



Terms of Reference: Master/Block Plan



Study Description

The purpose of the Master/Block Plan is to allow City staff to evaluate a development proposal's achievement towards the intent of City policies, guidelines and plans, with the goal of creating complete communities of the highest urban design standard. In particular, it is used for larger and more complex development proposals to coordinate streets, blocks, buildings, public spaces, community uses, infrastructure and other elements across large areas, and that may include multiple ownerships, or that have a long build-out period. Key objectives of the Master/Block Planning process include:

- Coordinating new street and block patterns that connect proposed development with existing streets, active transportation connections and potential future development sites;
- Achieving appropriate distribution of land uses, density and built form massing; and
- Providing publicly accessible parks, plazas and/or other spaces, and/or community uses, to serve new residents and users.

Purpose

The purpose of this Terms of Reference ("TOR") is to establish clear expectations and requirements for the preparation of Master/Block Plans submitted to the City of Waterloo. Compliance with these guidelines will help to expedite review times and mitigate the need for further revisions and submissions. Failure to satisfy the requirements set out in this TOR may result in an application being deemed incomplete. If an application is deemed incomplete it will be returned to the applicant to satisfy the necessary submission requirements.

What is the Difference?

This section serves to clarify the difference between a Block Plan and a Master Plan. Block Plans are prepared to demonstrate how a small development site fits within a larger Master Plan or within an Official Plan approved context. The Block Plan extends to the edges of the existing or proposed block that a development site is on. The contents of the Block Plan will take a simplified approach to the required contents. Master Plans are prepared when an overall guiding framework is needed. Master Plans are for larger sites, where



there are multiple blocks, and may extend across multiple property ownerships.

When is it Required?

A Master/Block Plan may be required for the following Planning Act applications:

- Official Plan Amendment
- Zoning By-law Amendment
- Draft Plan of Subdivision
- Draft Plan of Condominium
- Site Plan Control
- Other planning applications, as determined by the City.

At staff's direction, a Master/Block Plan will be required for more complex development scenarios instead of an Urban Design Brief. The need for a Master/Block Plan as part of a complete application will be identified as part of the pre-application consultation review. In the instance where a planning application being advanced does not have a mandatory pre-application consultation process (e.g., Committee of Adjustment applications), the applicant is encouraged to contact the City's Planning Division to discuss the nature of the proposal and to determine if a Master/Block Plan is required.

A Block Plan may be required for sites that are within an approved Official Plan, District Plan, Master Plan or Major Transit Station Area context. Currently there are five Station Area Plans for Major Transit Station Areas located outside of the Uptown Urban Growth Centre including:

- Laurier-Waterloo Park
- University of Waterloo
- Research & Technology
- Northfield
- Conestoga

These five station Area plans form the Station Area Planning document: *Station Area Plans: City of Waterloo Station Area Planning (2017)*.

Criteria triggering Master/Block Plans can include, but shall not be limited to:

- Site size over 6,000 square metres (1.5 acres)
- Multiple buildings or land uses on a site
- New street and block pattern proposed/required
- New public uses such as parks, community uses, mid-block

- connections and POPS proposed/required
- Sites identified in the Official Plan

The Master/Block Plan is expected to be a separate document from the Planning Rationale Report.

Qualified Persons

A Master/Block Plan shall be prepared by qualified and competent professional in good standing as follows:

- Urban Designer
- Registered Planner (RPP/MCIP)
- Licensed Architect (OAA)
- Landscape Architect (OALA)

The report must identify and be signed by the author(s) and, where prepared under the direction of a qualified professional, the signature of the reviewer of the report. The qualified professional that has signed the report shall take professional responsibility for its contents and the accuracy of the information contained therein.

Applicable Legislation

The authority to require or request information or material to evaluate and make a decision on proposed planning applications is provided by the Ontario *Planning Act*, the Provincial Policy Statement, and City of Waterloo Official Plan Section 12.2.14 (“Complete Applications”).

This Terms of Reference document is to be applied in conjunction with all applicable regulations, by-laws, and guidelines, including the City of Waterloo’s Urban Design Manual and Comprehensive Engineering and Landscape Manual.

Report Contents

This TOR document sets out the minimum requirements that must be included in all reports. More specific scoping of the Master/Block Plan may be identified by appropriate staff during the pre-application consultation process.

Block Plans will demonstrate how a site fits within a Master Plan for the block it is within. City Staff may request additional materials, including an addendum to the Master/Block Plan as required.

It is expected that the Master/Block Plan will be highly visual with the extensive use of graphics to demonstrate how the proposed development responds to the existing and planned context.

A. Introduction

The introduction should include the following:

- Applicant information
- Name and qualifications of who is preparing the Brief
- Site address and the extent of the study area

B. Design Vision

Provide a design vision statement that describes the overall intent and design objectives of the development proposal. Address how the development proposal will integrate into the local existing and planned context and responds to applicable design policies, standards and guidelines.

C. Context Analysis

Demonstrate an understanding of the site and surrounding conditions within a 250-500 metre radius of the site. It is expected that the following will be addressed through the use of text and graphics:

- Site Attributes:
 - Site location, area, and boundary
 - Existing conditions including topography, buildings/structures, access, natural, cultural and heritage features
 - Utility corridors and easements
- Surrounding Context:
 - Neighbourhood structure including street network, neighbourhood pattern, landmarks, gateways, and view corridors;
 - Surrounding land uses including built form, character, and heritage features;
 - Transportation networks including vehicular, pedestrian, bicycle, and transit; and
 - Natural features, topography, open spaces and public amenities.



D. Policy Context and Analysis

Provide a high-level analysis of how the proposed development implements the relevant urban design policies found in all applicable documents:

- City of Waterloo Official Plan, including any Secondary Plans;
- Zoning By-law regulations, particularly those relating to built form;
- Urban Design Manuals, Guidelines and Plans; and
- Any other document as identified by City Staff.

Master/Block Plans within the Major Transit Station Areas identified above must demonstrate how they will achieve the principles of the **5 Station Area Plans: City of Waterloo Station Area Planning (2017)** document for their specific station area.

- Include a graphic demonstration of how the proposal responds to and applies design objectives.

In the case of non-conformance with the above, the Master/Block Plan should provide sound planning rationale for any potential amendments or areas of divergence.

E. Proposal

The Master/Block Plan should provide a discussion and graphic communication of the proposal in the context of the following. Graphic clarity and brevity is encouraged, and the following plans and information can be combined when legibility is maintained.

Reference to other required submission materials and their corresponding Terms of Reference may be required to address the content in this section.

- Site Plan
 - Overall site plan;
 - Location of the proposed building(s), open spaces, streets, and driveways; and
 - Show how the site integrates with the surrounding urban fabric, including adjacent lands with future development potential
- Land Use
 - Land use plan showing proposed use of land and buildings, including ground level and above-grade uses in the case of mixed use buildings. Show how land uses integrate with existing and planned surrounding uses;



- Proposed ownership (public vs. private) of all blocks including roads, driveways, road widenings, sight triangles or easements; and
- Site Data Chart showing development statistics summary such as: site area, area of each land use on site, building gross floor areas by use, unit count by unit type and bedrooms, density, population estimate, vehicular and bicycle parking by type/location (both required and provided).
- Design Drivers
 - Plan diagram illustrating major site opportunities and challenges, e.g., transit stations, natural features, adjacent uses, major roads and infrastructure, existing neighbourhoods, etc; and
 - Plan diagram illustrating “big moves:” key design objectives of the proposal, e.g., new street grid, pedestrian spine, central public square, built form transitions, etc.
- Public Realm
 - Brief written overview of approach to public realm;
 - Plan diagram for streetscape hierarchy and public spaces by type, e.g., parks, parkettes, plazas, mid-block connections, trails, natural heritage features, POPS, etc;
 - Plan diagram for pedestrian circulation including building entrances, crosswalks and connections to existing active transportation infrastructure;
 - Typical landscape typologies illustrated through plan or cross section for street boulevard conditions, building frontage conditions, buffer conditions, and other linear spaces. Illustrate strategy to achieve sufficient soil volumes to support a healthy tree canopy;
 - Location and size of publicly accessible community facilities; and
 - Describe or illustrate the landscape approach for public spaces, landscape features, art, lighting, views and vistas, gateways and other elements of public realm design.
 - Summary, providing planning rationale, as to why the public realm represents good planning and aligns with good urban design principles.
- Built Form
 - Brief written overview of approach to built form;

- Plan diagram illustrating building footprints, general heights, building typologies;
- Plan diagram illustrating frontage conditions, e.g., retail edges, residential edges, servicing areas, etc. and street wall conditions, e.g., podium heights;
- Site and building cross sections to illustrate massing and relationships (2 minimum);
- Views of building massing model;
- Illustrate and dimension all buildings and components such as overall heights, podiums and towers, step-backs, building-to-building separation distances on- and off-site and to property lines, and setbacks to all existing and proposed property lines;
- Illustrate building transitions and privacy mitigation where there are low-rise or other sensitive use adjacencies;
- Provide an analysis of building impacts to views, sunlight, wind and microclimatic comfort; and
- Describe or illustrate the approach to architectural character and theme.
- Summary, providing planning rationale, as to why the built form proposed represents good planning and aligns with good urban design principles.
- Transportation & Active Transportation
 - Brief written overview of approach to transportation;
 - Plan diagram for vehicular circulation, including EMS access;
 - Plan diagram with transit routes and stops, with walking radii;
 - Plan diagram for cycling network;
 - Plan diagram for pedestrian routes (public and private);
 - Plan diagram for vehicular and bicycle parking, and servicing, loading and garbage collection strategy;
 - Identify points of vehicular access, driveways, drop offs, and short term layby;
 - Show how the transportation networks above integrate with existing and planned networks.
- Infrastructure and Servicing
 - Plan diagram illustrating utility and infrastructure servicing strategy; and
 - Plan diagram illustrating stormwater management strategy.

- Phasing
 - Plan diagram illustrating proposed phasing and timing; and
 - Phased Site Data Chart showing development statistics summary such as: site area, area of each land use on site, building gross floor areas by use, unit count by unit type and bedrooms, density, population estimate, vehicular and bicycle parking by type/location (both required and provided).
- Sustainability
 - Describe the approach to sustainability and energy conservation.
- Heritage
 - Describe how designated cultural heritage resources on or adjacent to the site will be protected, conserved, enhanced and integrated; and
 - Include details such as massing, materiality, datum lines, fenestration, and landscape.

F. Urban Design Guidelines

For Master/Block Plans that will be implemented over a period of time, urban design guidelines are required. This applies to most large scale proposals and includes:

- Applications seeking Official Plan and/or Zoning By-law approvals that will proceed through one or more Site Plan approvals at a later date; and
- Applications that will be implemented over multiple phases.

The urban design guidelines will serve as the guiding design framework to ensure final build-out is consistent with the vision, prior to final planning approvals and the issuance of building permits. Where possible, the urban design guidelines will be implemented through conditions of approval (e.g., subdivision or site plan agreements). Content will include, but shall not be limited to the following:

- Structuring Elements (as set out in the Master/Block Plan)
 - Site Plan
 - Land Use Plan diagram(s)
 - Public Realm Plan diagrams(s)
 - Built Form Plan diagrams(s)
 - Transportation Plan diagram(s)



- Phasing Plan diagram(s)
- Public Realm and Landscaping Plan
 - Indicative design plan(s) and cross section(s) showing uses, programming, function, and circulation, access and servicing for:
 - Streetscapes – public and private
 - Setback zones – building face to street right of way or curb edge
 - Public outdoor spaces
 - Private outdoor spaces
 - Buffers and screening
 - Include all streetscape and landscape elements such as street trees, landscaping, soil volumes, furniture, lighting, paving, and feature elements (play areas, pavilions, public art, gateway elements, etc.)
 - Provide supporting text and imagery indicating design intent and overall vision
- Built Form Plan
 - Indicative design plan(s) and cross section(s) for all building typologies showing ground level and above grade uses, entrances, vehicular access and servicing
 - Show proposed relationship to public realm through cross section or perspective, including design strategy for street walls
 - Show parking strategy
 - Provide supporting text and imagery indicating design intent and overall vision

Additional Information

Note 1:

If City staff consider the submitted Master/Block Plan to be incomplete, unsatisfactory, inconsistent, insufficient, authored by an unqualified individual, or if it fails to satisfy the requirements set out in this TOR in any other manner, the associated development application may be deemed incomplete and returned to the applicant.

Note 2:

Deeming an application complete does not guarantee that the contents of the study are acceptable to City staff and/or that the application will be approved.

Note 3:

If a request for a Master/Block Plan is not made at an earlier stage in the development process, this does not preclude the City from requesting a Master/Block Plan at a later stage. Once an application has been deemed “complete”, the City may require additional information, reports, and/or studies following a more detailed review to assess the implications of an application for approval.

Note 4:

The City of Waterloo is committed to complying with the Accessibility for Ontarians with Disabilities Act (AODA). In our everyday work with businesses institutions, and community partners we anticipate the same commitment to AODA compliance. Therefore, the Master/Block Plan must be AODA compliant and must meet the current provincial standard for compliance.

Note 5:

The City reserves the right to request an updated study, or an addendum thereto, should staff determine that changes in the development proposal or changes to legislation warrant further/modified planning analysis.

Note 6:

City staff reserve the right to require a peer review of submitted materials by an appropriate agency or qualified professional, the cost of which will be borne by the applicant.

Note 7:

Documents and all related information submitted to the City as part of a complete development application are considered public documents once submitted.

Note 8:

The Master/Block Plan shall be submitted in conjunction with the applicable development application(s), unless otherwise agreed to by the City.

Note 9:

This Terms of Reference document is intended to be used for guideline purposes only, and will be used to provide technical direction throughout the planning and development process. Completion of a report in alignment with the requirements of this Terms of Reference will not guarantee approval of the development application in question.

Note 10:

This TOR is relevant at the time of publishing and will be updated as necessary to reflect current policy, best practices, and accepted standards. It is the applicant's responsibility to ensure the report is prepared in accordance with the most recent version of the TOR issued by the City.

This Terms of Reference was prepared by a qualified external consulting firm. For clarification for any information contained within this document, please contact the City of Waterloo staff assigned to the pre-consultation process.