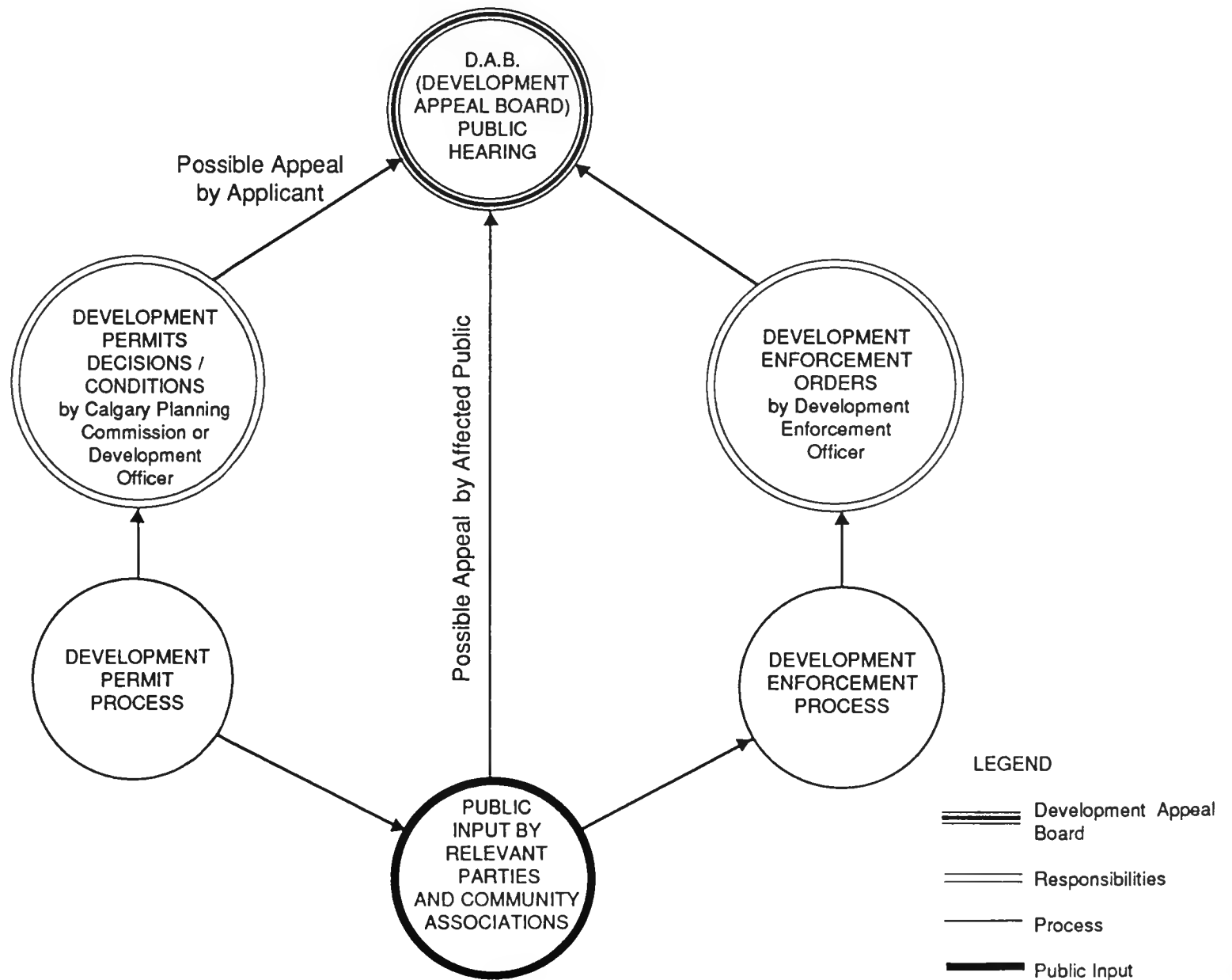


CALGARY PLANNING COMMISSION RESPONSIBILITIES

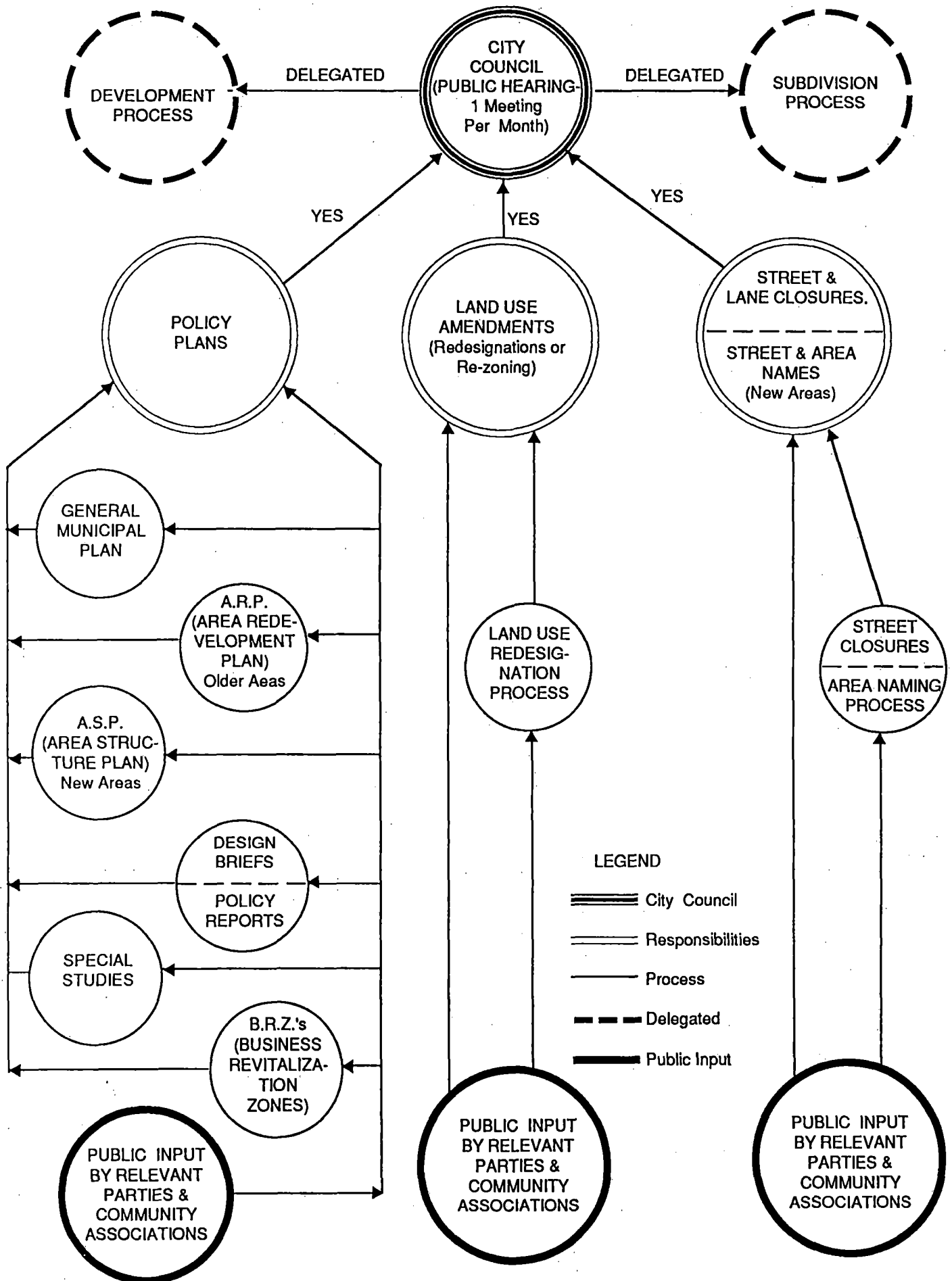
(TWO MEETINGS PER MONTH)



DEVELOPMENT APPEAL BOARD RESPONSIBILITIES



CITY COUNCIL RESPONSIBILITIES IN PLANNING



CITY COUNCIL PROCESS

