REVISED AGENDA

SPECIAL MEETING OF THE PRIORITIES AND FINANCE COMMITTEE
RE: Citywide Growth Strategy – New Community Growth

October 19, 2020, 9:30 AM
IN THE COUNCIL CHAMBER

Members

Mayor N. Nenshi, Chair
Councillor S. Chu, Vice-Chair
Councillor G-C. Carra (CPS Chair)
Councillor J. Davison (T&T Chair)
Councillor J. Gondek (PUD Chair)
Councillor W. Sutherland (UCS Chair)
Councillor E. Woolley (Audit Chair)

SPECIAL NOTES:
Public are encouraged to follow Council and Committee meetings using the live stream Calgary.ca/WatchLive

Public wishing to make a written submission may do so using the public submission form at the following link: Public Submission Form

Public wishing to speak are invited to contact the City Clerk's Office by email at publicsubmissions@calgary.ca. to register and to receive further information.

Members may be participating remotely.

1. CALL TO ORDER

2. OPENING REMARKS

3. CONFIRMATION OF AGENDA

4. CONFIRMATION OF MINUTES
   None

5. CONSENT AGENDA

   5.1. DEFERRALS AND PROCEDURAL REQUESTS
   None

   5.2. BRIEFINGS
   None

6. POSTPONED REPORTS
(including related/supplemental reports)

None

7. ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES

REVISED MATERIAL

7.1. *2020 Growth Strategy Monitoring Report, PFC2020-0962*
****The public may present on this item****

NEW MATERIAL

7.2. New Community Growth Strategy 2020, PFC2020-0963
****The public may present on this item****

7.3. Water Utility Indicative Rates - Revised for 2021 and 2022 and Financial Plan Update, PFC2020-1140
****The public may not present on this item****

8. ITEMS DIRECTLY TO COMMITTEE

8.1. REFERRED REPORTS
None

8.2. NOTICE(S) OF MOTION
None

9. URGENT BUSINESS

10. CONFIDENTIAL ITEMS

10.1. ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES
None

10.2. URGENT BUSINESS

11. ADJOURNMENT

2020 Growth Strategy Monitoring Report

RECOMMENDATIONS:

That the Priorities and Finance Committee recommends that Council direct Administration to bring a Growth Strategy Monitoring Report to the Priorities and Finance Committee no later than 2022 January.

HIGHLIGHTS

- This monitoring report provides Council and stakeholders with current citywide growth-related information that can help inform growth decision-making, including:
  - Consideration of the New Community Growth Strategy (NCGS) 2020 review of 11 business cases (PFC2020-0963); and
  - Any budget adjustments to consider ahead of the Mid-Cycle One Calgary Service Plans and Budget deliberations in 2020 November.
- What does this mean to Calgarians? This means current information is provided to both Council and stakeholders to help guide decisions related to growth.
- Why does this matter? It matters for Calgarians because it provides increased transparency and accountability for decisions that affect how the city grows, and reports on progress made towards achieving a balanced Citywide Growth Strategy, including associated financial impacts.
- Key growth capacity information:
  - Overall, citywide growth is slower than forecasted in 2018.
  - It is estimated the actively developing areas absorbed 5,500 units from 2019 May-2020 April. The majority of the 14 new communities that were approved in 2018 have progressed forward and over $100 million in private investment has occurred, however the number of units constructed is expected to be less than indicated in the 2018 business case submissions by the end of 2022.
  - It is estimated that the established areas absorbed 4,100 units from 2019 May-2020 April, this represents approximately 43 per cent of unit growth in the city.
  - $600 million in assessed value was added in 2020 from industrial development. Much of the new construction across strategic industrial areas has been small or medium storage facilities with office or mezzanine components that are built on spec.
- Council directed Administration through report PFC2019-1062 to bring a 2020 Growth Strategy Monitoring Report to Council through Priorities and Finance Committee by no later than 2020 October.
- Strategic Alignment to Council's Citizen Priorities: A city of safe and inspiring neighbourhoods
- Background and Previous Council Direction is included as Attachment 1.

DISCUSSION

<u>Growth Monitoring</u>

This is the second year of the Growth Strategy Monitoring Report, which is included as Attachment 2. New in this year's report is an update on the Industrial Area Growth Strategy and sector, as well as an update on the implementation of the Established Area Growth and Change Strategy (EAGCS) Phase 1 projects and indicators to be used to evaluate the impact of this investment.

The monitoring report also seeks to demonstrate the extent of private capital investment within the Calgary housing market since 2018 to inform future discussions on growth investment decision-making such as the NCGS 2020 report (PFC2020-0963 also on this agenda). The information provided in Attachment 2 complements other reporting on growth, such as The City's *Suburban Residential Growth 2020-2024* document and Off-site Levy and City Centre 2019 Levy Report (PUD2020-0904).

This report generally covers the period of 2019 October to 2020 August. As a high-level summary, the housing market in 2019 was stronger than in 2018 and building permits and housing starts were in line with forecasts. Housing starts in 2019 were down four per cent compared to the previous five year average. 2020 has been significantly impacted by COVID-19, and overall economic activity has declined as reflected in the lower building permit construction value and housing starts. Current provincial economic forecasts project an 8.7 to 11.3 per cent decrease in GDP for 2020, with the economic recovery expecting to extend over the next two years, punctuated with a 4.5 to 7.9 per cent GDP increase in 2021 (sources: RBC, Conference Board of Canada).

Administration uses several metrics to understand the strength of the development sector of the economy. Below are some selected indicators:.

- Building permit construction value in the city was $4.55 billion in 2018, $5.16 billion for 2019, and in 2020 is $2.56 billion through September. The 2020 full year forecast from the beginning of the year is around $4.7 billion. (source: The City of Calgary)
- Calgary Census Metropolitan Area (CMA) housing starts are down 16 per cent in 2020 compared to 2019 from January through August. The 2020 forecast from Fall 2019 is 10,100 to 11,900. (source: Canada Mortgage and Housing Corporation)
- In 2019, 147 hectares were executed through Development Agreements in the greenfield area, this is signicantly lower than the 374 hectares in 2018. In 2020, as of October first, 212 hectares have been executed, an increase from 2019, and approximately 48 per cent have been from the 14 new communities approved in 2018. The City's 2020 forecast is 309 hectares.
- Approximately 64 per cent of the estimated citywide dwelling unit growth between 2019 and 2020 occurred in the Developing Areas as identified in Map 1 of the Municipal Development Plan.
- Calgary's share of regional growth has been stable, with 10,632 new housing starts in 2019, representing 89 per cent of the Calgary CMA. In 2020 YTD, about 85 per cent of the CMA's housing starts have occurred in Calgary. Over the last five years Calgary has averaged 83 per cent of the CMA's new housing starts.

Citywide Growth Strategy

For the first time, in 2020, all three components of the Citywide Growth Strategy are fully underway, including the NCGS, the EAGCS and the new Industrial Area Growth Strategy. In 2020 May, a reserve fund was established with $30 million in one time funding for public realm investments, work continues on implementation of these investments. Phase 2 work is underway and will continue through 2021. Resources in 2020 have also been dedicated to the NCGS and the review of 11 business cases for new community development, with the recommendation included in report PFC2020-0963 and brought forward to this same committee meeting. Lastly, Administration has also begun scoping work for the Industrial Area Growth Strategy, with a report to Council anticipated for 2021 Q1.

Administration also continues to monitor growth investments necessary to facilitate approved new community growth in light of a changing economic and financial context. Financial data in Attachment 2 outlines that Council-approved reductions that have already been made to the operating budget for actively developing communities. Administration again recently reviewed operating and capital budgets commitments associated with these communities and will bring forward recommended adjustments to the 2020 November mid-cycle budget discussions.

Conclusions

Overall, the city's growth trends have felt the impact of COVID-19 and the decline in world oil prices, yet given the magnitude of these challenges, development has been resilient. Citywide housing starts are down 20 per cent from 2019 this year. Industrial land absorption is expected to be down 50 per cent in 2020 compared to the five year average of 50 hectares. Nine of the communities have moved into stripping and grading, Administration expected communities to be further along in the servicing installation at this point to achieve the anticipated build-out by 2022.

Growth Implications

1. Lower levels of growth moving forward will impact the amount of levies received and thus additional funding may be required to fund the utility infrastructure, and transportation and community services infrastructure may have to wait longer for full funding.
2. As a result of lower growth in 2019-2020, operating and capital budgets that facilitate new community growth can be reduced without hindering the current pace of the market.
3. Analysis provided in the Residential section of Attachment 2 of this report outlines that there is sufficient supply to accommodate the projected demand through this budget cycle and the 2023-2026 budget cycle; this ties into report PFC2020-0963 also on this agenda.
4. Given slower growth citywide and a financially constrained environment, there is greater importance on completing the Citywide Growth Strategy. There is evidence of private investment resulting from City investment in new communities, this should be expanded for established areas beyond the $30 million investment fund, and initiated in industrial areas. These components are expected to integrate during the development of the 2023-2026 budget cycle.

STAKEHOLDER ENGAGEMENT AND COMMUNICATION (EXTERNAL)

☐ Public Engagement was undertaken

☐ Public Communication or Engagement was not required

☐ Public/Stakeholders were informed

☒ Stakeholder dialogue/relations were undertaken

Administration discussed the purpose, timelines and overview of this monitoring report with Industry/City Working Groups, including the New Community working group, the Established Area Growth and Change Strategy Advisory Group, and the Developer Advisory Committee. To understand current timing expectation of applications and servicing in the 14 new communities, Administration contacted developers directly in Q1 2020.

IMPLICATIONS

Social

The information provided in this report will help Council to make informed citywide growth-related decisions on budget and services in alignment with Section 2.3 of the MDP, Creating Great Communities, that contribute to the health and well-being of communities and businesses.

Environmental

The information provided in this report will help Council to make informed citywide growth-related decisions in alignment with the MDP goal of a compact city, and also with MDP policy 5.2.5(b), which is to invest in municipal capital infrastructure to support intensification of the Developed Areas of the city as a first priority. Alignment with the MDP, as well as the Climate Resilience Strategy, will help achieve emissions reductions and cost savings from a sustainable growth pattern and associated service models.

Economic

The decisions made by Council on new community growth in 2018 July and established areas in 2020 May provided multiple new opportunities to leverage City investment for residential growth, capital retention, and job creation. However, lower GDP and high unemployment due to the COVID-19 pandemic has in part resulted in much lower than normal commercial and industrial growth. This in turn has led to slower residential growth within the Calgary Economic Region.

Service and Financial Implications

Analysis in support of this report indicates that it is unlikely the city will achieve the anticipated amount of commercial, industrial and residential development that was expected by the end of 2022 that was used as a basis in the One Calgary (2019-2022) service plan and budget creation. Proposed adjustments will be brought forward to Council through the regular mid-cycle budget process in 2020 November.

Other: Proposed adjustments to be brought forward in November

RISK

A risk assessment has been included in Attachment 3.

ATTACHMENT(S)

1. Previous Council Direction, Background
2. 2020 Growth Strategy Monitoring Report
3. Risk Assessment

Department Circulation

General Manager (Name)	Department	Approve/Consult/Inform (Pick-one)

2020 Growth Strategy Monitoring Report

Stuart Dalgleish	Planning & Development	Approve
Doug Morgan	Transportation	Approve
Katie Black	Community Services	Approve
Carla Male	Chief Financial Office	Approve
Chris Arthurs	Deputy City Manager's Office	Approve
Jill Floen	Law/City Solicitor	Approve
Dan Limacher	Utilities and Environmental Protection	Approve

Background

Context

The Citywide Growth Strategy evolved from the Industry/City Work Plan that was developed as a collaboration between the development and building industry and The City to continue to pursue ways to enable growth following the 2016 Off-site Levy Bylaw approval. Eventually, it was determined that growth issues would be addressed under three growth strategies, the New Community Growth Strategy (first iteration in 2018), Established Areas Growth and Change Strategy (Phase 1 in 2020) and the Industrial Growth Strategy (scoping report expected in early 2021). Looking ahead to the 2023-2026 budget cycle, an integrated Citywide Growth Strategy will be brought forward that examines growth trends and will make growth investment recommendations across the city, holistically. Investment across the city is important for the following reasons:

- Investment in established areas is important to accommodate population growth and change and occurs in parallel with redevelopment and replacement of aging infrastructure.
- Industrial development plays a key role in supporting a prosperous economy, to capitalize on Calgary’s competitive advantage and attract various industry clusters. Well-timed growth-related investments in Calgary’s industrial areas are crucial.
- Investment in new communities helps provide more affordable housing options and choices while supporting private capital investment.

An important accountability and transparency element of the growth strategy is to provide an annual monitoring report on growth and related budget decisions to support Administration and Council’s future decision making related to investments in growth.

The goal of this monitoring report, included as Attachment 2, is to

- provide transparency and accountability based on The City’s and developers’ commitments made through the NCGS 2018 decisions, commitments made through Phase 1 of the EAGCS, and through the One Calgary (2019-2022) Service Plans and Budget;
- demonstrate the extent of private capital investment within the Calgary housing market since 2018 to inform future discussions on growth investment decision-making such as the New Community Growth Strategy report (PFC2020-0963, also on this agenda); and
- help guide potential budget course corrections to consider ahead of Mid-Cycle One Calgary Service Plans and Budget deliberations in 2020 November.

Current New Community Naming and Number References
At the time of Council’s approval of the 14 new communities in 2018 July, a community was defined generally by the community boundaries approved within Area Structure Plans. Many of the approved business cases represented a portion of a new community, with additional development within the community expected to be brought forward later. Since that time, many of the business cases have moved forward in the land development process and have received Council approval of new community boundaries and names. These new community boundaries and names no longer add up to 14, nor do the new community boundaries represent the same areas of business cases. For consistency, Administration continues to reference the 14 new

communities as they were approved in 2018 July, as well as the new community name. A map of the original 14 new communities, and a table of how naming has changed since, is included in Attachment 2.

Previous Council Direction

Below is complete list of recommendations from report PFC2019-1062. This report PFC2020-0962 is in response to item 7.

That Council direct Administration to:

1. As a modification to the established process of regularly receiving business cases for new communities that recognizes the City of Calgary's current economic constraints, Administration may recommend a limited number of growth opportunities to Council, that must meet the following criteria:
   a. no required capital from the City of Calgary to initiate development;
   b. no required operating costs in the current One Calgary (2019-2022) budget or the next (2023-2026) budget cycle, without a proposed mitigating solution, that does not include tax and utility rate increases using the existing model and any improvements made by the date of review;
   c. completing areas of previously approved communities and leveraging capital investments already made in 2018 and prior years;
   d. property tax generation potential; and
   e. levy generation potential that funds new and established areas.
2. Invite landowners to submit a one-page proposal (with a template to be provided) by December 31, 2019 to demonstrate how their proposed business case meets the criteria noted above.
3. In consultation with Calgary Economic Development's real estate pillar experts, Administration will determine which growth opportunity areas will continue to full business case review, and will then invite business cases from related landowners by January 31, 2020 with a submission deadline of March 13, 2020.
4. Review business cases by May 29, 2020, with subsequent dialogue with proponents and a summary of approved and rejected cases to be forwarded to October 13 2020 Priorities and Finance Committee for review, discussion and recommendation. Recommendations will be forwarded to the following Council meeting for decision.
5. Evolve the practice of looking at a direct incremental operating cost model to a full operating cost model, in conjunction with other stakeholders. A briefing on progress toward the new model will be presented at 2020 June 9 Priorities and Finance Committee meeting, with a targeted timeline for completion of no later than Q3 2021.
6. Explore the phasing out of the growth management overlay, and report back to Priorities and Finance Committee no later than Q2 2020 with options to better align to our current economic situation and that creates policy that encourages a business-friendly environment and further development investment and retention in Calgary.
7. Bring a 2020 Growth Strategy Monitoring Report to Council through Priorities and Finance Committee by no later than 2020 October;
8. Remain committed to the following 4 guiding principles outlined in Attachment 3 through this modified process for business cases for growth:
   a. Recognize the principle of shared risk that Industry and Administration agreed to as part of the New Community Growth Strategy 2018 work;
   b. Address City financial constraints related to capital and operating funding availability;
   c. Address City resourcing constraints related to work plan priorities; and

d. Continue to drive toward a Comprehensive Citywide Growth Strategy that includes new communities, established areas and industrial areas for 2022 March.

Following Council it was determined through discussions with Calgary Economic Development and Councillors that Calgary Economic Development's real estate pillar experts would not be involved in the process due to a conflict of interest.

Items five and six have been postponed to 2021 and Q2 2021 respectively.

Citywide Growth Strategy

May 25, 2020

PFC2020-0381

Council received the Established Area Growth and Change Strategy (EAGCS) 2020: Phase 1 Recommendations report and approved the recommendation to "Approve a capital budget request for Budget Id 481650 Public Realm (EAGCS) of $11.7M in 2021 and $18.3M in 2022, funded by the Established Area Investment Fund".

February 3, 2020

PUD2020-0020

Through the Industry/City Workplan 2019 Year-End Report, Administration indicated they would bring forward an Industrial Growth Strategy scoping report in Q3 of 2020. Through report C2020-0698 that deferred all reports due in Q3 and Q4 2020 at the discretion of the City Manager and the General Manager, the timing of the scoping report was adjusted to Q1 2021.

November 18, 2019

PFC2019-1062

Council received the 2019 Growth Strategy Monitoring Report (PFC2019-1062) and directed Administration to complete a review of new community business cases in 2020. In recognition of The City's financial constraints at the time, Council directed a modified business case process as outlined in Council's recommendations 1-4.

September 24, 2018

PFC2018-0891

Council directed Administration to undertake the Established Area Growth and Change Work and bring forward strategic actions across the Established Area that meaningfully support community growth, change and quality of life.

July 30, 2018

PFC2018-0678, C2018-0900

Council approved a total of 14 new communities for the 2018 New Community Growth Strategy. Eight communities were recommended for approval by the Priorities and Finance Committee through PFC2018-0678, and the Priorities and Finance Committee also recommended that associated Growth Management Overlay removals be brought forward to Council on 2018 July 30 for a public hearing. Overlay removals were accomplished through C2018-0585 New Community Growth Strategy – Growth Management Overlay Removals Arising from PFC2018-0678.

An additional six new communities were added on 2018 July 30 through Council direction on supplemental report C2018-0900 New Community Growth Strategy 2018 – Further Review and Analysis Directed through PFC2018-0678.

March 19, 2018

PFC2018-0200

Council provided direction for a New Community Growth Strategy. Foundational to this work, Administration and Industry agreed on six principles that were developed together to guide the work, they are; 1) Collaborate, 2) Incorporate a market oriented perspective, 3) Advancing new development, 4) Establishing accountable processes, 5) Cumulative impact considerations on capital and operating costs, and 6) Shared risk. Council also directed Administration to bring a report to Council with findings and recommendations toward the development of an Established Areas Growth Strategy, including funding and timing considerations, that complements the New Community Growth Strategy.

2020 Growth Strategy Monitoring Report

2019 October through 2020 August

Table of Contents

Executive Summary

Purpose
This monitoring report is the second version of annual report intended to provide Council and stakeholders with an overall update on, and assessment of, the ongoing integrated Citywide Growth Strategy. For the first time this year, the report includes content on established and industrial growth and change. The information in this report can help guide growth decisions or make course corrections ahead of the New Community Growth Strategy (NCGS) 2020 report PFC2020-0963 on the same agenda, and ahead of Mid Cycle Budget deliberations in November.

The objective of the monitoring report is to provide transparency and accountability based on commitments (City and developer) made initially through the NCGS 2018 decisions and through the One Calgary (2019-2022) Service Plans and Budget, and continuing into the other two growth strategies. It is also an objective to provide an indication of how The City is progressing towards meeting the growth policies within Part 5 of the Municipal Development Plan (MDP).

Content
The monitoring report includes an overall Calgary market snapshot, community development progress, market absorption, financial summary, and infrastructure and service details. The report also offers conclusions based on the data. The information within this document will help inform future discussions on growth investment decision-making and service introduction levels. The report complements the information in the The City's ***Suburban Residential Growth*** document. As a result of COVID-19 response measures, a census was not completed in 2020.

Period
The information generally represents the period from 2019 October to 2020 August. A number of data sources do not exactly align with this period, and this is noted where applicable. Financial data is aligned with the One Calgary (2019-2022) budget cycle, beginning in 2019 January and including to the end of 2020 August.[1] The information regarding development status of the new communities is based on their progress at the beginning of 2020 October.

Conclusion
The monitoring report highlights that Calgary's growth in 2019 was higher than in 2018 and occurred within the forecasted targets from the fall of 2018, down four per cent over the previous five year average. In 2020, growth has slowed considerably due to economic impacts of COVID-19. Land absorption in new community and industrial areas (defined as amount, in hectares, of City-developer Development Agreements executed) in 2020 has remained lower than anticipated but showing improvement over 2019 with approximately 212 hectares to the first of October.

The 14 new communities that were approved in 2018 have shown progress through The City's approvals continuum towards the goal of achieving first occupancies in 2021. However, only half of these new communities have executed a Development Agreement and therefore significantly less development is anticipated by the end of 2022 than was originally indicated in the 2018 business cases.

Data and analysis provided in the Residential section of this report outlines that there is sufficient capacity to accommodate the projected demand through this budget cycle and the 2023-2026 budget cycle.

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[1] The One Calgary 2019-2022 Service Plans and Budget can be found here: https://www.calgary.ca/cfod/finance/Pages/Plans-Budgets-and-Financial-Reports/Plans-and-Budget-2019-2022/Plans-and-Budget-2019-2022.aspx. Details on the Growth budgets can be found as part of One Calgary 2019-2022 Service Plans and Budgets (C2018-1158), Attachment 9 "Supplemental Information", pages 19-20 (operating budgets) and 146-148 (capital budgets).

Calgary Market Snapshot

Summary

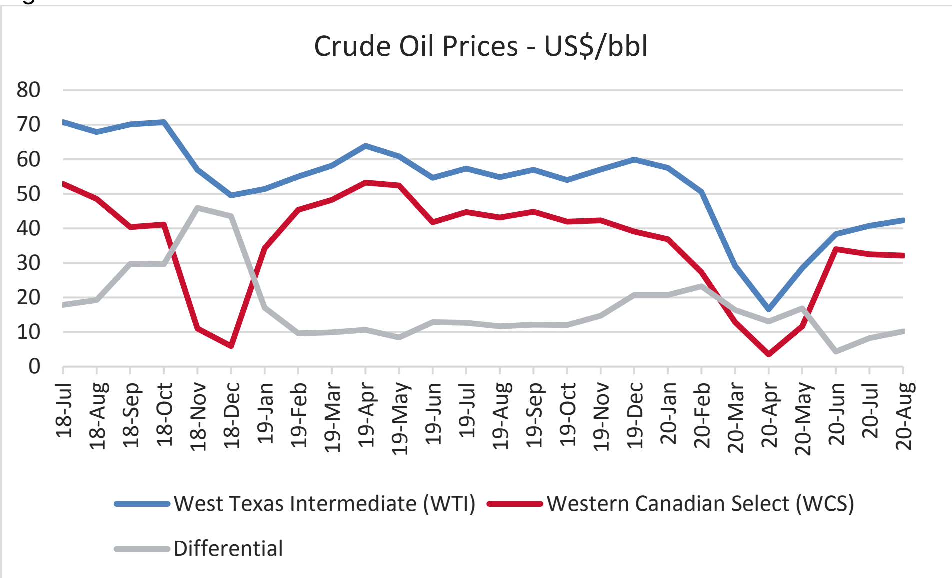
This section provides an overall snapshot of what has happened in the Calgary economy in 2019 and the first eight months of 2020 and is illustrated in Figures 1 through 5. Overall economic forecasts project an 8.7 to 11.3 per cent decrease in GDP for 2020 in Alberta, with the economic recovery expected to take place over the next two years. GDP increases in a range of 4.5 to 7.9 per cent are expected for 2021 (sources: RBC, Conference Board of Canada). The price per barrel of oil (West Texas Intermediate) has moved in a range of $16.55 to $59.88 USD since 2019 September, to settle at $42.34 in 2020 August. The price per barrel of Western Canadian Select has moved in a range of $3.50 to $42.32 USD since 2019 September, to settle at $32.11 in 2020 August. These ranges are based on monthly closing prices; oil prices in fact traded below $0 in April at the peak of COVID-19 economic uncertainty. The prime lending rate in 2020 has decreased by 1.5 percentage points to 2.45 per cent, the Bank of Canada's policy interest rate was cut to 0.25 per cent due to the economic impacts of COVID-19. As result, mortage rates have recently fallen to record lows.

In 2019, the Calgary Census Metropolitan Area (CMA) housing starts were higher than in 2018 but down four per cent from the previous five year average. Building permit activity came in as forecasted from Fall 2018 and was slightly above the 10 year median average. Subsequently, 2020 has been significantly impacted by the COVID-19 pandemic; overall economic activity has decreased accordingly, the unemployment rate rose as high as 15 per cent in June and is currently at 14.2 per cent as of 2020 August. Building permit construction value is down 19 per cent over the first eight months this year compared to the same time period in 2019 and housing starts are down 20 per cent in Calgary over the first eight months this year compared to 2019.

Due to the COVID-19 pandemic, no Civic Census was taken in 2020, meaning that the 2019 data reported on in the 2019 monitoring report remains the more recent available cenus data. As a result, post pandemic data on Calgary's population, vacancies, vacancy rates, occupancy and other variables was not available for this report.

In 2019, Development Agreements associated with 147 hectares were received in new community and new industrial areas. In 2020 to the first of October, 212 hectares have been received in new Development Agreements. Figure 6 highlights that since 2016, The City has not achieved the anticipated 401 hectares per year assumption employed in the Off-site Levy Bylaw. As a result, utility rates have been required to make up the respective shortfall each year to support capital investment in these areas. Based on information received from developers in 2020 April it is anticipated there will be a levy shortfall again in 2021 when the utility portion of off-site levies are due to be paid from this year's agreements.

Figure 1 - Crude Oil Prices



WTI Source: U.S. Energy Information Administration
WCS Source: Alberta Energy

Figure 2 - Calgary Population Growth

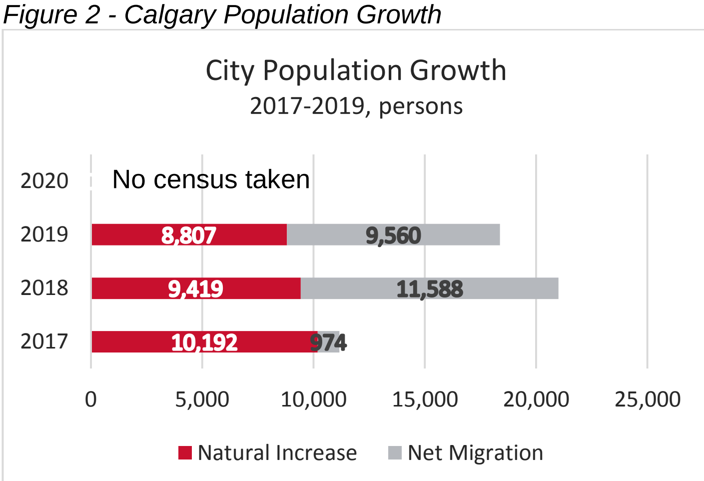


Figure 3 - Housing Starts

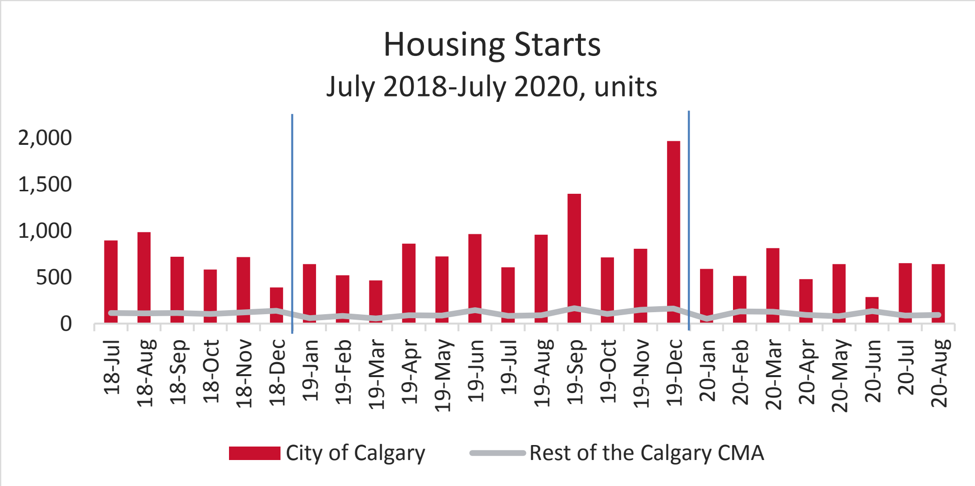


Figure 4 - Unemployment Rate

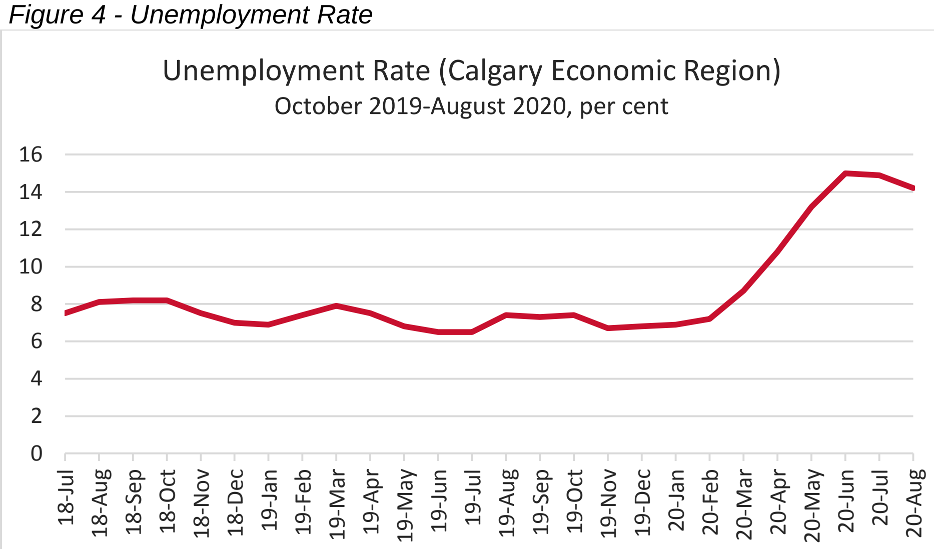


Figure 5 – Canada Chartered Banks Prime Lending Rate

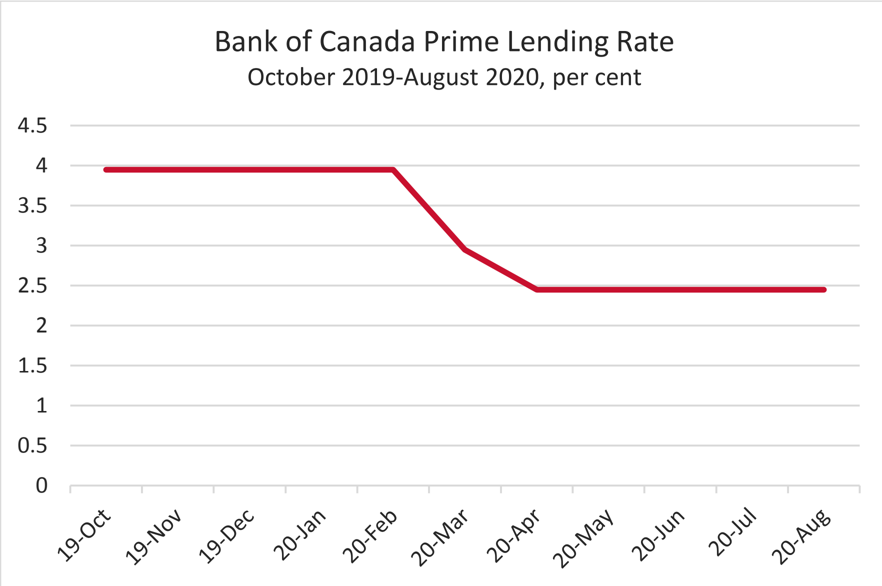
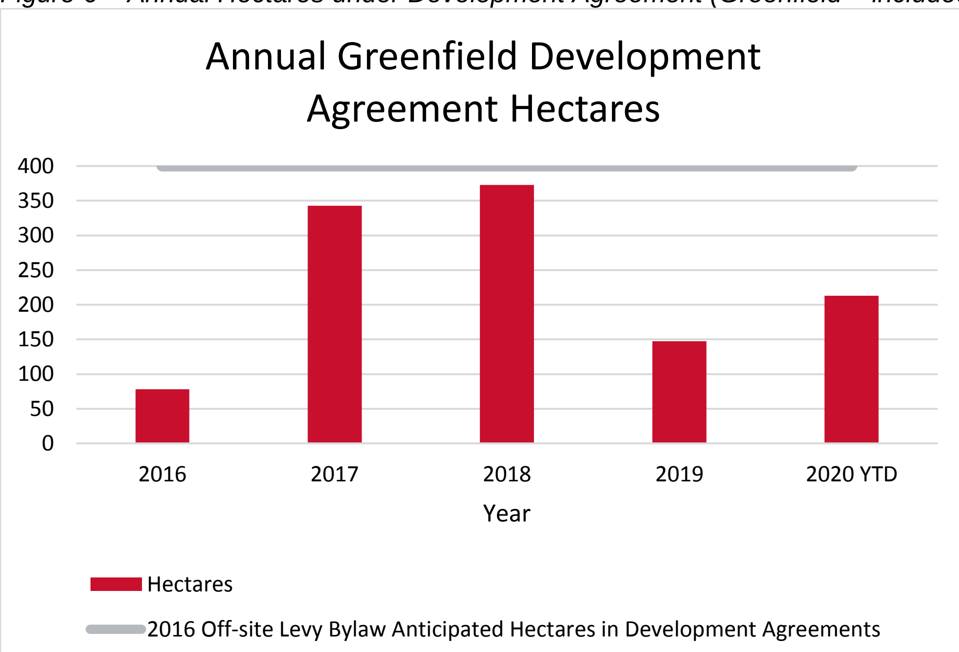


Figure 6 – Annual Hectares under Development Agreement (Greenfield – included new community and industrial)



Industrial Development

Summary

In Calgary, industrial lands play a crucial role in supporting a prosperous economy. In the city there is nearly 60 square kilometers of industrial lands which represent approximately 7.2 per cent of the total land area in the city.

The total assessed value of all industrial properties in Calgary stood at approximately $16.0 billion in 2019 and $16.6 billion in 2020. This represented 27 per cent of all non-residential properties, and six per cent of total properties in the city. Industrial properties contributed an estimated $285.7 million in property tax contribution in 2019 and $262.7 million in 2020 to help fund the delivery of services. 2020 saw a decrease in property taxes as a result of the property tax shift onto residential properties. Industrial lands accommodate approximately 200,000 jobs and contribute to Calgary's economic well-being.

Calgary's strategic geographic location and its multimodal logistics network of air, rail, and highway transportation makes it a well-positioned inland port. Calgary is a goods-distribution hub for markets in Western Canada, the U.S Pacific Northwest and beyond. To capitalize on this competitive advantage and attract various industry clusters in Calgary, well-timed growth-related investments in Calgary's industrial areas are crucial.

Market Absorption

Calgary's industrial real estate market experienced lower than normal activity in the first two quarters of 2020. The low activity can be primarily attributed to a subdued industrial real estate market that has seen negative impacts from the COVID-19 pandemic. The period of 2019 Q3 to 2020 Q2 saw approximately 1,450,650 square feet of new construction initiated on approximately 40 hectares (issued building permits) in Calgary's four industrial areas (Centre, Northeast, Northwest, and Southeast). Activity in the past year was heavily concentrated in the Northeast and Southeast industrial areas, with each of these areas receiving nearly 600,000 square feet of new construction. Figures 7 and 8 below show the timing and location of square feet of activity over the past year.

Figure 7: New Activity in All Industrial Areas: Square Feet of Construction Space

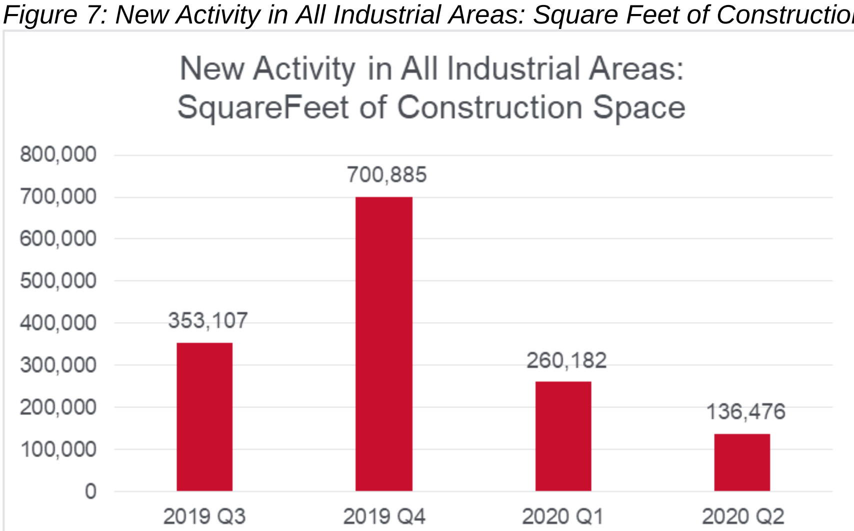
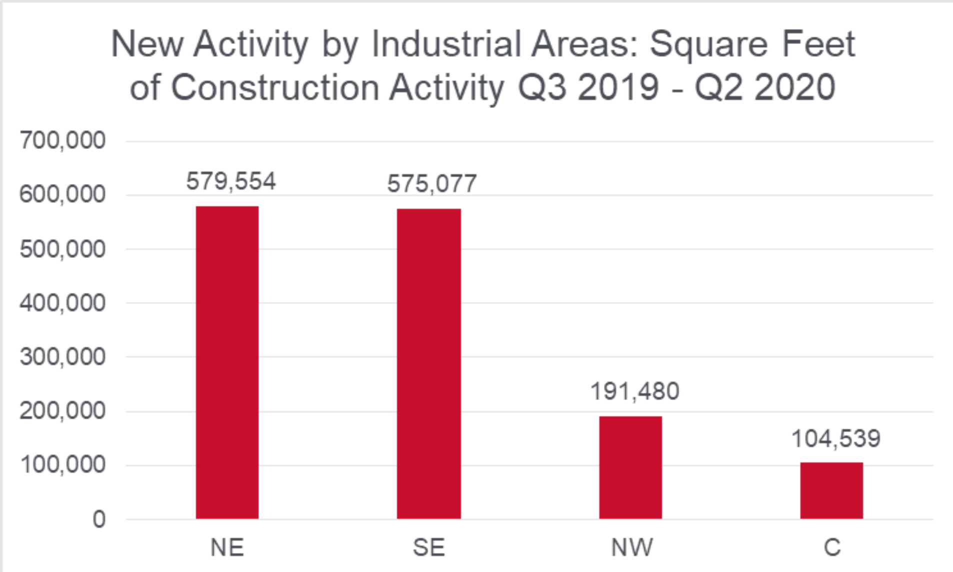


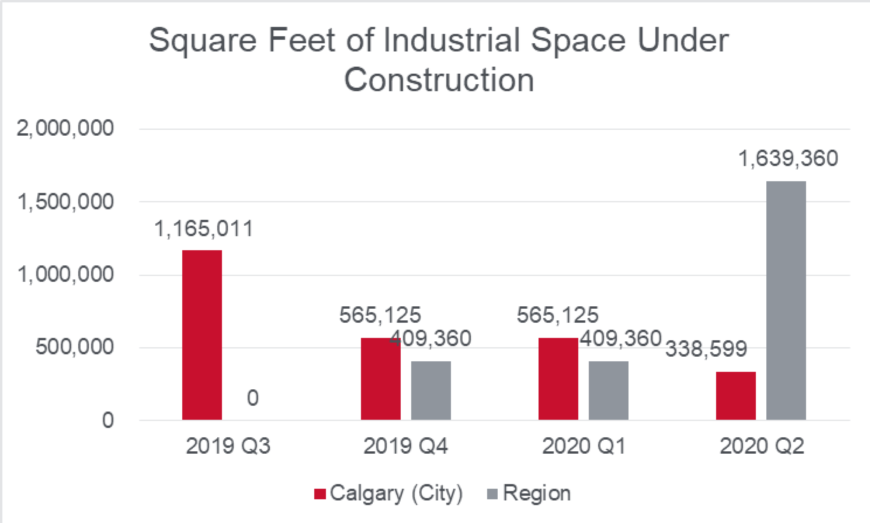
Figure 8: New Activity by Industrial Area: Square Feet of Construction Activity Q3 2019 - Q2 2020



The past four quarters of industrial activity has been categorized by small and medium-scale development. Specifically, the majority of new construction across Calgary's industrial areas has been small or medium storage facilities with office or mezzanine components. These products are primarily built on spec, and are designed to be leased and fitted to multiple tenants after construction is completed. The average size of individual construction projects in this time period was 28,000 square feet, with individual bays designed to cater to small businesses needing 5,000-10,000 square feet. Notable exceptions include a limited number of larger-scale warehousing, logistics, and processing centre products initiated in areas such as Great Plains (SE) and Stoney 2 (NE) that offer larger bays off approximately 50,000 or 100,000 square feet in size. It is important to note, however, that in the first half of 2020, no new issued individual building permit was larger than 40,000 square feet.

Market reports from third parties, such as CBRE Limited, help to understand industrial real estate activity occurring in the Calgary region outside of the city boundary. As illustrated in Figure 9, from Q3 2019 to Q2 2020 more industrial growth occurred within The City than within the region. The City had 2,633,860 square feet of industrial development compared to 2,458,080 square feet of industrial development in the region. Only two separate industrial projects in the region were listed as actively under construction by CBRE in the second quarter of 2020. These two projects accounted for over 1,630,000 square feet of new construction and absorbed over 37 hectares of land. Both projects are located in the High Plains Business Park in Balzac, with one being over 1,230,000 square feet of design-build space for the new Lowe's distribution centre.

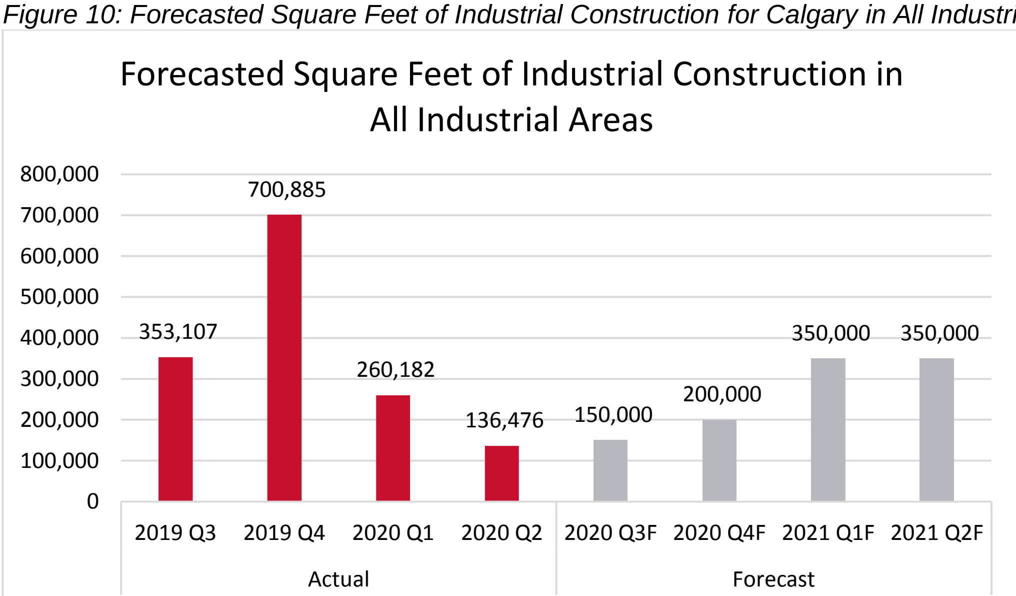
Figure 9: City versus Regional Industrial Activity



<u>Forecasted Absorption</u>

CBRE believes, that due to the rise of online shopping during the COVID-19 pandemic and the desire of suppliers and producers to mitigate risks of logistics disruptions, there will be an increase in domestic inventory held and higher demands for local production facilities. These two emerging trends will likely continue to drive down demand of certain types and sizes of industrial development inside Calgary's boundaries, likely keeping activity levels low for the next year. Figure 10 shows an estimate of Calgary's industrial activity for the next year.

Figure 10: Forecasted Square Feet of Industrial Construction for Calgary in All Industrial Areas



Source: CBRE Limited

Financial Summary

In 2020, the total assessed value of all industrial lands in Calgary was $16.6 billion which represents 27 per cent of all non-residential lands. The industrial areas contribute to the City's economy with up to $262.7 million in annual property tax in 2020. Industrial lands accommodate approximately 200,000 jobs and contribute to the city's economic well-being by driving GDP and employment, which in turn helps to drive residential growth.

Infrastructure and Service Details

Transportation

The City has initiated several major road construction infrastructure projects in the northeast and southeast that will directly support the industrial sector of Calgary. In the northeast this includes the Airport Trail Extension between 36 Street and 60 Street NE to be substantially completed in 2020; new interchanges at 19 Street E and Barlow Trail NE to be completed in 2022; and southbound Stoney Trail to westbound Airport Trail NE Ramp to be completed in 2020. These projects along Airport Trail will complete the connection between Deerfoot Trail to Stoney Trail. The estimated project costs for these listed north projects are approximately $153M.

In the southeast, construction on 130 Avenue SE twinning between 52 Street and McIvor Boulevard is ongoing and completion is expected in 2020 Fall. The expected project costs are approximately $5.5M. In 2019 and 2020, numerous main roads in the industrial areas were paved as part of the City of Calgary's annual paving program. This work involved the repair or replacement of concrete sidewalks, wheelchair ramps, and curbs and gutters and the repair and replacement of ashalt roadway.

Conclusion

In the Calgary region, in the second quarter of 2020, the industrial vacancy rate sits at 7.8 per cent and the industrial market saw almost 500,000 square feet of net occupancy growth. The subdued level of industrial activity can be primarily traced to the effects of the COVID-19 pandemic. The impacts to the employment, financial, and real estate markets brought by COVID-19 will likely continue to affect Calgary's industrial market for the next year or longer. CBRE reports in its 2020 Q2 Industrial Marketview report, that small and medium-scale industrial tenants (generally small local businesses) have been disproportionately negatively impacted by the COVID-19 pandemic. The majority of industrial units being becoming vacant since the start of the pandemic are of these type and size.

As of the end of Q4 2019, there was a supply of approximately 1,154 hectares of planned land, and 957 hectares of planned and serviced land within Calgary's strategic industrial areas. Due to the extreme uncertainty around the pandemic, an estimated 747,000 square feet of construction and 26 hectares of land is expected to be absorbed in the 2020 calendar year. A prolonged period of this absorption rate would provide an estimated supply of approximately 37 years of planned and serviced land. However, absorption is expected to return to average levels of 1.7 million square feet and 50 hectares of land per year in 2021, providing an estimated supply of approximately 19 years of planned and serviced land.

For more than 50 years, The City's development arm (Real Estate & Development Services, formerly the Office of Land Servicing and Housing) has played an important role providing certainty in the availability of serviced industrial land, complementing the economically cyclical investment of private industry. The principles behind Council's decision to ensure a steady supply of serviced industrial land are detailed in the 2013-2022 Industrial Land Strategy. The strategy is due to be updated as part of RE&DS Corporate Land Strategy program.

The City has stewardship of 2,044 acres of planned and serviced land within Calgary's strategic industrial areas. Most of which is in the southeast in Dufferin North, Point Trotter, Great Plains, Starfield and Shepard.

Despite the pandemic, demand for space for large industrial users continues. The major leases signed in the second quarter of 2020 include an e-commerce company taking 302,206 square feet and another 1.2 million square feet Lowe's Canada building in Balzac. This is the second largest industrial building in the region. These leases indicate that large multi-national organizations are still finding advantages in Calgary's strategic geographic location as a distribution hub.

Residential Growth

Summary

In the Calgary CMA there was 11,909 housing starts in 2019, this was close to the previous five year average of 12,382 starts. Calgary' share of that growth was 89 per cent. Since the 2019 census, it is estimated Calgary grew by 9,700 units to April 2020 when a 2020 census would have normally been completed. 43 per cent of that growth occurred in the established areas. The City's Growth Strategy considers how best to help meet the goals of the Municipal Development Plan (MDP) in support of growing residential and commercial development in these communities, while aiming for an effective balance across the community types and locations.

The City's approach for determining the right time and location to support and invest in growth is evaluating decisions through the lens of MDP/CTP alignment, market opportunities and financial impacts to The City and the economy. New communities require new supporting infrastructure that is provided through investment from both private and public sources. Once occupied, these new communities are generally stable for a period of decades and require operating dollars to fund the services provided by The City.

After time a community will experience demographic change, housing redevelopment, and aging of the supporting infrastructure. Where population growth or growth-related demographic change occurs in parallel with redevelopment and aging infrastructure, the opportunity for growth-related investment is presented. This creates an opportunity for both private and public investment in maintenance and/or upgrades of community infrastructure.

Indicators for monitoring lifecycle stage include:

- Development activity;
- Housing stock change;
- Policy status;
- Amenities;
- Housing prices;
- Demographics;
- Community Lifecycle; and
- Trends in ownership and rental.

While growth-related investment in new communities is generally straightforward, and the results of which are clearly measureable in number of new units and area of non-residential space, growth-related investment in established areas is less so. Investment in existing infrastructure often serves dual purposes including maintenance/lifecycle, and this can blur the purpose of a growth-related upgrade. Some investment may serve the dual purpose of improving infrastructure based on growth that has already materialized, and in preparing for more anticipated growth.

The return on established area investment is also less clear in that upgrades may indeed result in new residential units and commercial space, but also increase the quality of life in areas and may alleviate infrastructure challenges related to the pressures of local or regional growth. These elements are more qualitative to identify and evaluate. Therefore, growth-related investment in established areas may include a replacement or an enhancement of an asset that already exists, or new supporting infrastructure to increase capacity of the current system. As the Established Area Growth and Change Strategy (EAGCS) moves forward with the implementation of Phase 1 investment, reporting will included both quantitative and qualitative indicators, including:

- Citizen satisfaction/quality of life surveys;
- Access to infrastructure that supports mobility choices;
- Sense of safety of pedestrians; safety-related data;
- New units and non-residential floor space; density of communities;
- Market activity and how closely it matches anticipated trends;
- The value of local business licenses for retail/commercial uses;
- Infrastructure buildout and timing; new services brought online;
    - New or upgraded park space and pathways, and increased connectedness of mobility choices;
    - New or upgraded utility and road/pedestrian infrastructure;
    - New or upgraded emergency services infrastructure;
    - The value of delivered growth-related projects;
- Availability of local services/service levels;
- Increase/shift in use of upgraded public realm; and
- Changes in property taxes collected and spent on growth-related investment and servicing; change in property value in proximity to improved public realm/services.

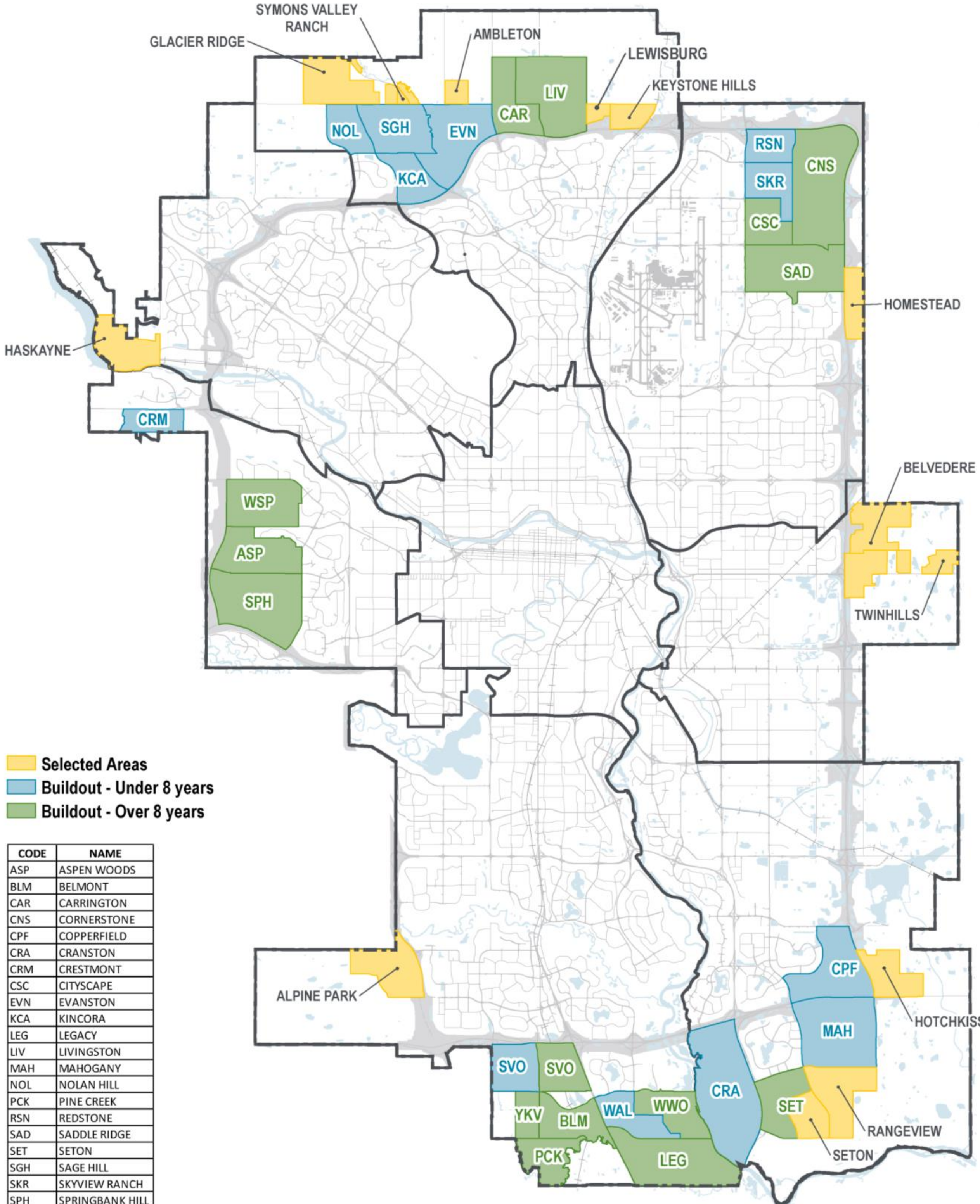
Definitional Note on the 14 New Communities

Through the New Community Growth Strategy 2018, eleven business cases proposing 14 new communities were approved by Council. These communities represented all, or a portion of, communities identified through the Area Structure Plan process. The new communities vary widely in size, and some will be the subject of future business cases to address completion of the communities. There is not a one-to-one ratio of business cases to new communities. As is common in the planning process, the final community naming and determination of the community boundaries can and does change as development applications move through the planning continuum.

The following table shows how the 14 new communities have been refined since 2018 July. The map on the following page shows the most recent boundaries for the new and actively developing communities, and the legend indicates anticipated build out time. For the 2020 New Community Growth Strategy evaluation, Administration has shifted to speaking in terms of business cases, as opposed to communities.

NCGS 2018 Name (# of Communities)	2019 Community Name
Keystone Hills (2)	Lewisburg
	Keystone Hills
East Stoney	Homestead
Belvedere (West)	Belvedere
Belvedere (TwinHills)	TwinHills
South Shepard	Hotchkiss
Rangeview (2)	Seton
	Rangeview
Providence	Alpine Park
Haskayne	Haskayne
Glacier Ridge (Ronmor/Wenzel) (2)	Glacier Ridge
Glacier Ridge (Capexco)	Symons Valley Ranch
Glacier Ridge (Qualico)	Ambleton

Map of Actively Developing and 14 New Communities



CODE	NAME
ASP	ASPEN WOODS
BLM	BELMONT
CAR	CARRINGTON
CNS	CORNERSTONE
CPF	COPPERFIELD
CRA	CRANSTON
CRM	CRESTMONT
CSC	CITYSCAPE
EVN	EVANSTON
KCA	KINCORA
LEG	LEGACY
LIV	LIVINGSTON
MAH	MAHOGANY
NOL	NOLAN HILL
PCK	PINE CREEK
RSN	REDSTONE
SAD	SADDLE RIDGE
SET	SETON
SGH	SAGE HILL
SKR	SKYVIEW RANCH
SPH	SPRINGBANK HILL
SVO	SILVERADO
WAL	WALDEN
WSP	WEST SPRINGS
WWO	WOLF WILLOW
YKV	YORKVILLE

Residential Growth and Change

This year, COVID-19 related impacts led to the cancellation of the municipal census, meaning that population and new dwelling units have been estimated across the city using building permit starts and information.

Calgary's current population forecast for 2024 is for a population of 1,380,700, accounting for 77 per cent of the region's total population. This would be an addition of 95,000 people. Over the last five years (2015 to 2019), Calgary absorbed 78 per cent of the region's total population growth.

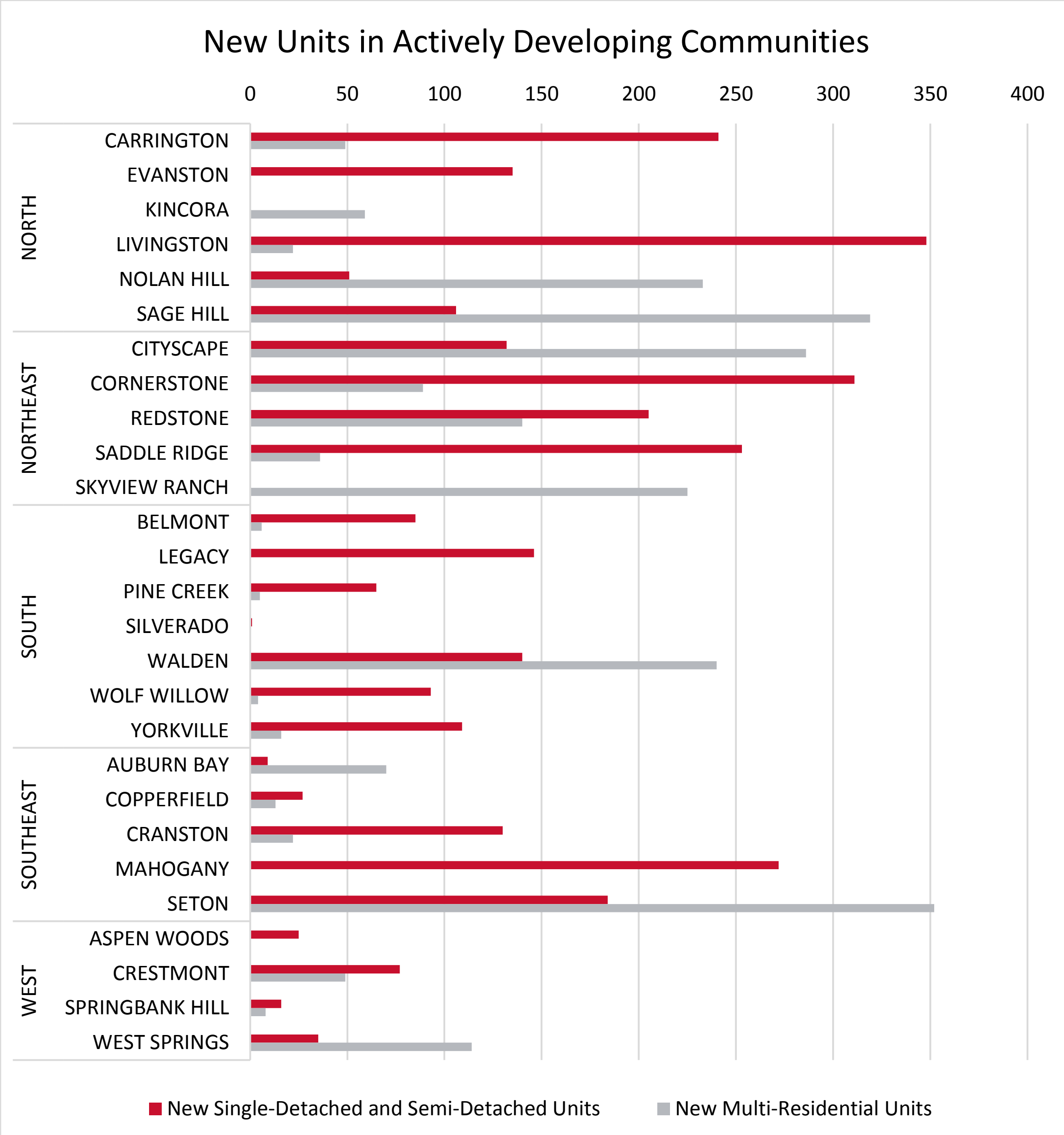
In 2019, residential construction value was $3.14 billion, which is above the 10 year median of $2.65 billion. In 2020 through the first eight months the residential construction value is $1.45 billion compared to the 10 year median of $1.70 billion over the same time period.

The actively developing communities continue to build out and see gains in population growth compared to other parts of the city. This year marked the completion of Auburn Bay with only multi-residential parcels remaining for development. The majority of new community development occurred in the North and Northeast planning sectors. Figure 12 illustrates that the actively developing communities saw an estimated +3,200 single-detached and semi-detached unit increase and an estimated +2,300 multi-residential unit increase. The estimated 5,500 units are comparable to the 5,451 units in the actively developing communities as indicated in the 2019 census. A snapshot below illustrating the forecasted 2020 unit growth for the first eight months compared to the actual unit growth, determined by applied building permits, during the same period of 2020 indicates a significant decline in development.

Figure - 2020 total suburban forecasted unit growth compared to actual units applied in building permits (January – August)

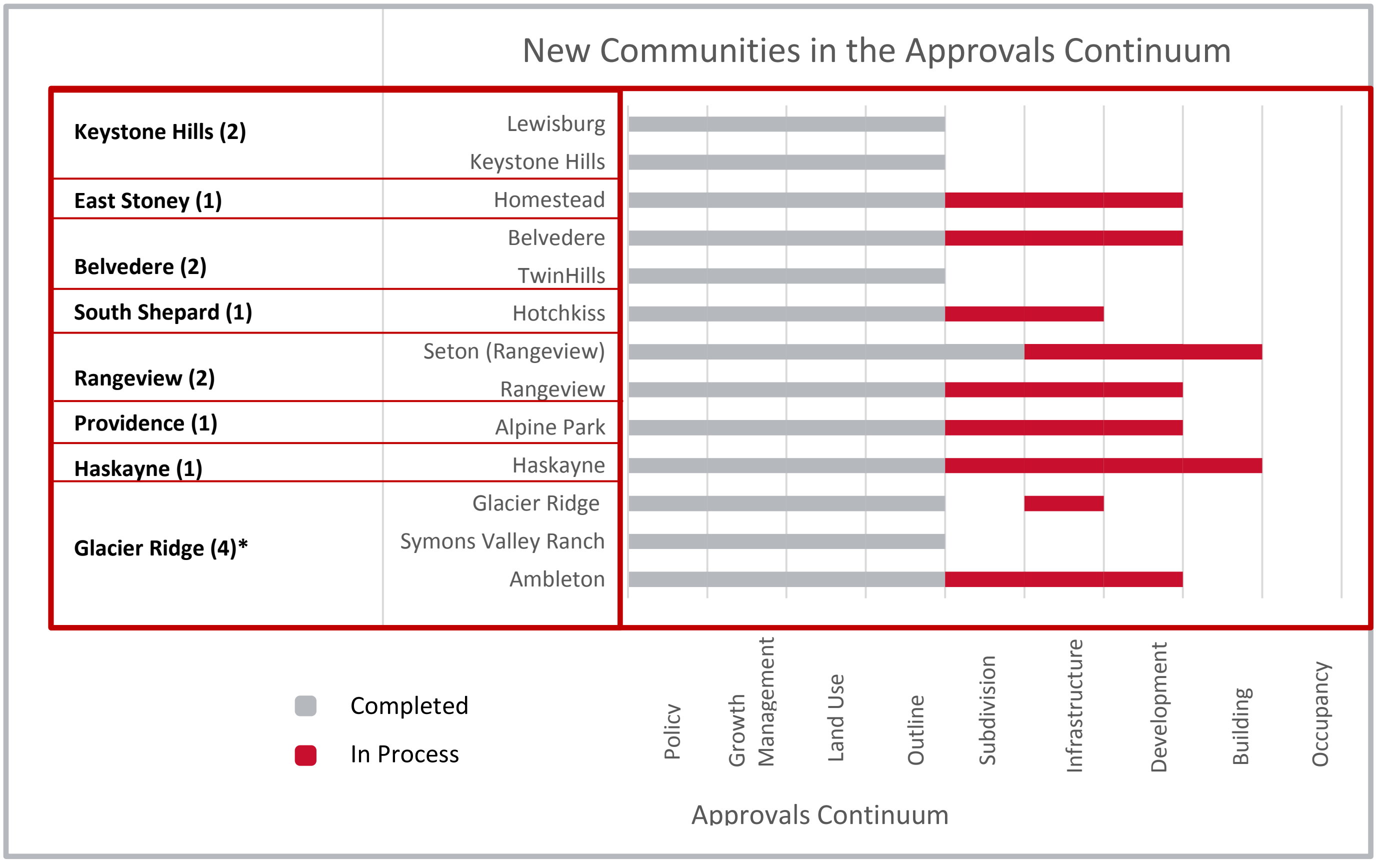
Sector	**2020 (January - August)**		
	Forecasted Growth (units)	Actual Growth (BP units)	Gap (+/- %)
North	837	664	-21%
Northeast	740	584	-21%
Southeast	565	482	-15%
South	931	774	-17%
West	130	129	-1%
Total	3,203	2,633	-18%

Figure 11 – Estimated 2020 New Units in Actively Developing Communities Using Building Permit Data



For the 14 new communites approved in 2018, Figure 13 demonstrates progress made by each new in the approvals continuum, based on the furthest advanced development proposal in that community. If a stage in the continuum is indicated as “in process”, this means an application has been submitted, but that stage has not yet concluded. Most of the new communities have continued to progress through the development approvals continuum. All new communities have received some land use approvals. Seven of the new communities have executed a Development Agreement and two have received building permits for housing construction. First occupancies for all communities, with the exception of Keystone Hills, Symons Valley and TwinHills, was to be expected in 2021. At the time of this report, it may still be possible that at least a few units have been occupied by the end of 2021 in 12 of the new communities. However, at this time it is almost certain that the majority of the 14 new communities will not meet The City’s anticipated build-out of 250 units in each community by the end of 2022 nor the 2018 business case’s anticipated build-outs that were much higher than 250 units.

Figure 12 - New Communities in the Approvals Continuum (as of 2020 September)



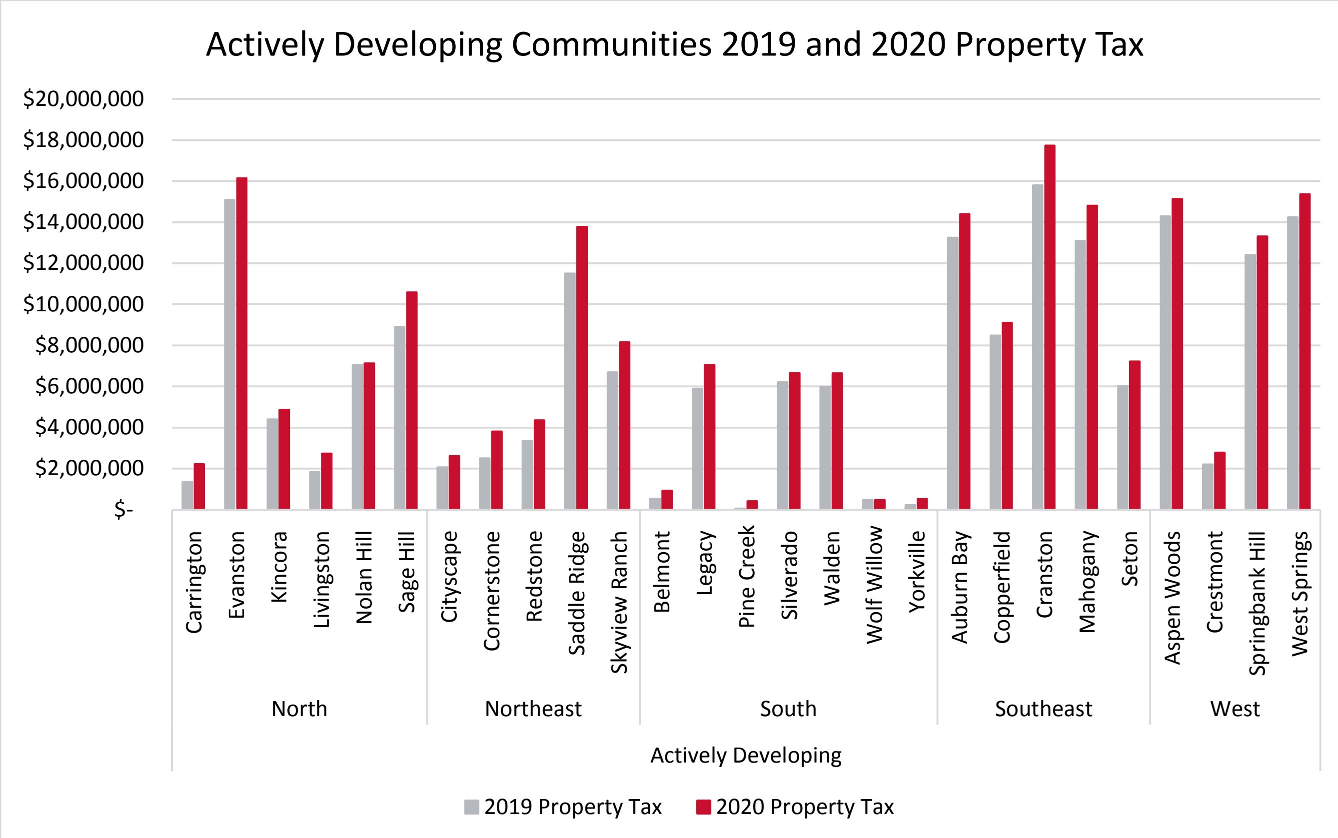
Definitions:
Infrastructure: Once the civil engineering design for the infrastructure has been approved, grading & construction of the essential on-site infrastructure can begin.
Development: The execution of a development agreement.
**The new community of Glacier Ridge represents two communities from 2018.*

The infrastructure process generally takes 9-12 months to complete with building construction taking about 6-9 months once servicing is in place. Administration expected the majority of the new communities to have completed the subdivision process and be further along in the servicing process.

Financial Summary

The following chart illustrates the increase in property taxes assessed from 2019-2020 from land development in the actively developing communities. Since 2019 the property tax has increased by approximately $25 million in the actively developing communities. In the 14 new communities the 2020 property tax is approximately $0.89 million total. It should be noted that it cannot be determined exactly how much of the property tax increased due to new unit growth (versus other forms of appreciation) in the actively developing communities, however most of the new property tax growth is a result of new unit growth and new commercial growth.

Figure 13 - Year-over-Year Property Tax, Actively Developing Communities



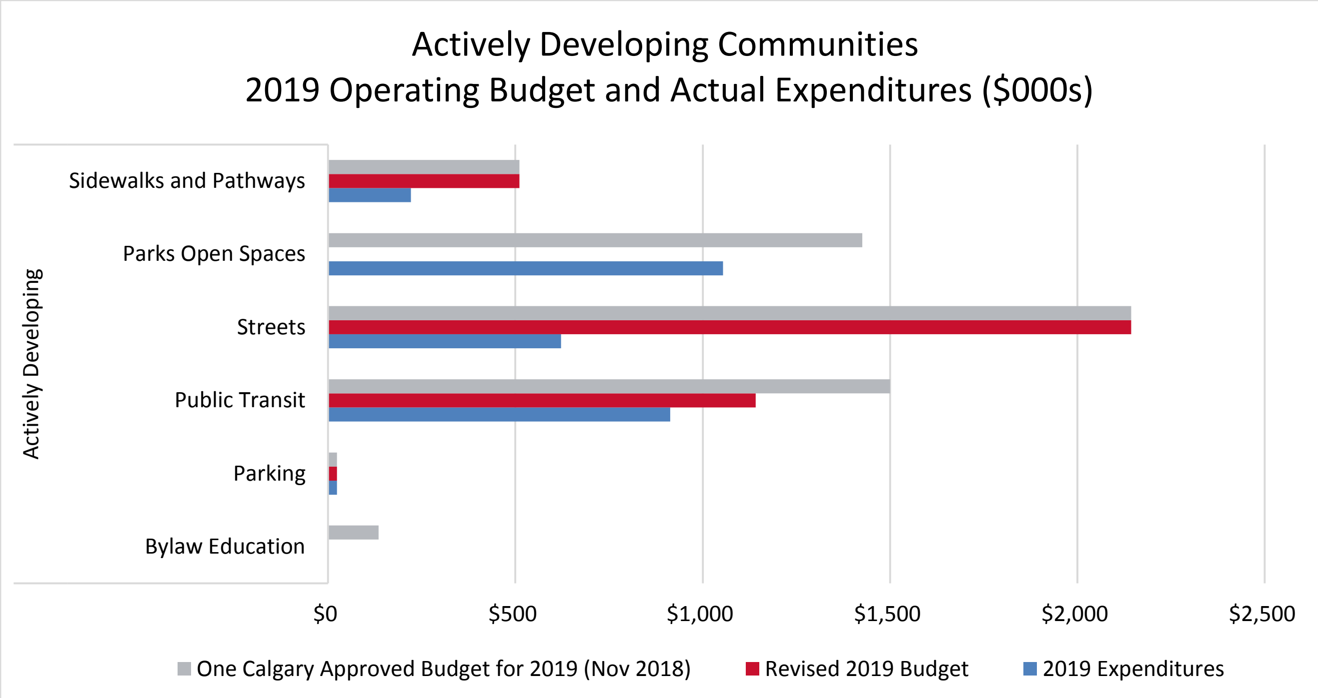
Infrastructure and Service Details

Details of infrastructure servicing and budget expenditures are provided here by year, for 2019 and 2020.

2019

In 2019 there was no budget for the Established Area Growth and Change Strategy (EAGCS). For the actively developing communities, Figure 15 below illustrates the direct incremental operating expenditures in 2019 in relation to the original One Calgary budget (2018 November) and 2019 revised budget. The direct incremental costs represent a portion of the total costs captured to provide services to the residents of these communities, the total costs are much higher. The City incurred an increase of approximately $2.8 million in direct incremental operating costs out of a revised budget of $3.8 million in 2019 for new roads maintenance, transit service, sidewalk and pathways maintenance and parks maintenance in actively developing communities. In the case of parks, additional parks maintenance expenditures in relation to the actively developing communities has been absorbed into the department's overall budget. In 2019 there was no infrastructure turned over to The City and no housing development from the 14 new communities and therefore no operating costs.

Figure 14 - 2019 Operating Budget and Actual Expenditures, Actively Developing Communities



In the actively developing communities, capital expenditures for 2019 are illustrated in Figure 16. All of the capital expenditures represented are for transportation infrastructure projects. Figure 16 illustrates only communities where capital expenditure was to occur in 2019. In 2019 approximately $5.7 million was spent on capital infrastructure in the actively developing communities from a revised 2019 budget of approximately $20.1 million. The low spending rate in 2019 is a result of projects not yet moving into the construction phase where the significant spending occurs for each project.

Figure 15 - 2019 Capital Budget and Actual Expenditures, Actively Developing Communities

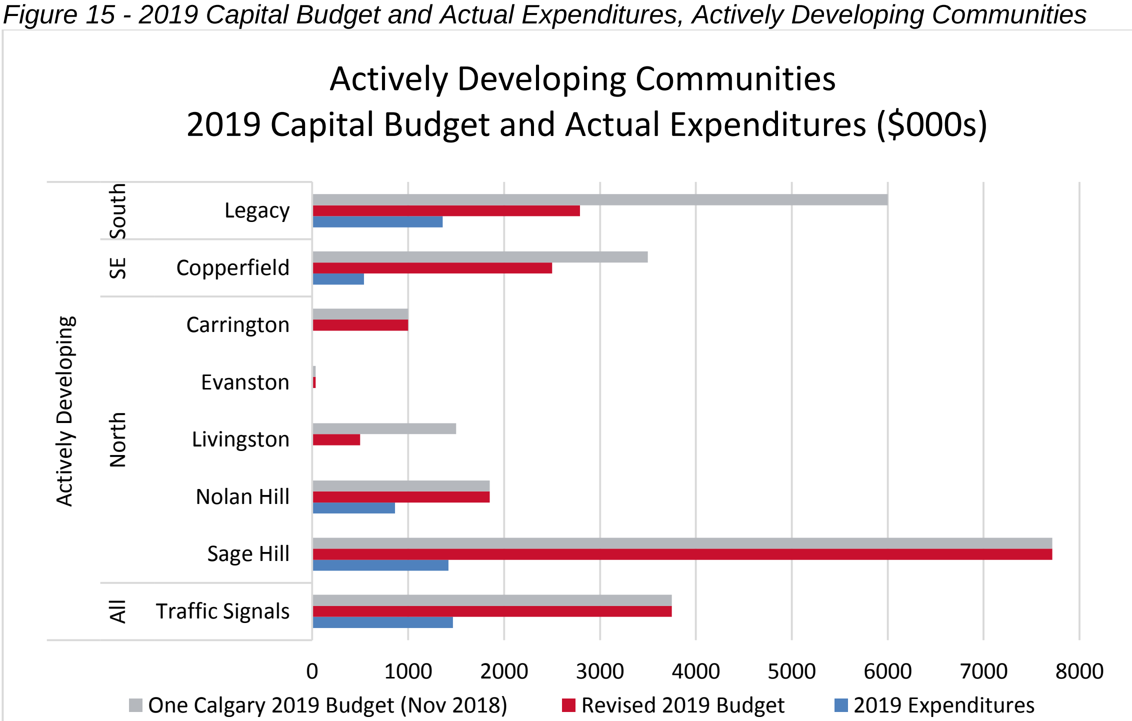
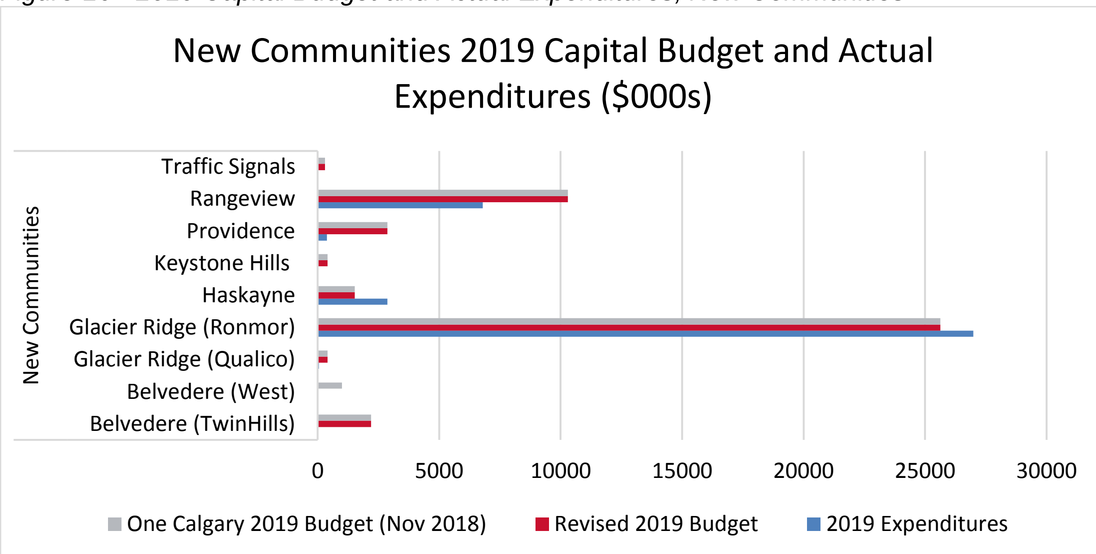


Figure 17 illustrates the capital expenditures in 2019 for the 14 new communities. In 2019 approximately $37.1 million was spent from a revised 2019 budget of approximately $43.6 million. Most of the capital expenditures were for utility infrastructure in Rangeview, Glacier Ridge and Haskayne. Engineering design work has also started for other utility projects in other communities and for some transportation infrastructure in Rangeview.

Figure 16 - 2019 Capital Budget and Actual Expenditures, New Communities



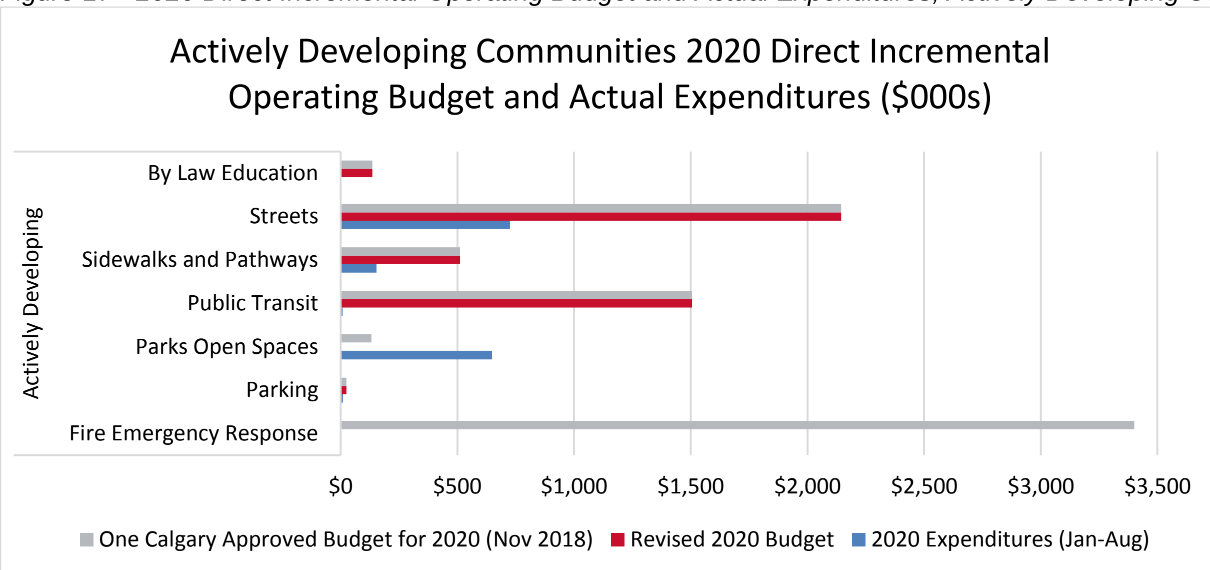
<u>2020</u>
In the established area, Phase 1 growth-related investments in water and sanitary utilities were identified in two areas for strategic proactive upgrades to leverage prioritized Main Streets, support redevelopment, minimize community disruption and realize efficiencies.

The strategic investments in utilities along 17 Avenue SW and 33 Avenue SW will be delivered as components of the overall construction of the Main Streets streetscape designs. Construction for the 17 Avenue SW main street is now underway (started summer 2020) and is expected to be complete in 2022; sanitary and water upgrades are included in this scope of work. For 33 Avenue SW (Marda Loop), the funding for the water and sanitary upgrades has been allocated, with an expected construction in 2022. The upgrades in both areas will support the anticipated intensification on and around the main streets.

In May 2020, Phase 1 of the Established Area Growth and Change Strategy (EAGCS) identified five multi-community growth areas where it was anticipated that the redevelopment market interest would remain for the next 1-3 years. These areas generally ringed the downtown and represented an opportunity to support the ongoing strategy to support Calgary’s downtown. Projects that could enhance the public realm and utility capacity within these areas were identified. Council approved a capital program request for $11.7 million in 2021 and $18.3 million in 2022, funded by the newly-created Established Area Investment Fund. This approval directed the delivery of public realm projects within the EAGCS Phase 1 Growth Areas including traffic calming and pedestrian safety improvements, park and recreation upgrades, pathway connectivity, sidewalk & streetscape improvements, and one-time public space programming. Public realm capital projects are currently being transitioned into the delivery phase and as of 2020 Q3, project teams have begun detailed planning and design work. Next steps include engagement with the local community and organizing the construction. The projects remain on track for construction in 2021 and 2022.

Figure 18 below illustrates the actively developing communities direct incremental operating expenditures in 2020 to the end of August in relation to the original One Calgary budget (2018 November) and 2020 revised budget. The City has incurred an increase of approximately $1.5 million in direct incremental operating costs out of a revised budget of $4.3 million in 2020 for new roads maintenance, sidewalk and pathways maintenance and parks maintenance. As shown in Figure 18, the parks and fire services budgets were previously deferred from 2020. In the case of parks, additional parks maintenance expenditures in relation to the actively developing communities has been absorbed into the department's overall budget. In 2020 there was no development expected from the 14 new communities and thereore no City direct incremental operating costs.

Figure 17 - 2020 Direct Incremental Operating Budget and Actual Expenditures, Actively Developing Communities



In the actively developing communities, capital expenditures for 2020 to the end of August are illustrated in Figure 19. All of the capital expenditures represented are for transportation infrastructure projects. Figure 19 illustrates only communities where capital expenditure was to occur in 2020. In 2020 approximately $11.5 million has been spent on capital infrastructure in the actively developing communities from a revised 2020 budget of approximately $41.6 million. The majority of the expenditures to the end of August have been for the 14 Street NW/Stoney Trail interchange, traffic signals and 210 Avenue SE construction. Again the low spending rate is a result of many projects not yet moving into the construction phase when the significant spending occurs for each project.

Figure 18 - 2020 Capital Budget and Actual Expenditures, Actively Developing Communities

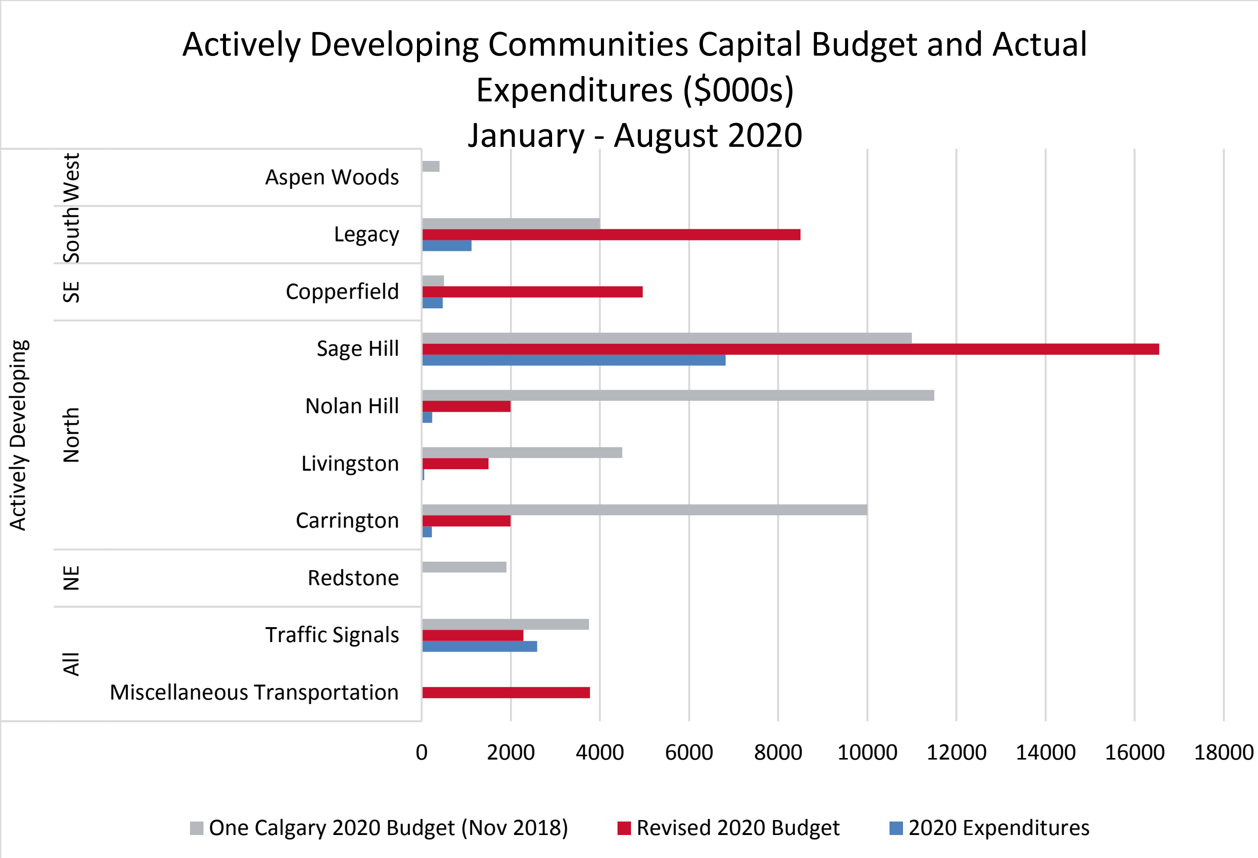
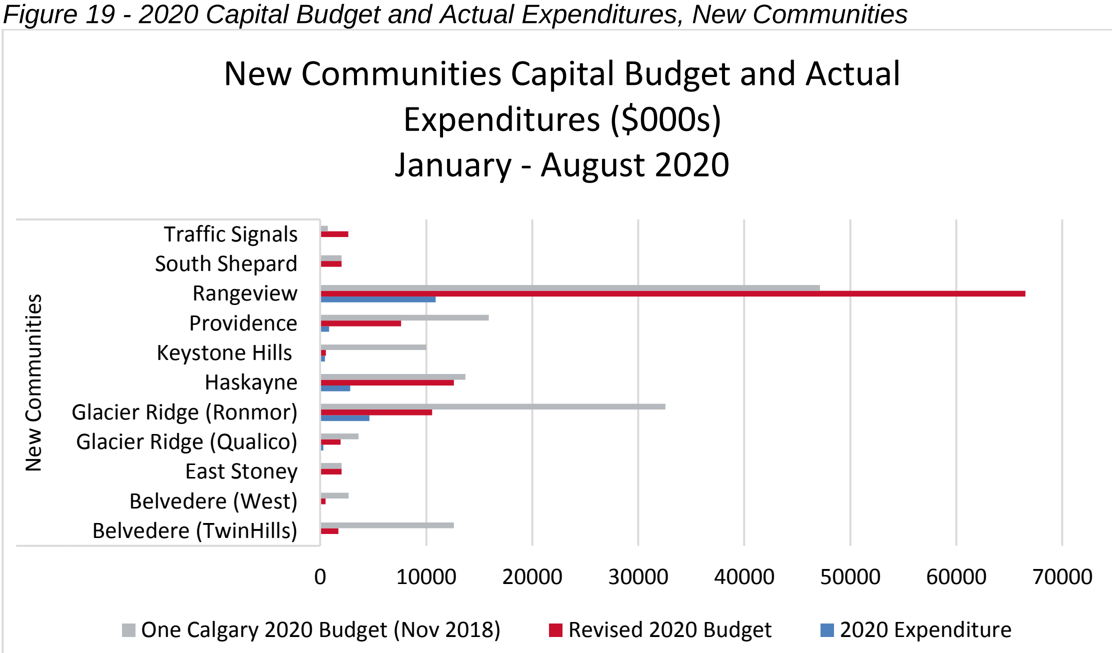


Figure 20 illustrates the capital expenditures in 2020 to the end of August for the 14 new communities. In 2020, expenditures of approximately $19.9 million from a revised 2020 budget of approximately $108.6 million have been incurred to the end of August. Most of the capital expenditures continue to be for utility infrastructure in Rangeview, Glacier Ridge and Haskayne.

Figure 19 - 2020 Capital Budget and Actual Expenditures, New Communities



Conclusion

The residential information indicates estimated unit growth for 2020, using building permit data, that occurred during the census time frame of May 2019-April 2020 is about the same as unit growth that was reported in the 2019 census that covers the same time frame. Since the beginning of the COVID-19 pandemic, growth has significantly slowed. The actively developing communities continue to absorb approximately 64 per cent of Calgary`s estimated unit growth. All 14 new communities that were approved in 2018 have received some land use approvals. Seven of these new communities have executed a Development Agreement and two have received building permits for housing construction. It will be important to monitor how many continue to move forward this year and execute a Development Agreement. The execution of Development Agreements signal the developer is moving forward with considerable capital investment, and gives a good indication if occupancy can be expected in 2021. Since some of the developments are not moving forward as quickly as expected, Administration is reviewing the anticipated capital and direct incremental operating costs for 2021 and will bring adjustments forward to the 2020 mid-cycle budget adjustments. These adjustments will reflect lower spending in 2021 partly as a result of slower growth and partly as a result of budget adjustments to off-set projected shortfalls.

Considering the growth that has occurred over the past year, an update is provided below on the serviced capacity and the anticipated demand. The supply of land remains sufficient to accommodate the projected demand through this budget cycle and the 2023-2026 budget cycle. The dispersion of supply is also healthy, with additional available capacity expected from the 14 new communities over the next year and a half.

For Single/Semi Detached Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity - Start of Period	14,607	18,320
Forecasted Demand - Entire Period	(12,283)	(15,422)
Additional Available Serviced Capacity from Actively Developing Communities	14,246	0
Additional Available Serviced Capacity from New Community Growth Strategy 2018	1,750	19,217
Total Serviced Capacity - End of Period	18,320	22,116
Estimated Years of Supply Balance – End of Period	5	6
For Multi Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity - Start of Period	33,909	32,789
Forecasted Demand - Entire Period	(8,645)	(12,001)
Additional Available Serviced Capacity from Actively Developing Communities	7,525	0
Additional Available Serviced Capacity from New Community Growth Strategy 2018	0	15,941
Total Serviced Capacity - End of Period	32,789	36,728
Estimated Years of Supply Balance – End of Period	11	12

Note: Actively developing community capacity is projected to become available during the 2019-2022 budget cycle, while the NCGS capacity is projected to become available largely through the 2023-2026 budget cycle

Conclusion

The monitoring information indicates growth has been significantly impacted in 2020 due to the COVID-19 pandemic and may take 1-2 years to recover. Prior to COVID-19, growth in Calgary in 2019 had improved over 2018 but was slightly lower than the previous five year average indicating what may be expected as a new normal.

The impacts to the employment, financial, and real estate markets brought by COVID-19 will likely continue to affect Calgary's industrial market for the next year or longer. Maintaining adequate supply of industrial lands throughout Calgary plays a direct role in local economic development and diversifying the municipal tax base. Administration is currently in the process of developing the Industrial Area Growth Strategy, which is the third component of the Citywide Growth Strategy. The scoping report is expected to go Council in 2021 Q1 and actions of Phase 1 of the strategy are expected to be completed in 2022 as part of the Citywide Growth Strategy.

For new communities, the ability to anticipate trends is somewhat longer (5-10 years) than with redevelopment (1-3 years). Calgary's redevelopment market is subject to many influential factors that create market volatility. Identifying City investment that can align with short-term market trends/private investment means a nimble approach to budget decisions and regular updates to a market trend assessment. Growth is expected to remain steady in established areas with 16,000 new units forecasted, and an 30,000 housing units are estimated for new community areas.

Data and analysis provided in the Residential section of this report outlines that there is sufficient supply to accommodate the projected demand through this budget cycle and the 2023-2026 budget cycle. The dispersion of supply is also healthy, with additional available capacity expected from the 14 new communities over the next 18 months. This will result in a the total serviced land supply of eight to 12 years.

Moving forward, the manner in which The City supports city-building and growth is evolving through a coordinated approach to aligning planning policy, growth and investment. Initiated in 2019, the Next Generation Planning System will improve the way we plan Calgary's future. This systematic approach that incorporates strategies for new communites, established areas, and industrial areas, will help us implement and realize the Municipal Development Plan, which provides the foundation and framework for how we plan our city for citizens who live here now and citizens who will call Calgary home in the future.

Administration will continue to monitor the existing investments in One Calgary to support growth across the city and will bring forward budget adjustments and recommendations to remain financially nimble to support growth in alignment with the MDP. Looking forward to the 2023-2026 budget cycle, through an integrated Citywide Growth Strategy approach, Administration will identify investments across the city that support balanced growth in alignment with the MDP.

2020 Growth Strategy Monitoring Report

2019 October through 2020 August

Table of Contents

Executive Summary

Purpose
This monitoring report is the second version of annual report intended to provide Council and stakeholders with an overall update on, and assessment of, the ongoing integrated Citywide Growth Strategy. For the first time this year, the report includes content on established and industrial growth and change. The information in this report can help guide growth decisions or make course corrections ahead of the New Community Growth Strategy (NCGS) 2020 report PFC2020-0963 on the same agenda, and ahead of Mid Cycle Budget deliberations in November.

The objective of the monitoring report is to provide transparency and accountability based on commitments (City and developer) made initially through the NCGS 2018 decisions and through the One Calgary (2019-2022) Service Plans and Budget, and continuing into the other two growth strategies. It is also an objective to provide an indication of how The City is progressing towards meeting the growth policies within Part 5 of the Municipal Development Plan (MDP).

Content
The monitoring report includes an overall Calgary market snapshot, community development progress, market absorption, financial summary, and infrastructure and service details. The report also offers conclusions based on the data. The information within this document will help inform future discussions on growth investment decision-making and service introduction levels. The report complements the information in the The City's ***Suburban Residential Growth*** document. As a result of COVID-19 response measures, a census was not completed in 2020.

Period
The information generally represents the period from 2019 October to 2020 August. A number of data sources do not exactly align with this period, and this is noted where applicable. Financial data is aligned with the One Calgary (2019-2022) budget cycle, beginning in 2019 January and including to the end of 2020 August.[1] The information regarding development status of the new communities is based on their progress at the beginning of 2020 October.

Conclusion
The monitoring report highlights that Calgary's growth in 2019 was higher than in 2018 and occurred within the forecasted targets from the fall of 2018, down four per cent over the previous five year average. In 2020, growth has slowed considerably due to economic impacts of COVID-19. Land absorption in new community and industrial areas (defined as amount, in hectares, of City-developer Development Agreements executed) in 2020 has remained lower than anticipated but showing improvement over 2019 with approximately 212 hectares to the first of October.

The 14 new communities that were approved in 2018 have shown progress through The City's approvals continuum towards the goal of achieving first occupancies in 2021. However, only half of these new communities have executed a Development Agreement and therefore significantly less development is anticipated by the end of 2022 than was originally indicated in the 2018 business cases.

Data and analysis provided in the Residential section of this report outlines that there is sufficient capacity to accommodate the projected demand through this budget cycle and the 2023-2026 budget cycle.

[1] The One Calgary 2019-2022 Service Plans and Budget can be found here: https://www.calgary.ca/cfod/finance/Pages/Plans-Budgets-and-Financial-Reports/Plans-and-Budget-2019-2022/Plans-and-Budget-2019-2022.aspx. Details on the Growth budgets can be found as part of One Calgary 2019-2022 Service Plans and Budgets (C2018-1158), Attachment 9 "Supplemental Information", pages 19-20 (operating budgets) and 146-148 (capital budgets).

Calgary Market Snapshot

Summary

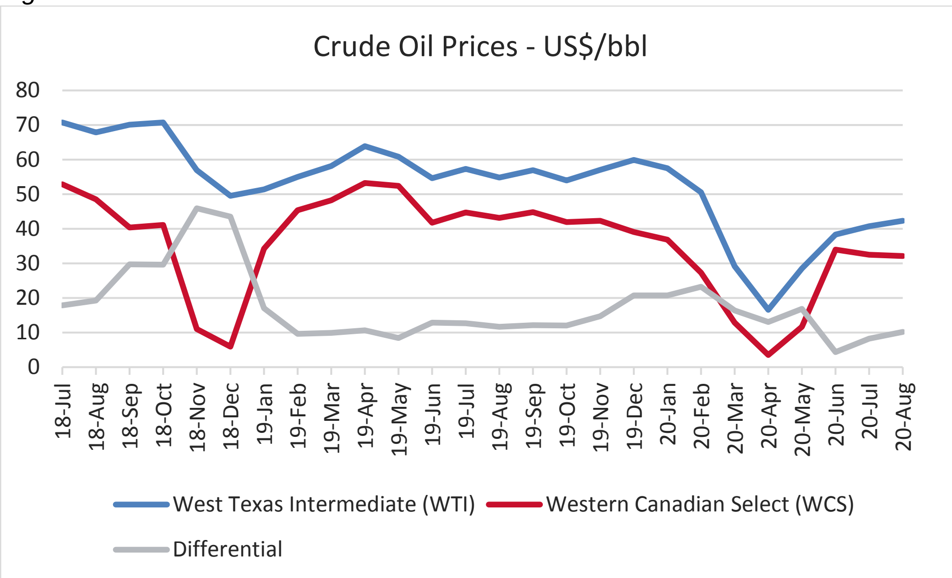
This section provides an overall snapshot of what has happened in the Calgary economy in 2019 and the first eight months of 2020 and is illustrated in Figures 1 through 5. Overall economic forecasts project an 8.7 to 11.3 per cent decrease in GDP for 2020 in Alberta, with the economic recovery expected to take place over the next two years. GDP increases in a range of 4.5 to 7.9 per cent are expected for 2021 (sources: RBC, Conference Board of Canada). The price per barrel of oil (West Texas Intermediate) has moved in a range of $16.55 to $59.88 USD since 2019 September, to settle at $42.34 in 2020 August. The price per barrel of Western Canadian Select has moved in a range of $3.50 to $42.32 USD since 2019 September, to settle at $32.11 in 2020 August. These ranges are based on monthly closing prices; oil prices in fact traded below $0 in April at the peak of COVID-19 economic uncertainty. The prime lending rate in 2020 has decreased by 1.5 percentage points to 2.45 per cent, the Bank of Canada's policy interest rate was cut to 0.25 per cent due to the economic impacts of COVID-19. As result, mortage rates have recently fallen to record lows.

In 2019, the Calgary Census Metropolitan Area (CMA) housing starts were higher than in 2018 but down four per cent from the previous five year average. Building permit activity came in as forecasted from Fall 2018 and was slightly above the 10 year median average. Subsequently, 2020 has been significantly impacted by the COVID-19 pandemic; overall economic activity has decreased accordingly, the unemployment rate rose as high as 15 per cent in June and is currently at 14.2 per cent as of 2020 August. Building permit construction value is down 19 per cent over the first eight months this year compared to the same time period in 2019 and housing starts are down 20 per cent in Calgary over the first eight months this year compared to 2019.

Due to the COVID-19 pandemic, no Civic Census was taken in 2020, meaning that the 2019 data reported on in the 2019 monitoring report remains the more recent available cenus data. As a result, post pandemic data on Calgary's population, vacancies, vacancy rates, occupancy and other variables was not available for this report.

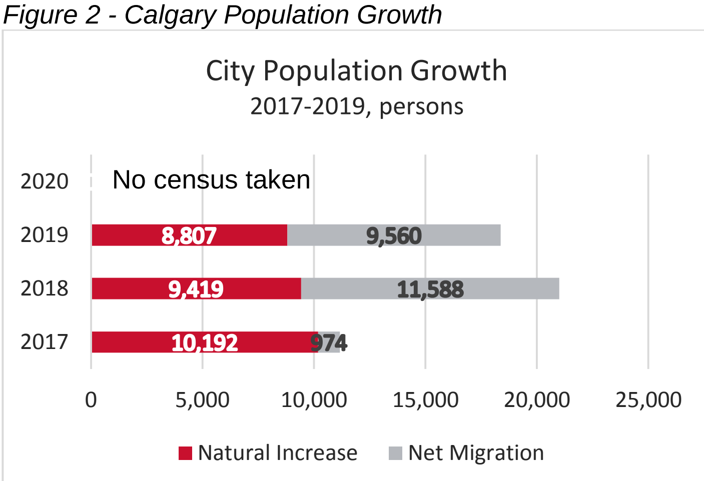
In 2019, Development Agreements associated with 147 hectares were received in new community and new industrial areas. In 2020 to the first of October, 212 hectares have been received in new Development Agreements. Figure 6 highlights that since 2016, The City has not achieved the anticipated 401 hectares per year assumption employed in the Off-site Levy Bylaw. As a result, utility rates have been required to make up the respective shortfall each year to support capital investment in these areas. Based on information received from developers in 2020 April it is anticipated there will be a levy shortfall again in 2021 when the utility portion of off-site levies are due to be paid from this year's agreements.

Figure 1 - Crude Oil Prices



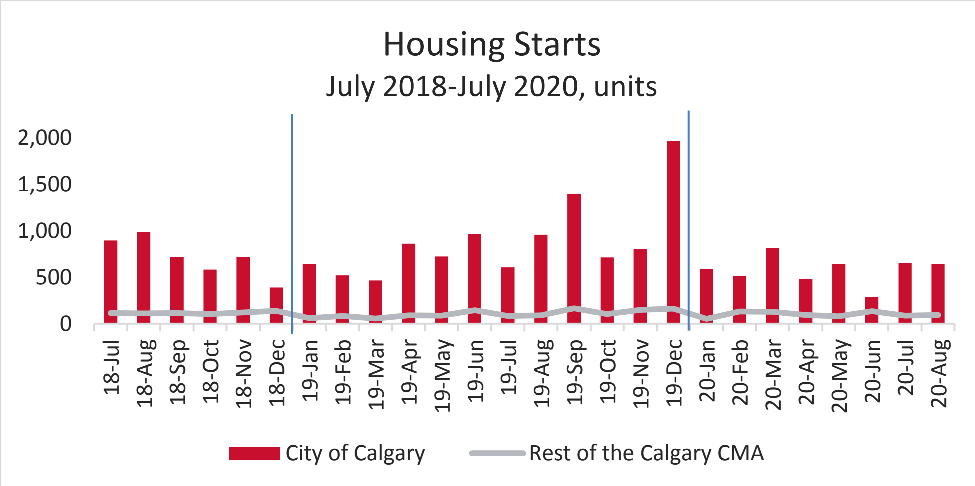
WTI Source: U.S. Energy Information Administration
WCS Source: Alberta Energy

Figure 2 - Calgary Population Growth



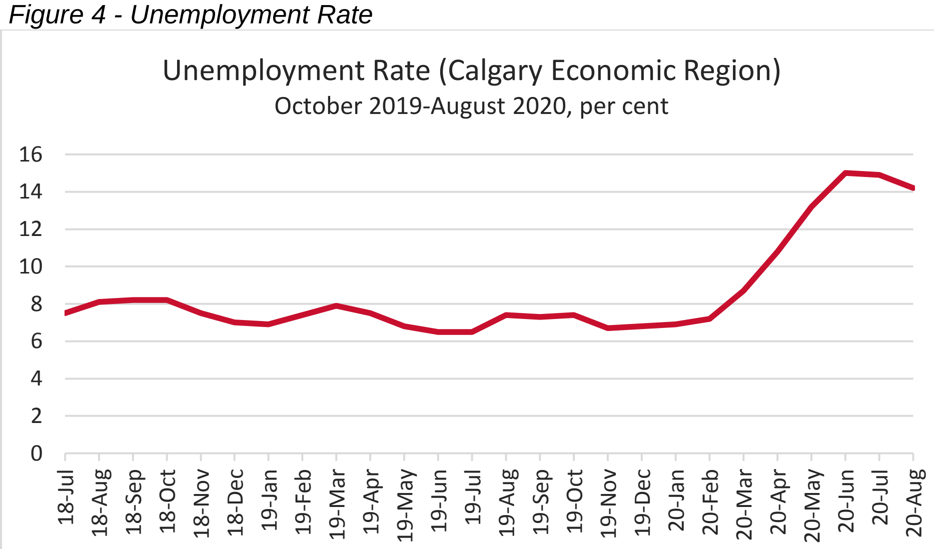
Source: City of Calgary

Figure 3 - Housing Starts



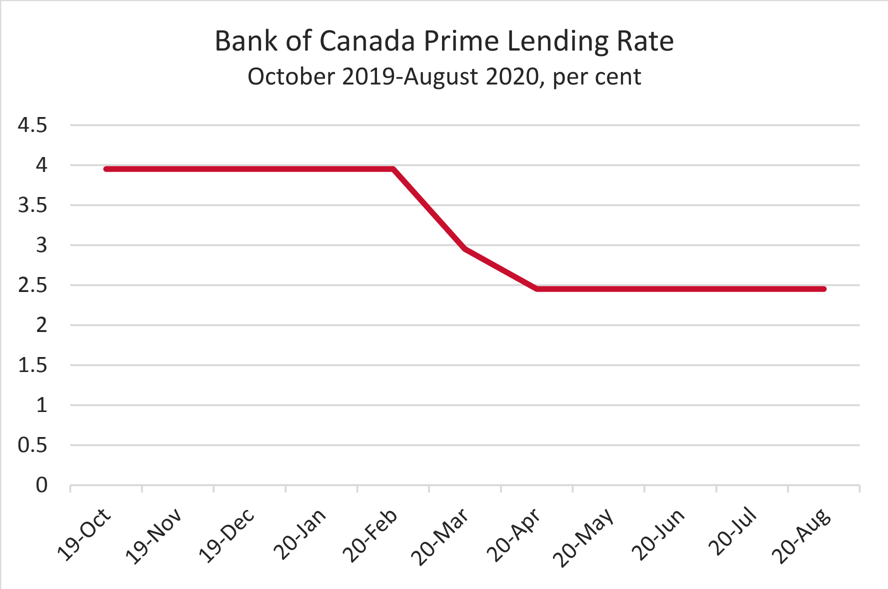
Source: Canada Mortgage and Housing Corporation

Figure 4 - Unemployment Rate



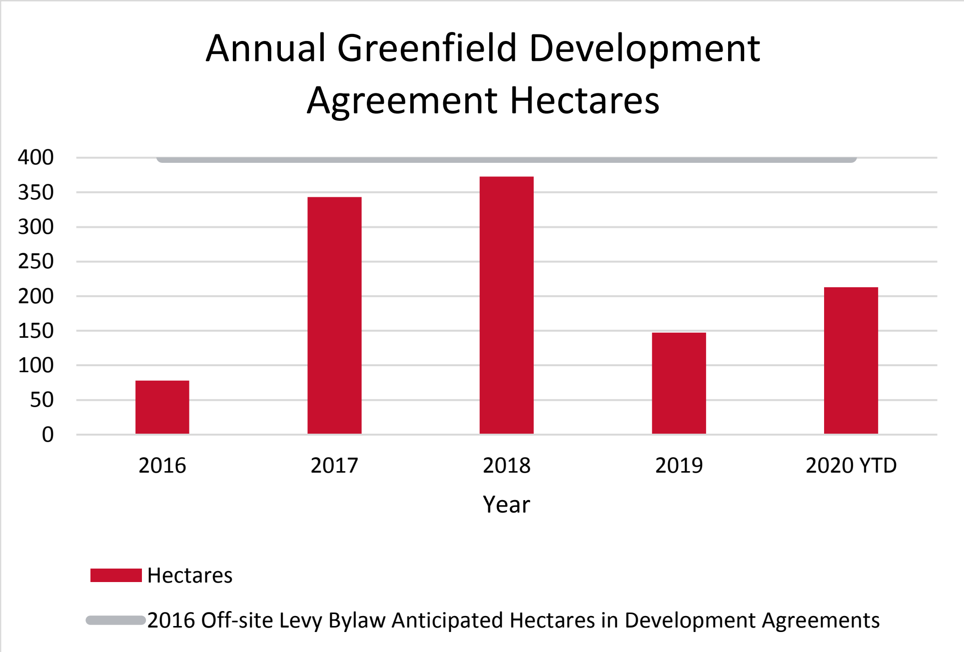
Source: Statistics Canada

Figure 5 – Canada Chartered Banks Prime Lending Rate



Source: Bank of Canada

Figure 6 – Annual Hectares under Development Agreement (Greenfield – included new community and industrial)



Source: City of Calgary

Industrial Development

Summary

In Calgary, industrial lands play a crucial role in supporting a prosperous economy. In the city there is nearly 60 square kilometers of industrial lands which represent approximately 7.2 per cent of the total land area in the city.

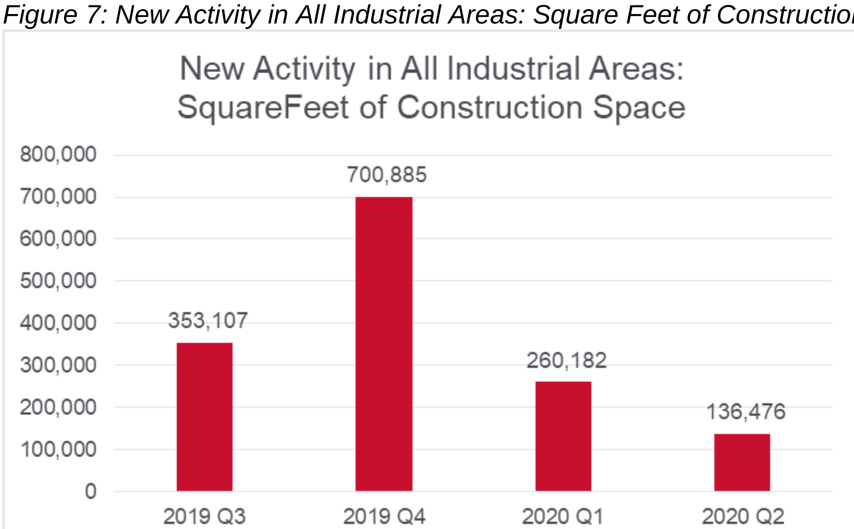
The total assessed value of all industrial properties in Calgary stood at approximately $16.0 billion in 2019 and $16.6 billion in 2020. This represented 27 per cent of all non-residential properties, and six per cent of total properties in the city. Industrial properties contributed an estimated $285.7 million in property tax contribution in 2019 and $262.7 million in 2020 to help fund the delivery of services. 2020 saw a decrease in property taxes as a result of the property tax shift onto residential properties. Industrial lands accommodate approximately 200,000 jobs and contribute to Calgary's economic well-being.

Calgary's strategic geographic location and its multimodal logistics network of air, rail, and highway transportation makes it a well-positioned inland port. Calgary is a goods-distribution hub for markets in Western Canada, the U.S Pacific Northwest and beyond. To capitalize on this competitive advantage and attract various industry clusters in Calgary, well-timed growth-related investments in Calgary's industrial areas are crucial.

Market Absorption

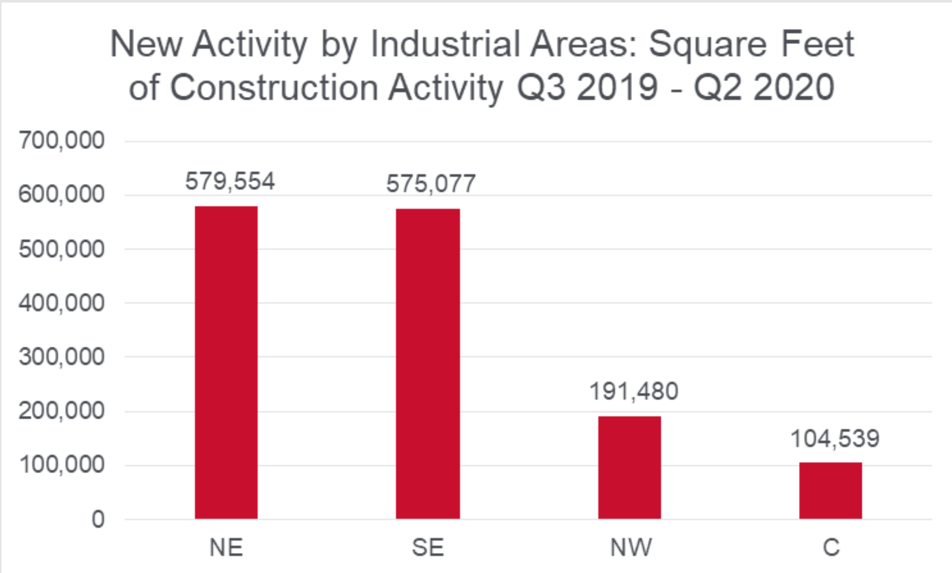
Calgary's industrial real estate market experienced lower than normal activity in the first two quarters of 2020. The low activity can be primarily attributed to a subdued industrial real estate market that has seen negative impacts from the COVID-19 pandemic. The period of 2019 Q3 to 2020 Q2 saw approximately 1,450,650 square feet of new construction initiated on approximately 40 hectares (issued building permits) in Calgary's four industrial areas (Centre, Northeast, Northwest, and Southeast). Activity in the past year was heavily concentrated in the Northeast and Southeast industrial areas, with each of these areas receiving nearly 600,000 square feet of new construction. Figures 7 and 8 below show the timing and location of square feet of activity over the past year.

Figure 7: New Activity in All Industrial Areas: Square Feet of Construction Space



Source: City of Calgary

Figure 8: New Activity by Industrial Area: Square Feet of Construction Activity Q3 2019 - Q2 2020

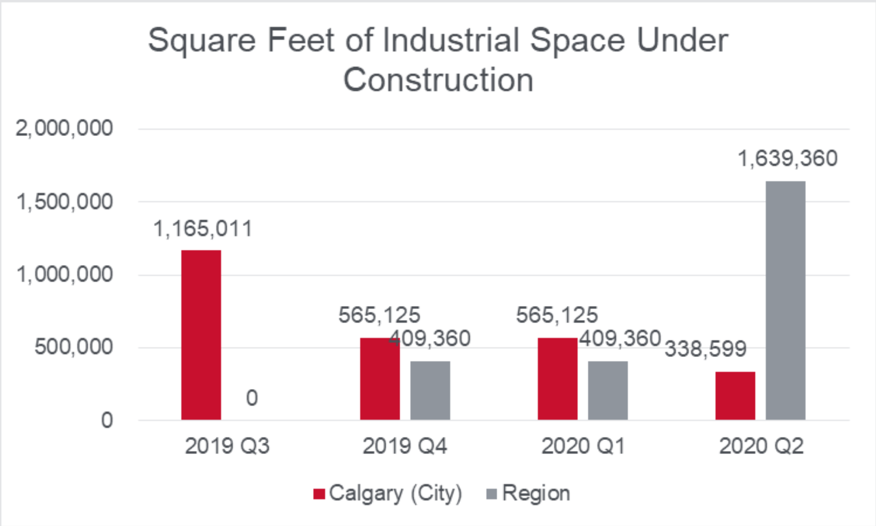


Source: City of Calgary

The past four quarters of industrial activity has been categorized by small and medium-scale development. Specifically, the majority of new construction across Calgary's industrial areas has been small or medium storage facilities with office or mezzanine components. These products are primarily built on spec, and are designed to be leased and fitted to multiple tenants after construction is completed. The average size of individual construction projects in this time period was 28,000 square feet, with individual bays designed to cater to small businesses needing 5,000-10,000 square feet. Notable exceptions include a limited number of larger-scale warehousing, logistics, and processing centre products initiated in areas such as Great Plains (SE) and Stoney 2 (NE) that offer larger bays off approximately 50,000 or 100,000 square feet in size. It is important to note, however, that in the first half of 2020, no new issued individual building permit was larger than 40,000 square feet.

Market reports from third parties, such as CBRE Limited, help to understand industrial real estate activity occurring in the Calgary region outside of the city boundary. As illustrated in Figure 9, from Q3 2019 to Q2 2020 more industrial growth occurred within The City than within the region. The City had 2,633,860 square feet of industrial development compared to 2,458,080 square feet of industrial development in the region. Only two separate industrial projects in the region were listed as actively under construction by CBRE in the second quarter of 2020. These two projects accounted for over 1,630,000 square feet of new construction and absorbed over 37 hectares of land. Both projects are located in the High Plains Business Park in Balzac, with one being over 1,230,000 square feet of design-build space for the new Lowe's distribution centre.

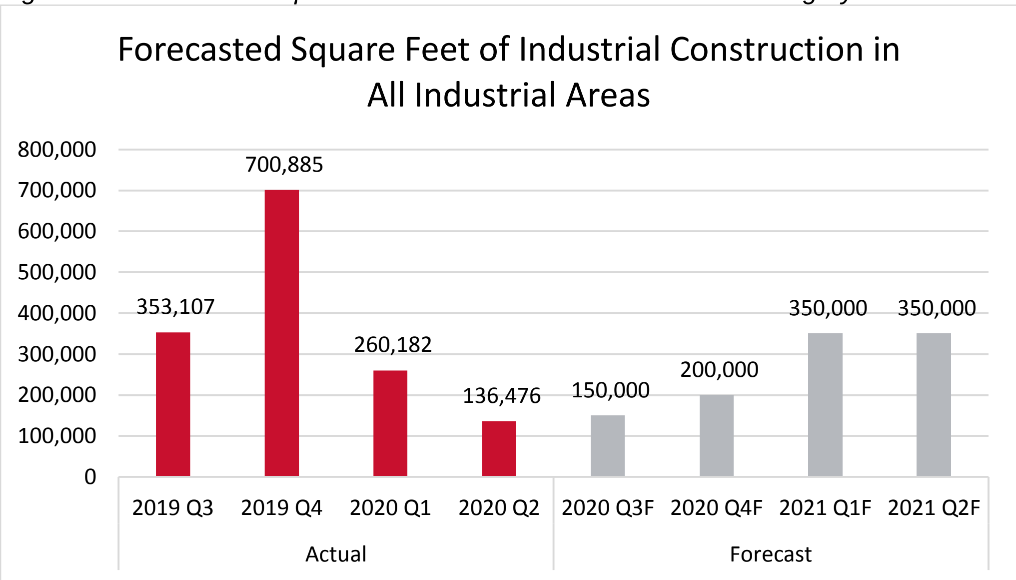
Figure 9: City versus Regional Industrial Activity



Source: City of Calgary, CBRE Limited

<u>Forecasted Absorption</u>
CBRE believes, that due to the rise of online shopping during the COVID-19 pandemic and the desire of suppliers and producers to mitigate risks of logistics disruptions, there will be an increase in domestic inventory held and higher demands for local production facilities. These two emerging trends will likely continue to drive down demand of certain types and sizes of industrial development inside Calgary's boundaries, likely keeping activity levels low for the next year. Figure 10 shows an estimate of Calgary's industrial activity for the next year.

Figure 10: Forecasted Square Feet of Industrial Construction for Calgary in All Industrial Areas



Source: CBRE Limited

Financial Summary

In 2020, the total assessed value of all industrial lands in Calgary was $16.6 billion which represents 27 per cent of all non-residential lands. The industrial areas contribute to the City's economy with up to $262.7 million in annual property tax in 2020. Industrial lands accommodate approximately 200,000 jobs and contribute to the city's economic well-being by driving GDP and employment, which in turn helps to drive residential growth.

Infrastructure and Service Details

Transportation

The City has initiated several major road construction infrastructure projects in the northeast and southeast that will directly support the industrial sector of Calgary. In the northeast this includes the Airport Trail Extension between 36 Street and 60 Street NE to be substantially completed in 2020; new interchanges at 19 Street E and Barlow Trail NE to be completed in 2022; and southbound Stoney Trail to westbound Airport Trail NE Ramp to be completed in 2020. These projects along Airport Trail will complete the connection between Deerfoot Trail to Stoney Trail. The estimated project costs for these listed north projects are approximately $153M.

In the southeast, construction on 130 Avenue SE twinning between 52 Street and McIvor Boulevard is ongoing and completion is expected in 2020 Fall. The expected project costs are approximately $5.5M. In 2019 and 2020, numerous main roads in the industrial areas were paved as part of the City of Calgary's annual paving program. This work involved the repair or replacement of concrete sidewalks, wheelchair ramps, and curbs and gutters and the repair and replacement of ashalt roadway.

Conclusion

In the Calgary region, in the second quarter of 2020, the industrial vacancy rate sits at 7.8 per cent and the industrial market saw almost 500,000 square feet of net occupancy growth (Source: JLL). The subdued level of industrial activity can be primarily traced to the effects of the COVID-19 pandemic. The impacts to the employment, financial, and real estate markets brought by COVID-19 will likely continue to affect Calgary's industrial market for the next year or longer (Source: JLL). CBRE reports in its 2020 Q2 Industrial Marketview report, that small and medium-scale industrial tenants (generally small local businesses) have been disproportionately negatively impacted by the COVID-19 pandemic. The majority of industrial units being becoming vacant since the start of the pandemic are of these type and size.

As of the end of Q4 2019, there was a supply of approximately 1,154 hectares of planned land, and 957 hectares of planned and serviced land within Calgary's strategic industrial areas. Due to the extreme uncertainty around the pandemic, an estimated 747,000 square feet of construction and 26 hectares of land is expected to be absorbed in the 2020 calendar year. A prolonged period of this absorption rate would provide an estimated supply of approximately 37 years of planned and serviced land. However, absorption is expected to return to average levels of 1.7 million square feet and 50 hectares of land per year in 2021, providing an estimated supply of approximately 19 years of planned and serviced land.

For more than 50 years, The City's development arm (Real Estate & Development Services, formerly the Office of Land Servicing and Housing) has played an important role providing certainty in the availability of serviced industrial land, complementing the economically cyclical investment of private industry. The principles behind Council's decision to ensure a steady supply of serviced industrial land are detailed in the 2013-2022 Industrial Land Strategy. The strategy is due to be updated as part of RE&DS Corporate Land Strategy program.

The City has stewardship of 2,044 acres of planned and serviced land within Calgary's strategic industrial areas. Most of which is in the southeast in Dufferin North, Point Trotter, Great Plains, Starfield and Shepard.

Despite the pandemic, demand for space for large industrial users continues. The major leases signed in the second quarter of 2020 include an e-commerce company taking 302,206 square feet and another 1.2 million square feet Lowe's Canada building in Balzac. This is the second largest industrial building in the region. These leases indicate that large multi-national organizations are still finding advantages in Calgary's strategic geographic location as a distribution hub.

Residential Growth

Summary

In the Calgary CMA there was 11,909 housing starts in 2019, this was close to the previous five year average of 12,382 starts. Calgary' share of that growth was 89 per cent. Since the 2019 census, it is estimated Calgary grew by 9,700 units to April 2020 when a 2020 census would have normally been completed. 43 per cent of that growth occurred in the established areas. The City's Growth Strategy considers how best to help meet the goals of the Municipal Development Plan (MDP) in support of growing residential and commercial development in these communities, while aiming for an effective balance across the community types and locations.

The City's approach for determining the right time and location to support and invest in growth is evaluating decisions through the lens of MDP/CTP alignment, market opportunities and financial impacts to The City and the economy. New communities require new supporting infrastructure that is provided through investment from both private and public sources. Once occupied, these new communities are generally stable for a period of decades and require operating dollars to fund the services provided by The City.

After time a community will experience demographic change, housing redevelopment, and aging of the supporting infrastructure. Where population growth or growth-related demographic change occurs in parallel with redevelopment and aging infrastructure, the opportunity for growth-related investment is presented. This creates an opportunity for both private and public investment in maintenance and/or upgrades of community infrastructure.

Indicators for monitoring lifecycle stage include:

- Development activity;
- Housing stock change;
- Policy status;
- Amenities;
- Housing prices;
- Demographics;
- Community Lifecycle; and
- Trends in ownership and rental.

While growth-related investment in new communities is generally straightforward, and the results of which are clearly measureable in number of new units and area of non-residential space, growth-related investment in established areas is less so. Investment in existing infrastructure often serves dual purposes including maintenance/lifecycle, and this can blur the purpose of a growth-related upgrade. Some investment may serve the dual purpose of improving infrastructure based on growth that has already materialized, and in preparing for more anticipated growth.

The return on established area investment is also less clear in that upgrades may indeed result in new residential units and commercial space, but also increase the quality of life in areas and may alleviate infrastructure challenges related to the pressures of local or regional growth. These elements are more qualitative to identify and evaluate. Therefore, growth-related investment in established areas may include a replacement or an enhancement of an asset that already exists, or new supporting infrastructure to increase capacity of the current system. As the Established Area Growth and Change Strategy (EAGCS) moves forward with the implementation of Phase 1 investment, reporting will included both quantitative and qualitative indicators, including:

- Citizen satisfaction/quality of life surveys;
- Access to infrastructure that supports mobility choices;
- Sense of safety of pedestrians; safety-related data;

- New units and non-residential floor space; density of communities;
- Market activity and how closely it matches anticipated trends;
- The value of local business licenses for retail/commercial uses;
- Infrastructure buildout and timing; new services brought online;
  - New or upgraded park space and pathways, and increased connectedness of mobility choices;
  - New or upgraded utility and road/pedestrian infrastructure;
  - New or upgraded emergency services infrastructure;
  - The value of delivered growth-related projects;
- Availability of local services/service levels;
- Increase/shift in use of upgraded public realm; and
- Changes in property taxes collected and spent on growth-related investment and servicing; change in property value in proximity to improved public realm/services.

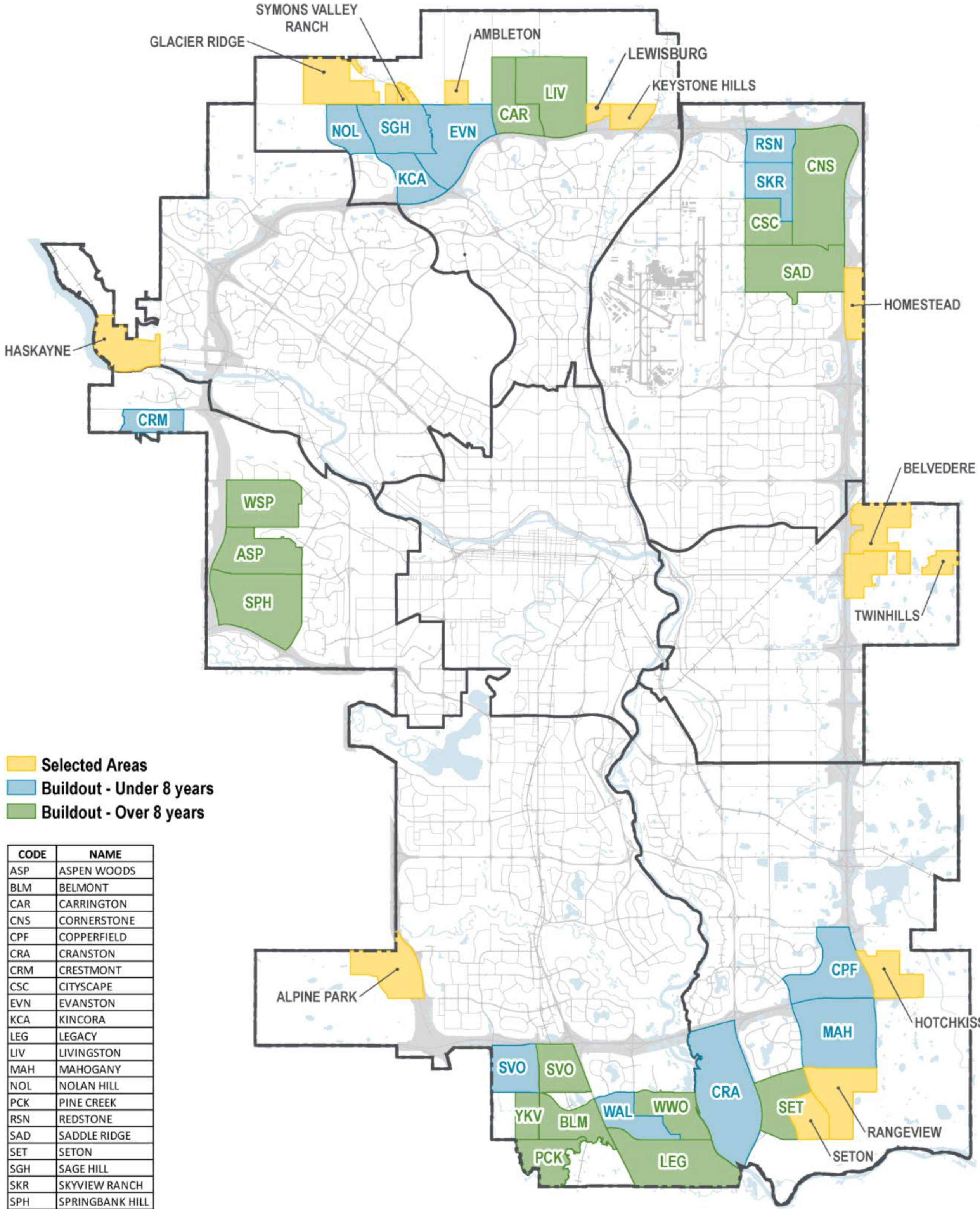
Definitional Note on the 14 New Communities

Through the New Community Growth Strategy 2018, eleven business cases proposing 14 new communities were approved by Council. These communities represented all, or a portion of, communities identified through the Area Structure Plan process. The new communities vary widely in size, and some will be the subject of future business cases to address completion of the communities. There is not a one-to-one ratio of business cases to new communities. As is common in the planning process, the final community naming and determination of the community boundaries can and does change as development applications move through the planning continuum.

The following table shows how the 14 new communities have been refined since 2018 July. The map on the following page shows the most recent boundaries for the new and actively developing communities, and the legend indicates anticipated build out time. For the 2020 New Community Growth Strategy evaluation, Administration has shifted to speaking in terms of business cases, as opposed to communities.

NCGS 2018 Name (# of Communities)	2019 Community Name
Keystone Hills (2)	Lewisburg
	Keystone Hills
East Stoney	Homestead
Belvedere (West)	Belvedere
Belvedere (TwinHills)	TwinHills
South Shepard	Hotchkiss
Rangeview (2)	Seton
	Rangeview
Providence	Alpine Park
Haskayne	Haskayne
Glacier Ridge (Ronmor/Wenzel) (2)	Glacier Ridge
Glacier Ridge (Capexco)	Symons Valley Ranch
Glacier Ridge (Qualico)	Ambleton

Map of Actively Developing and 14 New Communities



CODE	NAME
ASP	ASPEN WOODS
BLM	BELMONT
CAR	CARRINGTON
CNS	CORNERSTONE
CPF	COPPERFIELD
CRA	CRANSTON
CRM	CRESTMONT
CSC	CITYSCAPE
EVN	EVANSTON
KCA	KINCORA
LEG	LEGACY
LIV	LIVINGSTON
MAH	MAHOGANY
NOL	NOLAN HILL
PCK	PINE CREEK
RSN	REDSTONE
SAD	SADDLE RIDGE
SET	SETON
SGH	SAGE HILL
SKR	SKYVIEW RANCH
SPH	SPRINGBANK HILL
SVO	SILVERADO
WAL	WALDEN
WSP	WEST SPRINGS
WWO	WOLF WILLOW
YKV	YORKVILLE

Residential Growth and Change

This year, COVID-19 related impacts led to the cancellation of the municipal census, meaning that population and new dwelling units have been estimated across the city using building permit starts and information.

Calgary's current population forecast for 2024 is for a population of 1,380,700, accounting for 77 per cent of the region's total population. This would be an addition of 95,000 people. Over the last five years (2015 to 2019), Calgary absorbed 78 per cent of the region's total population growth.

In 2019, residential construction value was $3.14 billion, which is above the 10 year median of $2.65 billion. In 2020 through the first eight months the residential construction value is $1.45 billion compared to the 10 year median of $1.70 billion over the same time period.

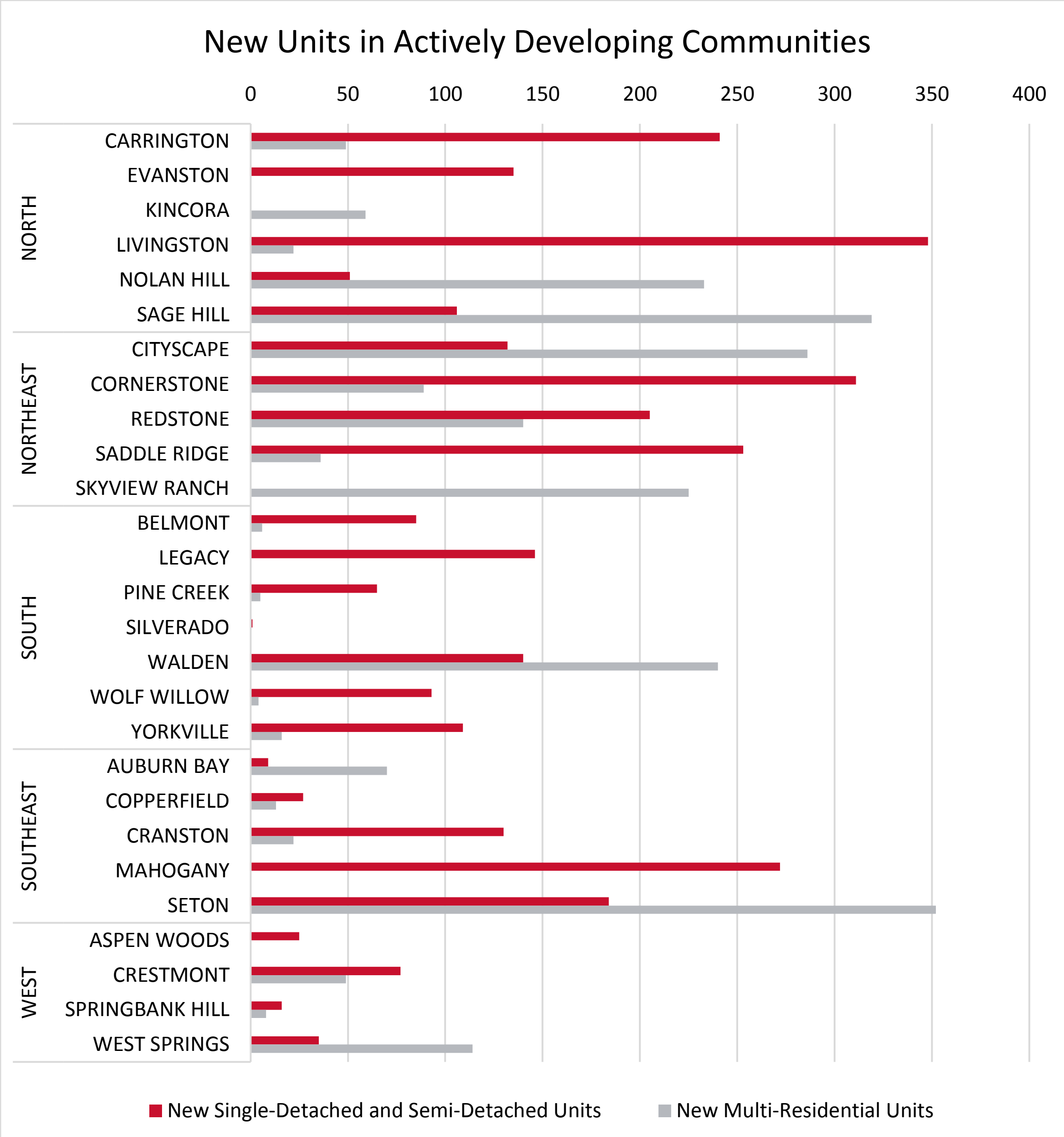
The actively developing communities continue to build out and see gains in population growth compared to other parts of the city. This year marked the completion of Auburn Bay with only multi-residential parcels remaining for development. The majority of new community development occurred in the North and Northeast planning sectors. Figure 12 illustrates that the actively developing communities saw an estimated +3,200 single-detached and semi-detached unit increase and an estimated +2,300 multi-residential unit increase. The estimated 5,500 units are comparable to the 5,451 units in the actively developing communities as indicated in the 2019 census. A snapshot below illustrating the forecasted 2020 unit growth for the first eight months compared to the actual unit growth, determined by applied building permits, during the same period of 2020 indicates a significant decline in development.

Figure - 2020 total suburban forecasted unit growth compared to actual units applied in building permits (January – August)

Sector	**2020 (January - August)**		
	Forecasted Growth (units)	Actual Growth (BP units)	Gap (+/- %)
North	837	664	-21%
Northeast	740	584	-21%
Southeast	565	482	-15%
South	931	774	-17%
West	130	129	-1%
Total	3,203	2,633	-18%

Source: City of Calgary

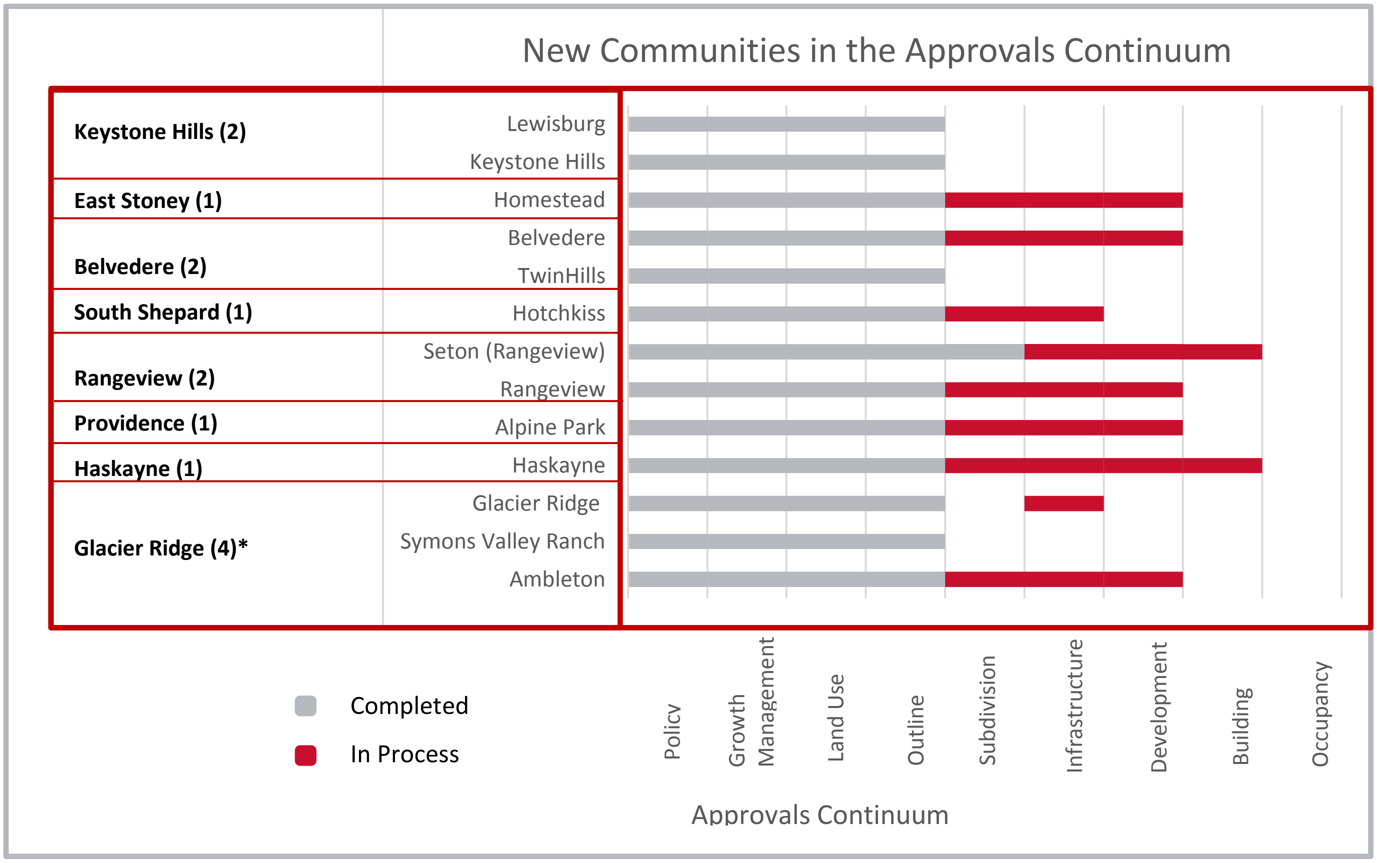
Figure 11 – Estimated 2020 New Units in Actively Developing Communities Using Building Permit Data



Source: City of Calgary

For the 14 new communites approved in 2018, Figure 13 demonstrates progress made by each new in the approvals continuum, based on the furthest advanced development proposal in that community. If a stage in the continuum is indicated as “in process”, this means an application has been submitted, but that stage has not yet concluded. Most of the new communities have continued to progress through the development approvals continuum. All new communities have received some land use approvals. Seven of the new communities have executed a Development Agreement and two have received building permits for housing construction. First occupancies for all communities, with the exception of Keystone Hills, Symons Valley and TwinHills, was to be expected in 2021. At the time of this report, it may still be possible that at least a few units have been occupied by the end of 2021 in 12 of the new communities. However, at this time it is almost certain that the majority of the 14 new communities will not meet The City’s anticipated build-out of 250 units in each community by the end of 2022 nor the 2018 business case’s anticipated build-outs that were much higher than 250 units.

Figure 12 - New Communities in the Approvals Continuum (as of 2020 September)



Source: City of Calgary

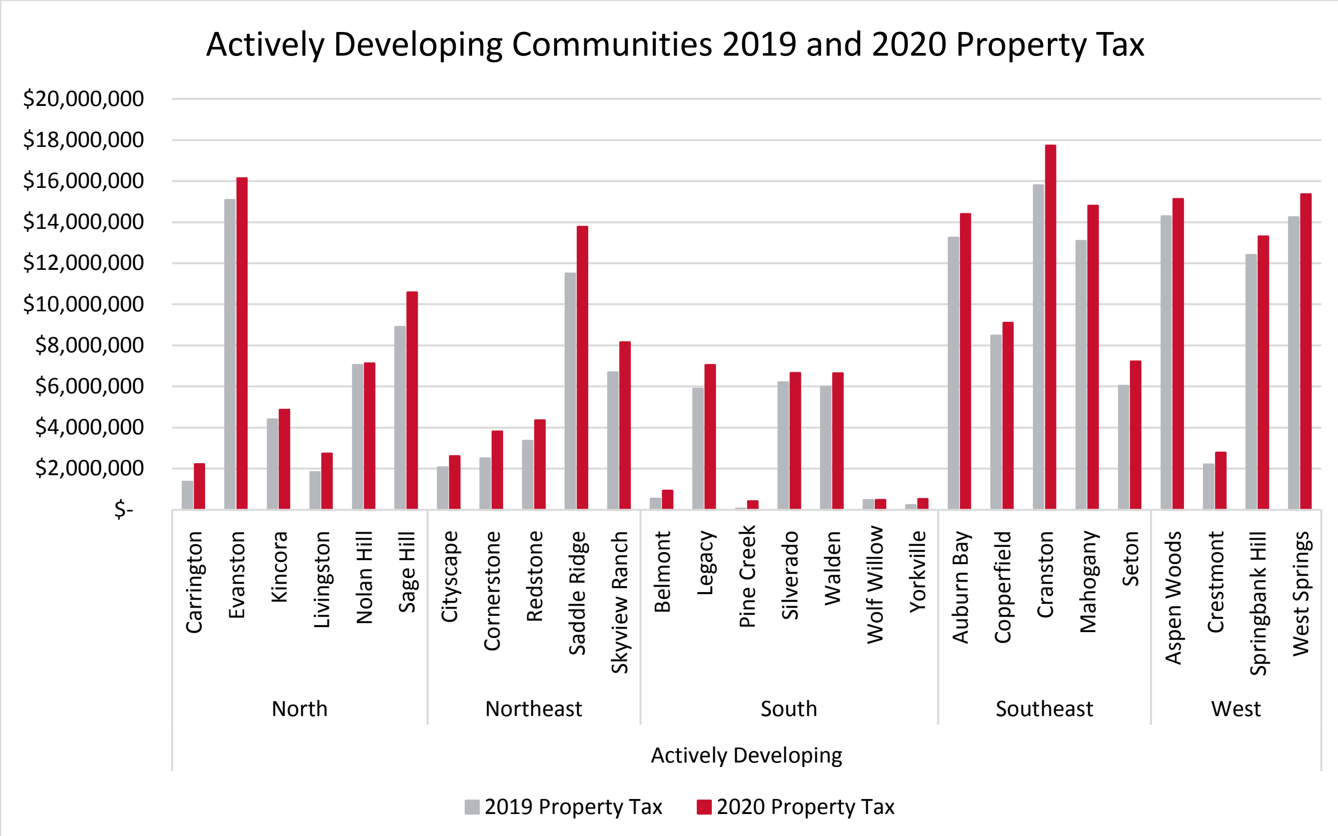
Definitions:
Infrastructure: Once the civil engineering design for the infrastructure has been approved, grading & construction of the essential on-site infrastructure can begin.
Development: The execution of a development agreement.
**The new community of Glacier Ridge represents two communities from 2018.*

The infrastructure process generally takes 9-12 months to complete with building construction taking about 6-9 months once servicing is in place. Administration expected the majority of the new communities to have completed the subdivision process and be further along in the servicing process.

Financial Summary

The following chart illustrates the increase in property taxes assessed from 2019-2020 from land development in the actively developing communities. Since 2019 the property tax has increased by approximately $25 million in the actively developing communities. In the 14 new communities the 2020 property tax is approximately $0.89 million total. It should be noted that it cannot be determined exactly how much of the property tax increased due to new unit growth (versus other forms of appreciation) in the actively developing communities, however most of the new property tax growth is a result of new unit growth and new commercial growth.

Figure 13 - Year-over-Year Property Tax, Actively Developing Communities



Source: City of Calgary

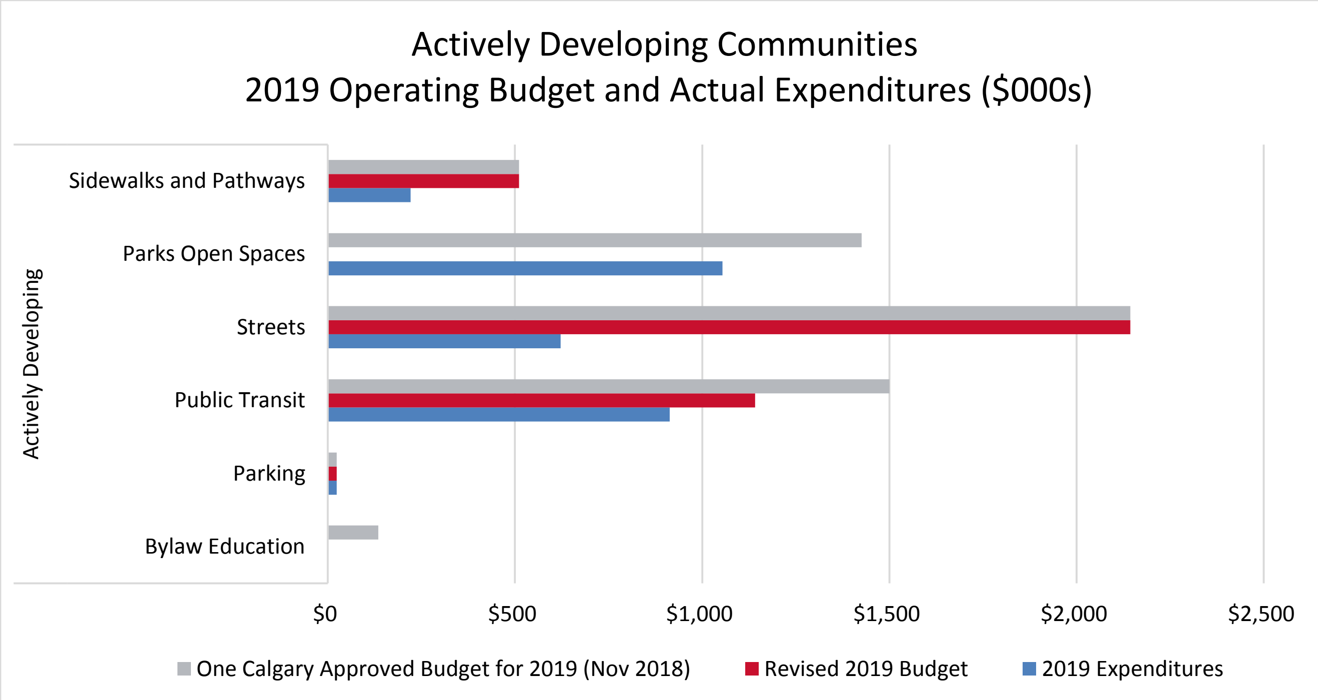
Infrastructure and Service Details

Details of infrastructure servicing and budget expenditures are provided here by year, for 2019 and 2020.

2019

In 2019 there was no budget for the Established Area Growth and Change Strategy (EAGCS). For the actively developing communities, Figure 15 below illustrates the direct incremental operating expenditures in 2019 in relation to the original One Calgary budget (2018 November) and 2019 revised budget. The direct incremental costs represent a portion of the total costs captured to provide services to the residents of these communities, the total costs are much higher. The City incurred an increase of approximately $2.8 million in direct incremental operating costs out of a revised budget of $3.8 million in 2019 for new roads maintenance, transit service, sidewalk and pathways maintenance and parks maintenance in actively developing communities. In the case of parks, additional parks maintenance expenditures in relation to the actively developing communities has been absorbed into the department’s overall budget. In 2019 there was no infrastructure turned over to The City and no housing development from the 14 new communities and therefore no operating costs.

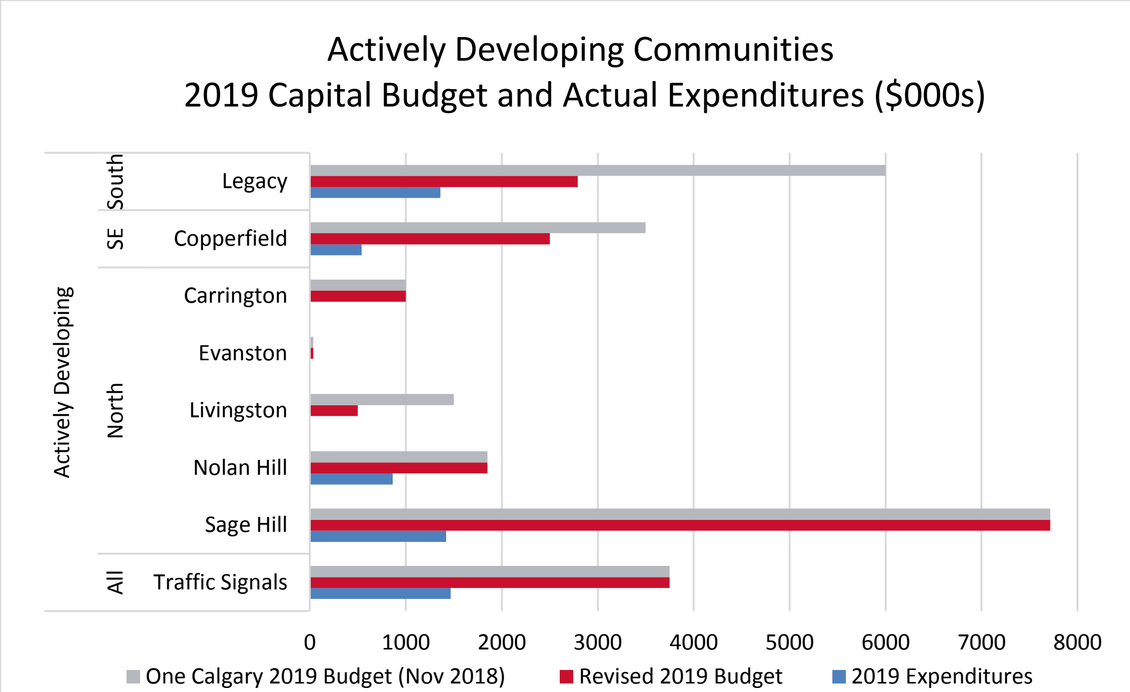
Figure 14 - 2019 Operating Budget and Actual Expenditures, Actively Developing Communities



Source: City of Calgary

In the actively developing communities, capital expenditures for 2019 are illustrated in Figure 16. All of the capital expenditures represented are for transportation infrastructure projects. Figure 16 illustrates only communities where capital expenditure was to occur in 2019. In 2019 approximately $5.7 million was spent on capital infrastructure in the actively developing communities from a revised 2019 budget of approximately $20.1 million. The low spending rate in 2019 is a result of projects not yet moving into the construction phase where the significant spending occurs for each project.

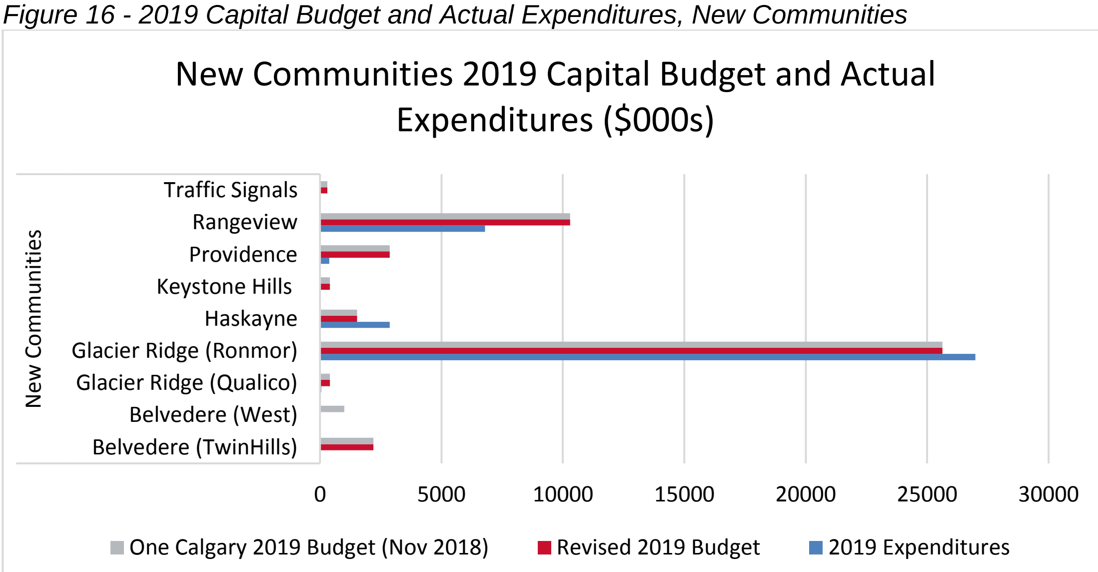
Figure 15 - 2019 Capital Budget and Actual Expenditures, Actively Developing Communities



Source: City of Calgary

Figure 17 illustrates the capital expenditures in 2019 for the 14 new communities. In 2019 approximately $37.1 million was spent from a revised 2019 budget of approximately $43.6 million. Most of the capital expenditures were for utility infrastructure in Rangeview, Glacier Ridge and Haskayne. Engineering design work has also started for other utility projects in other communities and for some transportation infrastructure in Rangeview.

Figure 16 - 2019 Capital Budget and Actual Expenditures, New Communities



Source: City of Calgary

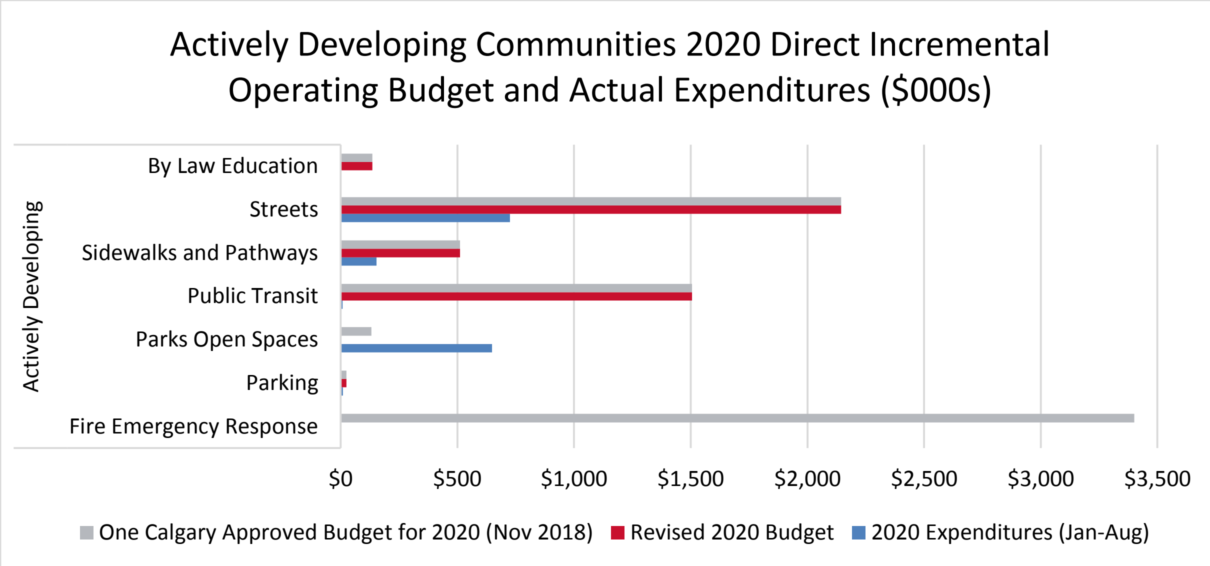
2020
In the established area, Phase 1 growth-related investments in water and sanitary utilities were identified in two areas for strategic proactive upgrades to leverage prioritized Main Streets, support redevelopment, minimize community disruption and realize efficiencies.

The strategic investments in utilities along 17 Avenue SW and 33 Avenue SW will be delivered as components of the overall construction of the Main Streets streetscape designs. Construction for the 17 Avenue SW main street is now underway (started summer 2020) and is expected to be complete in 2022; sanitary and water upgrades are included in this scope of work. For 33 Avenue SW (Marda Loop), the funding for the water and sanitary upgrades has been allocated, with an expected construction in 2022. The upgrades in both areas will support the anticipated intensification on and around the main streets.

In May 2020, Phase 1 of the Established Area Growth and Change Strategy (EAGCS) identified five multi-community growth areas where it was anticipated that the redevelopment market interest would remain for the next 1-3 years. These areas generally ringed the downtown and represented an opportunity to support the ongoing strategy to support Calgary’s downtown. Projects that could enhance the public realm and utility capacity within these areas were identified. Council approved a capital program request for $11.7 million in 2021 and $18.3 million in 2022, funded by the newly-created Established Area Investment Fund. This approval directed the delivery of public realm projects within the EAGCS Phase 1 Growth Areas including traffic calming and pedestrian safety improvements, park and recreation upgrades, pathway connectivity, sidewalk & streetscape improvements, and one-time public space programming. Public realm capital projects are currently being transitioned into the delivery phase and as of 2020 Q3, project teams have begun detailed planning and design work. Next steps include engagement with the local community and organizing the construction. The projects remain on track for construction in 2021 and 2022.

Figure 18 below illustrates the actively developing communities direct incremental operating expenditures in 2020 to the end of August in relation to the original One Calgary budget (2018 November) and 2020 revised budget. The City has incurred an increase of approximately $1.5 million in direct incremental operating costs out of a revised budget of $4.3 million in 2020 for new roads maintenance, sidewalk and pathways maintenance and parks maintenance. As shown in Figure 18, the parks and fire services budgets were previously deferred from 2020. In the case of parks, additional parks maintenance expenditures in relation to the actively developing communities has been absorbed into the department’s overall budget. In 2020 there was no development expected from the 14 new communities and thereore no City direct incremental operating costs.

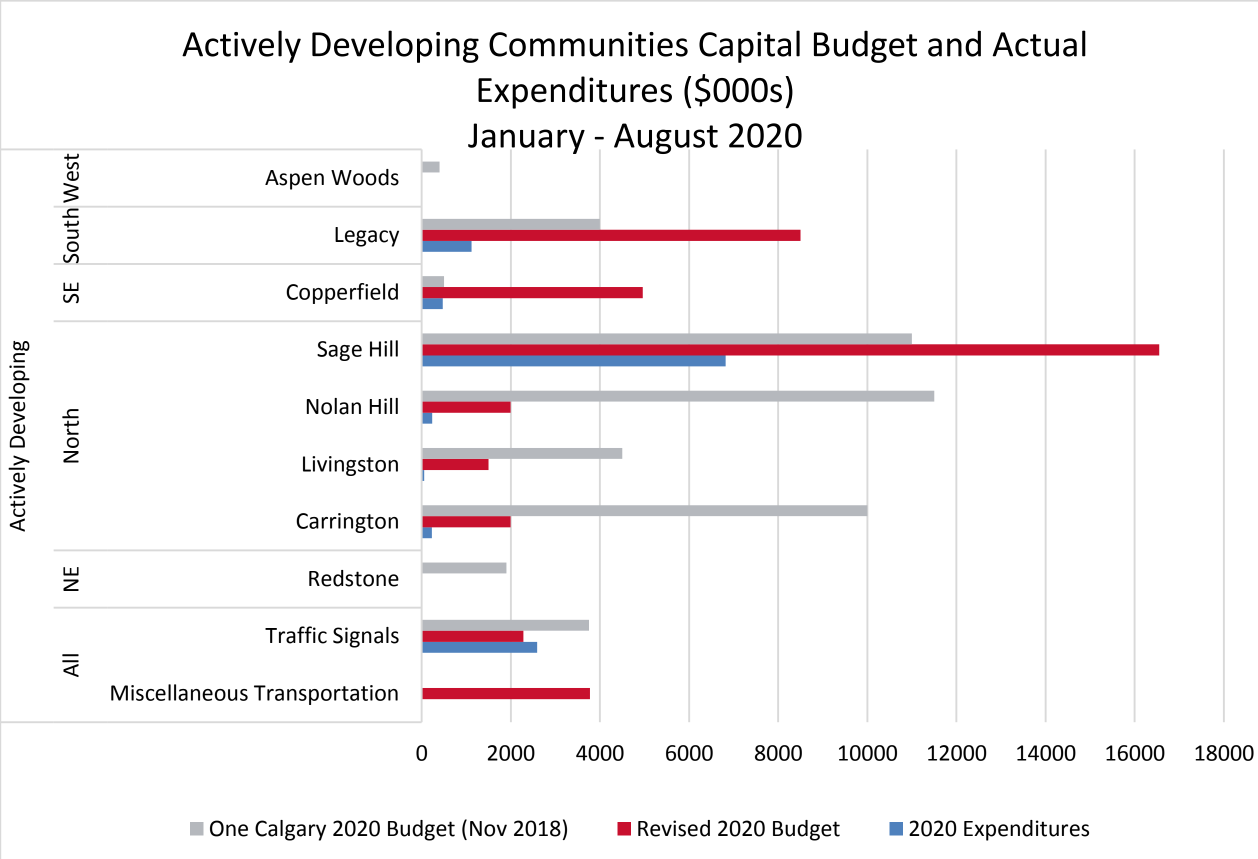
Figure 17 - 2020 Direct Incremental Operating Budget and Actual Expenditures, Actively Developing Communities



Source: City of Calgary

In the actively developing communities, capital expenditures for 2020 to the end of August are illustrated in Figure 19. All of the capital expenditures represented are for transportation infrastructure projects. Figure 19 illustrates only communities where capital expenditure was to occur in 2020. In 2020 approximately $11.5 million has been spent on capital infrastructure in the actively developing communities from a revised 2020 budget of approximately $41.6 million. The majority of the expenditures to the end of August have been for the 14 Street NW/Stoney Trail interchange, traffic signals and 210 Avenue SE construction. Again the low spending rate is a result of many projects not yet moving into the construction phase when the significant spending occurs for each project.

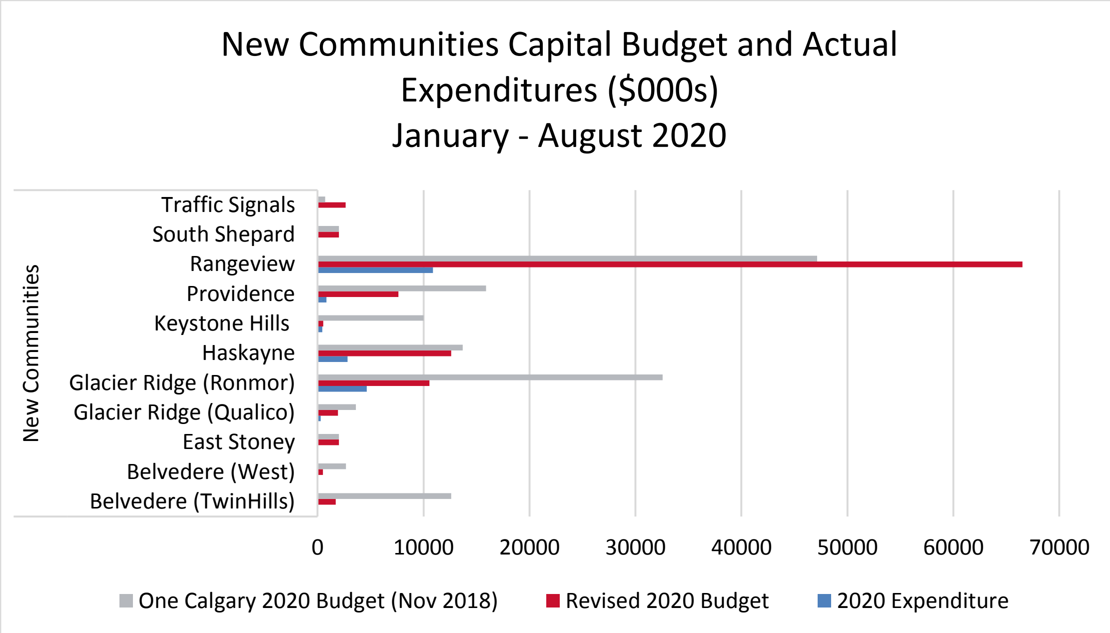
Figure 18 - 2020 Capital Budget and Actual Expenditures, Actively Developing Communities



Source: City of Calgary

Figure 20 illustrates the capital expenditures in 2020 to the end of August for the 14 new communities. In 2020, expenditures of approximately $19.9 million from a revised 2020 budget of approximately $108.6 million have been incurred to the end of August. Most of the capital expenditures continue to be for utility infrastructure in Rangeview, Glacier Ridge and Haskayne.

Figure 19 - 2020 Capital Budget and Actual Expenditures, New Communities



Source: City of Calgary

Conclusion

The residential information indicates estimated unit growth for 2020, using building permit data, that occurred during the census time frame of May 2019-April 2020 is about the same as unit growth that was reported in the 2019 census that covers the same time frame. Since the beginning of the COVID-19 pandemic, growth has significantly slowed. The actively developing communities continue to absorb approximately 64 per cent of Calgary`s estimated unit growth. All 14 new communities that were approved in 2018 have received some land use approvals. Seven of these new communities have executed a Development Agreement and two have received building permits for housing construction. It will be important to monitor how many continue to move forward this year and execute a Development Agreement. The execution of Development Agreements signal the developer is moving forward with considerable capital investment, and gives a good indication if occupancy can be expected in 2021. Since some of the developments are not moving forward as quickly as expected, Administration is reviewing the anticipated capital and direct incremental operating costs for 2021 and will bring adjustments forward to the 2020 mid-cycle budget adjustments. These adjustments will reflect lower spending in 2021 partly as a result of slower growth and partly as a result of budget adjustments to off-set projected shortfalls.

Considering the growth that has occurred over the past year, an update is provided below on the serviced capacity and the anticipated demand. The supply of land remains sufficient to accommodate the projected demand through this budget cycle and the 2023-2026 budget cycle. The dispersion of supply is also healthy, with additional available capacity expected from the 14 new communities over the next year and a half.

For Single/Semi Detached Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity - Start of Period	14,607	18,320
Forecasted Demand - Entire Period	(12,283)	(15,422)
Additional Available Serviced Capacity from Actively Developing Communities	14,246	0
Additional Available Serviced Capacity from New Community Growth Strategy 2018	1,750	19,217
Total Serviced Capacity - End of Period	18,320	22,116
Estimated Years of Supply Balance – End of Period	5	6
For Multi Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity - Start of Period	33,909	32,789
Forecasted Demand - Entire Period	(8,645)	(12,001)
Additional Available Serviced Capacity from Actively Developing Communities	7,525	0
Additional Available Serviced Capacity from New Community Growth Strategy 2018	0	15,941
Total Serviced Capacity - End of Period	32,789	36,728
Estimated Years of Supply Balance – End of Period	11	12

Note: Actively developing community capacity is projected to become available during the 2019-2022 budget cycle, while the NCGS capacity is projected to become available largely through the 2023-2026 budget cycle

Conclusion

The monitoring information indicates growth has been significantly impacted in 2020 due to the COVID-19 pandemic and may take 1-2 years to recover. Prior to COVID-19, growth in Calgary in 2019 had improved over 2018 but was slightly lower than the previous five year average indicating what may be expected as a new normal.

The impacts to the employment, financial, and real estate markets brought by COVID-19 will likely continue to affect Calgary's industrial market for the next year or longer. Maintaining adequate supply of industrial lands throughout Calgary plays a direct role in local economic development and diversifying the municipal tax base. Administration is currently in the process of developing the Industrial Area Growth Strategy, which is the third component of the Citywide Growth Strategy. The scoping report is expected to go Council in 2021 Q1 and actions of Phase 1 of the strategy are expected to be completed in 2022 as part of the Citywide Growth Strategy.

For new communities, the ability to anticipate trends is somewhat longer (5-10 years) than with redevelopment (1-3 years). Calgary's redevelopment market is subject to many influential factors that create market volatility. Identifying City investment that can align with short-term market trends/private investment means a nimble approach to budget decisions and regular updates to a market trend assessment. Growth is expected to remain steady in established areas with 16,000 new units forecasted, and an 30,000 housing units are estimated for new community areas.

Data and analysis provided in the Residential section of this report outlines that there is sufficient supply to accommodate the projected demand through this budget cycle and the 2023-2026 budget cycle. The dispersion of supply is also healthy, with additional available capacity expected from the 14 new communities over the next 18 months. This will result in a the total serviced land supply of eight to 12 years.

Moving forward, the manner in which The City supports city-building and growth is evolving through a coordinated approach to aligning planning policy, growth and investment. Initiated in 2019, the Next Generation Planning System will improve the way we plan Calgary's future. This systematic approach that incorporates strategies for new communites, established areas, and industrial areas, will help us implement and realize the Municipal Development Plan, which provides the foundation and framework for how we plan our city for citizens who live here now and citizens who will call Calgary home in the future.

Administration will continue to monitor the existing investments in One Calgary to support growth across the city and will bring forward budget adjustments and recommendations to remain financially nimble to support growth in alignment with the MDP. Looking forward to the 2023-2026 budget cycle, through an integrated Citywide Growth Strategy approach, Administration will identify investments across the city that support balanced growth in alignment with the MDP.

Risk Assessment

Current impacts from slower growth

A slower growth period increases overall risk to The City should developers not be able to complete or fulfill their obligations. During slow growth it is more difficult for developers to be successful if new units are taking longer to be absorbed, this increases the developer's own financial risk. Increased financial risk for developers increases the potential risks for The City such as the volume of levy payments and infrastructure maintenance.

Slower build out has been observed in some actively developing areas, which has resulted in unintended consequences. For instance, the water utility has seen some water quality issues in two actively developing communities as a result of less water demand from slower build out and a delay in developer infrastructure. Additional flushing of the water main is being done to maintain acceptable water quality within the water main. This flushing has resulted in additional costs to the developer and has operational impacts to the water utility. Similar water quality concerns may be realized as new communities come on line with a slower build out. Administration continues to work with impacted developers to monitor and manage the risks.

Lower than anticipated offsite levy revenues

In the water utility, offsite levy revenues are intended to fund the developer's share of the utility costs attributable to new growth. In periods where actual development, or the projected pace of future development, is lower than 401 hectares per year, a financial shortfall occurs. The only mechanism to absorb this shortfall is in utility rates, until the development happens.

As is summarized in the monitoring report (Attachment 2), Calgary is in a slower growth period, and land absorption in 2019 and 2020 year to date, has been significantly lower than 401 hectares coming in at 147 hectares and 175 hectares respectively. With the information currently available and the potential for this trend to continue, the already significant offsite levy shortfall may continue to grow.

Capital and operating budgets

There is increased competition for capital infrastructure dollars across the organization, as a result of downward pressure on revenue sources and increased funding uncertainty from other levels of government. There is also continued demand to reduce capital and operating budgets even as the city continues to experience growth. Both of these factors may result in the reduction of the capital and operating budgets for established communities, industrial areas, the 27 actively developing communities, the 14 new communities, and any further new communities contemplated.

New Community Growth Strategy 2020

RECOMMENDATION(S):

Administration recommends that the Priorities and Finance Committee recommend that Council:

1. Receive this report for the Corporate Record; and
2. Invite 2020 business case proponents to submit business cases during the next New Community Growth Strategy process, to be aligned with the start of 2023-2026 service plan and budget cycle.

HIGHLIGHTS

- For the New Community Growth Strategy 2020, Administration received and evaluated 11 business cases for new community development, assessing how they align with the three guiding growth factors of Municipal Development Plan/Calgary Transportation Plan (MDP/CTP) Alignment, Market Demand, and Financial Impact. Administration determined that no business cases align with all three growth factors.
- What does this mean to Calgarians? This means additional new community lands are not needed to support development at this time.
- Why does this matter? It matters for Calgarians because they can know there is sufficient development capacity to meet Calgary's short and medium term new community needs, and that The City does not need to make future commitments today in order to meet the goals of the MDP/CTP, balance market demand, and manage economic and financial considerations.
- Strategic new community development is important for the economy and is a key part of a balanced growth strategy. Administration thanks the proponents of the 11 business cases for their interest in developing in Calgary.
- Council approved significant investment in 2018 for growth opportunities in new community areas, setting the stage for 10-20 years of shared developer and City commitments. The business cases submitted in 2020 represent primarily low to medium density residential development, similar to those proposed in 2018. Since then, there has been a market slowdown, and there is anticipated to be sufficient land for development for the next 8 to 12 years. These factors may also mean new and actively developing communities take longer to become complete communities.
- To achieve the MDP/CTP policy targets, new growth approvals in new community areas are not needed at this time, and are likely to have a negative impact on achieving a compact urban form, balanced growth, choice of sustainable mobility options, including the provision of transit, and greater choice of residential and mixed use development across the city.
- In addition to the business cases not aligning in aggregate with the MDP/CTP and Market Demand factors, some of the business cases did not meet the financial criteria (no capital costs to initiate, no operating costs until 2027) and would require further tax supported investment to move forward; this is counter to Council's direction.
- Council directed Administration to review business cases by 2020 May 29, with subsequent dialogue with proponents and a summary of approved and rejected cases to be forwarded to the 2020 October 13 Priorities and Finance Committee for review, discussion and recommendation.

- Strategic Alignment to Council's Citizen Priorities: A city of safe and inspiring neighbourhoods
- Background and Previous Council Direction is included as Attachment 1.

DISCUSSION

The New Community Growth Strategy (NCGS) is part of a group of interconnected planning initiatives which work within Next Generation Planning (Attachment 2) – seeking to meet the goals of the MDP/CTP and successfully plan for two million people. The NCGS is one of three growth strategies focused on enabling growth and development to help build a great Calgary.

The NCGS is the process by which business cases for new community growth are submitted to and evaluated by Administration, with decisions made by City Council. The first iteration in 2018 resulted in the approval of 14 new communities, and the required capital and operating investments were included in the One Calgary (2019-2022) service plan and budget. The NCGS 2020 evaluation began in 2019 December with direction provided by Council through report PFC2019-1062. A detailed outline of the NCGS 2020 process is included in Attachment 3. The NCGS 2020 process resulted in Administration reviewing 11 submitted business cases to open additional land in the following Area Structure Plans; Keystone Hills (1 business case), Belvedere (5), Rangeview (1), Ricardo Ranch (1), West View (1) and Glacier Ridge (2). A summary of each business case and location is included in Attachment 4. Administration used updated review criteria that is aligned with the three guiding factors The City considers in making growth decisions – Municipal Development Plan (MDP)/Calgary Transportation Plan (CTP) Alignment, Market Demand, and Financial Impact.

Below is a description of Administration's overall assessment. Individual business case analyses are included in Attachment 5.

<u>MDP/CTP Alignment</u>
To achieve MDP/CTP growth policies and targets, more new community areas are not needed at this time, and may have a negative impact on progress made towards achieving the MDP vision, including the NEXT20 MDP amendments contained in report PUD2020-1106. In alignment with the policies in section 5.2.5 of the MDP, growth opportunities should be prioritized through the Citywide Growth Strategy in order to boost economic activity and city building efforts in alignment with the MDP/CTP to support a prosperous, vibrant local economy. In particular, growth approvals resulting in additional capacity in new community areas may negatively impact the ability to achieving a compact, mixed use city offering greater mobility options to citizens. Investment in new communities was prioritized in 2018, it would now be beneficial to see investment prioritized in a manner that would help achieve balanced growth throughout the city.

The Climate Resilience Strategy would also be impacted by further expanding new community growth. Greenhouse gas emissions would increase as a result of limited mobility options available in these areas. Increased dependency on energy utilization over a larger area could move Calgary away from the low-carbon economy. Alignment with the goals and direction of the Strategy is consistent with the current MDP, as well as the NEXT20 MDP revision, which contains direction to include the recommendations of the Climate Resilience Strategy in corporate decision-making (including growth management decisions) to reduce the city's overall greenhouse gas emissions and adapt to climate change. Demonstrated action on climate change is also increasingly a consideration for businesses choosing where to locate and invest, especially when they have choice among cities.

From an individual business case viewpoint, all 11 business cases meet Area Structure Plan policies and therefore individually meet specific MDP/CTP Alignment criteria in Attachment 3.

Market Demand

The 11 business cases were reviewed against citywide market demand and sectoral market demand. A market demand analysis is included in Attachment 6. Significant growth capacity was introduced through the 2018 new community business cases and the new housing market has since slowed. 2019 Calgary Census Metropolitan Area (CMA) housing starts were four per cent below the five year average, and 2020 housing starts are down 16 per cent from 2019 year to date. The City has currently funded single/semi-detached dwelling unit capacity to the year 2032 and multi-residential dwelling unit capacity to the year 2038 based on anticipated demand.

The 14 new communities approved in 2018 will be able to provide sufficient and dispersed housing choice to the market through the 2023-2026 budget cycle.

When the housing market is considered by geographic sectors, only one business case would provide additional serviced capacity to address demand, however that same business case doesn't meet the financial criteria. Administration acknowledges that some of the 11 business cases would increase choice and competition of developers and builders in different geographic sectors of the market, however the market is already generally well supplied and competitive.

Financial Impacts

Impacts were considered both from an enabling growth and economic impact perspective, as well as a City budget perspective. In terms of economic impact, because of the existing capacity for growth and the similarity of proposed development to previously approved development, it is Administration's position that new development is likely to compete for the same market activity, rather than attract new market activity. There would be no net new benefit to the overall economy. It is acknowledged that some business cases would leverage previous investment at little or no cost, however these business cases may cannibalize the market as a whole.

In terms of the City budget, five business cases were determined to meet the entrance criteria of no operating costs prior to 2027, and no capital costs to initiate development. Others would require capital infrastructure investment in order for development to proceed (details are provided in Attachment 5). If business case approvals occur but the current pace of growth stays the same or slows,after 2027 there would be no net new increase in revenue to absorb increased operating costs that would begin to arise in these areas. Administration also considered infrastructure funding source risks, including cash flow impacts from the offsite levy payment deferral program and the impact to levy revenues associated with the current pace of development. At least one proponent has so far made the decision to take advantage of the levy deferral program.

Conclusion and Next Steps

Administration has assessed that none of the business cases meet the criteria under all three factors, and recommends that no business cases be supported at this time. There is significant growth potential leading to shorter term return on investment via Phases 1 and 2 of the

Established Area Growth and Change Strategy, and from the emerging Industrial Area Growth Strategy. As these growth strategies converge with the New Community Growth Strategy ahead of the 2023-2026 service plan and budget cycle, it presents an excellent opportunity for proponents to submit business cases to be considered as part of an integrated Citywide Growth Strategy at the beginning of a budget cycle.

STAKEHOLDER ENGAGEMENT AND COMMUNICATION (EXTERNAL)

☐ Public Engagement was undertaken

☐ Public Communication or Engagement was not required

☒ Public/Stakeholders were informed

☒ Stakeholder dialogue/relations were undertaken

At the beginning of the 2020 process, Administration consulted with the NCGS Working Group (consisting of industry members and BILD Calgary Region) in the preparation of the business case directions and evaluation criteria. During the business case review process Administration communicated with the business case proponents as detailed in Attachment 3. Administration also provided background information on the process and review timelines on The City's public website and through social media to help inform the public and on how the public can participate in this Priorities and Finance Committee meeting.

IMPLICATIONS

Social

The recommendation in this report supports continued focus on developing a balanced, citywide growth strategy. Balanced growth promotes a more liveable and people friendly environment where existing and new amenities are offered to citizens close by to where they live and work.

Environmental

Administration's recommendation considered the Climate Resilience Strategy and the potential for Green House Gas (GHG) emission reductions in growth decisions. Expanding new community growth areas at this time would negatively impact GHG emissions as a result of limited mobility options that would be available in those areas.

Economic

Administration has considered the economic impacts of the additional business cases and concluded that there is a limited return on investment given the amount of growth potential already in place. Administration wants to realize a return on investment and see accelerated build out from currently approved new communities before introducing more and expects a greater short term return on investment in the established areas and through the Industrial Areas Growth Strategy.

Service and Financial Implications

Administration's recommendation has no impacts to services or budgets. Should Administration's recommendation not be accepted and some or all business cases approved, there may be capital and operating impacts.

No anticipated financial impact

RISK

There are significant risks associated with approving additional new community growth capacity during a period of slower economic growth. During these times, spreading a stable or shrinking market over more communities can have a negative effect on service efficiencies and related costs. While a risk also exists that developers will not be able to pursue development plans and may seek opportunities outside of Calgary, this is just one of several strategic growth considerations, and significant capacity to facilitate development continues to exist.

A risk assessment of approving and not approving the recommendations in this report has been included in Attachment 7.

ATTACHMENT(S)

1. Previous Council Direction, Background
2. Planning Calgary Now and for the Next Generation
3. Outline of the 2020 Process and Industry Stakeholder Consultation
4. Business Case Summaries
5. New Community Growth Strategy 2020 Business Case Analysis
6. New Community Growth Strategy 2020 Market Demand Analysis
7. New Community Growth Strategy 2020 Risk Assessment
8. **Public Submissions**

Department Circulation

General Manager (Name)	Department	Approve/Consult/Inform (Pick-one)
Stuart Dalgleish	Planning & Development	Approve
Doug Morgan	Transportation	Approve
Katie Black	Community Services	Approve
Carla Male	Chief Financial Office	Approve
Chris Arthurs	Deputy City Manager’s Office	Approve
Jill Floen	Law/City Solicitor	Approve
Dan Limacher	Utilities and Environmental Protection	Approve

Background

This report provides a bi-annual opportunity for Council to evaluate new community growth business cases as part of the Citywide Growth Strategy. The evaluation completed by Administration facilitates Council's strategic decision making process in the context of other City growth and budget priorities.

Context

In 2016 October, Administration extended an invitation to new community development proponents to submit business cases in support of new community development in areas of the city that had a Growth Management Overlay (Overlay) in place in an Area Structure Plan. Twelve business cases proposing to initiate development in 16 new communities were subsequently received and reviewed. Proponents were asked to include information responding to criteria that outlined how their lands and development plans advanced the objectives of the Municipal Development Plan (MDP) and Calgary Transportation Plan (CTP), met market demand, and contributed to economic development in Calgary through property tax generation, private capital investment and job creation.

In early 2018, Council provided direction for a New Community Growth Strategy (NCGS) through a Strategic Session of Council in January (verbal report C2018-0122), through report PFC2018-0200, and with the setting of indicative rates in report C2018-0489. Foundational to the New Community Growth Strategy, Administration and industry representatives agreed on six principles that were developed together in the fall of 2017 to guide this work, they are; 1) Collaborate, 2) Incorporate a market oriented perspective, 3) Advancing new development, 4) Establishing accountable processes, 5) Cumulative impact considerations on capital and operating costs, and 6) Shared risk.

Administration undertook a review of the twelve business cases received, and on 2018 June 30 brought forward a recommendation of new communities for investment in the One Calgary (2019-2022) service plan and budget. Also, through the One Calgary process and subsequent to the setting of indicative rates, Administration identified recommended investments for the 27 actively developing communities which were not subject to Growth Management Overlays, but did have outstanding infrastructure needs.

To fund the investments required to service the 14 new communities approved through report C2018-0900 plus the 27 actively developing communities identified in report PFC2018-0200, dedicated funding sources were identified through the One Calgary (2019-2022) service plan and budget that included utility rates, off-site levies and dedicating a specific portion of the property tax rate increase for 2019-2022 for the 14 new communities and the 27 actively developing communities. The dedicated property tax rate is intended to fund The City's portion of capital and the direct incremental operating costs to serve these communities. Council approved a property tax rate increase of 0.75 per cent in 2019 for new communities and a tax rate increase of 1.4 per cent in 2019 and 0.4 per cent per year in 2020-2022 for actively developing communities. The Off-Site Levy Bylaw was updated to include necessary capital infrastructure to serve these new communities through report PFC2018-0973 on 2018 November 12. The identification of the investments and updates to these tax and non-tax supported funding sources resulted in a total cost and revenue package of $488 million for the 2019-2022 period.

In 2018 July, Council directed Administration to bring the next recommendations for new community growth and development approvals by no later than 2020 March, and in coordination with the One Calgary (2019-2022) service plan and budget Mid Cycle Adjustment process. The rationale behind this direction at the time was that the review of new community growth opportunities every two years would provide the following benefits:

1. Allows for ongoing and predictable decision-making timing for Council and the development industry;
2. Aligns with the City budget cycle timing in order that growth opportunities be considered cumulatively at the same time, and also alongside other City budget priorities; and
3. Allows a biannual check of market demand conditions, and an opportunity for action should additional investment be necessary to create capacity in the market.

Current New Community Naming and Number References
At the time of Council's approval of the 14 new communities in 2018 July, a community was defined generally by the community boundaries approved within Area Structure Plans. Many of the approved business cases represented a portion of a new community, with additional development within the community expected to be brought forward later. Since that time, many of the business cases have moved forward in the land development process and have received Council approval of new community boundaries and names. These new community boundaries and names no longer add up to 14. For consistency, Administration continues to reference the 14 new communities as they were approved in 2018 July. To avoid this from occurring in the New Community Growth Strategy 2020 process, Administration only refers to the 11 business cases as business cases and not communities.

In the fall of 2019, Administration brought forward report PFC2019-1062 seeking direction from Council on how to proceed with the New Community Growth Strategy (NCGS) 2020 review. Since the direction in 2018, the Calgary Region housing market had slowed and The City's financial position had become more constrained. Council had also prioritized completing the other two components of the Citywide Growth Strategy, Established Area Growth and Change Strategy and Industrial Area Growth Strategy, directing resources accordingly. Due to the change in context, a modified NCGS 2020 process was devised whereby an initial screen would be performed on interested business case proponents and any recommended business cases have to 1) comply with no operating costs prior to 2027 and 2) have no City-funded capital costs required to support the initiation of development.

Project Alignment with Next Generation Planning and the Municipal Development Plan and Calgary Transportation Plan

Next Generation Planning is a new way of planning that ensures our citizens, and the people who move to and invest in Calgary, can make a great life and a great living in our city. It's a better way to plan our future. We're enabling development and investment through clear, accessible plans, strategies and tools that strategically guide and support growth. This program of nine initiatives provides a coordinated and clear planning system for the whole city, modernizes our planning and development approach, updates and simplifies policy to implement the MDP/CTP, and creates a better toolbox to allow for development and investment in Calgary (see Attachment 2 for more information).

This approach to planning supports and grows our communities so they continue to thrive and are prosperous for years to come. When our communities thrive, so does Calgary.

These nine Next Generation Planning initiatives allows professionals from different backgrounds, to collaborate, align and close gaps between our MDP/CTP, local planning and development activity. The results is enabling growth and investment in Calgary's communities. The NCGS leverages/implements the NEXT20 MDP project and provides the foundation for/enables partnerships and investment. The NCGS aims to:

- Communicate capital and operating costs of new growth to all stakeholders;
- Ensure City infrastructure is delivered during the budget cycle in alignment with development; and
- Work towards the growth and change framework of the Municipal Development Plan.

Previous Council Direction

Below is complete list of recommendations from report PFC2019-1062. Item 7 is included on the 2020 October 13 Priorities and Finance Committee agenda as report PFC2020-0962.

That Council direct Administration to:

1. As a modification to the established process of regularly receiving business cases for new communities that recognizes the City of Calgary's current economic constraints, Administration may recommend a limited number of growth opportunities to Council, that must meet the following criteria:
   a. no required capital from the City of Calgary to initiate development;
   b. no required operating costs in the current One Calgary (2019-2022) budget or the next (2023-2026) budget cycle, without a proposed mitigating solution, that does not include tax and utility rate increases using the existing model and any improvements made by the date of review;
   c. completing areas of previously approved communities and leveraging capital investments already made in 2018 and prior years;
   d. property tax generation potential; and
   e. levy generation potential that funds new and established areas.
2. Invite landowners to submit a one-page proposal (with a template to be provided) by December 31, 2019 to demonstrate how their proposed business case meets the criteria noted above.
3. In consultation with Calgary Economic Development's real estate pillar experts, Administration will determine which growth opportunity areas will continue to full business case review, and will then invite business cases from related landowners by January 31, 2020 with a submission deadline of March 13, 2020.
4. Review business cases by May 29, 2020, with subsequent dialogue with proponents and a summary of approved and rejected cases to be forwarded to October 13 2020 Priorities and Finance Committee for review, discussion and recommendation. Recommendations will be forwarded to the following Council meeting for decision.
5. Evolve the practice of looking at a direct incremental operating cost model to a full operating cost model, in conjunction with other stakeholders. A briefing on progress toward the new model will be presented at 2020 June 9 Priorities and Finance Committee meeting, with a targeted timeline for completion of no later than Q3 2021.
6. Explore the phasing out of the growth management overlay, and report back to Priorities and Finance Committee no later than Q2 2020 with options to better align to our current economic situation and that creates policy that encourages a business-friendly environment and further development investment and retention in Calgary.
7. Bring a 2020 Growth Strategy Monitoring Report to Council through Priorities and Finance Committee by no later than 2020 October;

8. Remain committed to the following 4 guiding principles outlined in Attachment 3 through this modified process for business cases for growth:
   a. Recognize the principle of shared risk that Industry and Administration agreed to as part of the New Community Growth Strategy 2018 work;
   b. Address City financial constraints related to capital and operating funding availability;
   c. Address City resourcing constraints related to work plan priorities; and
   d. Continue to drive toward a Comprehensive Citywide Growth Strategy that includes new communities, established areas and industrial areas for 2022 March.

   Following Council it was determined through discussions with Calgary Economic Development and Councillors that Calgary Economic Development's real estate pillar experts would not be involved in the process due to a conflict of interest.

   Items five and six have been postponed to 2021 and Q2 2021 respectively.

New Community Growth Strategy

November 18, 2019

PFC2019-1062

Council received the 2019 Growth Strategy Monitoring Report (PFC2019-1062) and directed Administration to complete a review of new community business cases in 2020. In recognition of The City's financial constraints at the time, Council directed a modified business case process as outlined in Council's recommendations 1-4.

July 30, 2018

PFC2018-0678, C2018-0900

Council approved a total of 14 new communities for the 2018 New Community Growth Strategy. Eight communities were recommended for approval by the Priorities and Finance Committee through PFC2018-0678, and the Priorities and Finance Committee also recommended that associated Growth Management Overlay removals be brought forward to Council on 2018 July 30 for a public hearing. Overlay removals were accomplished through report C2018-0585.
An additional six new communities were added on 2018 July 30 through Council direction on supplemental report C2018-0900 *New Community Growth Strategy 2018 – Further Review and Analysis Directed through PFC2018-0678*. For a complete history of the growth strategy these additional reports are also noted: PFC2018-0200 and C2018-0900.

March 19, 2018

PFC2018-0200

In 2018, Council provided direction for a New Community Growth Strategy (NCGS). Foundational to the New Community Growth Strategy, Administration and Industry agreed on six principles that were developed together in the Fall of 2017 to guide this work, they are; 1) Collaborate, 2) Incorporate a market oriented perspective, 3) Advancing new development, 4) Establishing accountable processes, 5) Cumulative impact considerations on capital and operating costs, and 6) Shared risk.

Planning Calgary Now and for the Next Generation

We're changing the way we plan our city through what we call **Next Generation Planning**. Initiated in 2019, this new way of planning makes sure our citizens, and the people who move to and invest in Calgary, can make a great life and a great living in our city. It's a better way to plan our future:

- allows The City to be more fiscally responsible, giving better value to citizens, over a longer period of time
- supports our existing communities to be vibrant and successful for decades to come
- allows for closer working relationships with our citizens

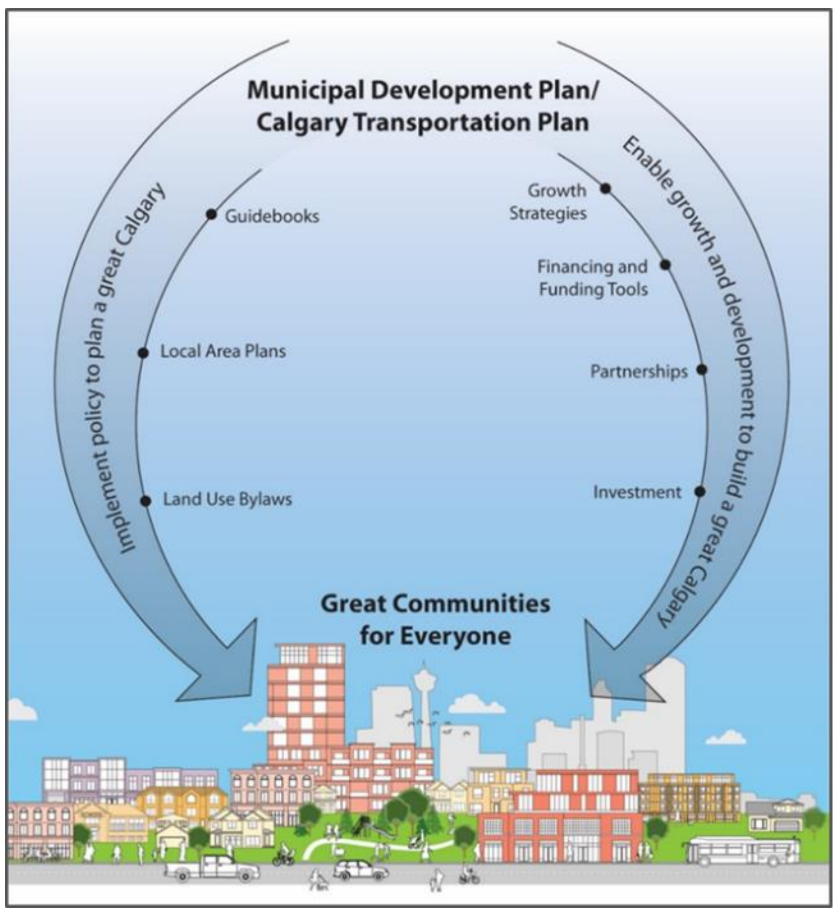
Currently, made up of nine initiatives, Next Generation Planning helps us carry out the policies and meet the goals in our Municipal Development Plan and Calgary Transportation Plan (MDP/CTP):

- provides a coordinated and clear planning system for the whole city
- modernizes our planning and development approach
- updates and simplifies policy to meet the MDP and CTP
- creates a better toolbox to allow for development and investment in Calgary

Calgary has momentum

Calgary is building on the success of the past ten years from the investments we've made in our city. We've improved the way people can move around Calgary, by growing our primary public transit network and adding new and more transportation options. We're constructing our Main Streets and are providing a better mix of housing and amenity options for our citizens.

These nine Next Generation Planning initiatives will work together with existing polices. The goal is to plan a great Calgary that will enable growth and development so we can continue building a great city.



Next Generation Planning Initiatives

Calgary's LONG-RANGE VISION

1. **Planning our city for 2 million people-** The **Municipal Development Plan** and **Calgary Transportation Plan** are our vision, with goals and policies to make sure we're successful.

Our approach to PLAN A GREAT CALGARY

2. **Planning communities for people and their activities-** The **Guidebook for Great Communities** will make it easier for a person to find a place to live and grow in any community, regardless of stage of life, income or age. It allows communities to offer more types of housing, shops and service options, closer to where people live.

3. **Planning future development and growth in our communities-** We're creating **Local Area Plans** to guide future development, growth, reinvestment and renewal in Calgary's communities.

4. **Planning the different types of development in communities-** Renewing the **Land Use Bylaw** positions it to better guide how a building is designed, a site is laid out and landscaped, and what types of businesses or activities can happen at buildings or sites.

5. **Protecting Calgary's past, for our future-** Our **Heritage Conservation Incentives and Programs** include tools and grants that encourage property owners to designate and conserve historical properties and spaces.

Our approach to enable BUILDING A GREAT CALGARY

6. **Supporting growth in Calgary's existing, new and industrial communities**
   - The **Established Area Growth and Change Strategy** guides investments, creates financial tools to allow growth, and attracts private investment to our communities.
   - The **New Community Growth Strategy** aligns planning policy, market demand, and service needs with City budgets, so our newest communities are successful now and in the future.
   - The **Industrial Area Growth Strategy** will further support diversifying our city's economic growth and strengthen this city as an inland port and distribution centre for western Canada.

7. **Funding new growth in Calgary-** The **Off-Site Levy and Centre City Levy** help pay for new services, like water and sanitary trunks, roads, libraries and fire halls in our existing and new communities.

8. **Making Calgary's streets more attractive for investment and places to gather-** Our **Main Streets Program** is improving 24 of Calgary's streets to celebrate community character, encourage business development, create a vibrant destination, and improve public health.

9. **People living and working closer to Calgary's transit network-** Implementing the **Transit Oriented Development Program** means more people will live, work and shop within walking distance to our transit network. It's an easy and economical way of living and travelling in our city**.**

Outline of the 2020 Process and Industry Stakeholder Consultation

In recognition of The City of Calgary's financial constraints in 2019 December, Council approved an update to the 2018 process by introducing a two-step process for 2020 through report PFC2019-1062. An overall timeline of the New Community Growth Strategy (NCGS) 2020 process is listed below, followed by background on the process and interaction with stakeholders.

<u>NCGS 2020 Process Timeline</u>

2019 December 2	Administration sent out a memo and directions to interested developers and BILD Calgary Region to participate in the New Community Growth Strategy 2020.
2020 January 6	Administration received 11 one page submissions from proponents and reviewed these against the five screening criteria through a cross corporate working group.
2020 January 31	After completing a review of the one page submissions against the five screening criteria, Administration invites the 11 business case proponents to submit a full business case by 2020 March 13, to be evaluated against updated criteria.
2020 March 13	Administration received 11 full business case submissions and begins review of the business cases against the evaluation criteria.
2020 June 1	Administration has completed reviews of the 11 business cases and provides comments to the business case proponents.
2020 June/July	Administration and proponents meet to discuss review findings and a formal opportunity for information clarification and sharing.
2020 July	After meeting with each business case proponent, the cross corporate team formulated a recommendation that was confirmed by the Directors Integrated Growth Committee (DIGC) and the General Managers Strategic Growth Committee (GMSGC).
2020 August	Administration developed a communication plan to notify business case proponents and other stakeholders of the recommendations ahead of the report.
2020 September	On 2020 September 18, Administration notified business case proponents and Council members of Administration's recommendation to be included in this report. Administration then met with business case proponents to continue to resolve outstanding technical issues.
2020 October 13	Administration brings forward the recommendation on the 11 business cases to the Priorities and Finance Committee.

Council-Directed Two Step Process

The first step of the NCGS 2020 process began in 2019 December by sending out a memo and directions on 2019 December 2 to known interested developers and BILD Calgary Region. Administration also included the memo and directions on The City's Citywide Growth Strategy webpage. The first step required proponents to submit a one page proposal that demonstrated how their business case met the following criteria:

a) No required capital costs from The City of Calgary to initiate development;
b) No required operating costs in the current One Calgary (2019-2022) budget or the next (2023-2026) budget cycle, without a proposed mitigating solution, that does not include tax and utility rate increases, using the existing model and any improvements made by the date of review;
c) Completing areas of previously approved communities and leveraging capital investments already made in 2018 and prior years;
d) Property tax generation potential; and
e) Levy generation potential that funds new and established areas.

During the month of January, Administration consulted with the NCGS Working Group on changes to the evaluation criteria as a result of the current context and lessons learned from the 2018 process. The changes were to improve clarity and understanding of how the criteria would be measured. The evaluation criteria are included at the end of this attachment, and have been grouped under the three growth planning factors of Municipal Development Plan (MDP)/Calgary Transportation Plan (CTP) Alignment, Market Demand and Financial Impacts, with each factor having equal weight (33%). Under these three factors the criteria remained structured around the following MDP goals:

1. A prosperous economy;
2. Shaping a more compact urban form;
3. Creating great communities;
4. Urban design;
5. Connecting the city; and
6. Greening the city.

The criteria include both binary and qualitative components that are designed to assess the opportunity presented in the business case and measure how a business case meets City goals, policies and directives. All business cases have been evaluated against all criteria.

The second step of the process began on 2020 March 13 with the formal submission of the 11 business cases. Over the next two months Administration reviewed the business cases, during this time there was communication back and forth with business case proponents if there were questions of clarification or additional information requested. On 2020 June 1, Administration sent out comments to each business case proponent that highlighted discrepancies or gaps between Administration's understanding and the business case proponent's understanding. In this manner, Administration tried to improve the NCGS 2020 process by focusing on the issues of contention and coming to an agreement of facts or mutual understanding of each other's point of view. Once the comments were sent out Administration organized a meeting with each business case proponent to discuss each business case. These meetings were followed up with an exchange of information as required.

In reviewing the 11 business cases, Administration considered the cumulative impacts of approving one or more business cases in context of previous approvals, in addition to the review of the individual business case against the evaluation criteria. It was a combination of individual business case reviews and cumulative impacts that have led to the recommendations included in this report.

Stakeholder Consultation

Administration worked with BILD Calgary Region and the NCGS Working Group at the beginning of the process to formulate the evaluation criteria and create the directions and one page template for business case proponents to follow.

Administration also had a discussion with Calgary Economic Development about their involvement in the NCGS 2020 process. Calgary Economic Development declined to be involved directly in the evaluation of the business cases. It has been challenging to seek third party input to the New Community Growth Strategy process and outcomes, given that individuals with expertise in the subject may face a conflict with their firms or clients.

Administration also outlined the NCGS 2020 process on The City's Comprehensive Citywide Growth website in 2019 December. In 2020 September, prior to the report being published, this website and the Next Generation Planning website were updated with information about the process and how the public could participate in the Committee and Council discussions. Some social media posting was also undertaken.

Administration has kept the proponents up to date through regular communication, including meetings.

Table 1: New Community Growth Strategy 2020 Evaluation Criteria

Factor	MDP Goal	Definition	Criteria	Clarifying Direction
Strategic Alignment: Municipal Development Plan/Calgary Transportation Plan	Prosperous Economy	Planning for our economy's long-term sustainability ensures that current and future generations are resilient and adaptable to economic cycles and unanticipated changes.	1. How many temporary construction jobs are expected from development in the business case area?	Indicate how many direct and indirect temporary construction jobs are expected annually from development (expressed in person-years), in the business case area.
			2. How many future jobs/permanent jobs are expected within the business case area?	Indicate how many permanent jobs are anticipated, at development completion, within the business case area.
			3. How does the business case area support economic diversification for Calgary?	Explain how the business case supports an economic focus area as identified by Calgary Economic Development (e.g., the following sectors Energy, Renewable Energy & Green Economy, Financial Services, Technology, Agribusiness, Creative Industries, Aerospace & Logistics and Life Sciences).
	Compact City	A dispersed and spread out population creates some social, economic and environmental challenges. In a compact city, balancing growth between new and developed areas builds vibrant, thriving communities. A compact city is made up of complete communities that provide a broad range of housing choices and services, as well as high quality transit and transportation options.	4. Is the business case area contiguous?	Illustrate the location of the business case in relation to a fully developed community or an area with existing urban land uses (not S-FUD). Provide a GIS file for the business case with the preliminary road network.
			5. How does the business case area meet the intensity target of 60 people and jobs per gross developable hectare?	Demonstrate how the business case area meets the minimum intensity target of 60 people and jobs per gross developable hectare.
	Great Communities	Great communities are flexible. They adapt to the needs of current and future residents by providing a variety of housing options and services so that people can meet their day-to-day needs within their own neighbourhood. Essentially, it is about creating communities where residents can live, work and play.	6. How does the business case fit into the greater community?	Explain how the business case provides amenities and complements existing communities.
			7. How does the business case area immediately support existing non-residential development?	Explain how the business case supports existing non-residential development in the short term (next 1-3 years).
			8. How does the business case area integrate Neighbourhood Activity Centres (NAC), a Community Activity Centre (CAC), and/or leverage a Major Activity Centre (MAC)?	Illustrate the location of the business case in relation Neighbourhood Activity Centres, Community Activity Centres, and Major Activity Centres. (Greater and closer connectivity to a higher order activity centres is better.)
			9. How does the business case area support City facilities, such as libraries and recreation centres?	Illustrate the location of the business case in relation to facilities such as libraries, recreation centres, cultural centres. Administration will use existing catchment areas to measure proximity.
	Good Urban Design	Good urban design is the result of collaboration and coordination between various disciplines, creating public places that people enjoy.	10. How does the business case area demonstrate innovation or a new approach for development in Calgary (e.g. LEED, BREAM, green energy)?	Explain what innovative approaches for development will be used (e.g., LEED, BREAM, green energy).

	Connecting the City	The design of the transportation system has a significant impact on how a city grows and how people get around. The Municipal Development Plan encourages more sustainable transportation options such as walking, cycling and transit to create a system that provides more choice. This means prioritizing investment to improve transit networks, designing streets to accommodate cycling and walking, plus improved connectivity.	11. How does the business case area integrate with the Primary Transit Network in the MDP/CTP?	Explain how the business case area will connect to the Primary Transit Network either through location or service provision. Administration will measure walking distance and transit service connectivity.
	Greening the City	Protecting environmentally sensitive areas and promoting renewable energy sources, energy efficiency, low-impact development for stormwater management, construction of green buildings, and encouraging cycling and walking all work together to make Calgary more environmentally friendly.	12. How does the business case help deliver quality public spaces or open spaces for residents/employees?	Describe unique attributes about open spaces or public environment features that the business case area will provide.
	Managing Growth and Change	Founded on the principles of sustainable development and guided by fiscal responsibility and managed growth, these goals will stimulate growth and change across the city for the next 60 years.	13. How does the business case area use existing utilities, fire/emergency service, and transportation infrastructure?	Explain and confirm how the business case will leverage existing and/or budgeted utilities, fire/emergency service, and transportation infrastructure without new City capital costs.
Factor	**MDP Goal**	**Definition**	**Criteria**	**Clarifying Direction**
Market Demand	Managing Growth and Change	Founded on the principles of sustainable development and guided by fiscal responsibility and managed growth, these goals will stimulate growth and change across the city for the next 60 years.	14. What is the business plan for development approval starting from Land Use and Outline Plan to Subdivision Phasing?	Provide the status of technical studies such as Master Drainage Plan, Transportation Impact Assessment, etc. Provide the projected timeline of planning application submission and approvals including land use and outline plan, stripping and grading, and subdivision. Provide a subdivision phasing plan with expected year of development for each phase.
			15. Are there any considerations involving third parties? (e.g., public land claims, rights of way acquisitions, Provincial funding or approvals, arrangements involving other land owners/developers)	Indicate if there are any considerations involving third parties and how they would be addressed (e.g., public land claims, rights of way acquisitions, Provincial funding or approvals, court proceedings, other land owners/developers delivering infrastructure). What timeline do you understand a third party consideration to be resolved or delivered in.
			16. What factors (other than City timelines) may cause a delay in private investment from the timelines provided? How would you mitigate against these factors?	Explain how you would mitigate against any factors that may delay submitting a development agreement as indicated in the business case submission.
			17. How does the business case area benefit the city-wide serviced residential or non-residential growth capacity? How does it improve near term market competition? 18. How does the business case area benefit the sector/local serviced residential or non-residential growth capacity? How does it improve near term market competition?	Explain how development in the business case area addresses city-wide and sector/local serviced residential or non-residential market capacity. The City's forecasted demand is outlined in the *Suburban Residential Growth 2019-2023* document, including consideration for the 14 new communities. Please demonstrate how the development fits

				within these forecasts, or discuss how you think the development will alter forecasted demand expectations.
Factor	**MDP Goal**	**Definition**	**Criteria**	**Clarifying Direction**
Financial Impacts	Managing Growth and Change	Founded on the principles of sustainable development and guided by fiscal responsibility and managed growth, these goals will stimulate growth and change across the city for the next 60 years.	19. What are the City of Calgary annual operating costs for the business case area over the lifetime of the development? 20. What is the anticipated total amount of levies to be contributed by the business case area? 21. What is the average annual City portion of the property tax revenue for the business case area over the lifetime of the development? 22. What is the capital investment required to development the business case?	Please fill in the attached spreadsheet. The City will complete a direct incremental operating cost review to determine if an operating gap exists for the services identified in the no required operating cost funding for City funded operating costs prior to 2027. The City will calculate the cumulative impact of the 14 new communities and any new business cases received. The City will assume the 14 new communities will build out as indicated. The City will calculate the total amount of levies to be contributed using 2020 rates. The City will calculate the annual City portion of the property tax revenue for the business case using the 2020 property tax rates.
Other	**Other**	23. Are there any other key attributes that should be highlighted about the business case area? Examples could include improvements to city resiliency and sustainability, service efficiency, alignment to other City initiatives, and innovative approaches.		

Business Case Summaries

The purpose of this attachment is to summarize each business case in a consistent way, relying upon information collected from business cases themselves and from City Administration, as described on the next page.

Table of Contents

Definition of Municipal Development Plan Goals

MDP Goal – Prosperous Economy
Planning for our economy's long-term sustainability ensures that current and future generations are resilient and adaptable to economic cycles and unanticipated changes.

MDP Goal – Compact City
A dispersed and spread out population creates some social, economic and environmental challenges. In a compact city, balancing growth between new and developed areas builds vibrant, thriving communities. A compact city is made up of complete communities that provide a broad range of housing choices and services, as well as high quality transit and transportation options.

MDP Goal – Great Communities
Great communities are flexible. They adapt to the needs of current and future residents by providing a variety of housing options and services so that people can meet their day-to-day needs within their own neighbourhood. Essentially, it is about creating communities where residents can live, work and play.

MDP Goal – Connecting the City
The design of the transportation system has a significant impact on how a city grows and how people get around. The Municipal Development Plan encourages more sustainable transportation options such as walking, cycling and transit to create a system that provides more choice. This means prioritizing investment to improve transit networks, designing streets to accommodate cycling and walking, plus improved connectivity.

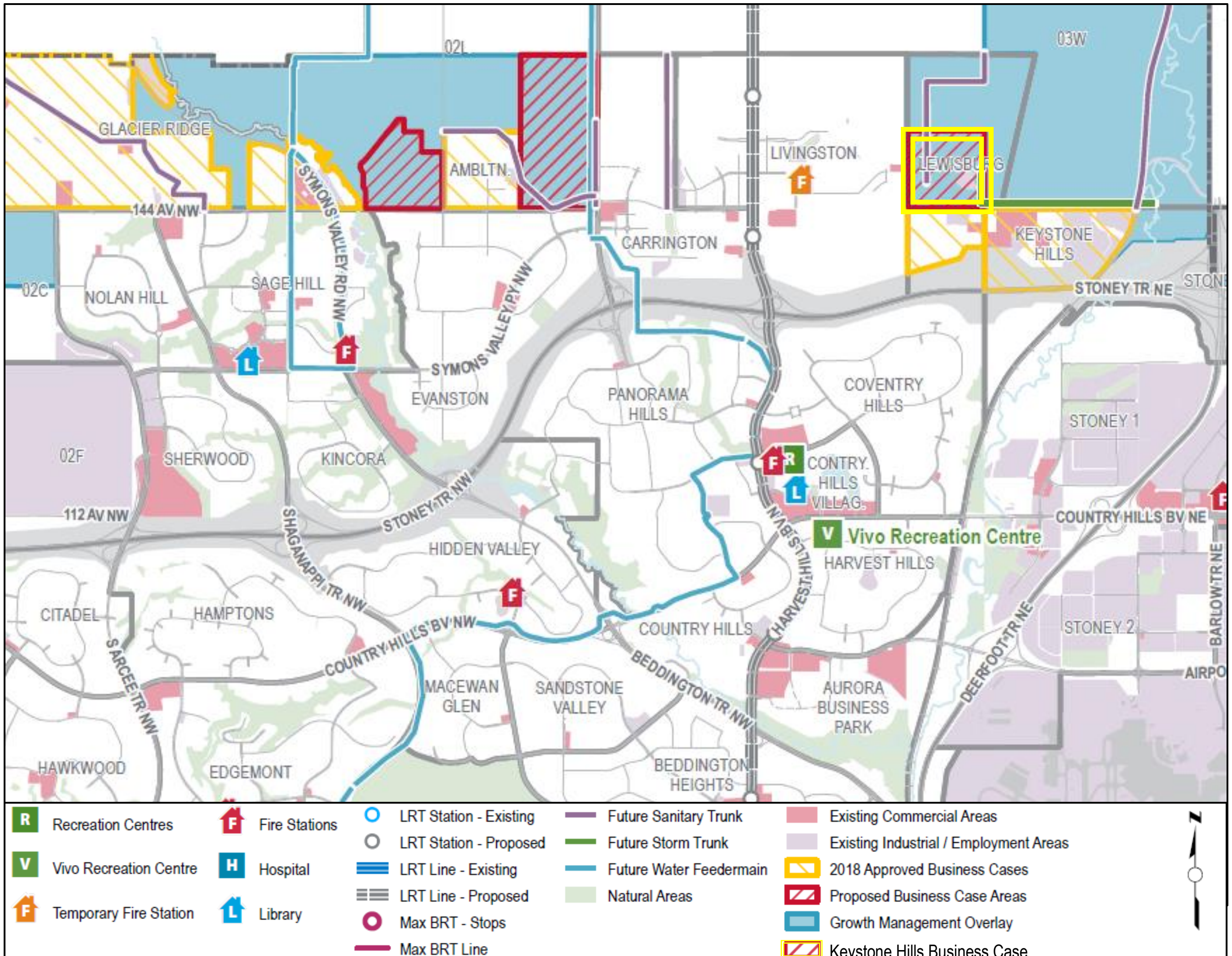
MDP Goal – Greening the City
Protecting environmentally sensitive areas and promoting renewable energy sources, energy efficiency, low-impact development for stormwater management, construction of green buildings, and encouraging cycling and walking all work together to make Calgary more environmentally friendly.

MDP Goal – Managing Growth and Change
Founded on the principles of sustainable development and guided by fiscal responsibility and managed growth, this goal will stimulate growth and change across the city of the next 60 years.

Information Sources in this Attachment

1. *Information regarding "Factor 1: MDP/CTP Alignment" and "Factor 2: Market Demand" has been provided by business case proponents.*
2. *Information regarding "Factor 3: Financial Impact", supply and demand projections, and the mapping information has been provided by City Administration.*

At-A-Glance
Keystone Hills ASP - Genesis



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance
Keystone Hills - Genesis

Market – North sector (2020-2024)

City's single/semi supply expected by 2024

Approved supply................ 15,424 units
Projected demand.................3,910 units
Difference.........................+11,514 units
This business case proposes 896 units

City's multi-residential supply expected by 2024

Approved supply................ 17,527 units
Projected demand.................2,960 units
Difference.........................+14,567 units
This business case proposes 148 units

Gross Developable Hectare

Business Case Area...........65.0 hectares

Proposed jobs

1,412 temporary
207 permanent

Proposed non-residential development

Commercial ....0.2 hectares

Proposed innovation

Energy efficient construction
Green energy readiness for residential

Years to completion....................6 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

This neighbourhood is primarily residential and will support developing employment centres such as the Calgary Airport, YYC Global Logistics Park, Stonegate Landing, North Stoney Industrial, Aurora Business Park, Spyhill Industrial and the future Keystone Hills Regional Retail Centre and industrial/employment areas. Calgary Economic Development identifies the established Transportation and Logistics cluster as an opportunity for growth in the City.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipated 66 people/jobs per gross developable hectare

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- Supports the short-term build out of the Keystone Hills Regional Retail Centre & Industrial/Employment Area and Keystone Hills Core Area.
- Additional population will support surrounding underutilized retail and amenities.
- Business Case area provides a school site and Neighbourhood Activity Centre.
- Contiguous with development to the west and south.

Criteria: Supporting **existing** non-residential facilities

The additional population will provide demand for the following existing community facilities in proximity:

- Country Hills Village Commercial Area
- Sage Hill Library
- Vivo Centre
- Keystone Hills Regional Retail Centre and Industrial/Employment Area

Criteria: Integrating and leveraging Activity Centres

- One Neighbourhood Activity Centre provided in business case area, to be generally comprised of a central amenity space and commercial and/or employment uses.
- The Keystone Hills Regional Retail Centre & Industrial/Employment is proximate and accessible via an efficient mobility network.
- Keystone Hills Core Major Activity Centre is in walking distance and provides additional services and population.
- Supports the long-term development of a Community Activity Centre in the northeast portion of Keystone Hills ASP area.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- Direct transit connections will be provided to the Major Activity Centre, future Green Line LRT station and the proposed BRT routes planned along 14 Street NW and 144 Avenue NW.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- The business case will provide a variety of passive and active open spaces for residents and employees, including a soccer field, baseball diamond and two local parks.
- Open space connections will provide proximity to the innovated Stormwater Kidney.
- Connections will be provided to allow residents and employees to enjoy the naturalized drainage course that runs through the plan area.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

- The business case achieves the long-term city-wide fire/emergency response policy with the approval of the Temporary Fire Hall in Livingston
- 11 Street NE at Stoney Trail interchange
- Airdrie Feedermain
- East Keystone Sanitary Trunk
- East Keystone Storm Trunk

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q2 2020 Outline Plan and Land Use Application submitted
- Q2 2021 Stripping and grading
- Q2 2021 Phase 1 subdivision submission

Criteria: Third Party considerations

- The wetland spans three land holdings – all parties consent to proceed with pond construction.
- The wetland has not been claimed by the Provincial Crown.

Criteria: Possible Delays

None.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- Many of the 27 activity developing communities will be completed in the near to mid-term or have infrastructure constraints.
- A healthy balanced serviced land supply is needed to accommodate short-term growth pressure and future market demand.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- Provides more choice for home buyers and will create competition in the market with a new developer.
- Increased competition in residential development will support housing affordability.
- The business case area will be self-sufficient by providing a base population to support local services at full build-out.
- The business case area is serviceable with leading infrastructure, and where possible, corresponds with servicing catchments areas.

- The North sector is one of the fastest growing sectors in the city, accounting for 26% of total suburban units over the last 5 years.
- As communities building out, a reduction in housing supply has a direct impact on housing prices and affordability.
- The development will increase the efficiency of existing and funded infrastructure.

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

-$381,000/year at build out.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$26,951,966

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$2,692,497/year at build out.

Criteria: Required capital investment to develop business case area

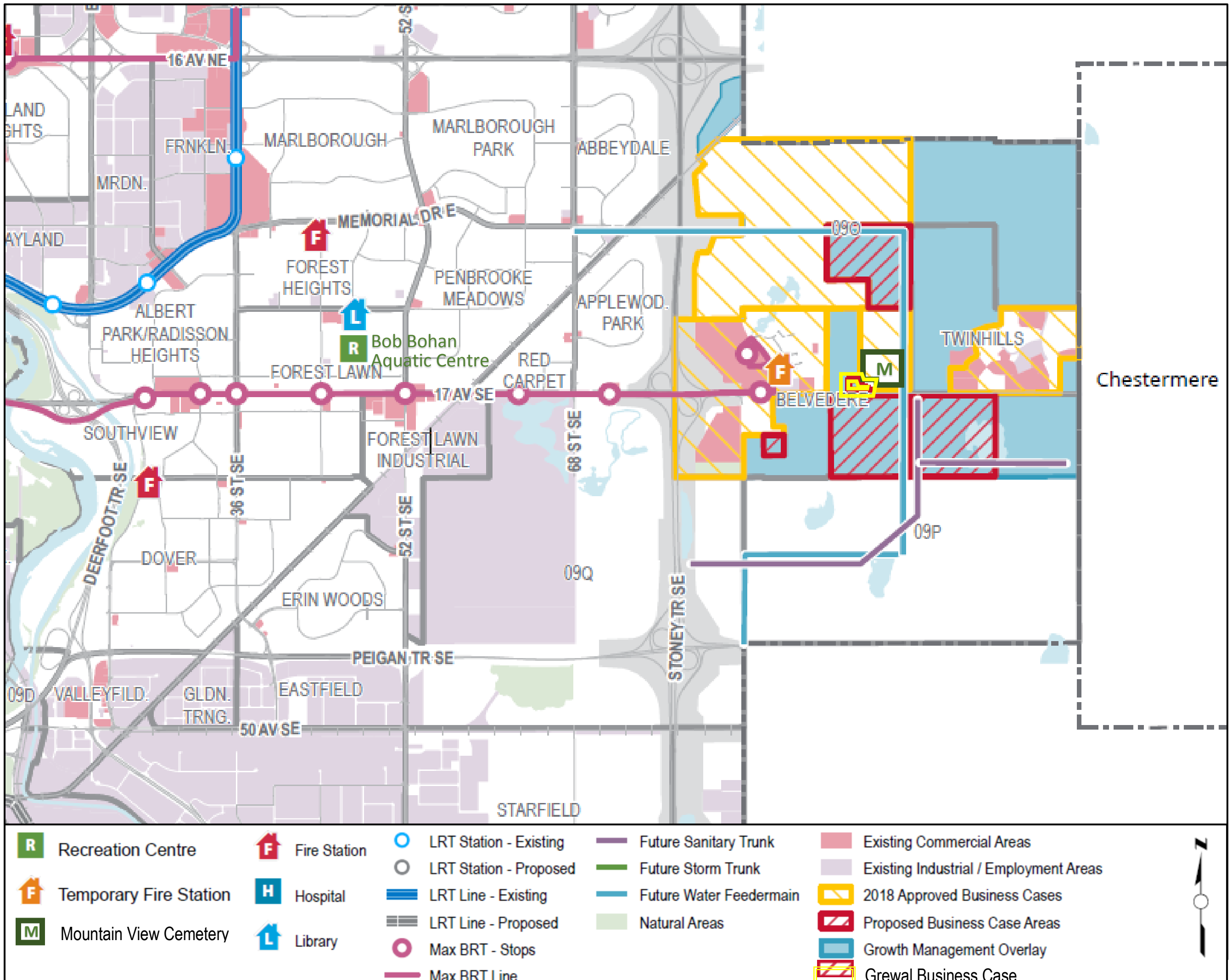
$0

Operating Costs ($000s)[1]

Operating **all numbers 000s*		**One Calgary (2019-22) Total**	**Budget (2023-2026) 2023**	**2024**	**2025**	**2026**	**Total 2023-26**	**Total Final Year**
Direct Incremental Operating Cost		10	22	201	1000	1,207	2,429	2,401
Community-based Tax Revenue Share		285	576	865	1305	1553	4299	2020
Revenue (Shortfall)		**275**	**554**	**665**	**305**	**346**	**1870**	**(381)**

[1] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance
Belvedere ASP – Grewal



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance
Belvedere - Grewal

Market – East sector (2020-2024)

Multi-residential supply expected by 2024

Approved supply.................... 3,398 units
Projected demand....................270 units
Difference.............................+3,128 units
This business case proposes **42** units

Gross Developable Hectare

Business Case Area.............1.5 hectares

Proposed jobs

200 temporary
115 permanent

Proposed non-residential development

Retail ....0.8 hectares

Proposed innovation

Solar and geothermal energy sources to be explored for retail/commercial

Years to completion.....................2 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

Development of the Grewal parcel will establish continuity through the provision of mixed-use commercial along the 17 Avenue transit corridor.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipated 173 people and jobs per gross developable hectare

MPD Goal – Great Communities

Criteria: Fitting into the greater community

- The development will facilitate the extension of the 17 Avenue regional transit corridor to Chestermere.

Criteria: Supporting **existing** non-residential facilities

- Increase population will support existing and future East Hills commercial development.
- The development will provide a residential base for the employment uses in Twin Hills CyberCity.

Criteria: Integrating and leveraging Activity Centres

- The development proposes to create a transit-oriented urban interface along one of Calgary's main eastern gateways.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- The Grewal parcel is located on the 17 Avenue Corridor, which is identified as part of the Primary Transit Network.
- The development will help established continuity of development along 17 Avenue and support the Primary Transit Network.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- A centrally located private open space that will be shared among the residential and mixed uses will be provided.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area will utilize:

- Belvedere East Feedermain
- Belvedere Phase 1 Sanitary Trunk
- Discussions currently underway to execute a construction agreement to extend water Feedermain and sanitary trunk
- Temporary Fire Hall
- East Freeway (Stoney Trail) construction
- 17 Avenue transit corridor and extension of MAX purple BRT

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q1 2021 Outline Plan and Land Use submission
- Q2 2022 Phase 1 subdivision approval
- Q2 2022 Stripping and grading
- Q1 2023 Phase 1 construction start

Criteria: Third Party considerations

- There are right of way requirements to extend the water and sanitary sewers, which will be addressed through the construction agreement between Open Gate and The City.

Criteria: Possible Delays

- Lack of approval/implementation of The City-OpenGate construction agreement could cause delay in ultimate water and sanitary servicing.
- City Water Resources has advised that Stormwater Management study for East Belvedere will commence later this Fall (2020)
- Grewal will explore alternate solution and will construct/operate zero-discharge facility until the ultimate infrastructure is available.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- The development will provide residential and non-residential development in the east sector, where previously there has been no supply.
- Strengthening market offerings in the east sector will help the City compete better with the adjacent municipality of Chestermere.
- Mixed-use retail and office development along 17 Avenue will support the extension of the major regional transit corridor.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- The development will help establish continuity along 17 Avenue transit corridor
- The development will help fill the development gap between Tristar and the Twin Hills CyberCity development.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$751,449

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$155,643/year at build out.

Criteria: Required capital investment to develop business case area

Administration's position is further transportation investments are required in the budget to remove additional Growth Management Overlay in Belvedere, this includes the Memorial Drive/Stoney Trail overpass, upgrades to the intersection at 116 Street NE/Trans Canada Highway and upgrades to the 17 Avenue SW/Stoney Trail interchange.

The business case's position is that capacity exists along 17 Avenue to service this development.

Water and sanitary service is currently dependent on the TwinHills development moving forward. Funding is in the budget for the pipe construction but would not include the acquisition of right-of-way.

There is no permanent stormwater solution funded in East Belveldere. The business case proponent has committed to maintain the interim stormwater infrastructure until such time as a permanent stormwater solution is available.

If the business case proponent is not able to maintain the interim stormwater infrastructure, The City will be required to step in and address the maintenance of infrastructure that is not part of The City's overall capital infrastructure plan. This creates financial risk to The City because the infrastructure is not intended to be permanent in nature.

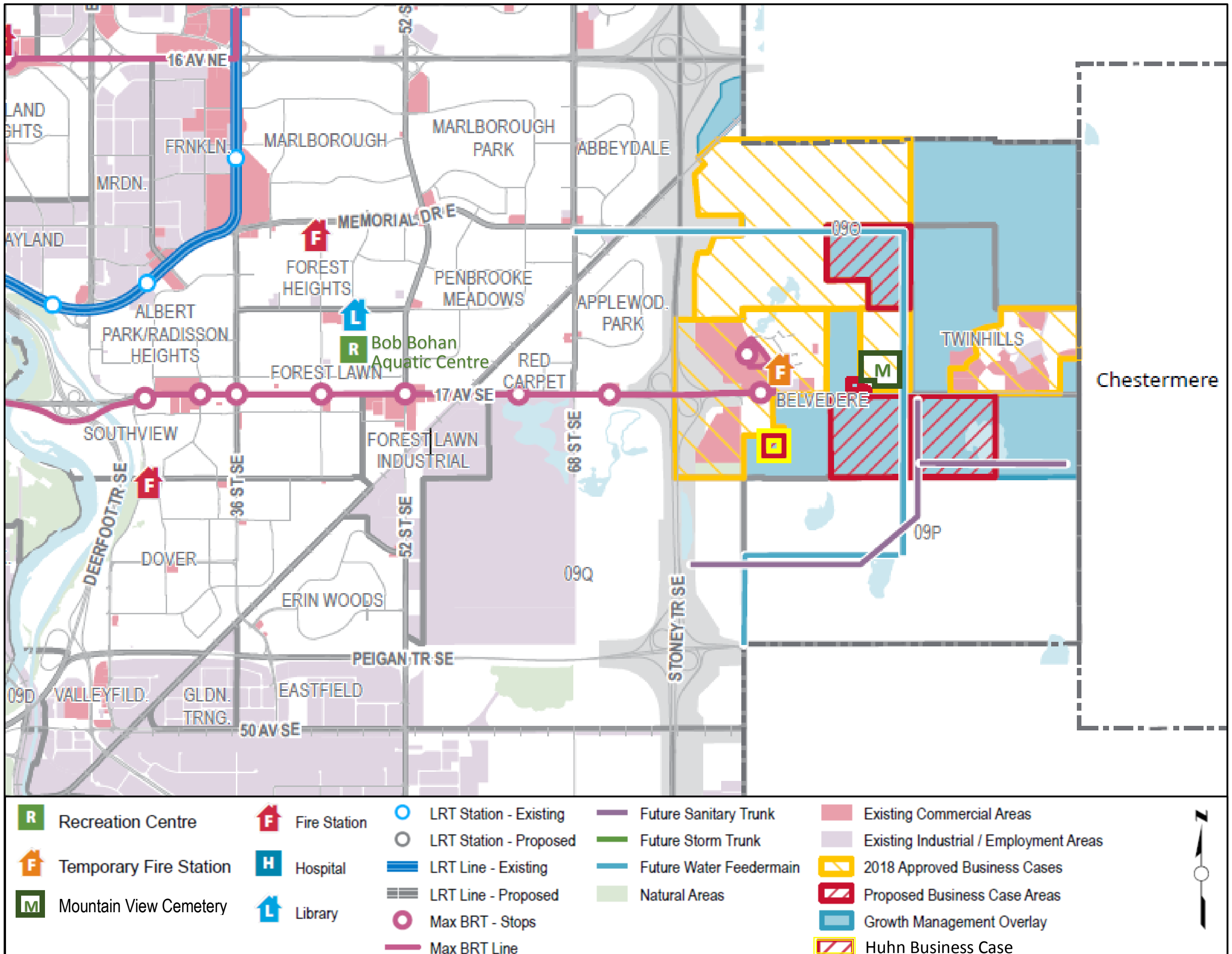
Operating Costs ($000s)[2]

Operating **all numbers 000s*	**One Calgary (2019-22) Total**	**Budget (2023-2026)**				**Total**	**Total**
		2023	**2024**	**2025**	**2026**	**2023-26**	**Final Year**
Direct Incremental Operating Cost	0	0	0	1	2	3	3
Community-based Tax Revenue Share	0	87	109	109	109	414	109
Revenue (Shortfall)	**0**	**87**	**109**	**108**	**107**	**412**	**107**

[2] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance

Belvedere ASP - Huhn



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance

Belvedere - Huhn

Market – East sector (2020-2024)

Multi-residential supply expected by 2024

Approved supply.................. 3,398 units

Projected demand..................270 units

Difference...........................+3,128 units

This business case proposes 337 seniors living units

Gross Developable Hectare

Business Case Area...........3.9 hectares

Proposed jobs

389 temporary

15-75 permanent

Proposed non-residential development

....0.0 hectares

Proposed innovation

Integration of Low Impact Dev.

Preservation of natural features

Minimized impervious surfaces

Integrated stormwater management

Multifunctional landscapes

Years to completion...................5 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

This development will meet the demand for seniors living facilities, which are a growing need within Calgary. The project's focus on the integration of seniors oriented facility with the nearby natural wetland will be unique in the City of Calgary and will contribute to the diversification of the City's inventory of diverse living arrangements.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipated 88-108 people/jobs per gross developable hectare

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- Pedestrian pathways will connect with the proposed regional pathway along 84 Street SE and to the neighbouring lands.
- Additional population will support the East Hills regional shopping district.
- The development will support sustainable modes of transportation by providing a highly connected network of paths, streets and transit routes.
- Direct vehicular access will be provided to the neighbouring lands, the East Hills shopping centre, and the existing MAX purple BRT.

Criteria: Supporting **existing** non-residential facilities

- Increase population will support various community amenities by connecting to the regional pathway system.
- The development will provide increased demand for East Hills goods and services.
- The development will provide alternative use open space and environmental open space.

Criteria: Integrating and leveraging Activity Centres

- The business case area is adjacent to the proposed Neighbourhood Activity Centre on 23 Avenue SE and 88 Street SE.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- The development will help facilitate the extension of the existing MAX purple transit line along 17 Avenue by providing increased ridership.
- This site is located within the 600m TOD area.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- The required storm water retention pond and natural wetland will be integrated into the development.
- Walking trails, bird watching benches, sheltering pavilions and other amenities will be provided to encourage use of the natural areas.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area will utilize:

- East Freeway (Stoney Trail) construction
- 17 Avenue Transit Corridor
- Extension of the MAX purple BRT to East Hills
- Existing 84 Street SE

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q4 2020 Outline Plan and Land Use submission
- Q2 2021 Development Permit application
- 2022-2023 Building 1 construction
- 2024-2025 Building 2 construction

Criteria: Third Party considerations

- There is a public land claim for the existing wetland located on site. Any disturbance to the wetland would require AEP approval.
- Development of the site allows The City to acquire the required ROW for 84 Street alignment.

Criteria: Possible Delays

None identified.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- Development in the east sector will provide a more distributed residential growth pattern from a city-wide perspective.
- Development within Belvedere will allow east-sector growth within the City boundary.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- Seniors living development will complement the planned single and multi-family growth in the area.
- Development will provide increased housing choice for Calgary's East residents.
- Development leverages Stoney Trail and 17 Avenue SE road networks.
- Supports the East Hills regional shopping area.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$1,981,560

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$169,693/year at build out.

Criteria: Required capital investment to develop business case area

Administration’s position is further transportation investments are required in the budget to remove additional Growth Management Overlay in Belvedere, this includes the Memorial Drive/Stoney Trail overpass, upgrades to the intersection at 116 Street NE/Trans Canada Highway and upgrades to the 17 Avenue SW/Stoney Trail interchange. The business case’s position is that capacity exists along 17 Avenue to service this development.

Water service is currently dependent on the TwinHills development moving forward. Funding is in the budget for the pipe construction but would not include the acquisition of right-of-way.

There is no permanent stormwater solution funded in East Belveldere. The business case proponent has committed to maintain the interim stormwater infrastructure until such time as a permanent stormwater solution is available.

If the business case proponent is not able to maintain the interim stormwater infrastructure, The City will be required to step in and address the maintenance of infrastructure that is not part of The City’s overall capital infrastructure plan. This creates financial risk to The City because the infrastructure is not intended to be permanent in nature.

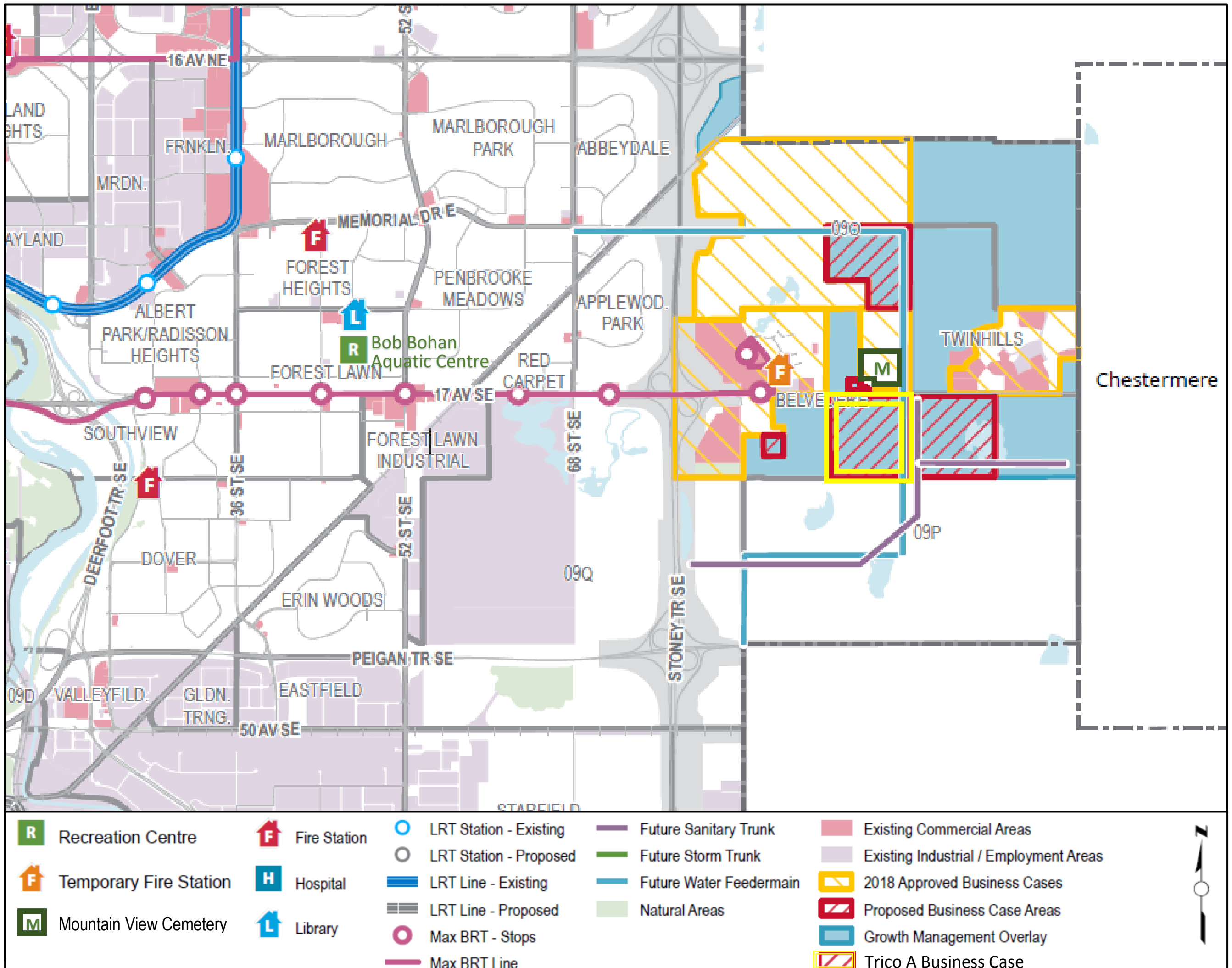
Operating Costs ($000s)[3]

Operating **all numbers 000s*	**One Calgary (2019-22) Total**	**Budget (2023-2026)**				**Total**	**Total**
		2023	**2024**	**2025**	**2026**	**2023-26**	**Final Year**
Direct Incremental Operating Cost	0	0	0	0	0	0	0
Community-based Tax Revenue Share	0	40	40	80	80	239	119
Revenue (Shortfall)	**0**	**40**	**40**	**80**	**80**	**239**	**119**

[3] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance

Belvedere ASP – Trico (Parcel A)



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance

Belvedere – Trico A

Market – East sector (2020-2024)

Single/semi supply expected by 2024

Approved supply.................... 2,138 units
Projected demand.....................520 units
Difference..............................+1,618 units
This business case proposes 566 units

Multi-residential supply expected by 2024

Approved supply.................... 3,398 units
Projected demand.....................270 units
Difference..............................+3,128 units
This business case proposes 854 units

Gross Developable Hectare

Business Case Area...........63.4 hectares

Proposed jobs

4,140 temporary
1,200 permanent

Proposed non-residential development

Mixed-Use Retail & Office..2.9 hectares

Proposed innovation

Entrepreneurial Centre
Alternate housing forms & walkability
Possible 'Next Generation School'
Low Impact Development Strategies

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

The Belvedere ASP area currently has regional scale commercial in East Hills and an approved Technology Hub in Twin Hills Cyber City. Development of Trico's Parcel A will establish continuity through the provision of mixed-use commercial along 17 Avenue. In addition, the plan proposes an Entrepreneurial Centre, intended to provide opportunities and support services to facilitate start-up companies and entrepreneurs, especially new immigrants, allowing them to transition into the Calgary market.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipates 78 people/jobs per gross developable hectare

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- Closes the gap between East Hills and Tristar (west) and Twin Hills Cyber City (east).
- Facilitates the extension of the 17 Avenue regional transit corridor.

Criteria: Supporting **existing** non-residential facilities

- Support existing and future East Hills commercial development.
- Provide residential base for the employment uses in Twin Hills CyberCity.

Criteria: Integrating and leveraging Activity Centres

- Subject area located on the 17 Avenue Urban Corridor and within a Transit Station Planning Area.
- A transit oriented urban interface along 17 Avenue is intended, with mixed-use development and neighbourhood commercial.
- A Neighbourhood Activity Centre will be provided within the development.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- 17 Avenue is part of the Primary Transit Network east of 84 Street, dependent on supportive land uses.
- Development will help facilitate the extension of the existing MAX purple transit line beyond East Hills.
- Development will facilitate future regional transit service between Calgary and Chestermere.
- The proposed transit station at Neighbourhood Boulevard 1 is adjacent to the business case area.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- Focal point of the development is an expansive open space that will be programmed to provide passive and active recreation, pathway connections and create a sense of place.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area will utilize:

- Temporary Fire Hall
- East Freeway (Stoney Trail) construction
- 17 Avenue Transit Corridor
- Both sanitary sewer and watermain stubs that will be necessary to service this business case area are currently funded and pending construction agreement with OpenGate Properties.

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q4 2020 Outline Plan and Land Use submission
- Q1 2022 Phase 1 subdivision
- Q2 2022 Stripping and grading
- Q4 2022 Construction start

Criteria: Third Party considerations

- Right of way requirements to build water and sanitary sewers will be addressed through the construction agreement between OpenGate and The City. Trico is willing to enter into the water and sanitary construction agreement should negotiations with OpenGate not come to fruition.

Criteria: Possible Delays

- Possible delay in availability of water and sanitary servicing if the construction agreement between The City and OpenGate is not approved. City Water Resources has advised the Trico team that Stormwater Management study for East Belvedere will commence later this Fall (2020). Developer will construct and operate a zero-discharge facility until the ultimate infrastructure is built.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- Business case will provide residential development in the east sector of the City, where previously there has been no supply.
- Increased choice within Calgary's east sector will help mitigate market share loss to Chestermere.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- The proposed mixed-use retail and office development along 17 Avenue will help establish continuity of development along the Primary Transit Network and a major regional transit corridor.
- Residential development in this area will support the retail and services existing in East Hills Shopping Centre.
- Residential development will support the employment uses envisioned in the approved Twin Hills CyberCity development.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$32,425,533

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$3,474,377/year at build out.

Criteria: Required capital investment to develop business case area

Administration's position is further transportation investments are required in the budget to remove additional Growth Management Overlay in Belvedere, this includes the Memorial Drive/Stoney Trail overpass, upgrades to the intersection at 116 Street NE/Trans Canada Highway and upgrades to the 17 Avenue SW/Stoney Trail interchange. The business case's position is that additional capacity exists today to allow this development to begin and that Memorial Drive is not required by this development.

Water and sanitary service is currently dependent on the TwinHills development moving forward. Funding is in the budget for the pipe construction but would not include the acquisition of right-of-way.

There is no permanent stormwater solution funded in East Belveldere. The business case proponent has committed to maintain the interim stormwater infrastructure and post sercurities as necessary until such time as a permanent stormwater solution is available.

If the business case proponent is not able to maintain the interim stormwater infrastructure, The City will be required to step in and address the maintenance of infrastructure that is not part of The City's overall capital infrastructure plan. This creates financial risk to The City because the infrastructure is not intended to be permanent in nature.

BUSINESS CASE: Belvedere ASP - Trico (Parcel A)

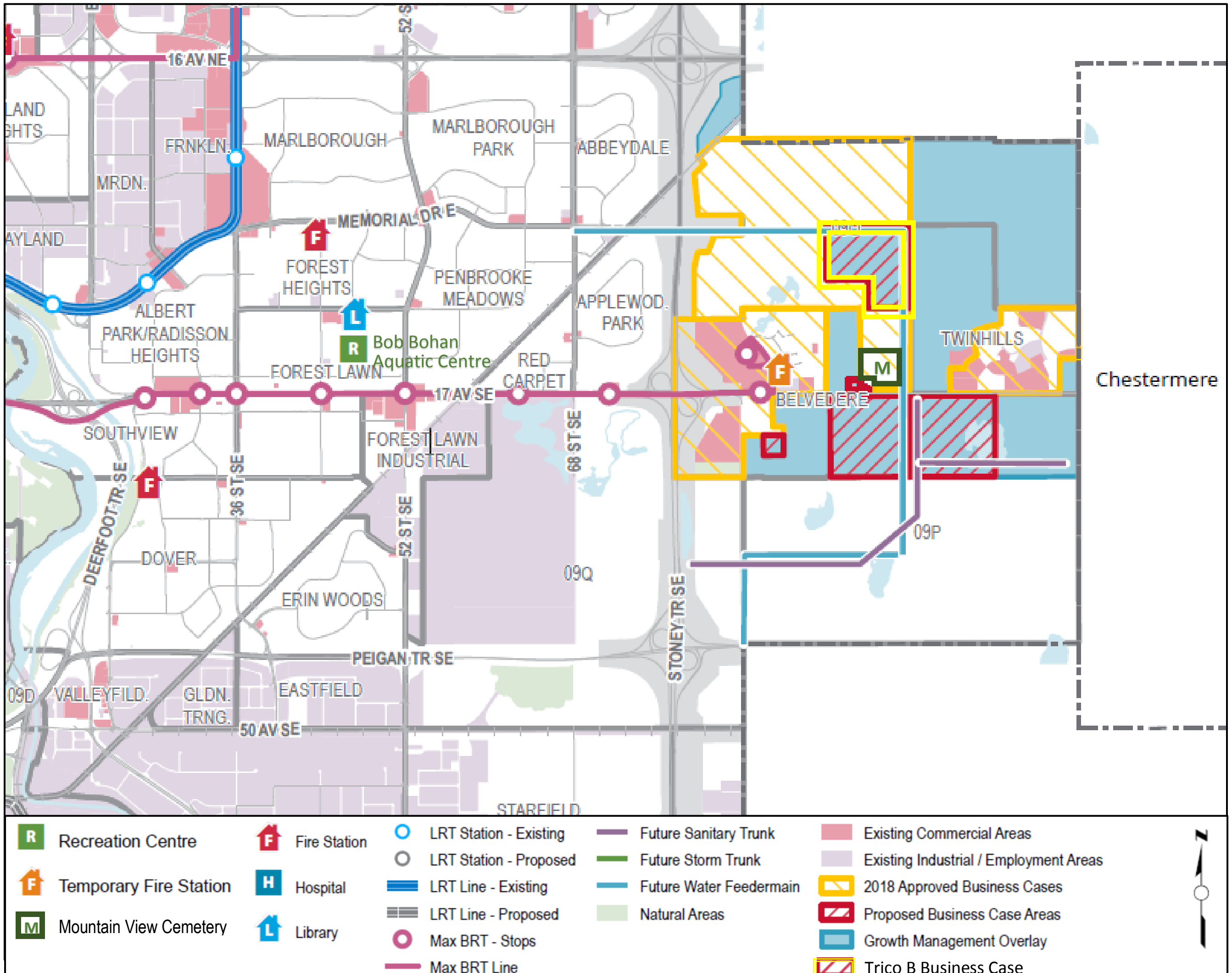
Operating Costs ($000s)[4]

Operating **all numbers 000s*	**One Calgary (2019-22) Total**	**Budget (2023-2026)**				**Total**	**Total**
		2023	**2024**	**2025**	**2026**	**2023-26**	**Final Year**
Direct Incremental Operating Cost	0	0	433	447	1,155	2,036	1,477
Community-based Tax Revenue Share	0	122	596	801	1,303	2,822	2,657
Revenue (Shortfall)	**0**	**122**	**163**	**354**	**148**	**786**	**1,180**

[4] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance

Belvedere ASP – Trico (Parcel B)



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance

Belvedere – Trico B

Market – East sector (2020-2024)

Single/semi supply expected by 2024

Approved supply.................. 2,138 units
Projected demand....................520 units
Difference...............................+1,618 units
This business case proposes 715 units

Multi-residential supply expected by 2024

Approved supply.................. 3,398 units
Projected demand....................270 units
Difference...............................+3,128 units
This business case proposes 405 units

Gross Developable Hectare

Business Case Area...........53.7 hectares

Proposed jobs

3,000 temporary
160 permanent

Proposed non-residential development

Retail ....0.5 hectares

Proposed innovation

Possible multi-generational housing
Possible "next generation" schools
Possible urban agriculture

Years to completion.................12 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

The Belvedere ASP area currently has regional scale commercial in East Hills and an approved Technology Hub in Twin Hills Cyber City. Development of Trico's Parcel B will provide a market for successful regional scale commercial with its location in proximity to East Hills.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipates 64 people/jobs per gross developable hectare

MPD Goal – Great Communities

Criteria: Fitting into the greater community

- Facilitates the Memorial Drive right of way that is required for servicing for the already approved Twin Hills development.

Criteria: Supporting **existing** non-residential facilities

- Supports existing and future East Hills commercial development.
- Provides residential base for the employment uses in Twin Hills CyberCity.

Criteria: Integrating and leveraging Activity Centres

- Business case area contains one Neighbourhood Activity Centre (NAC) that will be central to the development.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- 17 Avenue is part of the Primary Transit Network east of 84 Street, dependent on supportive land uses.
- Development will help facilitate the extension of the existing MAX purple transit line beyond East Hills.
- Development will facilitate future regional transit service between Calgary and Chestermere.
- The proposed transit station at Neighbourhood Boulevard 1 is adjacent to the business case area.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- Focal point of the development is an expansive open space that will be programmed to provide passive and active recreation, pathway connections and create a sense of place.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area will utilize:

- Temporary Fire Hall
- East Freeway (Stoney Trail) construction
- 17 Avenue Transit Corridor

- Both sanitary sewer and watermain stubs that will be necessary to service this business case area are currently funded and pending construction agreement with OpenGate Properties.

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q4 2020 Outline Plan and Land Use submission
- Q1 2022 Phase 1 subdivision
- Q2 2022 Stripping and grading
- Q2 2023 Construction start

Criteria: Third Party considerations

- Right of way requirements to build water and sanitary sewers will be addressed through the construction agreement between OpenGate and The City. Trico is willing to enter into the water and sanitary construction agreement should negotiations with OpenGate not come to fruition.

Criteria: Possible Delays

- Possible delay in availability of water and sanitary servicing if the construction agreement between The City and OpenGate is not approved. City Water Resources has advised the Trico team that Stormwater Management study for East Belvedere will commence later this Fall (2020). Developer will construct and operate a zero-discharge facility until the ultimate infrastructure is built.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- Business case will provide residential development in the east sector of the City, where previously there has been no supply.
- Increased choice within Calgary's east sector will help mitigate market share loss to Chestermere.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- Residential development in this area will support the retail and services existing in East Hills Shopping Centre.
- Residential development will support the employment uses envisioned in the approved Twin Hills CyberCity development.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$27,793,314

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$2,320,362/year at build out.

Criteria: Required capital investment to develop business case area

Administration's position is further transportation investments are required in the budget to remove additional Growth Management Overlay in Belvedere, this includes the Memorial Drive/Stoney Trail overpass, upgrades to the intersection at 116 Street NE/Trans Canada Highway and upgrades to the 17 Avenue SW/Stoney Trail interchange. The business case's position is that additional capacity exists today to allow this development to begin.

Water and sanitary service is currently dependent on the TwinHills development moving forward. Funding is in the budget for the pipe construction but would not include the acquisition of right-of-way. There is no permanent stormwater solution funded in East Belveldere. The business case proponent has committed to maintain the interim stormwater infrastructure and post sercurities as necessary until such time as a permanent stormwater solution is available.

If the business case proponent is not able to maintain the interim stormwater infrastructure, The City will be required to step in and address the maintenance of infrastructure that is not part of The City's overall capital infrastructure plan. This creates financial risk to The City because the infrastructure is not intended to be permanent in nature.

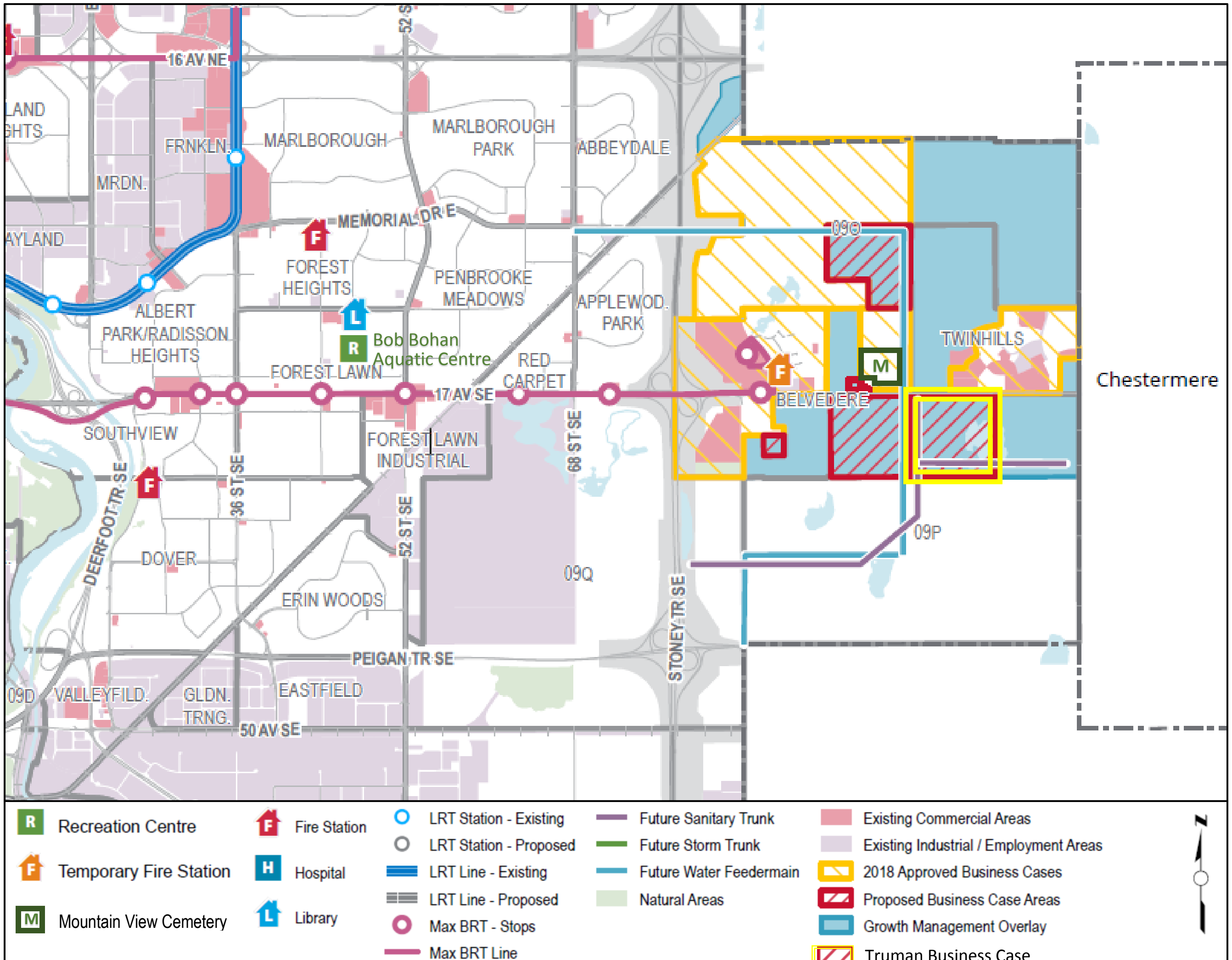
Operating Costs ($000s)[5]

Operating **all numbers 000s*	**One Calgary (2019-22) Total**	**Budget (2023-2026)**				**Total**	**Total**
		2023	**2024**	**2025**	**2026**	**2023-26**	**Final Year**
Direct Incremental Operating Cost	0	0	32	426	449	907	1,477
Community-based Tax Revenue Share	0	16	191	493	730	1,430	1,849
Revenue (Shortfall)	**0**	**16**	**159**	**66**	**281**	**523**	**372**

[5] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance

Belvedere ASP - Truman



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At-A-Glance

Belvedere - Truman

Market – East sector (2020-2024)

Single/semi supply expected by 2024

Approved supply	2,138 units
Projected demand	520 units
Difference	+1,618 units

This business case proposes **400** units

Multi-residential supply expected by 2024

Approved supply	3,398 units
Projected demand	270 units
Difference	+3,128 units

This business case proposes **1,450** units

Gross Developable Hectare

Business Case Area............64.8 hectares

Proposed jobs

1,988 temporary
1,020 permanent

Proposed non-residential development

Commercial	2.9 hectares
Retail	2.9 hectares
Total	5.8 hectares

Proposed innovation

Low Impact Design
Energy efficient strategies
Sustainable building practices

Years to completion..................±13 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

The business case area is centrally located in Calgary and the region, providing good vehicle access to regional destinations west of the site including employment and industrial areas along the east side of Calgary via Stoney Trail and other arterial roads. The subject lands also are approximately a 20 minute drive to Calgary International Airport and surrounding industrial areas, providing housing options for those working within the Aerospace Industry. The proposed development vision also supports nearby commercial and employment areas in development including the East Hill Shopping Centre and the Twin Hills CyberCity development.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

The development anticipates 84 jobs/people per gross developable hectare.

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- The site provides easy access to two future MAX purple line BRT stations along 17 Avenue SE to provide reliable East/West transit connections.
- Proposed community facilities in future Municipal Reserve lands include a library, recreation centre, and community centre.
- A green corridor and regional pathway will connect residents to surrounding areas and local amenities.

Criteria: Supporting **existing** non-residential facilities

The additional population will provide demand for the following existing community facilities in proximity:

- East Hills Shopping Centre
- International Avenue SE
- Primary Transit infrastructure

Criteria: Integrating and leveraging Activity Centres

- A Neighbourhood Activity Centre and an urban corridor will be provided in business case area. Both will be a focal point of the development and will support the day-to-day needs of future residents.
- Residential development of the business case will support the Twin Hills' CyberCity community activity centre.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- 17 Avenue SE, which is part of the Primary Transit Network, is within the business case area and includes the future extension and two stations of the Max Purple BRT to immediately adjacent to the business case area. Currently, the nearest existing MAX Purple BRT station is 1.5km from the subject site area.
- The development will support future Regional Transit Service between Calgary and Chestermere.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- The development includes a Regional Pathway and green corridor that connects the subject site to both adjacent neighbourhoods and regional destinations.
- The ASP identifies an Environmental Open Space study area for the subject lands, and it is anticipated a portion of this area may be dedicated as environmental reserve.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case proposes to utilize the following infrastructure:

- Belvedere Emergency Response Station
- Stoney Trail SE interchanges of 16 Avenue N, 17 Avenue S and Peigan Trail S.
- Existing Max Purple BRT routes at East Hills Shopping Centre
- Belevedere Phase 1 Sanitary Trunk & Belvedere East Feedermain (anticipated to be completed by 2021)

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q1 2021 LOC submission
- Q3 2021 Stripping and grading
- Q2-Q4 2022 Subdivision, development permit approvals

Criteria: Third Party considerations

- Development application will be subject to standard circulation with Rocky View County as per the Rocky View County/City of Calgary Intermunicipal Development Plan.
- Adjacent developments (i.e. TwinHills Cyber City) responsible for area water infrastructure deliver may impact availability to site. No construction agreement is currently in place.
- Transportation infrastructure in area includes City, Rockyview and Provincial areas of responsibility.

Criteria: Possible Delays

None.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- Business case area represents a natural progression of growth within the Belvedere ASP area. The proposed development can leverage existing and approved servicing investments in the area.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- Application seeks to build on existing growth, investment and development momentum in the Belvedere area.
- Business case area will unlock additional lands along the 17 Avenue SW corridor.
- Proposed development aligns with the ±30 year growth forecast for the Belvedere ASP area.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$33,326,242

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$3,608,097/year at buildout

Criteria: Required capital investment to develop business case area

Administration's position is further transportation investments are required in the budget to remove additional Growth Management Overlay in Belvedere, this includes the Memorial Drive/Stoney Trail overpass, upgrades to the intersection at 116 Street NE/Trans Canada Highway and upgrades to the 17 Avenue SW/Stoney Trail interchange. The business case's position is that additional capacity exists today to allow this development to begin.

Water and sanitary service is currently dependent on the TwinHills development moving forward. Funding is in the budget for the pipe construction but would not include the acquisition of right-of-way. There is no permanent stormwater solution funded in East Belveldere. The business case proponent has committed to maintain the interim stormwater infrastructure until such time as a permanent stormwater solution is available.

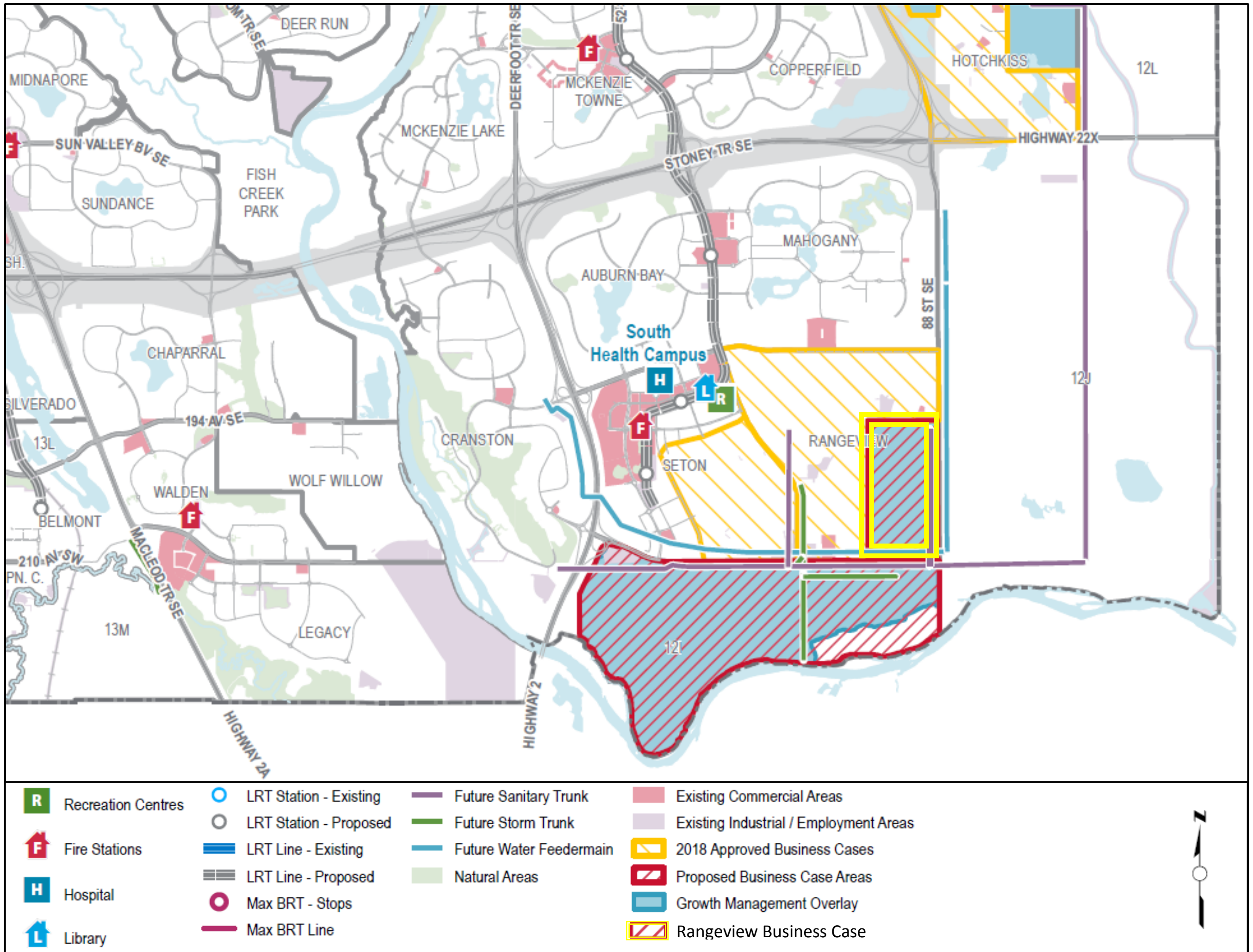
If the business case proponent is not able to maintain the interim stormwater infrastructure, The City will be required to step in and address the maintenance of infrastructure that is not part of The City's overall capital infrastructure plan. This creates financial risk to The City because the infrastructure is not intended to be permanent in nature.

Operating Costs ($000s)[6]

Operating *all numbers 000s*	One Calgary (2019-22) Total	Budget (2023-2026) 2023	2024	2025	2026	Total 2023-26	Total Final Year
Direct Incremental Operating Cost	0	0	500	675	1,203	2,378	1,662
Community-based Tax Revenue Share	0	253	602	854	1,235	2,944	2,751
Revenue (Shortfall)	**0**	**253**	**102**	**180**	**32**	**566**	**1,089**

[6] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance
Rangeview ASP – WestCreek (Trafford)



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance
Rangeview - WestCreek

Market – Southeast sector (2020-2024)

Single/semi supply expected by 2024

Approved supply................ 11,941 units
Projected demand.................3,880 units
Difference...........................+8,061 units
This business case proposes **1,624** units

Multi-residential supply expected by 2024

Approved supply................ 12,277 units
Projected demand.................3,410 units
Difference...........................+8,982 units
This business case proposes **696** units

Gross Developable Hectare

Business Case Area............130 hectares

Proposed jobs

3,381 temporary
455 permanent

Proposed non-residential development

Commercial ....0.46 hectares

Proposed innovation

Possible Nautilus Pond
Possible Stormwater Kidney
Possible green infrastructure

Years to completion.................15 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

The business case area will supply the population necessary to support diverse commercial, office and other non-residential uses in southeast Calgary. The South Health campus is an institutional anchor that creates opportunities for the Life Science Cluster, a focus area identified by Calgary Economic Development, furthering health and research partnerships, and other complementary businesses that benefit from its proximity.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipated 62 jobs/people per gross developable hectare

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- Business case area will provide additional population to support the Seton Urban District and the significant infrastructure already developed in the area.
- A significant wetland and associated habitat will provide continuous open space corridors.
- Development of green corridors will provide connections to the ecological system and to the regional pathway system.
- Business case area will provide a high degree of connectivity for pedestrians, cyclists, transit users and motorists within the community and beyond.
- Business case area will complete the open space corridors and mobility network within the community.

Criteria: Supporting **existing** non-residential facilities

The additional population will provide demand for the following existing community facilities in proximity:

- Seton employment centre
- Three commercial retail centres
- Mixed use gateway area
- Seton Recreation Centre
- Joane Cardinal-Schubert High School
- Library
- Seton Fire Hall
- South Health Campus
- BRT
- 212 Avenue/Deerfoot Trail interchange

Criteria: Integrating and leveraging Activity Centres

- The development includes a Neighbourhood Activity Centre and Community Retail Centre, which will complement the Major Activity Centre in Seton.
- The business case area includes a green corridor/regional network that connects to the Community Retail Centres, Neighbourhood Activity Centre, and to the Seton Major Activity Centre.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- The business case area leverages the existing 302 BRT route that provides access to downtown Calgary and two future LRT stations.
- Complete street and pathway connections will support the southeast sector's multi-modal transit hub, and connect to local amenities, the Bow River and the greenway system.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- A large natural wetland is located within the site.
- The development process will explore innovate stormwater solutions, such as the Stormwater Kidney and Nautilus Pond.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area will utilize:

- Seton Fire Hall
- Transit infrastructure
- Transportation infrastructure

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q4 2020 OP/LU submission
- Q2 2022 Phase 1 subdivision submission
- Q3 2022 Stripping and grading

Criteria: Third Party considerations

- None.

Criteria: Possible Delays

- None.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- Historically, 27-30 actively developing communities have been maintained to provide a healthy and balanced supply of housing.
- Many of the 27 actively developing communities will be completed in the near to mid-term or have infrastructure constraints.
- The southeast sector has been the fastest growing sector in Calgary, and three of the five actively developing communities are nearly completion.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- The development introduces a new developer to the area, providing increased competition, choice and affordability.
- Proximity to existing amenities and employment opportunities will provide further diversification in housing product and densities.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$61,471,080

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$5,676,516/year at buildout

Criteria: Required capital investment to develop business case area

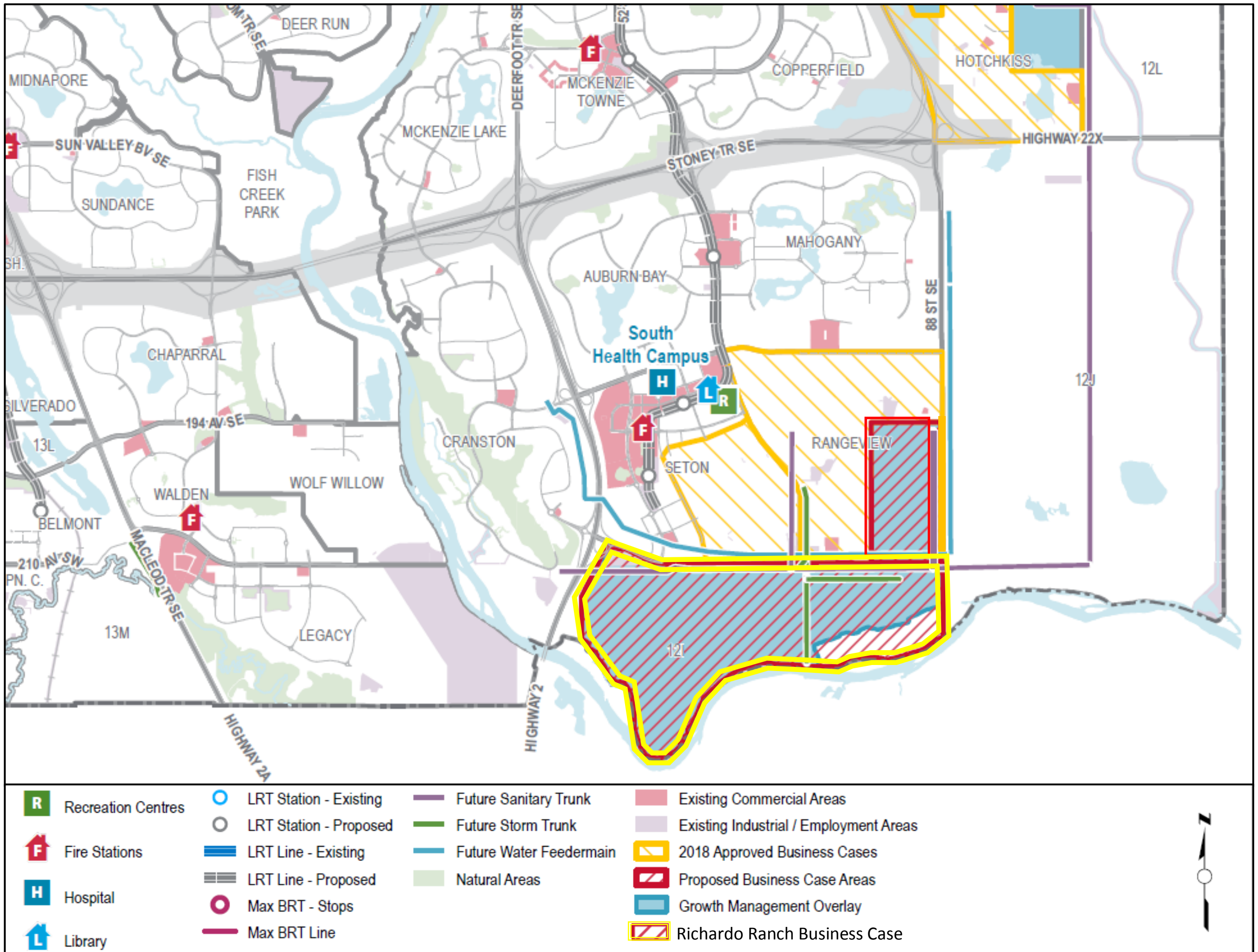
$0

Operating Costs ($000s)[7]

Operating *all numbers 000s*	One Calgary (2019-22) Total	Budget (2023-2026) 2023	2024	2025	2026	Total 2023-26	Total Final Year
Direct Incremental Operating Cost	0	0	0	12	44	56	14,928
Community-based Tax Revenue Share	0	0	235	470	705	1,411	26,165
Revenue (Shortfall)	**0**	**0**	**235**	**458**	**661**	**1,355**	**11,237**

[7] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance
Ricardo Ranch ASP – Brookfield, Genesis, Soutzo



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance
Ricardo Ranch

Market – Southeast sector (2020-2024)

Single/semi supply expected by 2024

Approved supply................ 11,941 units
Projected demand.................3,880 units
Difference.............................+8,061 units
This business case proposes 4,850 units

Multi-residential supply expected by 2024

Approved supply................ 12,277 units
Projected demand.................3,410 units
Difference.............................+8,982 units
This business case proposes 2,080 units

Gross Developable Hectare

Business Case Area..........486.0 hectares

Proposed jobs

3,933 temporary
1179 permanent

Proposed non-residential development

Retail ....1.1 hectares

Proposed innovation

Possible green infrastructure
Potential for a City-owned Boat Launch
Potential for Public Wi-Fi

Years to completion..................12 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

The business case area will supply the population necessary to support diverse commercial, office and other non-residential uses in southeast Calgary. The South Health campus is an institutional anchor that creates opportunities for the Life Science Cluster, a focus area identified by Calgary Economic Development, furthering health and research partnerships, and other complementary businesses that benefit from its proximity. Providing access to the Bow River corridor supports recreation and tourism opportunities, including new river-related businesses offerings such as kayaking, fishing and educational interpretive centres.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipated 62 jobs/people per gross developable hectare

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- The business case area includes four distinct neighbourhoods.
- Road and transit connections will be provided among the neighbourhoods and to surrounding areas.
- Three Neighbourhood Activity Centres are proposed, which will include employment and amenities.
- Three school sites are proposed.
- Public access to the Bow River will be provided.

Criteria: Supporting **existing** non-residential facilities

The additional population will provide demand for the following existing community facilities in proximity:

- South Health Campus
- Seton Recreation Centre
- Calgary Public Library
- Seton Fire Station
- 212 Avenue interchange
- Seton Urban District commercial and office space, high schools, hotels, and a regional park.

Criteria: Integrating and leveraging Activity Centres

- Business case area proposes three Neighbourhood Activity Centres; one for each neighbourhood.
- Neighbourhood Activity Centres strategically located to enhance the public realm.
- Subject lands are conveniently located in proximity to existing neighbourhood services and public service facilities.
- The business case area will provide additional population to support the existing Major Activity Centre.
- Direct and convenient multiple accesses to the Seton employment centre will be provided.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- The business case area leverages the existing 302 BRT route that provides access to downtown Calgary and two future LRT stations.
- Complete street and pathway connections will support the southeast sector's multi-modal transit hub, and connect to local amenities, the Bow River and the greenway system.
- A comprehensive system of regional and local pathways is proposed that will connect existing and future communities, amenities, schools and commercial developments, and will connect to the greenway system.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- A public accessible open space corridor is proposed along the escarpment area with possible park facilities, place-making and public art.
- Significant dedication to Environmental Reserve, protecting all the slopes perpetuity and providing access to the Bow River.
- Opportunity to extend Fish Creek park and add to the continuous pathways and trails in this area.
- Opportunity for a city-owned boat launch.
- A 50m setback from the river will be provided that includes open space, pathway networks and protection of an existing Heron colony.
- Scenic view-sheds will include the Bow River valley and the Rocky Mountain ranges.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area will utilize:

- Seton Fire Hall
- Tri-services facility
- 212 Avenue/Deerfoot Interchange

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q2-Q4 2020 OP/LU submission
- Q1-Q4 2021 Phase 1 subdivision submission
- Q1-Q3 2021 Stripping and grading

Criteria: Third Party considerations

- None.

Criteria: Possible Delays

- None.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- The southeast sector has been the fastest growing sector in Calgary, and three of the five actively developing communities are nearly completion.
- The development introduces three new developers to the area, providing increased competition, choice and affordability.

- The business case area is one of Calgary's last remaining new communities along the Bow River.
- As the communities are building out, reduction in housing supply has a direct impact on housing prices and affordability.
- The developer will provide additional consumer choice at different price points.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- The business case area is the most efficient business plan with the largest contiguous area and build out that will satisfy The City for 25 years.
- Proximity to a number of existing amenities and employment opportunities will provide further diversification in housing product and densities.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$166,305,480

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$17,263,216/year at buildout

Criteria: Required capital investment to develop business case area

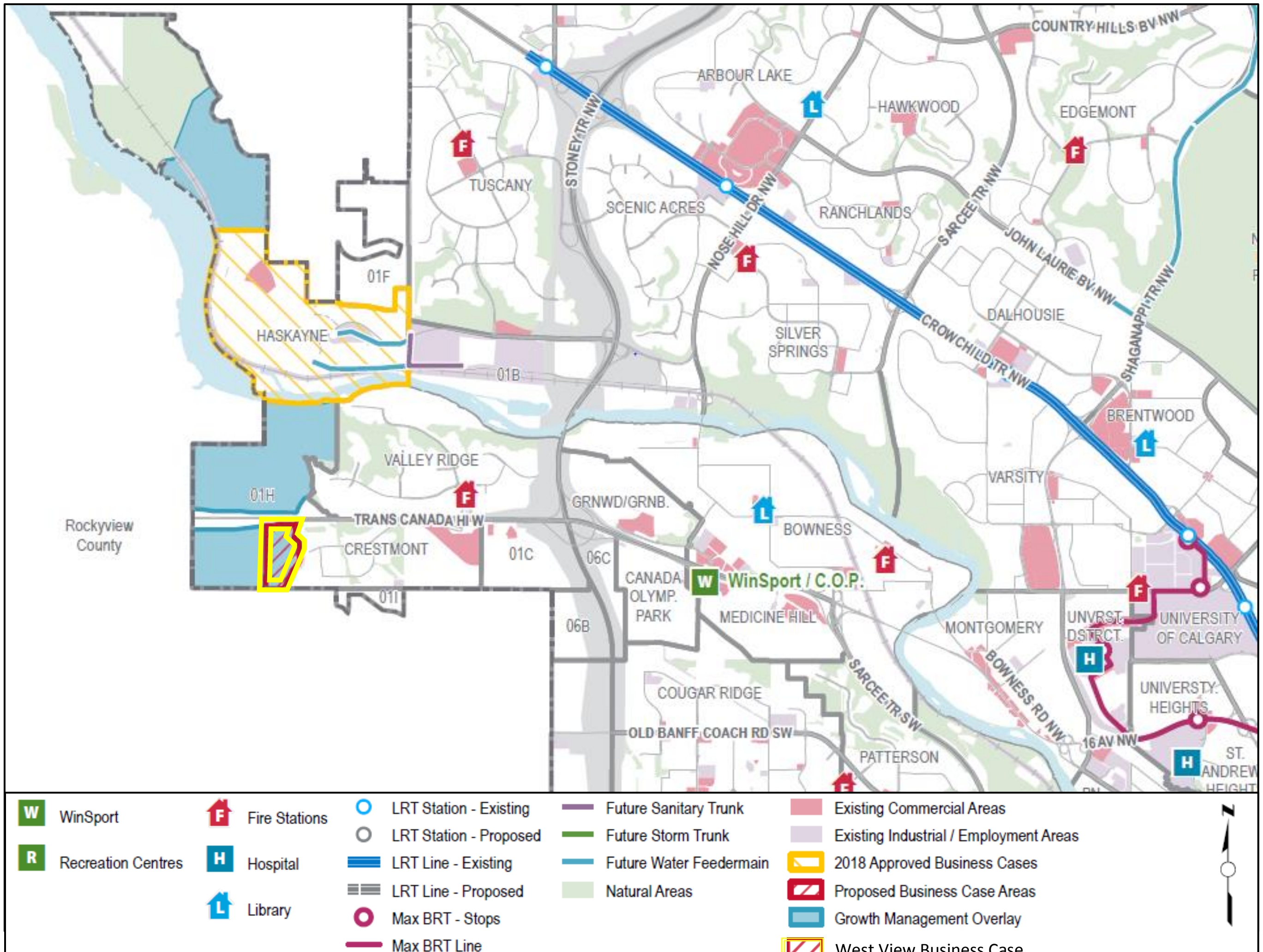
$0

Operating Costs ($000s)[8]

Operating *all numbers 000s*	One Calgary (2019-22) Total	Budget (2023-2026) 2023	2024	2025	2026	Total 2023-26	Total Final Year
Direct Incremental Operating Cost	0	235	510	973	2,051	3,769	44,038
Community-based Tax Revenue Share	544	1,386	2,376	3,758	5,287	12,806	97,674
Revenue (Shortfall)	**544**	**1,151**	**1,866**	**2,784**	**3,236**	**9,037**	**53,636**

[8] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance
West View ASP - Qualico



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance
West View - Qualico

Market – West sector (2020-2024)

Single/semi supply expected by 2024

Approved supply.................. 1,354 units
Projected demand.................. 930 units
Difference...............................+424 units
This business case proposes **415** units

Multi-residential supply expected by 2024

Approved supply....................3,930 units
Projected demand.................. 660 units
Difference............................+3,270 units
This business case proposes **64** units

Gross Developable Hectare

Business Case Area...........23.3 hectares

Proposed jobs

777 temporary
46 permanent

Proposed non-residential development

....0.0 hectares

Proposed innovation

Live/work/play functions
Double depth topsoil
Standard EV home charging
“Edible Orchard” concept
Tree Lot Program

Years to completion...................6 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

The business case area provides residential population to support developing employment centres at Winsport's Canada Olympic Park and the commercial development at Trinity Hills, approximately 10 minute drive away. The area is approximately a 15 minute drive to the University of Calgary, Foothills Medical Centre and associated research parks, which are identified as major employment centres within Calgary. From a regional perspective, the business case area is approximately a 15 minute drive from the Springbank Airport and surrounding employment areas.

No dedicated employment areas are planned within the business case area apart from live-work opportunities.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipated 67 jobs/people per gross developable hectare.

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- The business case area completes the community of Crestmont.
- Increased population in the business case area will support nearby Neighbourhood Activity Centres.
- Further build-out of the community supports the existing Crestmont Homeowners Association facilities by expanding the user base.

Criteria: Supporting **existing** non-residential facilities

The additional population will provide demand for the following existing community facilities in proximity:

- Valley Ridge Fire Station
- Bowness schools, library and parks (~6km)
- Valley Ridge commercial and services (~2.5km)
- Greenbriar commercial and services (~4.5km)
- Tristar commercial areas
- Winsport regional recreation uses (~4.5km)
- Shouldice Park, pool and recreational facilities
- Crestmont Homeowners Association facilities, Day Care & Neighbourhood Commercial

Criteria: Integrating and leveraging Activity Centres

- Development of the lands will bring services that will make Crestmont a complete community.
- The business case area supports nearby Neighbourhood Activity Centres by providing additional customers and employees.
- Regional pathways and internal road linkages will connect to the business case's planned Neighbourhood Activity Centre.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- The business case area is expected to tie into existing transit infrastructure when population thresholds are met.

Increased population will allow improved service frequency.

- An east-west pathway will be provided to facilitate direct, safe and accessible cyclist and pedestrian connectivity through the area to adjacent communities.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- Expansion of the "Orchard" concept that was used in the development of Crestmont is being explored. The concept focuses on the planting of fruit trees for public consumption.
- Minimizing impervious surface through efficient design

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area proposes to utilize:

- Valley Ridge Fire Station
- Crestmont bus route #70
- Sanitary sewer provided through Crestmont and Valley Ridge
- Water servicing extended from Crestmont
- Transportation accommodated by the existing network

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q2 2020 OP/LU application was submitted
- Q1-Q2 2021 Phase 1 subdivision submission
- Q1-Q3 2021 Stripping and grading

Criteria: Third Party considerations

- None.

Criteria: Possible Delays

- None.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- To maintain a healthy and balanced supply of housing, Calgary typically maintains 27-30 actively developing communities.
- Many actively developing communities will be completed in the near to mid-term or have infrastructure constraints.
- The business case area is an extension of Crestmont, which is an actively developing community expected to finish build-out by 2020.
- Of the 14 new suburban communities that received Growth Management Overlay removal in 2018, no new communities were added in the west sector and only one was added to the adjacent northwest sector.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- This proposal is the only business case proposed in the West sector. The Suburban Residential Growth Report suggests that new capacity is constrained in the sector (6.2 years of supply remaining), suggesting that increased supply will be needed to meet demand.
- With Crestmont nearing completion, the development is necessary to maintain market continuity in area.
- Much of the other residential land in the west sector is fragmented and/or has servicing and development challenges.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$11,088,620

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$1,322,004/year at buildout

Criteria: Required capital investment to develop business case area

In the West View business case, the applicant proposed interim storm and sanitary pipe connections. In this proposal, the applicant suggests sanitary servicing would connect to an existing sanitary pipe in Crestmont. The applicant is prepared to maintain an interim stormwater system through 2027 and has stated willingness to enter into a Development Agreement to that effect.

After review, Administration's position is the ultimate storm and sanitary solutions should be used to service any new development in the West View area. For sanitary servicing, the West View area is to be via a Trans-Canada sanitary trunk extension. For stormwater infrastructure, the ultimate stormwater servicing solution will require a downstream stormwater trunk that discharges below the second raw water intake in the Bow River. Similar to the Belvedere stormwater issues, Administration does not accept an interim stormwater solution due to the increased risks associated with potential future maintenance issues.

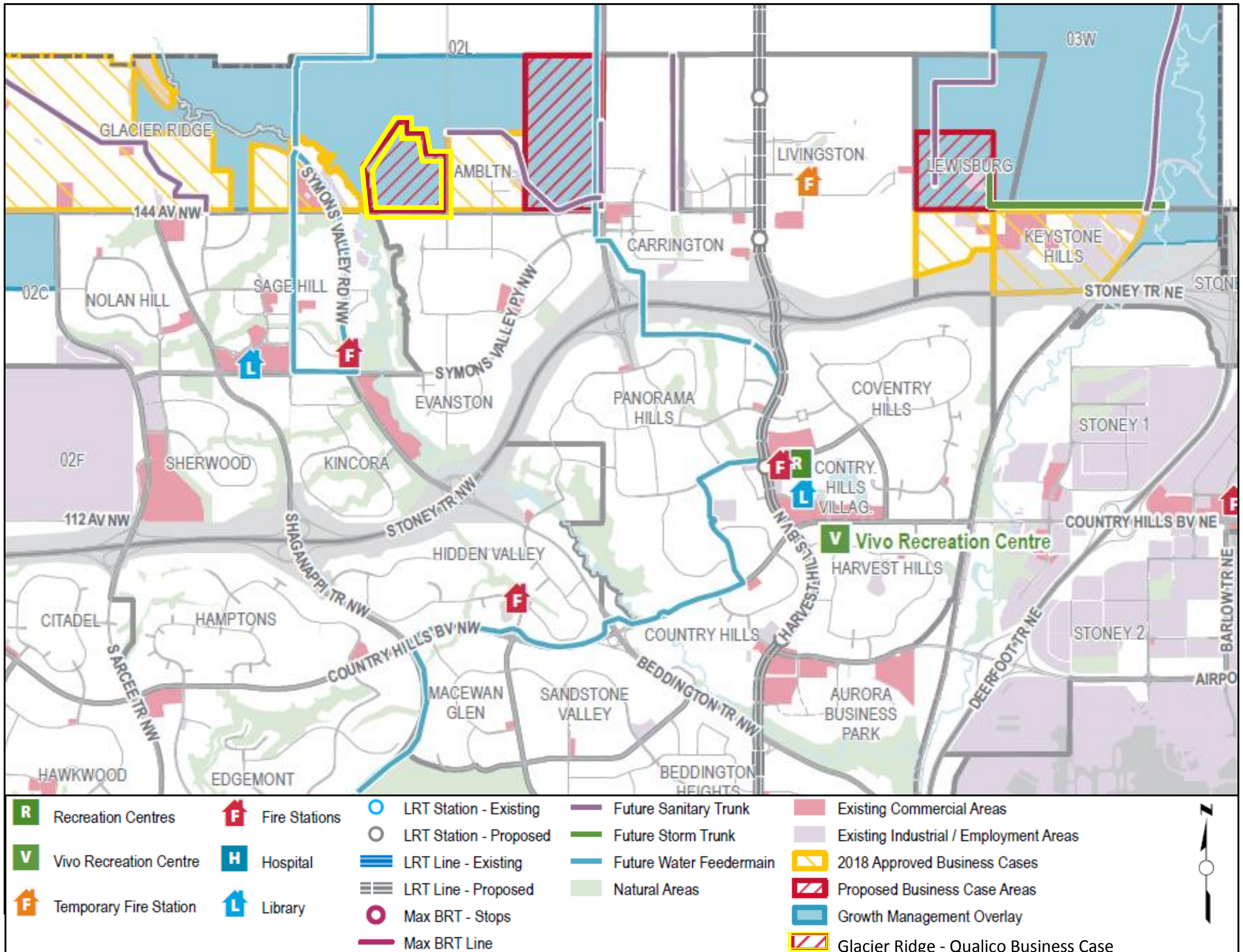
Operating Costs ($000s)[9]

Operating *all numbers 000s*	One Calgary (2019-22) Total	Budget (2023-2026)					
		2023	2024	2025	2026	2023-26	Final Year
Direct Incremental Operating Cost	11	18	46	445	458	967	982
Community-based Tax Revenue Share	886	733	925	1,022	1,022	3,702	1,150
Revenue (Shortfall)	**876**	**715**	**880**	**577**	**564**	**2,735**	**168**

[9] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance

Glacier Ridge ASP – Qualico



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance

Glacier Ridge - Qualico

Market – North sector (2020-2024)

Single/semi supply expected by 2024

Approved supply................ 15,424 units
Projected demand.................3,910 units
Difference........................+11,514 units
This business case proposes 989 units

Multi-residential supply expected by 2024

Approved supply................ 17,527 units
Projected demand.................2,960 units
Difference........................+14,567 units
This business case proposes 332 units

Gross Developable Hectare

Business Case Area..........60.0 hectares

Proposed jobs

750 temporary
40 permanent

Proposed non-residential development

Retail ....0.2 hectares

Proposed innovation

Custom ‘shared local residential roads’
Phased school site and programming
Double depth topsoil
Standard home EV charging
Lot tree planting program
Transit supportive uses/densities
Reduce impervious surfaces

Years to completion...................7 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

In alignment with the Glacier Ridge Area Structure Plan, this neighbourhood is primarily residential and will support nearby industrial and employment areas. The business case is in proximity to the Calgary International Airport and will support the Aerospace and Logistics Focus Area of Calgary Economic Development by providing population in proximity. The airport is a major economic driver and the main air cargo gateway for Alberta which has spin-off industry in transportation and logistics.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipated 63.7 people/jobs per gross developable hectare

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- Complements the developing community of Evanston.
- Additional population will support surrounding underutilized retail and amenities.
- Provides the logical extension and compliments the development of the planned neighbourhood of Ambleton.
- Development will provide access and draw residents to Symons Valley, a core component of the Glacier Ridge ASP.
- Business Case area provides a school site and Neighbourhood Activity Centre.

Criteria: Supporting **existing** non-residential facilities

The additional population will provide demand for the following existing community facilities in proximity:

- Symons Valley Fire Station #40
- Sage Hill Library
- Vivo Centre
- Rocky Ridge YMCA

Criteria: Integrating and leveraging Activity Centres

- One Neighbourhood Activity Centre to be provided in the business case area, which will support the day-to-day needs of future residents.
- The future Symons Valley Ranch Community Activity Centre is in close proximity and will be accessible by public transit.
- The future Community Activity Centre located to the north is planned to include more employment than typical, a library, and recreation facilities. This business case provides the required services and infrastructure upgrades to support this future development.
- The business case area will support the existing Evanston Towne Centre.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- 144th Avenue, which boarders the neighbourhood on the south, is identified as part of the Primary Transit Network and is currently in the design phase. Proponent is working with City Administration to maximize design efficiencies for this infrastructure.

- The Neighbourhood Activity Centre is planned in proximity to the Primary Transit Network.
- The neighbourhood will have access to local transit.
- Pedestrian and cycle routes will connect to the Primary Transit Network.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- The open space network will balance active and passive recreation needs with the requirement for a school site.
- The western boundary of the business case area forms part of the West Nose Creek/Symons Valley open space system and will provide natural amenity to residents.
- Opportunities to provide visual and physical access into this natural area will be investigated as part of the Outline Plan process.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area will leverage existing infrastructure, utilizing:

- Symons Valley Fire Station #40
- Route 124 transit service
- The planned extension of 144th Avenue
- Both sanitary sewer and watermain stubs are available immediately south of the business case area and are sized with capacity to service these lands.

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q2 2020 Outline Plan and Land Use submission
- Q1 2021 Phase 1 subdivision
- Q2-Q3 2021 Stripping, grading – phase 1 construction
- 2022 Occupancy

Criteria: Third Party considerations

None.

Criteria: Possible Delays

None.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- The previously approved 14 new communities will reduce the gap in demand once fully serviced, however there is opportunity to fill the immediate gap with these ready to service lands.
- The *Suburban Residential Growth 2019-2023* report identified the north sector as a primary growth corridor.
- This business case represents a no-cost opportunity to bring additional housing choice to the market and will ensure that the north sector maintains market supply and choice from 2023 onwards.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- Increases to the serviced land supply will be required in the near future to maintain the North sector as a primary growth corridor.
- This business case allows for the timely and efficient transition from the buildout of Evanston into this adjacent area, and allows for current competition levels to be maintained.
- Leverages existing services and infrastructure.
- Provides supplementary non-residential growth, while also supporting growth of existing commercial areas within Evanston and the future community of Ambleton.
- Will cater to a different market segment then the surrounding communities, and thereby increase housing choice and diversity.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development

No direct incremental operating cost gap as modelled.

Criteria: Anticipated total amount of levies to be contributed by the business case area

$26,990,815

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)

$2,424,886/year at build out

Criteria: Required capital investment to develop business case area

$0

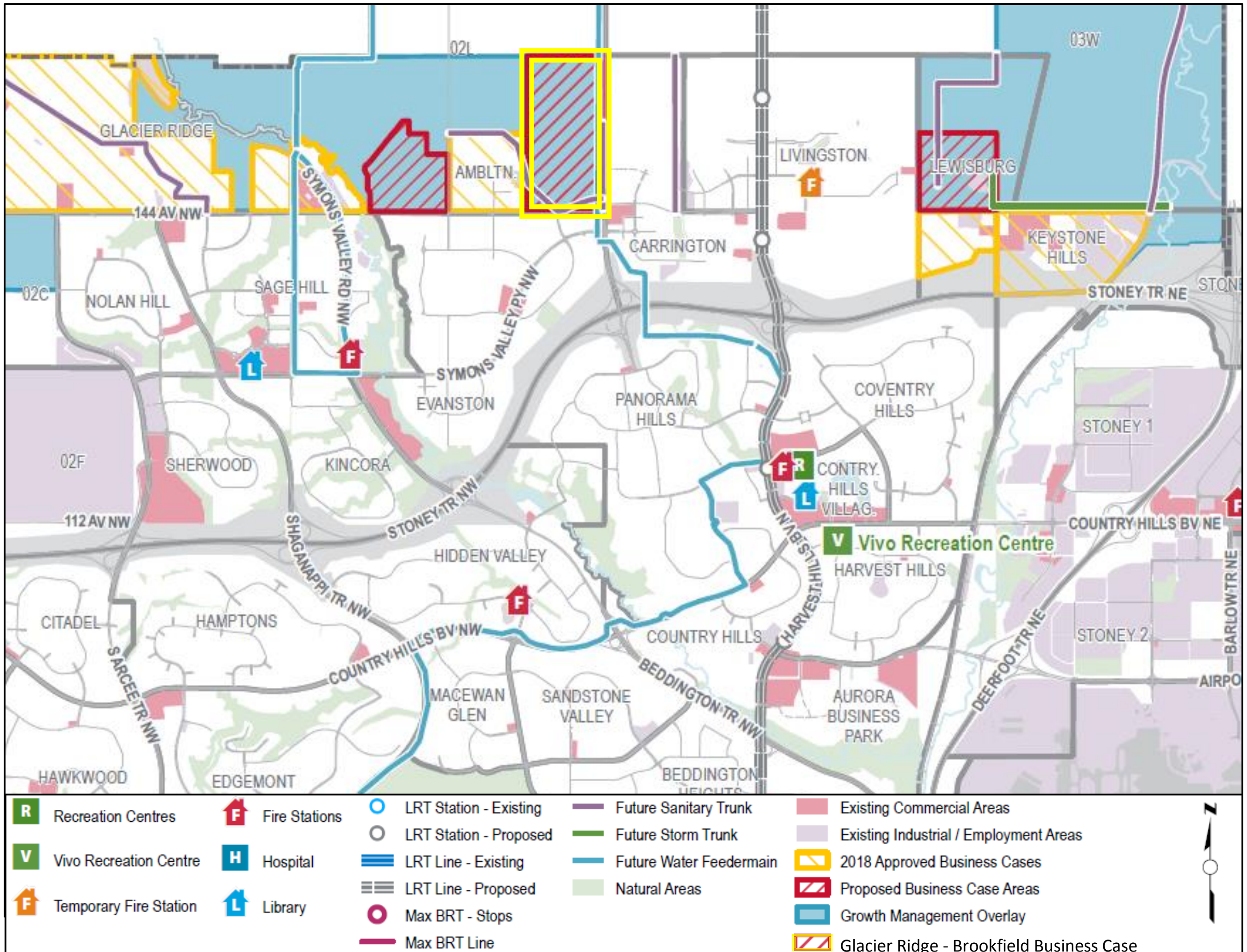
Operating Costs ($000s)[10]

Operating **all numbers 000s*	**One Calgary (2019-22) Total**	**Budget (2023-2026)**				**Total**	**Total**
		2023	**2024**	**2025**	**2026**	**2023-26**	**Final Year**
Direct Incremental Operating Cost	0	197	204	229	821	1,451	1,462
Community-based Tax Revenue Share	388	954	1,277	1,394	1,644	5,269	1,922
Revenue (Shortfall)	**388**	**757**	**1,073**	**1,165**	**823**	**3,817**	**460**

[10] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

At-A-Glance

Glacier Ridge ASP – Brookfield (Cabana)



Map is for contextual purpose only – not all amenities or detailed infrastructure may be shown.

At-A-Glance

Glacier Ridge - Brookfield

Market – North sector (2020-2024)

Single/semi supply expected by 2024

Approved supply................ 15,424 units
Projected demand..................3,910 units
Difference..........................+11,514 units
This business case proposes **2,163** units

Multi-residential supply expected by 2024

Approved supply................ 17,527 units
Projected demand..................2,960 units
Difference...........................+14,567 units
This business case proposes **261** units

Gross Developable Hectare

Business Case Area..........130.0 hectares

Proposed jobs

3,633 temporary
318 permanent

Proposed non-residential development

Commercial dev....................0.8 hectares

Proposed innovation

Nautilus Pond
Stormwater Kidney
Community Association – Designated Health Coaches/Ambassadors

Years to completion.................13 years

Factor 1: Strategic Alignment MDP/CTP

MDP Goal – Prosperous Economy

Criteria: Supporting economic diversification

The business case area will provide population to support nearby developing employment centres - such as the Calgary Airport, YYC Global Logistics Park, Stonegate Landing, North Stoney Industrial, Aurora Business Park and Spyhill Industrial; as well as to support the Livingston Major Activity Centre. To further support the Calgary economy, the development envisions providing multi-cultural living, aging in place, safer routes to school and affordable housing options.

MDP Goal – Compact City

Criteria: Minimum intensity target of 60 people and jobs per gross developable hectare

Anticipated 63 jobs/people per gross developable hectare

MDP Goal – Great Communities

Criteria: Fitting into the greater community

- Business case is contiguous with approved development, filling the gap between Qualico's Glacier Ridge lands and Mattamy's Carrington.
- With Evanston in its final development phases, northward growth is logical.
- Development could promote efficiencies through the alignment with Phase 2 of the Northridge Feedermain construction.
- Two Neighbourhood Activity Centres are proposed that will include employment uses and amenities.
- A Community Association site is proposed.

Criteria: Supporting **existing** non-residential facilities

The additional population will provide demand for the following existing community facilities in proximity:

- Sage Hill Library
- Rocky Ridge Recreation Centre
- Transit route 124
- Keystone Hills Employment area
- Livingston Urban Corridor and Town Centre

Criteria: Integrating and leveraging Activity Centres

- The business case area will support the recently approved Livingston Urban Corridor (MAC).
- The business case area will support multiple existing and proposed Neighbourhood Activity Centres throughout Evanston and the Glacier Ridge ASP area.

MDP Goal – Connecting the City

Criteria: Integration with the Primary Transit Network

- The business case area will have direct transit connections to the Major Activity Centre and future Green Line LRT station anticipated on Centre Street.
- The business case area may be able to leverage transit route 124.

MDP Goal – Greening the City

Criteria: Quality public and open spaces

- A large percentage of Municipal Reserve will include the natural drainage course that traverses the site.
- The developer intends to incorporate the Headwaters of Beddington Creek that are located on the lands, and provide setbacks to ensure long-term sustainability.
- A Nautius Pond is proposed to meet the Nose Creek Water Shed Management Plan and to protect the watershed.

MDP Goal – Managing Growth and Change

Criteria: Utilizing existing utilities, fire/emergency services, and transportation infrastructure

The business case area will utilize the following existing, funded or under construction infrastructure:

- West Keystone Sanitary trunk
- West Keystone Storm trunk
- Livingston Temporary Fire Station
- Stoney Trail and 14 Street interchange
- Northridge Feedermain Phase 1 and 2
- Northridge West Leg Feedermain
- Northridge Reservoir

Factor 2: Market Demand

MDP Goal – Managing Growth and Change

Criteria: Business Plan

- Q4 2020 OLP/LU submission
- Q1-Q3 2022 Stripping and grading
- Q1-Q2 2022 Phase 1 subdivision submission

Criteria: Third Party considerations

- There are two small landowners within the business case area. The developer does not foresee any issues with these lands containing more than one landowner.

Criteria: Possible Delays

- None.

Criteria: Benefits to the **city-wide** serviced residential and/or non-residential growth capacity

- Historically, 27-30 actively developing communities have been maintained to provide a healthy and balanced supply of housing.
- Many of the 27 actively developing communities will be completed in the near to mid-term or have infrastructure constraints.

Criteria: Benefits to the **local** serviced residential and/or non-residential growth capacity

- The North sector is one of the fastest growing sectors in the city, accounting for 26% of total suburban units over the last 5 years.
- With existing serviced supply dwindling and actively developing community building out, the North sector will start to experience a diminished housing supply of single/semi-detached units and a reduction in consumer choice.
- Reduction in housing supply has a direct impact on housing prices and affordability.

- The business case provides for the more efficient use of existing infrastructure and investments that have already been made.
- The business case area is large enough to contain a base population necessary to support local services at full build out.

Factor 3: Financial Impact

MDP Goal – Managing Growth and Change

Criteria: City of Calgary Annual Operating Costs for the business case area over the lifetime of the development
No direct incremental operating cost gap as modelled.

Operating Costs ($000s)[11]

Operating *all numbers 000s*	One Calgary (2019-22) Total	Budget (2023-2026) 2023	2024	2025	2026	Total 2023-26	Total Final Year
Direct Incremental Operating Cost	0	0	61	249	647	957	2,212
Community-based Tax Revenue Share	115	285	493	736	1,101	2,615	3,812
Revenue (Shortfall)	**115**	**285**	**432**	**487**	**454**	**1,658**	**1,600**

Criteria: Anticipated total amount of levies to be contributed by the business case area
$59,731,383

Criteria: Annual City portion of property tax revenue for the business case (2020 property tax rate)
$5,124,585/year at buildout

Criteria: Required capital investment to develop business case area
$0

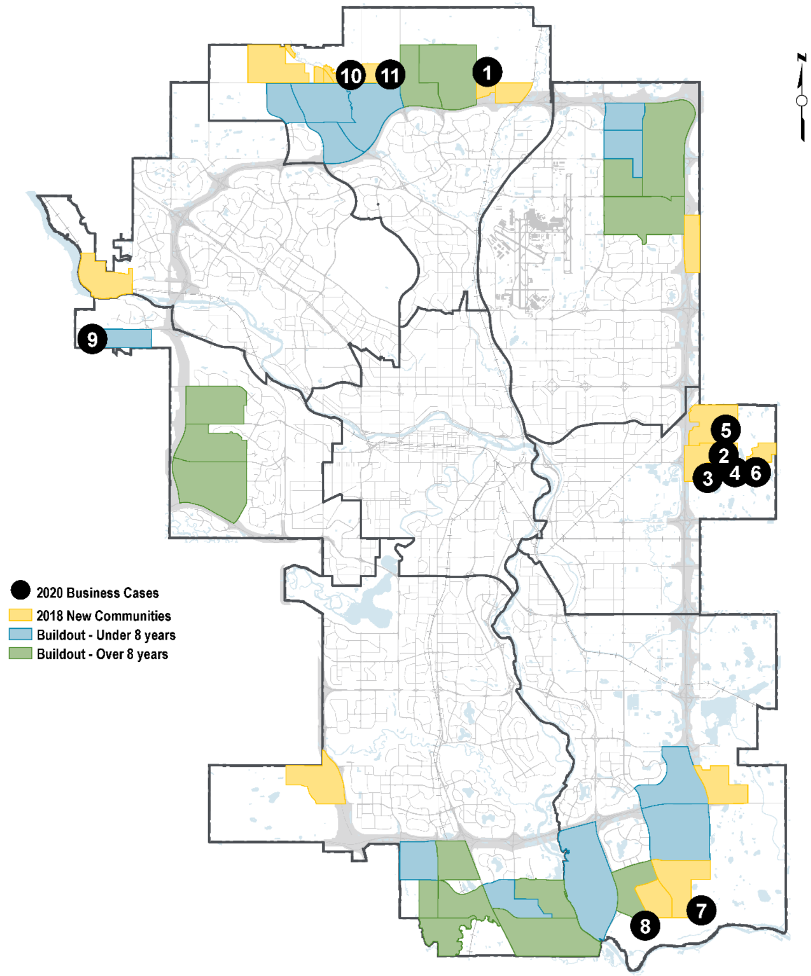
[11] All costs are estimates, in 2020 dollars, and do not include inflation or property tax increases. Operating estimates for the approved portfolio will be refined through the One Calgary (2019-2022) mid-cycle budget process. The operating cost model is the same model used in 2018 as directed by Council and represents only direct incremental operating costs and proportional tax revenues to the operating costs.

New Community Growth Strategy 2020 Business Case Analysis

This attachment provides an overview of the New Community Growth Strategy (NCGS) 2020 evaluation completed by Administration for the 11 business cases. Table 1 below indicates the number each business case is on the map.

Table 1 – Name of business cases

Business Cases (Area Structure Plan – Proponent)
1. Keystone Hills – Genesis
2. Belvedere – Grewal
3. Belvedere – Huhn
4. Belvedere – Trico Parcel A
5. Belvedere – Trico Parcel B
6. Belvedere – Truman
7. Rangeview – WestCreek
8. Ricardo Ranch – Brookfield, Genesis, Soutzo
9. West View – Qualico
10. Glacier Ridge – Qaulico/Dream
11. Glacier Ridge – Brookfield Cabana



Map 1 – General location of the 11 business cases.

Administration has recommended that no business cases be approved at this time. This is a comprehensive recommendation, made after considering all 23 criteria that each business case responded to, and also the cumulative impact on the broad growth factors of MDP/CTP Alignment, Market Demand, and Financial Impact. As shown below, individually many business cases were found to meet many of the criteria or growth factors – but in the cumulative analysis and in the context of the New Community Growth Strategy 2018 approvals, at this time additional new community approvals could not be supported.

Figure 1 summarizes Administration's review of each of the business cases, in accordance with five broad evaluation dimensions within the three growth factors. More description of the evaluation follows, and Attachment 6 contains a Market Data Analysis that supports this evaluation. Attachment 7 provides a Risk Assessment related to the strategy. The information in this attachment provides transparency on how Administration arrived at its recommendation.

Figure 1 – Summary of business cases evaluation against the three growth factors

	Growth Factor					
	MDP/CTP Alignment	Market Demand		Financial Impact		
Business Case	MDP/CTP Alignment	Citywide Market Demand	Sector Market Demand	Operating Costs	Capital Costs	Economic Impact
1. Keystone Hills	■	●	●	■	■	See discussion below
2. Grewal	■	●	●	■	●	
3. Huhn	■	●	●	■	●	
4. Trico Parcel A	■	●	●	■	●	
5. Trico Parcel B	■	●	●	■	●	
6. Truman	■	●	●	■	●	
7. Rangeview	■	●	●	■	■	
8. Ricardo Ranch	■	●	●	■	■	
9. Qualico – West View	■	●	■	■	●	
10. Qualico/Dream	■	●	●	■	■	
11. Brookfield Cabana	■	●	●	■	■	

■ Business case aligns with the criteria

● Business case is not in alignment with the criteria

Factor Review:

Municipal Development Plan/Calgary Transportation Plan Alignment

Administration considered the cumulative impact of approving some or all of business cases on the MDP/CTP policies and targets. It is through this consideration that it was determined the 11 business cases as a group would have a significant impact on achieving the growth policies and targets in the MDP. Administration considered Policies 5.2.5 (a) and (b) of the MDP that call for making growth decisions that a) consider the municipal capacity to finance growth and b) advise on the prioritization of investment in infrastructure. Given the current economic context, continuing to approve new community growth business cases at this time could reduce budget flexibility for the future during a slow growth period. In alignment with Policy 5.2.2(e) of the MDP, City planning and investment decisions must support the policy and growth directions of the MDP and CTP. Absent the concern of aligning with the minimum land supply policies in 5.2.3 (a) and (b), it is the opinion of Administration that approving new business cases is no longer in alignment with the policy and growth directions of the MDP and CTP and will impact some growth targets to a greater degree.

The City will be challenged to meet the developed/developing area growth split and by continuing to open up additional new growth areas. From a city building perspective, it will makes it more difficult for The City to offer mobility options. Providing transit service within a short walking distance to residents in new communities would require more financial investment and many communities are challenged by their distance to the Primary Transit Network. Active modes like walking and cycling can be difficult to use practically in new communities. The addition of more low and medium density residential dwellings also makes it more difficult to achieve a greater residential land use mix across the city. In addition spreading the growth across a larger geographic area during a slower growth period will result in a longer time frame to achieve complete communities.

Cumulative impacts to other policies were also considered such as the Climate Resilience Strategy. Action 6.2 in the Strategy directs The City to integrate Green House Gas (GHG) reduction potential into growth management decisions. In the future, there may be more robust measures in new communities to help mitigate against GHG emissions, however currently the primary form of transportation in new communities is automobile use, which is the primary contributor to GHG emissions in The City. Adding additional new growth areas will have an impact on GHG emissions.

From an individual business case perspective, all the business cases aligned with the policies of their respective Area Structure Plan such people and jobs per hectare and land use policies and thus with the Municipal Development Plan/Calgary Transportation Plan (MDP/CTP) criteria as individual business cases.

Market Demand (Citywide)

The Market Demand factor is used to assess the balance of supply and demand in the new community market, and use the findings to inform the decision to initiate more new community development. Undersupply can erode choice and affordability, while oversupply can lead to slower build out of communities and inefficiencies for The City. Capacity for growth is also addressed in the current MDP (5.2.3(b)) and the NEXT20 revisions, with a stated target of 3-5 years of serviced land to accommodate growth.

Looking out to the 2023-2026 budget cycle, in new and actively developing communities, the serviced land capacity (including current serviced land, and funded to be serviced land arising from the 2018 NCGS approvals) for single/semi-detached units is expected to be 22,116 units, while the projected market demand is 15,422 units. By the end of this cycle, in 2026, there is expected to be a serviced land supply of 6 years remaining, before consideration of the 11 new business cases. The serviced and funded capacity provided through the 2018 investment in new communities goes beyond this target and indicates a healthy position for The City to accommodate additional growth.

Additionally, if the slower than average growth that has occurred since 2018, and is projected over the next few years, continues, it could raise the risk of slower community build out and servicing inefficiencies as growth is distributed over a greater number of communities. In 2018, Council approved investments benefitting 27 actively developing and 14 new communities. Auburn Bay is expected to complete and move into the developed area this year, meaning that these 41 communities will become 40. Depending on developer plans, Administration expects 2-3 new communities to emerge from the 11 business cases, meaning that Calgary would have the largest number of new communities since 1999.

Given the above, Administration sees significant existing growth capacity, geographic choice, consumer choice, and potential for competition in the new community market.

<u>Market Demand (Sector)</u>
With the exception of the West Sector, the serviced land capacity provided by the 14 new communities that were approved in 2018 is also sufficient to meet the anticipated market demand by the end of 2026. In the West Sector at the end of 2026, the projected market demand of 640 single/semi-detached units is greater than the serviced land capacity of 625 units. By the end of 2026 this indicates there is not enough serviced capacity in the West Sector to meet anticipated demand. Therefore the West View – Qualico business case would provide additional serviced land to address projected market demand in several years. Detailed market analysis is included in Attachment 6.

<u>Financial Impact (Operating Costs)</u>
The operating cost model that was used during the New Community Growth Strategy (NCGS) 2018 was again used for the NCGS 2020 review as directed by Council. This model only considers direct incremental costs associated with new communities (e.g. Fire and Emergency Services, Transit, Parks Maintenance, Roads Maintenance) and does not represent all costs that will be incurred (e.g., Neighbourhood Services, City Administration, Planning). In the model, these costs are off-set by a proportional amount of the tax revenue expected in the community, this creates a positive or negative variance identified as an operating cost gap if negative. Property tax increases would be required to fill the gap. The output of the model is based on the business case's build out scenario and thus the actual costs and revenues will largely be determined by build out timing. Generally speaking a slower buildout will result in additional costs to The City as a result of less revenue to off-set the direct incremental costs.

For 2020, all business cases had to demonstrate no gap in expected operating cost prior to 2027, as Council directed that no property tax increases could be required to fund this gap. All the business cases have met the operating cost criteria. This means that if the proponent`s indicated build out timeline occurs as presented, tax revenue generated would be sufficient to cover the costs captured in the model, for the period 2021-2026 only. At this time, the model does not accommodate City costs beyond incremental, and does not accommodate the possibility that new units could be attracted from other communities, impacting efficiencies elsewhere.

Financial Impact (Capital Costs)
The capital cost criteria for the NCGS 2020 review was that no City-funded capital costs were required for a business case to begin development.

Six of the business cases were not able to demonstrate that they met this criteria. There are five business cases within the Belvedere area (#2-6) on the east side of Calgary that require additional City-funded capital costs, including investment in transportation and greater certainty for utility infrastructure. Transportation investment is required to provide additional connections that allow the transportation network to function and address the needs of the community. If these investments are not secured now, there is a future financial risk to The City that development would outpace the infrastructure necessary to support growth in the area. The transportation investments required include the Memorial Drive/Stoney Trail overpass, upgrades to the intersection at 116 Street NE/Trans Canada Highway and upgrades to the 17 Avenue SW/Stoney Trail interchange. In addition to these intersection upgrades, Memorial Drive and 116 Street NE would have to be constructed to urban streets to facilitate the connections. To determine the approximate costs of this additional infrastructure would require further work. The 116 Street NE/Trans Canada Highway intersection is not within the city limits and would require collaboration with the Province to complete this work.

Utility infrastructure for stormwater, water service, and sanitary are also required. As part of the 2018 approvals, many of the utilities associated with the 14 new communities are to be constructed by the developers through construction agreements with The City. Water and sanitary service is dependent on the TwinHills development moving forward, which was approved in 2018. This infrastructure is to be completed through a construction agreement with the TwinHills developer, Open Gate, and the timing of construction will be up to Open Gate. Currently a construction agreement has not been executed between The City and Open Gate.

In the east Belvedere area, where most of the new business cases are located, there is no permanent storm water solution. All the business cases in Belvedere are proposing interim solutions to address the stormwater servicing. If developers are not able to maintain the interim stormwater infrastructure, The City will be required to step in and address the maintenance of infrastructure that is not part of The City's overall capital infrastructure plan. This creates financial risk to The City because the infrastructure is not intended to be permanent in nature.

In the West View business case, proposed interim storm and sanitary pipe connections are proposed. Sanitary servicing would connect to an existing sanitary pipe in Crestmont. Ultimate servicing for the West View area is to be via a Trans Canada sanitary trunk extension, Administration's position is the ultimate solution should be used to service any development in the West View area. For stormwater infrastructure the business case is proposing an interim stormwater solution. The ultimate stormwater servicing solution will require a downstream stormwater trunk that discharges below the second raw water intake in the Bow River. Similar to the Belvedere stormwater, Administration does not accept an interim stormwater solution due to the increased risks associated with potential future maintenance issues.

Financial Impact (Economic)
It is important to also consider the impact on the broader economy arising from these business cases, and from new community development in aggregate. All business case developments will create jobs, result in private investment, pay off-site levies, result in development that contributes taxes and utility revenues in the future. Due to current slower economic growth combined with current market capacity in new and actively developing communities,

Administration struggles to see how development in the 11 new business cases will attract new growth to the city, rather than competing for market share among other communities.

Four of the developers participating in the NCGS 2020 process did not participate in 2018 and do not currently have active land holdings within Calgary. If approved in 2020, and these developers move forward with their first phase of development, this may create economic activity in the short term – though still within the context of whether they generate new growth, or compete for existing growth.

Conclusion:

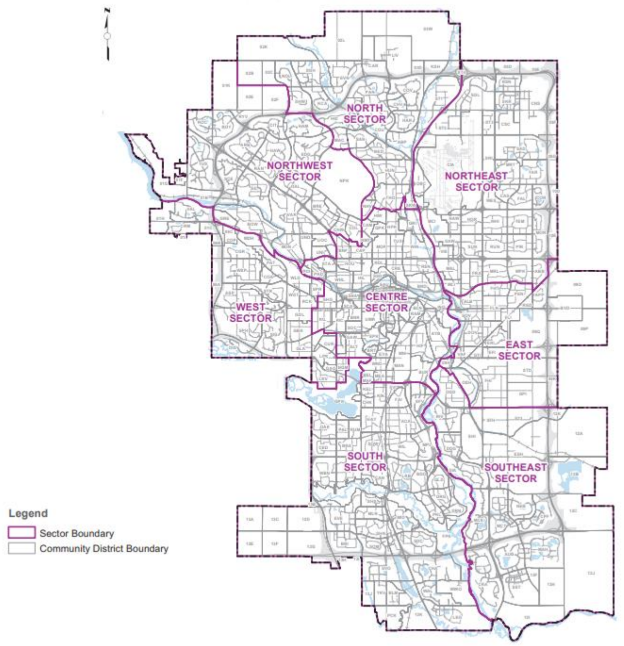
After reviewing all of the business cases, none of the individual business cases were found to sufficiently address the three fundamental factors considered in making a growth recommendation: MDP/CTP Alignment, Market Demand, and Financial Impact. While individual cases met design and land use policies from the MDP and relevant ASPs, the cumulative impact was felt to impact alignment with city growth policies in Part 5. None of the business cases meet the overall Market Demand criteria, and six of the 11 business cases did not demonstrate, to Administration`s satisfaction, that they would meet the no capital cost criteria.

The biannual opportunity to review business cases is a key feature of the New Community Growth Strategy. Additionally, the annual Growth Strategy Monitoring Report provides another opportunity to assess the state of new communities in the context of the three growth factors. The next opportunity for proponents to submit business cases for new community growth is just over a year away, and should the circumstances change, new community business cases can be evaluated under a new context.

New Community Growth Strategy 2020 Market Demand Analysis

The City of Calgary monitors both capacity and demand for housing in the Calgary market. This monitoring supports The City in its efforts to ensure that capacity does not fall too low (and risk eroding affordability), or become too high (and risk inefficiency in delivering City services and/or overinvestment in City infrastructure).

As part of the New Community Growth Strategy (NCGS) 2020, this attachment illustrates how the forecasted demand can be accommodated by existing serviced lands and the investments enabling the 14 new communities approved in 2018 in the One Calgary (2019-2022) Service Plan and Budget. This information is presented for single residential (single detached and semi-detached) unit types, as well as multi-residential. The analysis includes citywide impacts as well as the impacts to The City's planning/market sectors that contain the 11 business cases – North (3), East (5), Southeast (2), and West (1).



Administration is forecasting a yearly absorption of 3,506 single/semi detached dwelling units over the next five years, compared to last five year average of 2,905 units as new communities start to develop. Serviced land capacity for 18,320 single/semi units is anticipated to exist by the end of 2022 in the new communities. This provides market support for 5 years of supply. At the end of the 2023-2026 budget cycle, it is anticipated there will still be 6 years of supply, as new capacity through infrastructure and services continues to be introduced.

Notes

- "Serviced capacity" refers to lands that have capacity for transportation, water, sanitary, storm, and fire/emergency response. This land may or may not have approved land use.
- "Forecasted demand" is based on forecasting from The City regarding the expected share of citywide units that will be started in actively developing and new communities.
- "Additional available capacity from New Community Growth Strategy" includes capacity proposed to become available through the New Community Growth Strategy.

Citywide

- Additional available capacity from New Community Growth Strategy includes capacity from yet to be serviced areas of the 14 new communities.

For Single/Semi Detached Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity	14,607	18,320
Forecasted Demand - Entire Period	(12,283)	(15,422)
Additional Available Serviced Capacity from Actively Developing Communities	14,246	0
Additional Available Serviced Capacity from New Community Growth Strategy	1,750	19,217
Serviced Capacity - Before 11 business cases	18,320	22,116
Additional Available Capacity from 11 business cases	0	12,232
Total Serviced Capacity - End of Period	18,320	34,348
Estimated Years of Supply Balance - End of Period (without 11 business cases)	5	6
Estimated Years of Supply Balance - End of Period (including 11 business cases)	5	9
For Multi Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity	33,909	32,789
Forecasted Demand - Entire Period	(8,645)	(12,001)
Additional Available Serviced Capacity from Actively Developing Communities	7,525	0
Additional Available Capacity from New Community Growth Strategy	0	15,941
Serviced Capacity - Before 11 business cases	32,789	36,728
Additional Available Capacity from 11 business cases	0	7,078
Total Serviced Capacity - End of Period	32,789	43,806
Estimated Years of Supply Balance - End of Period (without 11 business cases)	11	12
Estimated Years of Supply Balance - End of Period (including 11 business cases)	11	15

North Sector *(3 Proposed Business Cases)*

For Single/Semi Detached Residential	2019-2022	2023-2026
Current Serviced Capacity	1,783	8,228
Forecasted Demand - Entire Period	(3,042)	(3,180)
Additional Available Serviced Capacity from Actively Developing Communities	9,187	0
Additional Available Serviced Capacity from New Community Growth Strategy	300	4,154
Serviced Capacity – Before three additional business cases	8,228	9,202
Additional Available Capacity from three additional business cases	0	3,598
Total Serviced Capacity - End of Period	8,228	12,800
Estimated Years of Supply Balance - End of Period (without three additional business cases)	10	12
Estimated Years of Supply Balance - End of Period (including three additional business cases)	10	16
For Multi Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity	9,563	11,591
Forecasted Demand - Entire Period	(2,367)	(2,710)
Additional Available Serviced Capacity from Actively Developing Communities	4,395	0
Additional Available Capacity from New Community Growth Strategy	0	3,569
Serviced Capacity – Before three additional business cases	11,591	12,450
Additional Available Capacity from three additional business cases	0	1,214
Total Serviced Capacity - End of Period	11,591	13,664
Estimated Years of Supply Balance - End of Period (without three additional business cases)	17	18
Estimated Years of Supply Balance - End of Period (including three additional business cases)	17	20

East Sector *(5 Proposed Business Cases)*

For Single/Semi Detached Residential	2019-2022	2023-2026
Current Serviced Capacity	0	30
Forecasted Demand - Entire Period	(170)	(670)
Additional Available Serviced Capacity from Actively Developing Communities	0	0
Additional Available Serviced Capacity from New Community Growth Strategy	200	1,938
Serviced Capacity – Before five additional business cases	30	1,298
Additional Available Capacity from five additional business cases	0	1,681
Total Serviced Capacity - End of Period	30	2,979
Estimated Years of Supply Balance - End of Period (not including five additional business cases)	0	8
Estimated Years of Supply Balance - End of Period (including five additional business cases)	0	18
For Multi Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity	0	0
Forecasted Demand - Entire Period	-	(510)
Additional Available Serviced Capacity from Actively Developing Communities	0	0
Additional Available Capacity from New Community Growth Strategy	0	3,398
Serviced Capacity – Before five additional business cases	0	2,888
Additional Available Capacity from five additional business cases	0	3,088
Total Serviced Capacity - End of Period	0	5,976
Estimated Years of Supply Balance - End of Period (not including five additional business cases)	0	11
Estimated Years of Supply Balance - End of Period (including five additional business cases)	0	22

Southeast Sector *(2 Proposed Business Cases)*

- Current serviced capacity includes part of Seton.

For Single/Semi Detached Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity	3,511	1,731
Forecasted Demand - Entire Period	(2,600)	(3,470)
Additional Available Serviced Capacity from Actively Developing Communities	0	0
Additional Available Serviced Capacity from New Community Growth Strategy	820	7,610
Serviced Capacity – Before additional two business cases	1731	5,871
Additional Available Capacity from two additional business cases	0	6,474
Total Serviced Capacity - End of Period	1731	12,345
Estimated Years of Supply Balance - End of Period (not including two additional business cases)	2	7
Estimated Years of Supply Balance - End of Period (including two additional business cases)	2	14
For Multi Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity	5,789	3,694
Forecasted Demand - Entire Period	(2,095)	(2,880)
Additional Available Serviced Capacity from Actively Developing Communities	0	0
Additional Available Capacity from New Community Growth Strategy	0	6488
Serviced Capacity – Before two additional business cases	3,694	7,302
Additional Available Capacity from two additional business cases	-	2,776
Total Serviced Capacity - End of Period	3,694	10,078
Estimated Years of Supply Balance - End of Period (not including two additional business cases)	5	10
Estimated Years of Supply Balance - End of Period (including two additional business cases)	5	14

West Sector *(1 Proposed Business Case)*

For Single/Semi Detached Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity	1,354	625
Forecasted Demand - Entire Period	(728)	(640)
Additional Available Serviced Capacity from Actively Developing Communities	0	0
Additional Available Serviced Capacity from New Community Growth Strategy	0	0
Serviced Capacity – Before West View business case	625	(15)
Additional Available Capacity from West View business case	-	479
Total Serviced Capacity - End of Period	625	464
Estimated Years of Supply Balance - End of Period (not including West View business case)	4	0
Estimated Years of Supply Balance - End of Period (including West View business case)	4	3
For Multi Residential	**2019-2022**	**2023-2026**
Current Serviced Capacity	3,930	3,257
Forecasted Demand - Entire Period	(674)	(460)
Additional Available Serviced Capacity from Actively Developing Communities	0	0
Additional Available Capacity from New Community Growth Strategy	0	0
Serviced Capacity – Before West View business case	3,257	2,797
Additional Available Capacity from West View business case	-	-
Total Serviced Capacity - End of Period	3,257	2,797
Estimated Years of Supply Balance - End of Period (not including West View business case)	28	24
Estimated Years of Supply Balance - End of Period (including West View business case)	28	24

New Community Growth Strategy 2020 Risk Assessment

With respect to the recommendation of the 2020 New Community Growth Strategy (NCGS) this attachment outlines associated risks with approval (no business cases are approved) and non-approval (some or all are approved) of the Administrative recommendation.

The risks of Council *not* approving the recommendation include:

Cumulative impacts of additional new community growth approvals

There is a significant risk that by not approving the recommendation, The City will be challenged to meet particular MDP/CTP targets and policies, including the balance of growth between developed and developing areas in Part 5. Continuing to open up additional developing areas when not necessary to meet market demand may have a negative impact on the opportunity for growth in the Calgary's developed areas. Adding additional new growth areas makes it increasingly more difficult for The City to provide more balanced transportation options. Providing transit service within a short walking distance to residents in new communities would require greater financial investment and many communities are challenged by their distance to the Primary Transit Network. Active modes like walking and cycling can be difficult to use practically in new communities. The addition of more low density residential dwellings also makes it more difficult to achieve a greater residential land use mix across the city. In addition, spreading the growth further geographically during a slower growth period will result in a longer time frame to achieve complete communities.

Finally, additional new community growth approvals during a slower growth period increases overall risk to The City should developers not be able to complete or fulfil their obligations. During slow growth it is more difficult for developers to be successful if units are taking longer to absorb, this increases the developer's own financial risk. Increased financial risk for developers increases the potential risks for The City such as levy payments and infrastructure maintenance.

Current impacts from slower growth

Slower build out has been observed in some actively developing communities, which has resulted in unintended consequences. For instance, the water utility has seen some water quality issues in two actively developing communities as a result of less water demand from slower build out and a delay in developer infrastructure. Additional flushing of the water main is being done to maintain acceptable water quality within the water main. This flushing has resulted in additional costs to the developer and has operational impacts to the water utility. Similar water quality concerns may be realized as new communities come on line with a slower build out. Administration continues to work with impacted developers to monitor and manage risks.

Future capital and operating costs

If more business cases are added to a sufficiently supplied market, an increase in future operating costs will be incurred, and revenues may not grow with costs. The City must provide certain services at the time they are required, regardless of the financial ability to do so. There may be increased costs due to service inefficiencies when a finite amount of demand is spread over a larger area, with a challenge of fully servicing communities that are slower to complete. Some of the business cases require additional capital infrastructure during a time when there is increased limitations on available capital for competing priorities across the corporation, partially as a result of increased funding uncertainty from other levels of government.

Lower than anticipated off-site levy revenues
In the water utility, offsite levy revenues are intended to fund the developer's share of the utility costs attributable to new growth. In periods where actual development, or the projected pace of future development, is lower than 400 hectares per year, a temporary financial shortfall occurs. The only mechanism to absorb this shortfall is in utility rates, until the development happens. Further, the capital programs in Transportation and Community Services may be required to slow or delay project spending if levy revenues and reserves are lower than costs.

As is summarized in the monitoring report PFC2020-0962, Calgary is in a slower growth period, and land absorption in 2019 and 2020 has been significantly lower than 400 hectares. With the information currently available and the potential for this trend to continue, the already significant offsite levy shortfall will continue to grow and may create additional pressure on other infrastructure if there is not enough funds to pay for infrastructure when it is needed. It is already known that at least one business case proponent has decided to defer some levy payments.

The risks of Council approving the recommendation include:

Missed economic opportunities
Four of the developers participating in the NCGS 2020 process did not participate in 2018 and do not currently have active land holdings within Calgary. If approved in 2020, and these developers move forward with their first phase of development, this may create economic activity in the short term – though this development is likely to compete for existing growth, rather than attracting net new growth.

Opportunity for efficiency of infrastructure
In five of the business cases, no additional City-funded capital infrastructure is required for the business case to move forward (Attachment 4). If there are no new business cases approved, it would defer the opportunity to increase the use and efficiency of existing infrastructure in these cases.

Calgary

Public Submission

City Clerk's Office

Please use this form to send your comments relating to matters, or other Council and Committee matters, to the City Clerk's Office. In accordance with sections 43 through 45 of Procedure Bylaw 35M2017, as amended. The information provided may be included in written record for Council and Council Committee meetings which are publicly available through www.calgary.ca/ph. Comments that are disrespectful or do not contain required information may not be included.

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✓ * I have read and understand that my name, contact information and comments will be made publicly available in the Council Agenda.

* First name	Natalie
* Last name	Bach
Email	
Phone	
* Subject	11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please do not approve 11 new communities at the edge of Calgary as this is not sustainable. Thanks,

Public Submission

City Clerk's Office

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* First name	Kathy
* Last name	Pangratis
Email	kpangratis@shaw.ca
Phone	4038527494
* Subject	New communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	We do NOT need any new communities in Calgary. No more sprawl! The services to our outer communities are already spread thin.

Public Submission

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* First name	Lee
* Last name	Stevens
Email	leestevens0@gmail.com
Phone	4035850916
* Subject	The Priorities and Finance Committee review of 11 new communities.
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am aware that the City of Calgary is losing hundreds of thousands of dollars in revenue every day due to the economic impacts of the pandemic. What's worse, I understand the City was already scrambling due to funding cuts from the province in the 2019 budget. So with this in mind, I don't understand how city council can vote in favor of allocating more public funds towards servicing 11 new communities when looking at the package of cuts that were made just last year to vital public services such as transit, social services and affordable housing. Calgary cannot sustain this growth and the impact of expansion will hit those who rely on city services (those living on lower incomes) much harder than those who are able to absorb the cuts by paying for them in the private market. I am not in favor of more growth.

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* First name	Lori
* Last name	Parker
Email	rycatsmom@yahoo.ca
Phone	4038082842
* Subject	Plan to add 11 new communities to Calgary's outskirts
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I a completely against this. Not only can we not afford the extra cost to the taxpayer, we need to quit destroying the homes of wildlife who are always affected by new development

Calgary

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* First name	Sean
* Last name	Korney
Email	sean.korney@gmail.com
Phone	5875855854
* Subject	Proposal to add 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please follow the recommendation of the City Administration. We do not need more housing; there is already an oversupply. It would be more efficient to add density or replace older homes that have not been kept up. We cannot endure any further property tax increases - either residential or commercial. Adding these communities at this time does not improve our city or its finances. If they are such a good idea, let the developers pay all the incremental service costs associated with them (and pass them along (if possible) - if it's not possible it proves that the new communities are not economic). I do not want to subsidize the developers' profits.

Calgary

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* First name	Naomi
* Last name	Esfahani
Email	naomi.esfahani@megenergy.com
Phone	5872338352
* Subject	Opposition to approval of ANY of the New 11 Community Growth projects in Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am adamantly opposing approval of any new communities in Calgary in 2020 due to the following reasons: - Council already approved 14 new communities in 2018, despite expert recommendations that we only approve eight based on lower market demand. - That approval flooded the market with a near-record total of 41 new and developing communities. Council's decision included subsidizing these 14 new communities so that every Calgarian saw a property tax increase of 0.75% in 2019 and will see 0.5% increases per year to water utility rates for 2019-2022. The total 2019 tax increase to subsidize the 41 communities was 2.15%. - For 2019-2022, the City has now committed almost $500 million in funding towards new community growth. While most of the City's financial commitment is supposed to be paid back by developers through levies, this simply is not happening. A glut of supply and reduced market demand means that houses are not being sold quickly enough in new communities, which means slower levy payback. As a result, there was a $57 million hit to the 2019 budget, with more shortfalls expected in coming years. - Approval of the 14 new communities was financially irresponsible. Now, 11 new communities are being put in front of Council for approval during a time when our city is facing one of the greatest economic challenges in generations. - The financial burden on Calgary city taxpayers from these proposals are huge all while the revenue generation is hindered by the global pandemic. No doubt if the council approves these projects the motives are personal and no economic justification is currently available to the city for such investments.

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* First name	Joshua
* Last name	Staav
Email	j_staav@hotmail.com
Phone	
* Subject	New communities should not be approved
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Enough of the crazy suburban sprawl. Please work on making this city more efficient by focusing on increasing density in existing city land. Listen to the urban planners - they know what they're talking about!

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* First name	Willow
* Last name	Brocke
Email	willowbrocke2@gmail.com
Phone	+14034837908
* Subject	Growth
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Hello, I am so upset to hear that we are considering more development at the edges of our sprawling city when the market is already saturated. Can we PLEASE make sure we are growing wisely and sustainably. There is so much room for smarter and better development centrally with some effort and imagination. Please help us become a LEADER of sustainable development in the world. We have the ingenuity if we will only find the WILL to do things differently. Sincerely, Willow Brocke

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* First name	Sebastien
* Last name	Bergeron
Email	sb.tetreault@gmail.com
Phone	4039733210
* Subject	PFC Oct 19 - Discussion of approving 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Hello, I would like to provide my comments on the discussion coming before the Priorities & Finance Committee for the plan to add 11 new communities to Calgary's outskirts. I vehemently and completely disagree with expanding our city outwards and urge PFC not to bend to the will of developers. Growth on the fringe is absolutely not in the best interests of this city and must be avoided. Calgarians in established neighbourhoods can not afford to subsidize more sprawl, especially when the benefits remain in private pockets. My taxes go up to pay for the build out, servicing, and maintenance of these new far flung communities, and it will be decades before all of this new growth on the fringe actually contributes to the tax base. it's just not the right approach. Beyond the economic arguments for stopping sprawl, Calgary must cease its outward expansion for countless other important reasons, such as: limiting the amount of cars travelling around the city and polluting our environment, limiting the destruction of the natural environment on the city's outskirts, and encouraging denser growth focused on more and better transit will create better communities. Please learn from your 2018 mistake of allowing 14 new communities to develop on the outskirts and stop this madness. Sprawl costs residents money and greatly reduces the city's liveability.

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* First name	Misty
* Last name	Halloran
Email	misty.halloran@gmail.com
Phone	
* Subject	Eleven More Communities?
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Councilors, I'm writing you today, pleading that you do not approve the business case for adding an additional 11 communities to our city for development. To do this, after approving 14 we already can not afford, to me, is reckless and unconscionable. Please don't do this! What happened to our Municipal Development Plan? We're already off track and at rest so if missing our targets, please don't abandon this initiative and do whatever is necessary to get it back on track. No more sprawl, as a tax payer and property owner with an already high tax burden, we just can't do it anymore. Please do the right thing and say no to these new communities and any others in the future until a course corrections occurs. Thank you, Misty Halloran T2G1K6

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* First name	Jarvis
* Last name	Schmid
Email	jarvisschmid@hotmail.com
Phone	4034789451
* Subject	New Community Development
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Growth in Calgary has shown to be inconsistent in recent years, and approving new communities based on an outdated funding model is irresponsible. Consistent wil administration's 2020 recommendations, no new communities should be considered until the reimbursement mode can be reviewed and adjusted to current realities, including considering a wholesale change of the property tax system.

Calgary

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* First name	Hurrell
* Last name	Hurrell
Email	christie.hurrell@gmail.com
Phone	
* Subject	Please do not approve 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Hello, I would like to register my support for City Administration, and their recommendation against approving 11 more communities to be built on the edges of Calgary. When the Priorities and Finance Committee meets October 19 I urge them to not approve these developments. Existing communities are already losing support and services, and the Calgary real estate market is already oversupplied. In the context of a struggling economy and a global pandemic, we do not need 11 more subdivisions on the outskirts of the city. Please support existing communities instead! Thank you for considering my feedback, Christie Hurrell

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* First name	Lisa
* Last name	Hobson
Email	montddlaw@aol.com
Phone	403-700-6592
* Subject	New Communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I would like to object to the approval of any new communities are this time. We already have more business and housing sq. footage than we can use. So no.

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* First name	Joy
* Last name	Brown
Email	
Phone	
* Subject	Say 'No" to 11 new communities on edges of Calgary.
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	We do not need any more new communities on the edges of Calgary. Calgary has enough urban sprawl! Any City Council members that approve any more development on the outer edges of Calgary are completely out of touch with what is going on for Calgarians. We are already wondering what the Council is thinking with the communities that have been added in the last few years when all we see is more people losing their jobs and families moving away from Calgary to survive economically. Please, wake up.

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* First name	Paul
* Last name	Boucher
Email	paul@paulboucher.com
Phone	403-607-7494
* Subject	New Proposed Suburban/Exurban Communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	As a taxpaying resident having lived in multiple neighbourhoods in Calgary, most recently Valley Ridge and Charleswood, I oppose any of my tax dollars being used to fund the development of new neighbourhoods. There is NO business case for these new communities. The administration has recommended against these developments because of, among other things, existing oversupply, reduced demand due to the pandemic, and the ongoing, long-term energy recession/transition impacting incomes across the city. It makes absolutely no fiscal sense not to maximize existing (over) capacity and continue to work make the existing city, including older, more central infrastructure more livable rather than always overbuilding, building new, etc. at the edges requiring ruinously expensive infrastructure extension. This is my plea to our city council, as a citizen here since 1984 (and active voter), that they respect the recommendation NOT to go ahead and approve these communities against all common fiscal sense. Thank you.

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* First name	Sue
* Last name	Beugin
Email	sbeugin@telus.net
Phone	403-282-2172
* Subject	New Communities & Priorities And Finance Committee Meeting Oct 19
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am strongly against the proposed approval by Council of 11 new communities on the outskirts of Calgary. The financial implications for the City are huge. Such unrestricted growth is simply unsustainable. At this precarious time in the City and for the foreseeable future, we must concentrate on smart, environmentally sound growth. That means increased inner city densification and upgrading of services there. We simply cannot afford, as a city, providing schools, water, sewer, transit and fire protection to these remote communities, when we can't even do it satisfactorily for the existing communities we have.

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* First name	Ian
* Last name	Porter
Email	
Phone	
* Subject	2020 new community business cases
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I would like to voice my opposition to approval of the 2020 new community business case that will add 11 new communities to the city. I'm aligned with the views of the City Administration experts. Developers and new residents of new communities should be responsible for the total cost of those developments with no subsidy. If they cannot be developed economically without subsidy then they are not viable investments and should therefore not be permitted. Furthermore, I don't believe that new development should ever be subsidized by existing residents whose proportional tax burden is much larger in older communities based on the flawed model of taxation of property value and location that forces those in the inner city to shoulder the largest proportional tax burden despite similar or lower service costs.

Calgary

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✓ * I have read and understand that my name, contact information and comments will be made publicly available in the Council Agenda.

* First name	Rob
* Last name	Crooks
Email	r.crooks@shaw.ca
Phone	403 968 8442
* Subject	Consideration of New Communities: Finance & Priorities Committee
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I would like to share my concern with the proposals from local developers to add more new communities. I did not agree with Council's decision to approve new communities previously & now as taxpayers we are bearing the cost of that decision. We cannot go there again as a City & community - we have so many other priorities impacting the City of Calgary's budget & I do not agree that further outward growth is one of them. I am not anti-development - let's put our collective focus on smart development within our current community base.

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* First name	Cayla
* Last name	Peckover
Email	cayla.peckover@gmail.com
Phone	
* Subject	11 new proposed communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I would like to express my disagreement with the 11 new communities being proposed before council. The city has so recently expanded with new communities, and is now going through a period of significant economic uncertainty. There is no reason to believe there will be demand for more growth, and the city can not afford to subsidize it. Calgarians are stretched thin and already in an uproar over increased taxation. If these new communities have such a strong business case, let them stand on their own feet financially. We can not afford another tax increase to pay for this.

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* First name	Dustyn
* Last name	Dumba
Email	dustyndumba@hotmail.com
Phone	
* Subject	Proposed 11 New Communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	(Original comments had a typo in the last sentence): The overbuild of neighborhoods is unsustainable and unnecessary which adversely impacts existing neighborhoods and city services. If Calgary was growing at a rapid pace (which, it isn't) and supply of homes was low (which, it's not) and new developments were not only fully funding the expansion of city infrastructure but also paid a subsidy for new services until property taxes were of a net benefit to city coffers then, and only then, does it seem fair to approve a large increase in communities.-Therefore it is critical that this proposal is rejected until these criteria are met.

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* First name	Brad
* Last name	Schneider
Email	brad.schneids@gmail.com
Phone	
* Subject	New communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	It would be utterly irresponsible from a financial And sustainability perspective for council to approve the development of 11 new communities, especially after approving 14 new communities just a couple of years ago. A vote in favour of this motion will result in a loss of my vote at the next municipal election. I, and many others, will be closely watching this matter.

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* First name	Jeannette
* Last name	Sturgess
Email	ja2ja2@shaw.ca
Phone	+14036719612
* Subject	Proposed 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please do NOT listen to this appeal from the developers. My tax dollars will go on paying to sustain this and the other sprawl for the foreseeable future, and the developers will walk away with a one time payment. Let's listen to developers who want to revive the vacancies downtown and in other areas. Let's stay with the land we have and reuse/rebuild that. Many existing communities have derelict homes that can be torn down/refurbished and that money is better well spent investing in that. Saves tax payer money too. The city is not growing enough to sustain this sprawl, so many houses for sale, our province is in a huge deficit, therefore not helping with the impact this sprawl will cost with services, infrastructure, policing, emergency services, and additional costs. So unless developers want to pay yearly fees to cover these expenses, say no to this proposal. Thank you

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* First name	Erin
* Last name	Steel
Email	erinsteel@shaw.ca
Phone	403-454-9158
* Subject	Community Growth
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	As a resident of Calgary (Mount Pleasant), I am not in favour of approving 11 new communities which will increase our property taxes, reduce our services, and increase urban sprawl. I am asking all city councillors to reject these applications. Current Calgary residents should not be required to subsidize suburban developers when there is an over supply housing in the suburbs and there is the possibility of redevelopment of office space downtown and lots in the inner city. This form of development is not in the best short or long term interest of the city and its residents.

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* First name	david
* Last name	daley
Email	ddaley@ucalgary.ca
Phone	
* Subject	New Developments in Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	With the heavy costs to service far-flung suburban developments already burdening the city as it is, now is not the time to approve any further developments.

Calgary

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* First name	Scott
* Last name	Elliott
Email	scottrelliot@gmail.com
Phone	
* Subject	New Community Growth in Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I just found out that there is a proposal to approve potentially another 11 new communities when there were 14 approved in 2018. I think this is a terrible idea given the current state of the economy and housing market here in Calgary. There are currently numerous options available for community living and approving more will only put a further burden on city services like transit, fire, police, snow removal, etc and then that burden will be passed onto tax payers. I am not in favor of approving more communities at this time

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* First name	Igpy
* Last name	Kin
Email	igpykin@gmail.com
Phone	
* Subject	RE: New communities in Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	It is appalling to me that council is considering developing new communities in Calgary when it is failing to support the communities that already exist here. We are under rule by a province that is making cuts to healthcare, education, and social services. We are in the middle of a global crisis that has seen evictions across Calgary Housing units — as a former resident of Calgary Housing I am well aware that if we'd been evicted, we would have been homeless. How dare you look to putting city resources into new development when you can't even care for the Calgarians you're already supposed to be acting in the interests of? As a lifelong Calgarian I strongly oppose new development under current circumstances. Focus on the communities you already have and how you can use city resources to support them.

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* First name	Miranda
* Last name	Johnson
Email	miranda.turnbull@gmail.com
Phone	4038747651
* Subject	MDP
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Now is not the time for development of new communities in Calgary. Please do not approve these new developments

Calgary

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* First name	Karen
* Last name	Donnelly
Email	canmoreviews@gmail.com
Phone	4032772449
* Subject	Say no to 11 new communities and Yes to SMART Growth On Oct 19th
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Dear members of CPC and Council, The facts are well documented and the professionals agree. It is not a good idea to develop multiple communities at once. The citizens of Calgary end up paying for inefficient land use patterns; the future residents of these neighbourhood don't get the access to the full suite of municipal and provincial services (from transit to schools) until much later and at a much higher cost, the staff at the City either become overextended or more people (at more cost) need to be hired to maintain safety standards and create a community that citizens can be proud of. Adding a further 11 communities is irresponsible. Council, please listen to the professionals that you have on your payroll and refuse the application to open up 11 more communities. Karen

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* First name	Jen
* Last name	Van Pick
Email	jennaandshea@gmail.com
Phone	
* Subject	New Communities - ARE YOU INSANE? WE CAN NOT AFFORD THIS.
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I do not even understand the reason why the development of 11 new communities would be going to council when admin has recommended against that. Oh wait, apparently Evan Wooley doesn't respond to emails from constituents unless you are part of RDNSQUR, and now we know why.... Magnicolla abusing tax payer funds but still on council for some reason? City, welcome to the real world - TAXPAYERS CAN NOT AFFORD YOUR PET PROJECTS. When Garrison woods and Lakeview can't even get proper transit downtown (all express routes replaced by Max yellow which doesn't stop in these communities) do you honestly think you can service these far flung places? Not to mention the no liability from builders shell companies... come on. Wake up. City taxes - every increasing - Alberta fiscal situation dismal (more taxes) - Trudeau, MORE TAXES. We can't afford it anymore.

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* First name	Malcolm
* Last name	Eaton
Email	mal.eaton92@gmail.com
Phone	4038152742
* Subject	Oct 19 Business Cases review for new community development
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Dear Priorities and Finance Committee, I am writing to express my strong opposition to the development of 11 new communities tabled by developers and being reviewed on October 19, 2020. I agree with Councillor Farrell's interpretation of the net financial benefit (or lack thereof) that these new communities will bring, both in terms of the municipality's ability to service these communities and the clear realities of the real estate market. In my view, the approval of any new greenfield community would be a disservice to current and future Calgarians. Furthermore, I had the unique experience of cycling over 2000 km of unique city streets this past summer, and feel that this experience, along with my 24 years in Calgary lends some perspective to the issue. First of all, there is absolutely no lack of space in the inner city, and certainly not within the bounds of the ring road. Densification is more environmentally sustainable, creates vibrant and diverse communities, and provides lease protection and economic growth as people frequent businesses and support local. I cringe at the thought of Calgary being a place where people are isolated in communities that are no doubt lovely in their own right but have no physical or emotional connection to the city. I see this as a sure-fire way of impeding the development of ideas collaboration and local sustainability, in a time when these are needed most. Creating a thriving business community that supports an extremely high standard of living is what Calgarians do best, and it is my view that the approval of these new communities would be a step backwards for that long-term vision and an irresponsible fiscal decision. Having covered literally several thousand kilometres of the city, I

Public Submission

City Clerk's Office

can personally say that there is plenty of room and that creative use of this space will lead to a more vibrant and sustainable future.

Sincerely,

Malcolm Eaton, PhD

Calgary

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* First name	David
* Last name	McLean
Email	dmackmclean@gmail.com
Phone	4033058782
* Subject	New Community Approvals
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am a resident and home owner in Sunnyside. It is disheartening to see council looking at approving 11 new communities. I don't understand how this is sustainable. My local fire station 6 is being examined to be closed. What other services will be cut? The city is struggling with deficits. How can we support more services for a largely vacant tax base on the periphery of the city. Why do I need to see a reduction in services? What does this look like in 15 years, especially in the absence of oil and gas revenue?

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* First name	David
* Last name	Sutherland
Email	sutherdr@gmail.com
Phone	5878890882
* Subject	review 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please vote no for all new communities in the year 2021. Please invest in the current communities to make them more walkable to improve the lives of Calgarians.

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* First name	Diane
* Last name	Anderson
Email	istdpcanada@gmail.com
Phone	4033126366
* Subject	No more new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I have watched Global TV News about Council looking at approving 14 more communities. I am writing to say NO to this. We need more fiscal responsibility and balanced growth. We do not need more additional capital costs at a time of real, unprecedented economic change and uncertainty--never mind a glut in the real estate market. We do not need to keep developers rich and in their luxury homes and cars while the rest of the population can barely afford their current bills. We need to ensure zero increases to business and property taxes for proprietors and residents already struggling to afford current living standards. Shame on city councillors who are recommending this against expert recommendations and city administration's recommendations. WE CANNOT AFFORD THIS UNSUSTAINABLE GROWTH AS CALGARIANS and FUTURE TAXPAYERS, Get back to the intent of Municipal Development Plan. If I ran my business or home the way some councillors are suggesting we run this city, I'd be broke. Enough already!

Public Submission

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* First name	Kenna
* Last name	Kelly-Turner
Email	
Phone	4036042062
* Subject	11 New Communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I have never written to City Council about anything but I feel compelled to write to you about this. Our city is suffering. Our professionals who can do so are fleeing, thanks to the disastrous state our economy is in and our provincial government's determination to worsen the situation with corporate handouts and a massive privatization agenda. Nobody can look at this scenario and think that we will need new communities in coming years. There is too much real estate available as it is. The only reason for Council to approve these developments would be as their own corporate handout to developers, at the cost of Calgarians. Your own city advisors are telling you this is a mistake. Believe them. The City's Municipal Development Plan (MDP) is already off track and approving more new communities only deepens the hole we're trying to escape. Failure to balance growth will result in $16.18 billion in additional capital costs over the next 60 years and additional annual operating costs of $390 million by 2070. Anyone who votes to approve these new developments is saying I will raise campaign dollars from developers while trampling the best interests of Calgarians. We are struggling. We are angry. We will remember who voted against regular citizens come 2021.

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* First name	Douglas
* Last name	Jeffery
Email	skipdix@telus.net
Phone	14032390153
* Subject	more new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please say no ! No ! We can not afford this option just so developers can make money - We the people will end up paying for it No! No!

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* First name	Melissa
* Last name	Tierney
Email	melissa.m.tierney@gmail.com
Phone	
* Subject	11 new communities planned for development
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I strongly disagree with approving the development of any new communities in Calgary. We already have so many houses unfilled and communities that must be maintained and revitalized before starting development on new ones. Focusing on revitalization projects like the city streets project happening in Montgomery is a better focus, as well as long term planning for the sustainability of our existing communities as our economy continues to change. Creating and following through on plans to build smart density and multi use/multi income neighborhoods needs to be a priority rather than continuing to expand ever outwards. This is an issue of prime importance to me as a 31 year old homeowner with a young child. I want this city to continue to be a great place to live for me and for my son as he gets his own first house in 20-30 years - we need to be planning for smart development for his generation, and not being convinced by developers of short sighted plans. Thank you for considering these views and voting according to our city's sustainable future. Melissa Tierney

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* First name	Anna
* Last name	MacEachern
Email	ammaceachern@yahoo.ca
Phone	4038052858
* Subject	Please - pause new community growth
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	My house was built in 1958. I have two small children that I send to the local school. We all share a bathroom. Our house is modest. We've put a lot of work in to it. I'm so tired of having older libraries, pools that are not as fancy as the new ones, schools that are shutting down, and sidewalks that are original to when this community was built. Let me rephrase that. I'm not tired of those things - I chose to live here. I deal with it. I accept this as part of my decision to choose an older neighborhood. However, I also chose to live near existing schools, police stations and fire houses and transit routes and bike paths. I should not be footing the bill for new developments where people knowingly purchase in communities without these. This must be part of the price of purchase. How is it that the developers promise fancy swimming pools in exchange for MY tax dollars? Build a fancy pool in my neighborhood. If my 1958 sewer line collapses I AM on the book for this - not the city and yet, I am paying for sewer lines in the subrurbs. Developers need to be financially responsible and transparent with consumers. Developers also have zero incentive to build up older communities. At a time when fiscal restraint seems to be in order, let's not cater to wealthy developers and banks (for houses that people can barely afford). Let's deal with homelessness. Let's not cut fire or policing. Let's get developers to contribute to funding safe injection sites. There is no need for us to build out and bigger for the few.

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* First name	Rhonda
* Last name	Fairhurst
Email	rfa@countrylivingfurnishings.com
Phone	4036808682
* Subject	New communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I live in Mapleridge which has 2 perfectly fine schools that are empty of neighborhood kids. There are a lot of homes for sale here Why are my tax dollars funding new wealthy communities?

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* First name	Alexandra
* Last name	Arevalo
Email	Alyx.arevalo@gmail.com
Phone	4036148682
* Subject	I am with Druh Farrel
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I can't say it better than Druh so I will say I stand with her on this

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* First name	Sandra
* Last name	Mills
Email	sandmills@gmail.com
Phone	
* Subject	No to 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I strongly urge council to reject any proposals for additional communities in Calgary. We are in a recession, we are in a pandemic. Council foolishly approved 14 new communities just 2 years ago. The market is over saturated and people are leaving the city/province. We cannot allow developers to determine the future of our city. It's time to stop sprawl, to solve complicated problems with clever solutions. Allow private industry to commit taxpayers to fiscal and ecological debt is regressive, and shows a total lack of creativity, a total lack of understanding of issues we are facing and a complete disconnect with the current situation. Clearly there is no benefit to anyone beyond the developers bringing this business case. Vote no.

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* First name	Karen
* Last name	Thomas
Email	karenlynnthomas@shaw.ca
Phone	4036511112
* Subject	Karen Thomas
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I oppose the 11 business cases submitted in 2020 These proposed new developments are all on the edges of the city. We do not need more sprawl and we cannot afford it either. Please be respectful of these times of fiscal restraint and our environment. Please do right by our children and vote no.

Calgary

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* First name	Doug
* Last name	Steel
Email	dougsteel@shaw.ca
Phone	587-429-6660
* Subject	New Community Growth Strategy Feedback
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Hi there, I just wanted to provide some quick feedback on the 11 new communities being proposed by developers. I am strongly not in favour of these plans and agree with the administrations recommendation to not proceed. Demand for new homes is dropping and the city cannot afford the infrastructure. More effort should be made to infill existing communities and densify the inner city. Thank you, Doug Steel

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* First name	jasmine
* Last name	palardy
Email	jasmine@thegoodfuture.co
Phone	4038362032
* Subject	Pls Do Not Approve 14 New Communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Dear Council Members, I am taking a moment to reach out as a proud Calgarian - and someone who is actively committed to rolling up my own sleeves to do my part to diversify our city's economy and position it as a place that attracts and retains talented people who will shape our city into the next decade and beyond. With that in mind, Calgary already has a reputation of generic suburban sprawl. Would this wave of new suburbs help check the "affordable city" box for economic development, maybe... but remarkable individuals, families, and businesses don't only move to (or stay in) a city for a glut of cheap housing on the far out reaches of town. They are seeking a Calgary that is vibrant, has fantastic transit, and healthy culture and bustling urban streets. The suburbs matter. Don't get me wrong. But we NEED a sustainable development plan that continues to push for densification over sprawl. Now - let's talk economics. I could wordsmith my own version of this - but facts are facts and so I'll paste the details shared by one of Council's own members: "For 2019-2022, the City has now committed almost $500 million in funding towards new community growth. While most of the City's financial commitment is supposed to be paid back by developers through levies, this simply is not happening. A glut of supply and reduced market demand means that houses are not being sold quickly

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enough in new communities, which means slower levy payback. As a result, there was a $57 million hit to the 2019 budget, with more shortfalls expected in coming years."

While we cut funding to key city services in 2020 - voting to allow for 14 new communities on top of the already recently approved communities makes ZERO economic sense.

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* First name	David
* Last name	Hammer
Email	hammerdc@telus.net
Phone	
* Subject	Approving new communties
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Calgary does not need any more communities and extra infrastructure added to our already overtaxed city budget. We are not even building in the communities that have been approved. To add to the already large existing infrastucture deficit for no gain to the City and its citizens would be ludicrous anytime, but even worse in these troublesome economic times. Please do not give in to big developers wants and sacrifice your constituents. Thank you for your time.

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* First name	Vincent
* Last name	Piotrowski
Email	vinpiotrowski@gmail.com
Phone	4036816700
* Subject	11 New Communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I read an article online that council is debating adding 11 new communities. I have lived in Calgary my whole life and am 40 years old. I have learned to love our city but this is the exact opposite of what we need to be doing right now. I would love to see us focus on densification and follow a progressive path that focuses on the quality of life of our citizens while being respectful of the environment. There are many examples of cities in North America that have figured out how to deal with builders and make their cities more sustainable. None of these proposals are aligned to market conditions or their trajectory. Please say no to these new communities.

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* First name	Robin
* Last name	Malegowski
Email	originaldesigns2010@hotmail.com
Phone	403 284-0682
* Subject	No more Growth- Development at this time
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am in favor of Druh Farrell, regarding now is not the time for developing communities along the skirts of Calgary. It only takes less then (1 year at times - up to 3 months) to a Build home. There are enough homes on the market for sale, if we have a serge of homes needed, then we can build once the demand is there. Also, one select builder should not have the right to buy an area and profit from it, like Trico. It's nice to see that all the home builders join in on the business growth, like in Walden. I would like to see new home builders given the chance to design & build the new homes with a emphasis on multi nuclear family homes. In fact I would recommend not only to build with a green sustainable design, but welcome the builders to consider adding energy efficient ways to incorporate green ways of building or they reduce their opportunity to build in Calgary. There should be a rating system that should be designed and encouraged the builders to follow or else the their company won't be invited to build as many homes. The city should set the criteria for the next stages of building within, (the building code), to follow. That should give the builders a year or two to design and restructure, then when things hopefully get back to the recovery stage, then we will have made a positive impact and used our time wisely. Thank you for your time Robin

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* First name	Kara
* Last name	Hallett
Email	Kara_inman@hotmail.com
Phone	4036305965
* Subject	New communities really????
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please do not approve plans for new sprawling communities. Calgary is seeing an exodus of residents not radical growth. Our (City of Calgary) planning department should create a vision and plan for attractive, easy to navigate on foot and bicycle, areas for people to live. The City accommodating developer whims, and not following plans of integrity, has resulted in many obnoxious aesthetics and difficult navigation. Please stop the madness! Make a solid plan the developers have to abide by.

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✓ * I have read and understand that my name, contact information and comments will be made publicly available in the Council Agenda.

* First name	Andrew
* Last name	Wilson
Email	wilson.andrew@outlook.com
Phone	4034370087
* Subject	Further expansion of city to 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Calgary is already overexpanded and overbuilt. The number of houses on the market is at an all time high. The last thing we need is to expand further and pull resources away from hardworking Calgarians to line the pockets of developers. Existing neighborhoods are in need of revitalization and maintenance, there is no need at this time or in the near future to build further out. This matter since it affects our property taxes should be put to a public referendum where it would be defeated easily. No Calgarians are in favor of this, and council ostensibly is there to represent it's constituents. I am a homeowner and have been in multiple Calgary neighborhoods and I am strongly opposed to this action.

Public Submission

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* First name	Laura
* Last name	Wilson
Email	laura.wilson@outlook.com
Phone	4036806774
* Subject	I am strongly opposed to more neighborhoods
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am strongly opposed to these proposed new neighborhoods. Calgary is overbuilt and undersold. Calgarians are hurting and will continue to hurt as our economy has struggled for the last few years. We simply can't afford this. Transit will be slashed, we are already seeing those effects in the cancelled neighborhood buses in several neighborhoods on the 13th with the "transit on demand" ridiculousness. If you put it to the people who are out of work, worried for the future, not looking for another pretty community half way to Okotoks you would see the vast majority would be opposed. How is it that only Mayor Nenshi and Druh Farrell were the only ones opposed? This makes me extremely suspicious of the motives of our city's council persons and I am confident they are not looking out for and acting to ensure the good and wishes of our city's people.

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* First name	Sandra
* Last name	Sawatzky
Email	sandra.bluemoon@shaw.ca
Phone	4032821479
* Subject	New development at edges of Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I live inner city. There is currently a glut of old houses and new along with a continued push for densification. My understanding is this is true across the city in most of the established neighbourhoods. My concern is that the already approved new communities that have been built along with the newly proposed will end up like the abandoned neighbourhoods in the cities of the USA after the 2008 Housing bubble - a shocking display of squandered resources. If the population Of Calgary is not growing and people are not buying, if millennials are choosing other kinds of housing, when the road is not clear as to where Calgary is heading financially - I don't see the point of development on speculation that things will change radically in the next 10 years.

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* First name	Adam
* Last name	Bhavnani
Email	adambhavnani@gmail.com
Phone	
* Subject	Action Needed: Stand Up For Smart Growth
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Our density is 9 times smaller than New York. I know it's not the most direct or even relevant comparison, but our lack of density is insane. Everybody complains about transit service being slow or property taxes being high, but those are symptoms. There's a balance for Calgary somewhere between the outrageous density of Hong Kong and the ridiculous sprawl of Houston - I'm not sure where this balance lies, but I know expanding at this rate isn't a viable solution. It's been causing us urban planning issues longer than I've been alive. If you could show me a bunch of vacancy rates and sky-high housing prices due to economic growth in another sector, I might be more on board with this expansion. I'm sympathetic to those whose jobs depend on these new developments, but we can't prop up our ailing economy by trying to force a development bubble. Finally, these developments - with their poor density, garbage planning, lack of amenities, and huge distance from the city core - will contribute to a lower quality of life and greater feeling of disconnectedness, especially in this time. Sure, in the short term, a house with four walls and a white picket fence is nice, until the reality sets in that you have to spend more money and time traveling to go out and do anything at all. Our city is more vibrant when we are together, not apart. People go out of their way to walk along the Bow, or Inglewood, or Kensington... Nobody says "Hey, let's go take a walk in Seton."

Public Submission

City Clerk's Office

Cheers,

Adam

Public Submission

City Clerk's Office

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* First name	Hans
* Last name	Verwijs
Email	jverwijs@yahoo.com
Phone	
* Subject	I do not support the upcoming motion to approve 11 new communities on the edges of Calgary.
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Council already approved 14 new communities in 2018, despite expert recommendations that we only approve eight based on lower market demand. Given the downturn which resulted in a reduced tax base available, approval of the 14 new communities was financially irresponsible. Now, 11 new communities are being put in front of Council for approval during a time when our city is facing one of the greatest economic challenges in generations. We need to do more to maximize existing infrastructure, rather than cut services for existing communities to make room for communities where no one yet lives. Thus I do not support the approval of 11 new communities. Sincerely, Hans Verwijs Calgary, AB

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* First name	Darshan
* Last name	Sandhu
Email	darcy@csnwine.com
Phone	
* Subject	Approval of new community
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am against the new approval . Taxes are going up and city will reduce services.

Public Submission

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* First name	Vicki
* Last name	Manzo
Email	vickimanzo@gmail.com
Phone	4036504799
* Subject	New Communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I would request that you NOT approve any new communities in Calgary, at this time. We are struggling financially, many are out of work, new housing demand is down (there is a glut of housing on the market), and it is simply not sustainable. We can't continue to line the pockets of developers as the rest of the City struggles. Thank you.

Calgary

Public Submission

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* First name	Renée
* Last name	Clark
Email	reneedanielleclark@gmail.com
Phone	
* Subject	11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Hello Priorities and Finance Committee, I wanted to voice my concern over the additional 11 new communities being proposed for Calgary. While I acknowledge the need for growth and construction options for suburbs, I am worried that we will be overly saturated with new communities that will remain empty. In 2018, 14 new communities were approved, and this was beyond what experts demanded. Considering oil prices and the current pandemic, I worry that more people are leaving Calgary, resulting in vacancies. Additionally, I worry that the money spent to approve more communities will result in fewer services for existing communities as Council tries to make the budget work. That's a lot of worries. Thank you for the consideration. Cheers, -Renée

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* First name	Garth
* Last name	Rowan
Email	garth@beready.ca
Phone	4032844982
* Subject	Stop the suburban sprawl
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I support Druh Farrell in this matter of more smart growth for the City. I'm against the development of 11 new communities on the edges of Calgary. This is happening as the City is cutting services for existing communities. Thank You, Garth Rowan

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* First name	Connie
* Last name	Erickson
Email	conniemayerickson@gmail.com
Phone	
* Subject	11 proposed new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am opposed to the addition of 11 new communities to Calgary. Calgary's development should reflect our economy and needs to stop until we can recover. Please vote against this proposal.

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* First name	Melanie
* Last name	Schmidt
Email	humansolutions@msn.com
Phone	4038306614
* Subject	Approval of 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I have lived in this city for a long number of years and watched its ever reaching expansion outwards. Calgary has one of the largest footprints for residential land use, negating any climate change initiatives we undertake (https://www.nationalobserver.com/2019/08/21/features/calgarys-sprawl-cancelling-out-climate-progress). In fact, we have the earned distinction of being one of the most egregious cities in Canada in terms of urban sprawl, simply because we have the land to do so. I live in the inner city where there are increasingly more empty infills that spring up by developers who slap them up where they stand empty for months at a time. This emptying of the inner center to more affordable new suburbs not only increases the number of empty homes but also decreases the value of our homes, rendering home buying as an unaffordable option for the losses. In addition, my taxes have increased dramatically over the last 10 years as I watch Calgary grow into a sprawling mess. The addition of 11 new communities will increase this cost. In conclusion, to reduce the emptying of the city's core and increasing property crime, to decrease the damage the economy is making on home values, to reduce climate impact, and to avoid additional unnecessary tax base during an economic painful period, I am opposed to approving these new communities.

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* First name	Simon
* Last name	Irving
Email	simon.irving7@gmail.com
Phone	5879694046
* Subject	Do not approve 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I would urge Council to follow the recommendation by Administration and NOT approve the 11 new communities being proposed on Oct. 19th. Now is not the time to expand sprawl and increase taxes. Our City must begin growing up, not out.

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* First name	larissa
* Last name	riemann
Email	
Phone	403 230 6787
* Subject	addition of 11 more remote communities--no thank you
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	we do not need more sprawl, suburban communities. we have enough housing to go around in our existing communities and should be focussing our attention on making those the best they can be.. until developers take on the costs of their own projects (short and long term) and stop having all the other Calgarians pay their way, there should be no more new development period.

Calgary

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* First name	Craig
* Last name	Husselby
Email	craig.husselby@gmail.com
Phone	
* Subject	Development of New Communities in Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	The vote to approve the new communities in Calgary is irresponsible at this time. With the revenue problems that have occurred that dramatically affect the cities property taxes for both residential and commercial taxpayers we can't continue the sprawl of the city without any way of paying for it. Calgary's growth should be done in a responsible way that doesn't put further strain on our police, fire, or transit services. The vote on this should be a no-brainer to not expand. We have a duty to control this type of spending.

Calgary

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* First name	Jacqulynn
* Last name	Mulyk
Email	jjmulyk@gmail.com
Phone	4038522787
* Subject	11 new communities on the edges of Calgary consideration
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Dear Members of council and committee, I object to any further annexing of communities into the Calgary zone. 14 were just approved in 2018 and most of these are not yet developed. Calgarians are being asked to take on new costs and long-term financial risk for communities that do not yet exist. This growth is unsustainable. Our taxes are rising and there is no foreseeable timeline for when the city will recoup these costs. This is not the time to expand and placate to the development industry. Council's decision to subsidize these 14 new communities and increasing property tax and increases per year to water utility rates for 2019-2022 - IS UNACCEPTABLE. The total 2019 tax increase to subsidize the 41 communities was 2.15%. The council needs to invest more into our existing communities and to keep costs down. I am a resident and home owner in Calgary and I object to any consideration of Calgary boarder expansion.

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* First name	Mel
* Last name	Blitzer
Email	mel@partner2win.com
Phone	403 990 2262
* Subject	Urban Sprawl
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	No more new communities please. It would be totally irresponsible for any representative on the Council to vote for approval of new communities at this time. The time has ended for growth as urban sprawl, especially in Calgary. The developers of these dubious projects cannot be leading the City's development.

Public Submission

City Clerk's Office

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✓ * I have read and understand that my name, contact information and comments will be made publicly available in the Council Agenda.

* First name	Elliot
* Last name	Martin
Email	kryptec@gmail.com
Phone	
* Subject	Please do not approve any additional communities in the near term
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I think it is irresponsible for the city to approve new communities that will be a drain on the city's finances when the current economic conditions are already forcing the city to make deep cuts. My understanding is that this is being done against the advice of city planners as well, making the justification for these communities very confusing.

Calgary

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* First name	Sierra
* Last name	Holzen
Email	sierraholzen@gmail.com
Phone	
* Subject	Proposed 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please stop with the new communities. Just stop. As net migration to Alberta slows with our struggling economy, I struggle to believe that there is any business case for these 11 new proposed communities. The developers are just competing with each other to get their project done first and the ones who are slowest off the mark will shelve the project. But the City will be left with the bill for its side of the bargain, which means higher property taxes and less services for those of us who call Calgary home already. The City needs to put more resources into improving services for existing communities. Every time that a new community is approved on the outskirts of the city, it feels like a snub to those of us who are already tax payers. If we had a strong economy and a need for more housing to meet demand, it would be different, but that's not our current situation. And If we have a goal for densification and increased development in established areas of the city, we need to put resources into making sure that those developments can happen.

Calgary

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* First name	Katrina
* Last name	Walper
Email	katrinawalper@gmail.com
Phone	4036165031
* Subject	I am against approving and developing 11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am against approving 11 new communities as it would significantly increase costs for the city.

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* First name	Danielle
* Last name	Oggy
Email	danielle.oggy@hotmail.com
Phone	
* Subject	Please do not approve new communities for further sprawl
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Hello and thank you for reading my concerns. As a lifelong Calgarians the one thing that is a major problem in our otherwise amazing city is the endless sprawl of new communities. In the boom years of the past it made sense but we are no longer, and have not for some time, been living in those times. We do not need more communities to be developed outside the ring road making it soon defunct especially while services are being cut to inner city areas. Property taxes are getting unaffordable and getting around our city is more and more difficult while public transit is is not valued and invested in. The cost of new communities lands on the rest of us while an over supply sits there empty. I urge each council member to take an extra minute and consider is it truly in the best interest of all Calgarians to approve new communities at this time while the last round approved is not even close to being full? Do not be bullied by the developers who end up falling short time and again in paying back the levies meant to lay for the new development which then lands on the little guy instead. I can barely afford homeownership right now and if taxes continue to go up it will be near impossible. Meanwhile especially in this time with COVID businesses are barely staying afloat. Use the budget to revitalize what we already have and do not waste it on unnecessary new development that will be underutilized for years to come. Please please vote NO. Thank you Danielle Oggy

Calgary

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* First name	David
* Last name	Bennett
Email	bennettd1963@gmail.com
Phone	
* Subject	New communities to be approved
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	We already have enough new communities. Right now the only people benefiting are those that have money. We aren't using whats available so why do we need more. Prioity needs to be elsewhere at this timr.

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* First name	Patricia
* Last name	Bennett
Email	Dearmoose3@gmail.com
Phone	4035105879
* Subject	New communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	We don't need more communties approved within our city. Its all profit for the wealthy developers. I don't need my property taxes to go up to support these new communities.

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* First name	B
* Last name	Dayman
Email	b-dayman@shaw.ca
Phone	4032462406
* Subject	11 new developments in Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I believe this survey says more then I can - Calgarians do not need more taxes , the vacancy rate is high in the inner city neighbourhoods and the police, fire and EMS are over worked and underpaid as it is. THERE IS NO BUDGET FOR services for new developments NO TO NEW DEVELOPMENTS IN CALGARY From ctv news Should the City of Calgary reject proposed new neighbourhood development? Thanks for your vote Yes 1242 (76 %) No 400 (24 %) Total number of votes: 1642

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* First name	Jo
* Last name	Hildebrand
Email	jolohild@gmail.com
Phone	
* Subject	New Community Growth in Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please do not approve the application for 11 new communities in Calgary. Approval of the 14 new communities in 2018 was irresponsible, and now there is a glut of supply and reduced market demand. Reducing services such as Calgary Transit and Calgary Fire Department is exactly what we do NOT need at this time. Such cuts would reduce quality of life and do harm to public safety. We should be aiming to increase the city's sustainability and quality of life, not reduce it.

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* First name	VICCY
* Last name	GRACE
Email	viccyc@hotmail.com
Phone	
* Subject	11 new communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I am completely against even more new communities. The growth and sprawl of Calgary is unsustainable and should not be allowed to continue. Why should I pay higher taxes when the new communities are subsidized? We need to focus more on smart growth investing in inner city areas with more diversification and options for families (instead of luxurious condo suites). We cannot continue with a car-centric city if we're trying to combat climate change. There is already too much new community housing supply (41 new communities to choose from!) and demand has fallen. We need to focus more on the MDP and work on making inner city a more accommodating place to live.

Calgary

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* First name	Sharon
* Last name	Kaczkowski
Email	sharon.kaczkowski@gmail.com
Phone	4032426534
* Subject	11 new communities asking for approval
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I do not believe council should approve the development of 11 new communities in Calgary at this time. The vacancy rate among new home builds is astonishingly high now. Building new communities is fool hardy and Calgarians should not have to pay the costs when taxes to replenish our coffers from these new communities is long in the future, if they even get purchased.

Calgary

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* First name	Diane
* Last name	Grant
Email	dianegrant@telus.net
Phone	403-710-9343
* Subject	New communities
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	We do not need anymore new communities at the moment. Budgets are being cut for services to existing communities. There is a lot of movement of families out of the city and there is plenty of supply of homes for buyers. Please do not approve any more communities at the moment. At this time families and homeowners can not afford an increase in property taxes.

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* First name	Bill
* Last name	Phipps
Email	bfphipps@shaw.ca
Phone	
* Subject	Submission to Council regarding 11 business cases and 2 to 3 new subdivisions, on October 19
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Dear City Council, I am sorry I am unable to speak on Monday with my usual passion on these matters. I urge you reject this proposals for expanding urban sprawl in our city. The reasons are simple: - We have more than enough unsustainable sprawl now. - Such expansion will only add to our GHG emissions - I believe such expansion will compromise our excellent efforts in our Climate Resilience Strategy, which Council has approved. - Such expansion will increase demand for more city services, already under great stress. - City budgets are already under significant restraint, and these proposals will only add to the pressure. - These proposals can only contradict Climate Action policies and practises. - With Covid 19 and Climate Change as our overarching context, the last thing Calgary needs is more sprawl. Thank you for your hard work in seeking to make responsible decisions for the present and our future. These are difficult times. You are under great pressure. Please reject these proposals. Thank you. PEACE, Bill

Trico Homes™
The Heart of Homebuilding.™

October 16th, 2020

Shawn Small, Senior Growth Management Planner
Calgary Growth Strategies
City of Calgary, 800 Macleod Trail S.E.
Calgary, AB T2G 2M3

Mr. Small,

RE: Public Hearing of The Priorities and Finance Committee, October 19th, 2020
Item: PFC 2020-0963 – New Community Growth Strategy

Within item PFC 2020-0963 Trico Homes has submitted two business cases for consideration, known in the application as Belvedere Parcel A and Belvedere Parcel B. In 2018 Council approved a number of GMO removals in the Belvedere ASP area and we believe that these additional business cases will continue to leverage investments previously committed by the City with the approval of the 2018 business cases.

In collaboration with City Administration our business case submissions were thoroughly reviewed over the last ten months based on the five criterion provided by Council in late 2019. Through this review process our business cases were identified to have the following key characteristics:

- In alignment with MDP and CTP goals
- No operating cost gap
- Completing the community by filling the 'hole' between the previously approved communities of Tristar (west) and Twin Hills Cyber City (east)
- Facilitating the ultimate Memorial Drive right of way that is required for servicing the previously approved Twin Hills development
- Generate ~$60MM in levies and ~$5.5MM annually in tax revenue
- Leverage previous investments made through the 2018 Business Case approvals such as the temporary fire hall and the funded water and sanitary infrastructure.
- Encourage development along the regionally significant 17th Ave corridor which in April of this year was identified as the #1 transportation priority by the Calgary Metropolitan Region Board.

Trico is very committed to the east side of Calgary and we believe providing more choices within Calgary's east sector is crucial to mitigate market loss to smaller satellite communities outside of Calgary. We are excited to bring these business cases forward and believe that they act to support an area of the city that has been overlooked in the past.

Sincerely,

Michael Brown
President
Trico Homes Inc.

Public Submission

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* First name	Bill
* Last name	Phipps
Email	bfphipps@shaw.ca
Phone	
* Subject	Proposal for new suburban development, Oct. 19, 2020
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Dear Councillors, I am not sure if my earlier email got through, so I want to be sure you receive my view. First of all, thank you for your hard work in these difficult times. These business cases, including 2 or 3 new developments, will only increase urban sprawl, compromising city budgets and demanding more public services. They will increase GHG emissions, thus compromising our efforts to address Climate Change, including the City's Climate Resilience Strategy. With the urgency of Covid 19 and the Climate Crisis, this is not the time to increase and intensify urban sprawl. Therefore please reject these proposals. Thank you again for seeking to address responsibly our present and our future as a vibrant 21st century city.

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* First name	Bob
* Last name	Halton
Email	bhalton@telus.net
Phone	4032708020
* Subject	Proposed approval of development of 11 more communities in Calgary
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I'm opposed to the development of 11 more communities. We just approved 14 more 2 years year ago that I don't feel were needed. There will be an oversupply of homes. The city will need to supply more infrastructure, it will increase stress on fire dept to meet response times , more stress on police, health services and education. It will cause an increase in residential taxes. Increase the need for public transport. The city and province are under significant financial stress currently and likely for some time. City officials recommend against it. It seems undemocratic that developers can lobby for this against the city's wishes when the city is opposed. Tks.

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* First name	Musab
* Last name	Syed
Email	musab.syed@gmail.com
Phone	4033991768
* Subject	New developments
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I've read that developers are requesting approval for several new residential developments. I think that this goes against many reasonable policies (environmental, fiscal namely). Calgary is currently in a very precarious situation with the significant vacancy in downtown Calgary. Creating new developments (which will mostly be accessible to the wealthier Calgarians) is a poor decision for Calgary. If the city is concerned about providing housing for Calgarians they need to look at brown fill developments, using existing spaces and buildings.

Calgary

Public Submission

City Clerk's Office

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FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

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✓ * I have read and understand that my name, contact information and comments will be made publicly available in the Council Agenda.

* First name	Ian
* Last name	Hawkins
Email	ihawkins@telusplanet.net
Phone	
* Subject	Business cases for new community development
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	I have read about the proposed business cases to add 11 new communities to Calgary. I think that Council should follow the recommendation from City Administration, and deny approval for these new developments. Calgary has a Municipal Development Plan, and from what I understand, these business cases do not satisfy the needs of this plan. Especially when Calgary is likely going into a few years of reduced growth and reduced revenue, I think it is imperative that we concentrate our resources where they will produce the most benefit to the city at large. There is currently enough approved development space to meet our needs. Premature approval of new development space is not in the best interests of the citizens of Calgary.

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* First name	S. Lawrence (Larry) & R. Lynn
* Last name	Pearce
Email	larry.pearce@shawlink.ca
Phone	
* Subject	Please vote NO - Proposal for additional 11 neighbourhood developments
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Please submit the following message to the Priorities and Finance Committee: We are asking you to vote against approving additional land for development that will have any cost; short or long-term, to our city at this time. Instead of spending on developing new land We are asking you to invest in: affordable housing, public transit and investments that will enhance the climate resiliency strategy. The administration has already recommended against building these communities. Council needs to follow the Municipal Development Plan it has already approved. Instead of urban sprawl, keeping Calgary compact will help the city build walkable neighbourhoods centred around good transit, with shops and offices close by -- creating the kind of neighbourhoods that attract new businesses and young people to our city. Thank you, Larry & Lynn Pearce (this message was sent earlier to the Mayor and all City Councillors)

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✓ * I have read and understand that my name, contact information and comments will be made publicly available in the Council Agenda.

* First name	Darryl
* Last name	Allen
Email	eccentrik1@hotmail.com
Phone	403-205-3925
* Subject	pending approval of new communities for developers on Oct 19 2020
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	Firstly. I must say that I am disgusted with the developers being able to tell the city what it needs. These people only have a short term interest in making lots of dollars - nothing else. If you did some checking I would bet that the money that they are using for this comes from off shore. Calgary is a well known place to "clean" dirty money by investment in real estate etc. We DO NOT NEED the development now. Regular people rarely ever get a say in these matters. NO, NO, NO to these greedy folks. As I understand it the city is deeply in debt now and it's only going to get worse. I strongly urge council to turn down this ridiculous proposal. We can not afford it. New roads, new bus routes, new street light new sewer, new power.......I don't care if money is cheap to borrow right now - it still eventually has to be paid back. Also, we have a glut of home on the market now. For example a new apartment building just built near me has at least a 70% vacancy. I implore council to kill this proposal.

Calgary

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✓ * I have read and understand that my name, contact information and comments will be made publicly available in the Council Agenda.

* First name	Janet
* Last name	Gourlay-Vallance
Email	janiegv@shaw.ca
Phone	14032899272
* Subject	NO new subdivision approval
* Comments - please refrain from providing personal information in this field (maximum 2500 characters)	The first evaluation criteria of 'alignment with the MDP/ CTP goals' is paramount. Then within the Municipal Development Plan it is my feeling that the goals toward a 'compact city' are what we need to be striving toward. To accomplish that, focus must be on improving and constructing our public transit. Our long term efforts need to reduce vehicle travel. We need infill development in our existing communities to truly make them non-vehicle accessible, vibrant, diverse communities. Our vision for this can be the '15 minute community' where the needs of citizens for shopping, work, recreation, schools, churches are all within a 15 minute non-automobile trip from their home. Given our present Calgary communities we do have much work in accomplishing such a compact city. This needs to be our focus- not approving new communities. The unprecedented change in our lives has opened the door to simpler visions of living together. We can no longer expect that the way we did business and kept enlarging our city will continue to be the prudent approach. We can no longer expect that people will choose to live in an urban setting. With remote work and technology people could very well choose smaller towns where living is more centralized and less expensive. I do not believe we can assume that the growth patterns that were realistic a year ago will remain viable. Let us focus on improving what we have rather than continuing to take land out of an ecosystem and thereby increasing our carbon footprint. Let us focus on ways to reduce

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it instead.

Water Utility Rates – Revised for 2021 and 2022 and Financial Plan Update

RECOMMENDATION(S):

That the Priorities and Finance Committee recommends that Council:

1. Approve the 2021 and 2022 rate changes shown in Table 1 which are reductions from the One Calgary approved rate changes for Water, Wastewater and Stormwater;
2. Direct Administration to prepare amending bylaws reflecting the rate changes shown in Table 1, and that they be forwarded to the Special Council Meeting on Adjustments to the One Calgary Service Plans and Budgets;
3. Approve the revised financial plan policies, measures, and targets for the Water, Wastewater, and Stormwater lines of service shown in Attachment 2;
4. Direct Administration to examine potential corporate funding and financing sources to reduce the impact of Off-site Levy shortfalls on Water Utility rates and report back with the 2021 Off-site Levy bylaw review; and
5. Direct Administration to report back on rates and limits for Wastewater extra strength surcharge parameters by Q2 2022.

HIGHLIGHTS

- The Water Utility presents the above recommendations based on the City of Calgary's (The City's) commitment to supporting Calgarians by providing essential services while maintaining current levels of service at affordable rates.
- What does this mean to Calgarians? Protecting public health by providing clean and safe drinking water at a reasonable and affordable cost continues to be The Water Utility's most important priority.
- Why does this matter? In the midst of an economic downturn and the impact of the Covid pandemic, the Water Utility is working to provide affordable and sustainable, high quality services, while meeting the cost pressures to meet regulations, support the needs of a growing population, and maintain critical assets and infrastructure.
- Revised land development forecasts and lower than anticipated urban development have also resulted in less off-site levy revenue than expected. In the absence of an alternate funding source, this lower revenue puts pressure on utility rates to meet obligations for growth related investments.
- The Water Utility has reviewed its financial policies and proposes a revised financial plan that includes:
  - eliminating the franchise fee policy in conjunction with updating the calculation for the return on equity (formerly referred to as dividend); and
  - revising the minimum associated with debt service coverage.
- Administration proposes a reduction to the One Calgary approved Water, Wastewater, and Stormwater rate increases of 0.3 per cent, 5.1 per cent, and 2.5 per cent to -1.0 per cent, 4.5 percent, and 0 per cent respectively for 2021 and 2022.
- Strategic Alignment to Council's Citizen Priorities: **A healthy and green city and A well-run city.**
- On 2019 November 29, Council directed Administration to report back with indicative rates for 2021 and 2022 prior to the November 2020 Mid-Cycle Adjustments (PFC2019-1402). Additional historical direction is provided in Attachment 1.

DISCUSSION

Update Financial Plans

The Water Utility's financial plan and policies were first established in 2011 to ensure financial capacity and sustainability to meet the challenges of maintaining service while meeting regulations and responding to growth.

Due to ongoing pressures on utility rates, continued focus on financial sustainability, a commitment to community support in the current economic conditions and aligning with utility industry best practice, Administration has reviewed the current policies, measures and targets with recommended changes outlined in Attachment 2. Removal of the franchise fee policy and updating the calculation for the return on equity (formerly referred to as dividend), as well as revising the minimum target for the debt service coverage are proposed. The rate changes were determined in consideration of these recommended changes.

Revised Water Utility Rates for 2021 and 2022

The Water Utility continues to advance operational efficiencies and capital program savings while maintaining the capital investment needed to support regulatory performance and the needs of a growing city. These efforts are reflected in each line of the water-related services, with each uniquely impacted by regulatory requirements, changes to financial policies, and the multi-year slowdown in urban development and the associated delay in off-site levy revenue. The ongoing global pandemic crisis has impacted the Calgary community, adding to the prolonged economic uncertainty and delays in land development.

Off-site levy revenues are intended to fund 100 per cent of the developers' share of utility costs attributable to new growth. Revenues vary based on hectares of land development as well as timing of capital investment to support growth. In periods where actual land development, or the projected pace of future land development, is lower than the growth assumption in the off-site levy rates, a temporary financial shortfall occurs. This means that The City does not have enough revenue from levies to cover principal and interest payments.

The Water Utility is experiencing an off-site levy shortfall for the fifth consecutive year, totalling $77 million since 2016. Based on the revised 2020 October land forecast, the off-site levy shortfall will persist, totalling $118 million by the end of 2022. In the absence of an alternate funding source, this lower revenue puts pressure on utility rates to meet obligations for growth related investments. Work is underway to revise the off-site levy bylaw, which could assist in mitigating this financial challenge.

Lower rate increases in 2021 and 2022 put pressure on future rate increases. In presenting the revised rate adjustments for 2021 and 2022, The Water Utility aims to maintain rate stability and predictability within this budget cycle and into the 2023 to 2026 cycle.

More details are provided in Attachments 3, 4 and 5.

<u>Water Treatment and Supply</u>

Safe and reliable drinking water provides the foundation to a healthy and green city. With a finite supply of water and climate change impacts, consideration must be given to future water supply and demand. Due to water conservation measures embraced by Calgarians, this line of service has been able to safely delay investments in treatment capacity and defer costly plant upgrades, while being able to provide for a growing population.

The Water line of service continues to face short term revenue pressures as a result of conservation efforts and lower per capita residential consumption. In response, The Water Utility has identified effective cost reducing methods for this line of service by proactively relinquishing and deferring capital investments, continuous innovation, and efficiency opportunities. These actions have resulted in the ability to keep rates low and continue to keep water safe and reliable for customers.

Wastewater Collection and Treatment

Calgary is a large, growing city located on two small rivers. To maintain the health of the rivers, ongoing investment is required to meet regulatory requirements. As the city's population grows and wastewater strength increases, the need for sufficient and effective treatment processes will continue to increase. The Wastewater line of service is focused on finding efficiencies and process improvements, to offset the additional operational and maintenance costs that a growing infrastructure base requires. The Wastewater line of service must continue to deliver on capital spending commitments in anticipation of an economic recovery and population growth.

The Wastewater rate increase will allow alignment with The City's 2020 Sustainability Direction, which ensures sufficient funding to support a growing city and maintain river health.

Stormwater Management

A healthy, resilient watershed provides clean, reliable water resources, and is vital to support the protection of property from flooding and the health of rivers. Efforts to improve flood resiliency and reduce local stormwater flooding are ongoing through a variety of infrastructure programs to address the pressure on Calgary's rivers from growth and a changing climate. The timing of capital projects to improve community drainage in older communities was adjusted in response to the Province's early termination of the Alberta Community Resilience Program and to ensure river flood mitigation work will continue to progress.

Table 1: 2021 and 2022 Water Utility rate changes

Line of Service	One Calgary Approved 2021 & 2022	Proposed Change	Recommended Revised 2021 & 2022 Rates
Water Treatment and Supply	+0.3%	-1.3%	-1.0%
Wastewater Collection and Treatment	+5.1%	-0.6%	+4.5%
Stormwater Management	+2.5%	-2.5%	0.0%

Impact to Customer Classes

Based on cost of service study recommendations, Council directed Administration to close the gap for each customer class to varying degrees, with 100 per cent cost of service recovery for multi-family customers. As a result, customer classes will be impacted differently and not all customer classes will see the same decrease or increase in utility rates. Overall the utility rate revenue will change according to the revised recommended rates indicated above. As shown in Table 2, a typical residential metered customer will see an overall decrease of $3.58 to their monthly bill by 2022 when compared to 2020. This is based on 19m^3 water consumption per month.

Table 2: Approximate Impact on typical residential monthly utility bill based on 19m^3/month water consumption

Line of Service	2020 monthly bill	2021 incremental change	2021 monthly bill	2022 incremental change	2022 monthly bill
Water Treatment and Supply	$44.07	($1.65)	$42.42	($1.34)	$41.08
Wastewater Collection and Treatment	$55.73	($0.94)	$54.79	$0.35	$55.14
Stormwater Management	$15.63	$0.00	$15.63	$0.00	$15.63
Total	**$115.43**	**($2.59)**	**$112.84**	**($0.99)**	**$111.85**

As the impact for each customer class varies, multi-family and business customers will see an overall increase to bills, based on a representative amount of consumption per month.

Specifically, the overall increases by 2022 compared to 2020 will be 2.6 per cent, 2.9 per cent, and 4.3 per cent for multi-family customers using around 600 m^3/month (based on 30 units), general service regular customers using around 400 m^3/month, and general service large customers using around 10,500 m^3/month.

Table 3: Approximate Impact on typical monthly total utility bill

Customer Class	2020 monthly bill	2021 incremental change	2021 monthly bill	2022 incremental change	2022 monthly bill
Multi Family Metered	$2,113.49	$12.24	$2,125.73	$42.63	$2,168.36
Per Multi Family unit	$70.45	$0.41	$70.86	$1.42	$72.28
General Service Regular	$1,328.58	$9.66	$1,338.24	$28.40	$1,366.64
General Service Large	$32,031.67	$455.07	$32,486.74	$915.99	$33,402.73

Wastewater Extra Strength Customers and Parameters

The Water Utility continues to work with customers that discharge extra strength wastewater. Six surcharge pollutants are defined in the Wastewater Bylaw, with concentration limits set for each pollutant. Industrial, commercial and institutional customers are assessed a surcharge fee for wastewater that exceeds these concentration limits, based on the extra cost to treat extra strength wastewater. Two of these pollutants – Total Kjeldahl Nitrogen (TKN) and Total Phosphorous (TP) – have discharge concentration limits in the Wastewater Bylaw, but do not factor into the surcharge calculation. A significant effort is underway to confirm the extra strength parameters and the methodology for the calculation of the surcharge fee.

In 2018, Council directed Administration to report back on rates and limits for Wastewater extra strength surcharge parameters no later than 2020 November (Attachment 1). The wastewater surcharge parameters, rates and limits will remain unchanged through the current budget cycle. The Water Utility will continue to engage extra strength wastewater customers to (1) understand the impacts of surcharge fees, (2) explore innovative options to treat extra strength wastewater, and (3) investigate alternative surcharge formula. Customers impacted by this initiative will be engaged through the development of a new surcharge framework prior to this being brought before Council in 2022.

STAKEHOLDER ENGAGEMENT AND COMMUNICATION (EXTERNAL)

☒ Public Communication or Engagement was not required

The Water Utility is committed to delivering quality water, wastewater, and stormwater services for customers. In revising the 2021 and 2022 utility rates, The Water Utility considered the current economic climate and identified efficiencies to minimize impact on customers' monthly bills.

Each year, The City communicates changes to customers' rates through various communications platforms including updates to Calgary.ca, providing information on the bill, and responding to customers questions when they contact The City or our contracted customer care and billing provider.

IMPLICATIONS

Social, Environmental, and Economic Implications

With the proposed reduction in rate increases for 2021 and 2022, The Water Utility continues to ensure The City's social, environmental, and economic goals are delivered under sound and sustainable financial policies, while maintaining safe, affordable services and reducing the magnitude of bill increases for Calgarians.

Service and Financial Implications

The net zero budget adjustments that will be presented to Council in 2020 November will include an overall reduction in rate revenue and off-site levy revenue ($43 million in 2021 and $73 million in 2022) offset by operating expenditure reductions. Operating expenditures include capital charges such as principal, interest and depreciation. To ensure the overall capital budget is maintained within the approved rates, The Water Utility will relinquish $23 million in 2021 and defer $103 million from 2021 and 2022 to the next budget cycle across the three lines of service. The recommended Water Utility rates support financial sustainability and compliance with the revised financial plans recommendations.

RISK

Forecasted off-site levy revenue is uncertain due to current economic conditions. The off-site levy revenue shortfall The Water Utility is experiencing is considered temporary until urban development occurs and levies are paid. The proposed rates incorporate the projected shortfall and thus mitigate some risk of off-site levy revenue not materializing. The off-site levy bylaw is currently being reviewed and that outcome may also have an impact on off-site levy revenue. Additionally, Water Utility rate change driven by off-site levy shortfalls may be mitigated if work is undertaken to examine potential corporate funding and financing sources and back with the 2021 Off-site Levy bylaw review.

Timely delivery of the systems and required capacity is needed to accommodate population growth and development, as well as meet regulatory requirements.

Rate changes, especially in the wastewater line of service, are needed to achieve compliance with the financial plan including the debt service coverage ratio and building the sustainment reserve balance.

ATTACHMENT(S)

1. Attach 1 – Previous Council Direction, Background – PFC2020-1140
2. Attach 2 – Updates to Financial Policies and Targets – PFC2020-1140
3. Attach 3 – Water Line of Service – PFC2020-1140
4. Attach 4 – Wastewater Line of Service – PFC2020-1140
5. Attach 5 – Stormwater Line of Service – PFC2020-1140

Department Circulation

General Manager	Department	Approve/Consult/Inform
Dan Limacher	Utilities and Environmental Protection	Approve
Carla Male	Chief Financial Officer	Consult
Stuart Dalgleish	Planning and Development	Consult
Jill Floen	City Solicitor	Consult

Background

Context

Under One Calgary, The City of Calgary (The City) is committed to Calgary's economic recovery through effective service delivery, while continuing to look for efficiencies to streamline the cost of municipal government. With increasing capital investment required to maintain highly reliable water and wastewater systems, meet regulatory requirements, and be resilient to environmental and economic changes, it is vital The Water Utility focus on continuous improvements including the implementation of the zero-based review recommendations to keep rates low for customers.

The Water Utility delivers services through a public utility model, where all revenue requirements are recovered through user rates, levies, and other utility fees. In the development of the 2019 to 2022 indicative rates, The Water Utility considered drivers and priorities related to operating and capital expenditures, customer expectations, and requirements to meet financial plan compliance to improve financial sustainability. The Water Utility continues to experience pressure on the rates to meet increasingly stringent regulations, provide high quality service, support the needs of a growing population, and maintain critical assets and infrastructure. Revised land development forecasts and lower than anticipated urban development have also resulted in greater off-site levy revenue shortfalls. These shortfalls place an upward pressure on utility rates.

Previous Council Direction

On 2019 November 29, Council approved PFC2019-1402, specifically revising 2020 indicative rate increases to -0.5 per cent, 6.7 per cent, and 1.3 per cent for Water, Wastewater, and Stormwater, respectively. Council also directed Administration to report back to the Priorities and Finance Committee with indicative rates for 2021 and 2022 prior to the November 2020 Mid-cycle Adjustments.

Leading up to the approval of C2019-1402, Council directed the following:

March 19, 2018

UCS2018-0223 and UCS2018-0230

Council approved financial plans for the Water, Wastewater and Stormwater lines of service for the 2019-2022 timeframe.

April 25, 2018

C2018-0489

Council directed that recommendation 2 of One Calgary: Setting Indicative Rates for 2019-2022 as follows: “approve 2019-2022 indicative rates for Water, Wastewater and Stormwater services including new growth as outlined on slide 52 of the presentation” be referred to the 2018 June 18 Strategic Meeting of Council.

June 18, 2018

C2018-0787

Council approved 2019-2022 range of indicative rate increases for Water, Wastewater and Stormwater services.

July 30, 2018

UCS2018-0884

Council directed Administration to, through the Cost of Service Study, develop water, wastewater and stormwater rates for 2019-2022 for each inside city customer class, and for outside city customers following the strategies articulated in Attachment 2, and report back to Council as part of One Calgary in 2018 November. Council also directed Administration to report back on rates and limits for Wastewater extra strength surcharge parameters no later than 2020 November.

November 24, 2018

C2018-1158

Council approved the 2019 to 2022 indicative rate increases of 0.3 per cent, 5.1 per cent, and 2.5 per cent each year for Water, Wastewater, and Stormwater respectively.

November 29, 2019

PFC2019-1402

Council approved revising 2020 indicative rate increases to -0.5 per cent, 6.7 per cent, and 1.3 per cent for Water, Wastewater, and Stormwater respectively.

Bylaws, Regulations, Council Policies

Bylaws impacted by this report are:

- 40M2006 The Water Utility Bylaw
- 14M2012 The Wastewater Bylaw
- 37M2005 The Drainage Bylaw

Financial Plan, Policies and Targets

Updates to Financial Policies and Targets

The structure of the financial plan includes policy statements, measures, targets, and the timeline for achieving targets. Review of the financial plan for The Water Utility lines of service is necessary to ensure it is current and relevant in terms of reflecting industry best practices to retain resiliency under changing environmental and economic conditions, while also meeting Council and citizen expectations.

In keeping with Administration's vision to modernize government and introduce or update financial mechanisms, and in light of ongoing pressures to utility rates, service commitments to Calgarians, continued focus on financial sustainability in the current economic conditions and utility industry best practice, Administration has reviewed the current policies, measures and targets, and recommend the following two updates:

Payment to the Corporation

The Water and Wastewater lines of service currently remit payment to the Corporation in the form of franchise fees and dividends. The franchise fee is calculated as 10 per cent of utility rate revenue collected from inside City customers. The dividend is a fixed annual amount dating back to 2004. Both the existing franchise fee and dividend will be replaced with an annual payment in the form of a return on equity.

The calculation of a return on equity uses a widely accepted and standardised method by applying a reasonable and agreed upon return percentage on the value of equity. The proposed 8.5% rate of return is in general alignment with industry standards and The City will continue to scan the utility environment for consideration of rates in the future. The City proposes that the rate of 8.5 per cent will be in effect for the duration of the current budget cycle for 2021 and 2022 and will review and update as needed for future budget cycles.

The calculation of utility rate base equity is based on utility assets net of non-rate base funding sources such as off-site levies and government grants. To calculate projected utility rate base equity, forecasted capital spend will be considered additions to utility assets.

Debt Financing and Servicing

Debt servicing limits are established to ensure debts and related interest costs are repaid in a timely manner. The debt service coverage ratio states operating income as a multiple of debt, and the target is stated in terms of how many times debt servicing obligations could be paid after other obligations are met. It reflects the line of service's ability to pay debt service after first paying for critical operations and maintenance expenditures and required transfers to The City.

The minimum target for each line of service is currently 1.75 times, increasing to 1.8 times from 2023 onward. The future increase was to function as capital contingency to ensure some debt capacity for unexpected capital requirements.

These targets are very conservative relative to the Standard & Poor's Global ratings criteria for US Public Finance Waterworks, Sanitary Sewer and Drainage Utility Systems that aligns a debt service coverage ratio of 1.4 to 1.6 times to a very strong AA+ profile, and 1.6 times or above to an extremely strong AA+ profile.

Administration recommends revising the debt service coverage ratio minimum target for each line of service to 1.6 times. This new target continues to maintain overall debt for The Water Utility at a level consistent with The City's internal financial planning standards while still providing each line of service with additional debt funding capacity. The revised debt service coverage ratio target has been incorporated into the revised Water Utility rates analysis.

Financial Policy Matrix

Policy Area	Policy Statement	Financial Measure	Financial Target
Self -Sustaining Utility	Water, Wastewater, **and Stormwater Management** services are provided under a self-sustaining, public utility model and all costs shall be recovered through user rates, levies, fees and sources other than the municipal tax base.	N/A	Meet all financial policies and not require tax support
Debt and Cash Financing	The Water, Wastewater, **and Stormwater** lines of service shall debt finance capital projects that are substantial in cost and size and where the benefits will extend over a relatively long period. Subject to funding availability, the Water and Wastewater lines of service shall cash finance capital projects that are part of an on-going improvement program, or will reduce the operation and maintenance costs.	Debt Service Coverage Ratio	Maintain a Debt Service Coverage Ratio to a minimum of **1.6** times
		Cash financing of Maintenance Capital	100%
Debt to equity ratio	The Water, Wastewater, **and Stormwater** lines of service monitor annually and report periodically on the debt to equity ratio.	Debt to equity ratio	60/40
Debt Term	The Water, Wastewater, **and Stormwater** lines of service will employ up to a 25 year debt term on major projects.	Length of debt term	N/A
Sustainment reserve	The Water, Wastewater, **and Stormwater** lines of service will maintain sufficient reserves to mitigate risks.	Number of days of Annual operating expenditures	Equal to 120 days of annual operating expenditures
Return on Equity	The Water, and Wastewater lines of service will pay a **return on equity (formerly referred to as dividend)** to The City of Calgary.	N/A	N/A
~~Franchise Fee~~	**~~In lieu of property taxes, the Water and Wastewater lines of service will pay The City of Calgary a 10 per cent tax on revenue. This tax on revenue, referred to as the franchise fee, is based on the total of sales and service charges and excludes developer fees and acreage assessments.~~**	**~~N/A~~**	**~~N/A~~**
Depreciation	The Water, Wastewater, **and Stormwater** lines of service will maintain depreciation rates that are aligned with generally accepted accounting practices. Depreciation on donated assets is not charged as an operating expense for the purpose of rates setting.	N/A	N/A

Note: Revisions to financial plan formatted in **Bold.**

Water Treatment and Supply

Services, Drivers and Priorities

Reliable water service provides the foundation to a healthy and green city. As Calgary's population continues to grow, so does the demand on the rivers. With a finite supply of water, the Water line of service needs to operate wisely, considering future water demands. Due to water conservation measures embraced by Calgarians, the line of service has been able to delay investments in treatment capacity and defer costly plant upgrades. These actions have resulted in our ability to keep rates low for customers.

Water conservation efforts aim to reduce water consumption and are important to ensure long term water supply reliability. However, the Water line of service must continue to look for ways to mitigate the upward pressures that lower per capita consumption places on revenues and financial sustainability. In response, the line of service has identified effective cost reducing methods through proactively relinquishing capital investments, continuous innovation, and efficiency opportunities to help offset additional inflationary pressures.

The focus on protecting public health by providing clean and safe drinking water continues to be The Water Utility's most important priority. The Water line of service is either currently working on, or will undertake, the following projects:

- Lead Mitigation
  To address the public health risk posed by lead water services, and from pipes and plumbing inside the home, The Water Utility is implementing an updated lead mitigation strategy. A central component of this strategy is the accelerated removal of the remaining lead service lines. The capital cost for the replacement of verified public and private lead water services is estimated to be up to $14 million. The total recoveries from all homeowner however would be up to $2.5 million. Apart from the capital requirement, additional resourcing will be required to conduct accelerated removal of remaining lead service lines, including managing the replacement contracts, working with individual homeowners to address their unique circumstances, and conducting required water quality sampling.

- Potential Reintroduction of Fluoride
  The Water Utility is in the process of estimating the cost of re-introducing fluoride to Calgary's drinking water. This estimate was requested by Council and is scheduled to be presented on 2020 December 16. The costs for this project are not included in the current capital plan for 2021 and 2022.

- Water Loss
  Performance indicators have suggested increasing trends in water loss in Calgary's distribution network. Preliminary investigations indicate that this water loss is significant and requires attention. A strategy is currently underway to validate the amount of leakage, develop recommendations to address this issue, and determine a resource plan to support the recommendations.

The Water line of service is currently in a good financial position with a favourable variance to the operating budget due to efficiencies and fleet optimization, a moderate capital program, declining debt, and decreasing interest expense. This combination enables the Water line of service to absorb inflationary pressures and adverse fluctuations in off-site levies for growth-related costs.

The proposed 2021-2022 capital spending plan is higher than the average investment of $89 million annually due to the capacity increasing work on Ogden and Lower Sarcee feeder mains, and services for new growth communities,

Figure 1: Capital Spending Plan

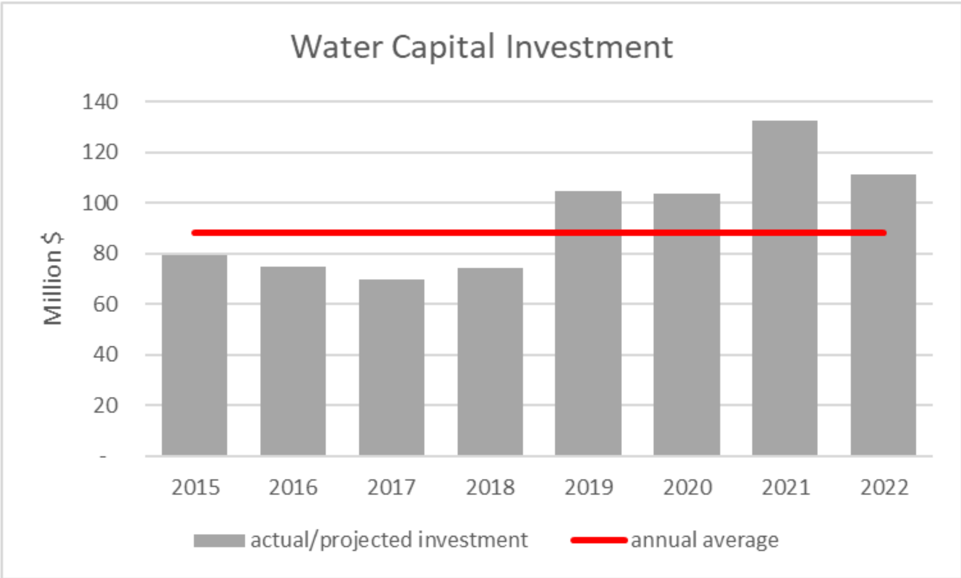
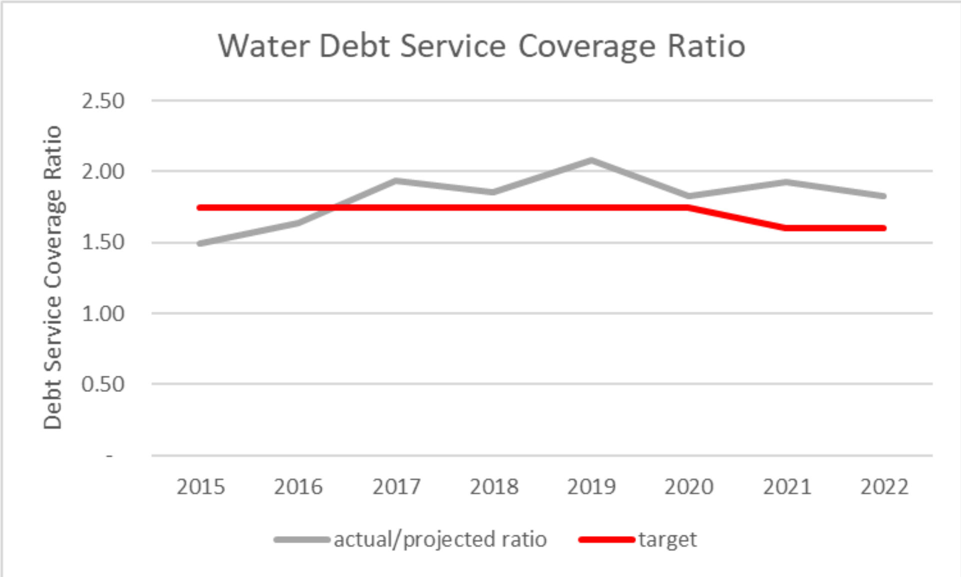
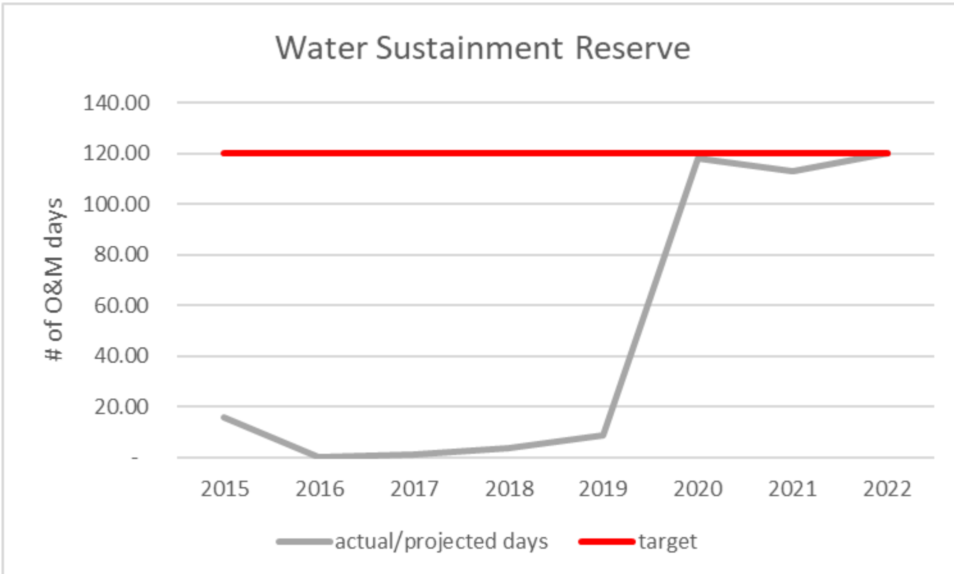


Figure 2: Debt Service Coverage Ratio



The Water line of service remains on track to achieve its sustainment reserve target by the end of 2022.

Figure 3: Sustainment Reserve Balance



Water Rates

Based on these considerations, the Water line of service can accommodate the recommended rate reduction of 1.3 per cent with minimal impact to service levels. A reduction in the 2021 and 2022 water rates from that previously approved as part of One Calgary will result in a $2.99 savings per month by 2022 to the water portion of the residential customers' typical monthly utility bill compared to 2020.

The tables below summarize previous reported and current proposed water rates and drivers for 2021 and 2022.

Table 1: Water rate change

	One Calgary Approved 2021 & 2022	Proposed Change	Revised 2021 & 2022 Recommended Rates
Water rate change	+0.3%	-1.3%	-1.0%

Table 2: Estimated Water Treatment and Supply drivers / impacts

WATER	Total	Change in operating costs	Change in capital related costs	Off-site levy shortfall	Contribute to sustainment reserve	Transition to ROE
Impact on typical residential metered monthly utility bill \$44.07 in 2020	-1.0%	1.0 %	-0.3%	-0.2%	0.0%	-1.5%

Based on the cost of service recommendations, not all customer will see the same increase or decrease in rates. As shown in Table 3, a typical residential metered customer will see a decrease to the monthly Water charges of approximately \$2.99 by 2022 compared to 2020. However, because the impact for each customer class does vary, multi-family and business customers will see different increases to their respective monthly bills.

Table 3: Impact on typical monthly utility bill

Line of Service	2020 monthly bill	2021 incremental change	2021 monthly bill	2022 incremental change	2022 monthly bill
Residential Metered ($19m^3$)	\$44.07	(\$1.65)	\$42.42	(\$1.34)	\$41.08
Multi Family Metered ($584m^3$)	\$915.60	(\$44.68)	\$870.92	(\$39.98)	\$830.94
General Service Regular ($400m^3$)	\$595.29	(\$3.68)	\$591.61	(\$0.61)	\$591.00
General Service Large (10,365 m^3)	\$14,113.15	\$110.34	\$14,223.49	\$182.56	\$14,406.05

Wastewater Collection and Treatment

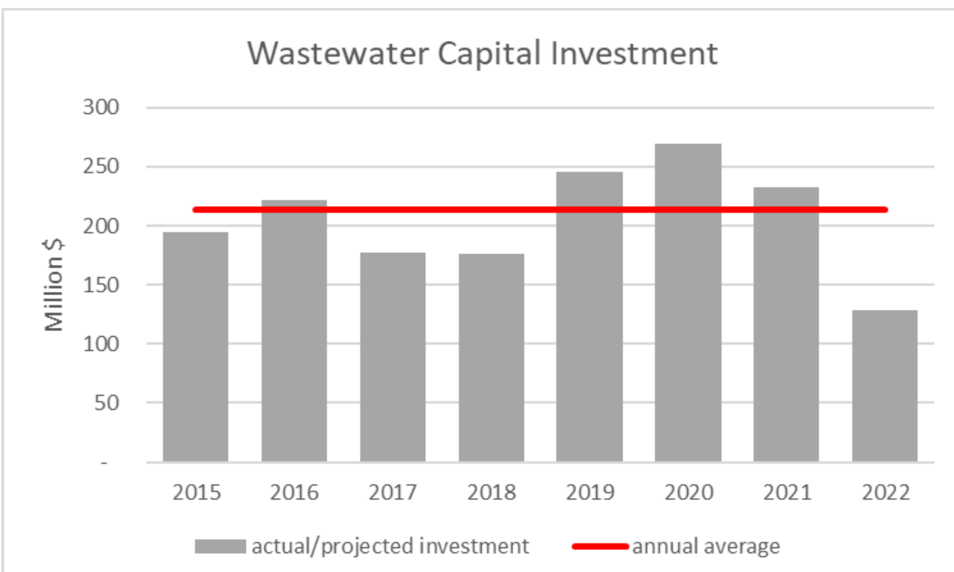
Services, Drivers and Priorities

Calgary is a large, growing city located on two small rivers. To maintain the health of the rivers, ongoing investment is required to meet regulatory requirements. Over the next few years, a continued priority for this service is the significant upgrades at Bonnybrook Wastewater Treatment Plant to address wastewater demands and regulations that will serve future generations of Calgarians.

The nature of the Wastewater line of service is capital intensive, and the majority of the planned investments are driven by population growth. With rising capital investments required to maintain highly reliable Wastewater systems, meet regulatory requirements, and protect the rivers and the environment, an increased emphasis on service efficiency is vital to the line of service. As the city grows, pressure on treatment processes will continue to increase. Water conservation efforts do not reduce this need. In response, the Wastewater line of service is focused on continually finding efficiencies and process improvements within the plants and collection system.

The proposed 2021-2022 capital spending plan is slightly lower than the average investment of $213 million annually due to the completion of the Rangeview and Inglewood Sanitary Trunks by the end of 2021, and the planned phasing of the Bonnybrook Plant Expansion.

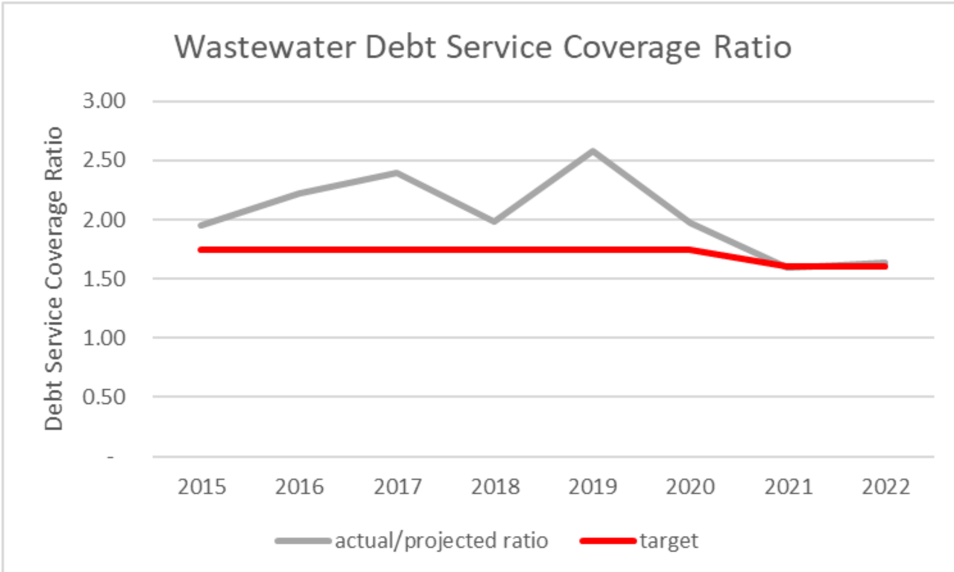
Figure 1: Capital Spending Plan



To maintain wastewater rates at affordable levels, the Wastewater line of service continues to reduce expenditures in several areas including capital maintenance, salary and wage, and consulting to offset capital investments, increasing debt, and inflationary pressures. The capital maintenance reductions include reduced investment in the customer initiated private side sanitary replacement program and sanitary trenchless rehabilitation. These reductions may result in increased risk of sanitary sewer backups in homes and businesses, and will be monitored closely by Administration.

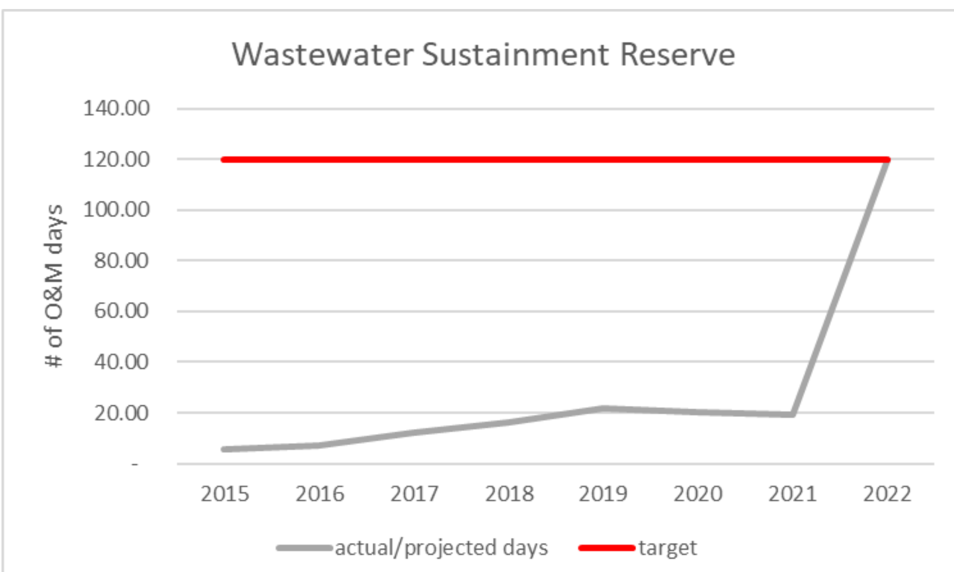
Reducing the Wastewater rates from what was previously approved as part of One Calgary impacts the debt service coverage ratio adversely in the next year but is rectified by 2022, and maintained thereafter.

Figure 2: Debt Service Coverage Ratio



Despite the above constraints, the Wastewater line of service remains on track to achieving its sustainment reserve target by the end of 2022. The reserve provides a safety buffer and mitigates adverse financial impacts that would otherwise have to be absorbed by customers through larger rate increases.

Figure 3: Sustainment Reserve Balance



Wastewater Rates

The effect of population growth has a substantial and compounding impact on the Wastewater line of service due to the capital required to build new infrastructure. The above-mentioned reductions enable the Wastewater line of service to partially absorb the adverse fluctuations and persistent shortfalls in off-site levies for growth related costs with a 4.5 per cent rate increase, a reduction of 0.6 per cent from what was approved in One Calgary. This will result in a $0.59 decrease by 2022 on a typical residential metered customer's monthly bill compared to 2020.

The tables below summarize previous reported and current proposed wastewater rates and drivers for 2021 and 2022.

Table 1: Wastewater rate change

	One Calgary Approved 2021 & 2022	Proposed Change	Revised 2021 & 2022 Recommended Rates
Wastewater rate change	+5.1%	-0.6%	4.5%

Table 2: Estimated Wastewater Collection and Treatment drivers / impacts

WASTEWATER	Total	Change in operating costs	Change in capital related costs	Off-site levy shortfall	Contribute to sustainment reserve	Transition to ROE
Impact on typical residential metered monthly utility bill $55.73 in 2020	+4.5%	2.5 %	-3.1%	1.2%	2.8%	1.1%

Based on the cost of service recommendations, not all customer will see the same increase or decrease in rates. As shown in Table 3, a typical residential metered customer will see a small decrease to the monthly Wastewater charges of approximately $0.59 by 2022 compared to 2020. However, because the impact for each customer class does vary, multi-family and business customers will see different increases to their respective monthly bills.

Table 3: Impact on typical monthly utility bill

Line of Service	2020 monthly bill	2021 incremental change	2021 monthly bill	2022 incremental change	2022 monthly bill
Residential Metered (19m^3)	$55.73	($0.94)	$54.79	$0.35	$55.14
Multi Family Metered (584m^3)	$1,182.26	$56.92	$1,239.18	$82.61	$1,321.79
General Service Regular (400m^3)	$717.66	$13.35	$731.01	$29.01	$760.02
General Service Large (10,365 m^3)	$17,902.89	$344.73	$18,247.62	$733.43	$18,981.05

Stormwater Management

Services, Drivers and Priorities

A healthy, resilient watershed provides clean, reliable water resources, and is vital to ensure that citizens and property are protected from flooding while keeping the rivers healthy. Efforts to improve river flood resiliency and reduce local stormwater flooding are ongoing through a variety of infrastructure programs.

Climate change will alter how and when Calgary's watershed receives precipitation, affecting both water quantity and quality. It is predicted that short duration and high intensity storms will become more frequent, leading to increased flooding and property damage. The Community Drainage Improvement (CDI) program uses a triple bottom line approach to prioritize and invest in stormwater infrastructure improvements with a focus on established communities with the highest risk of local stormwater flooding caused by rainfall. This program continues to be a high priority for the line of service.

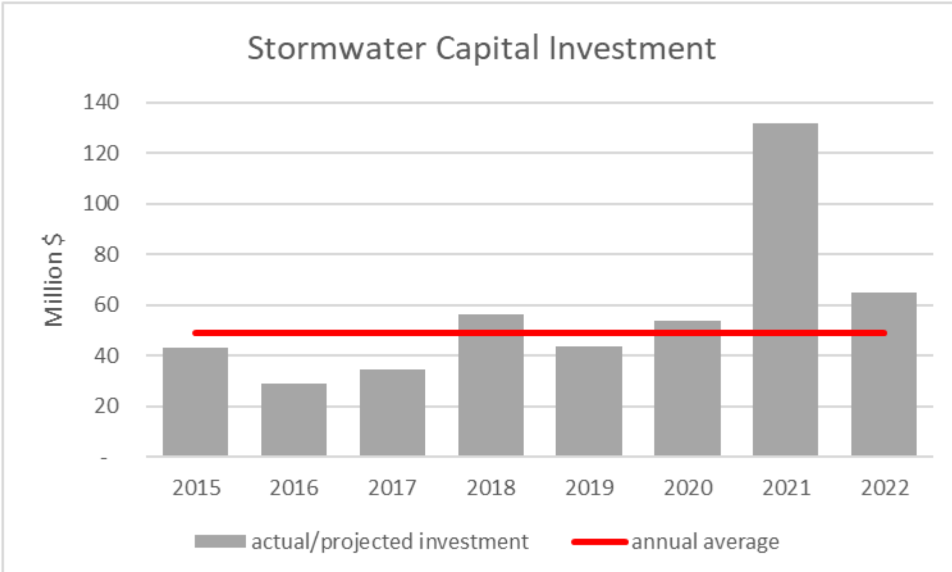
The Water Utility is also focused on implementing the Council-approved Flood Resilience Plan (PFC2017-0462). Flood resiliency investments including flood barriers and riverbank restoration projects are required to reduce impacts of future storm events. These projects represent approximately 38 per cent of the capital budget, of which a large portion is funded through external grants from the Provincial and Federal governments.

In 2019, the Province announced that the $150 million Alberta Community Resilience Program (ACRP) funding would be ending three years early in 2021 with a resulting shortfall of $81 million in capital funding for flood resiliency projects. All flood related projects have been reprioritized to address the funding impacts. The result is that The Water Utility is proceeding with the Downtown Barrier and Upper Plateau Separation projects as scheduled but this will result in a one year delay to some CDI projects. The Federal government recently announced partial funding for these two projects through the Investing in Canada Infrastructure Program (ICIP). Additional opportunities for provincial and federal funding are also being investigated for these and other flood resilience projects such as a potential barrier at Bowness. An application for $30 million was recently submitted to the Municipal Stimulus Program to advance CDI projects that have been delayed due to the reduction in ACRP funding and the subsequent reprioritization of the capital budget.

The Stormwater line of service is updating the 2005 Stormwater Management Strategy to define a unified vision for stormwater management and transform how The Water Utility collaborates with partners and stakeholders and evolves stormwater best management practices. This strategy will outline the short, medium and long-term actions for the Stormwater line of service, guiding the management of stormwater runoff in communities to keep the rivers healthy and build resiliency to flooding. It is anticipated that the strategy will be complete in Q2 2021.

The proposed 2021-2022 capital spending plan is higher than the average annual investment of $49 million primarily due to the investment timing of the Upper Plateau Separation, Downtown Barrier and Sunnyside Barrier projects totalling over $60 million in 2021.

Figure 1: Capital Spending Plan



The Stormwater line of service continues to maintain a healthy debt service coverage ratio and has achieved the target for its sustainment reserve

Figure 2: Debt Service Coverage Ratio

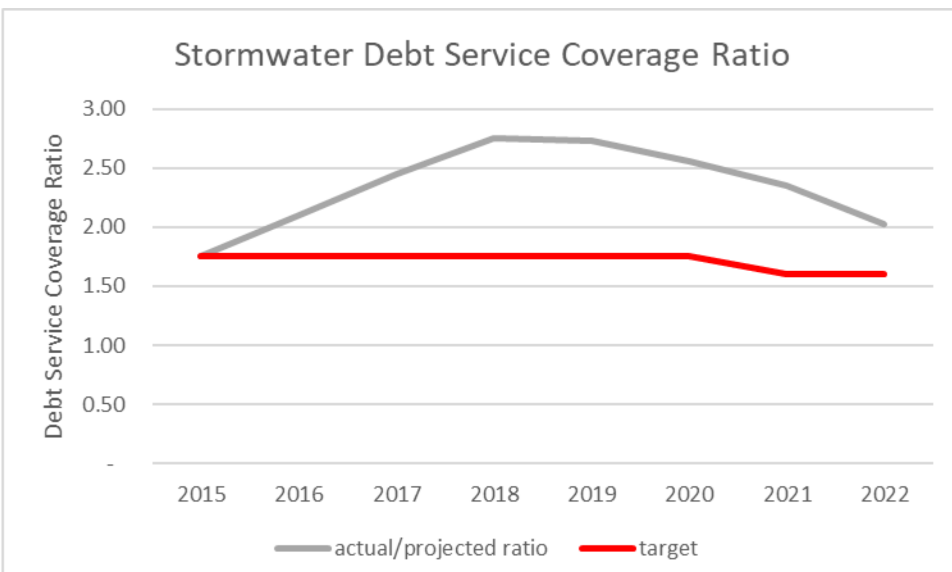
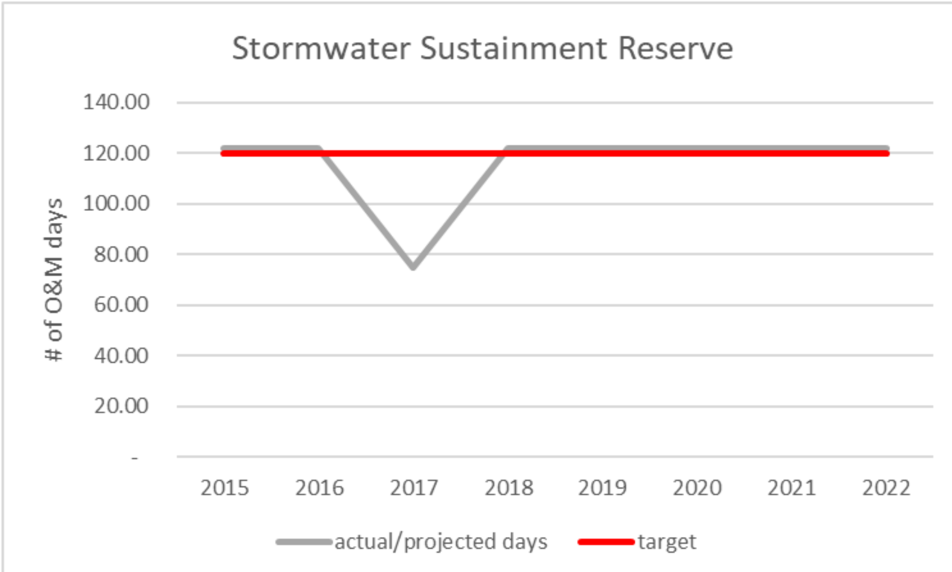


Figure 3: Sustainment Reserve Balance



Stormwater Rates

The Stormwater line of service continues to experience upward pressure to mitigate the environmental, social, and economic risks of river and localized flooding while considering climatic variability. Despite these pressures, as well as a reduced land development forecast and recent provincial funding changes, a reduced rate increase is recommended for Stormwater. This is due in part to a good financial position given early achievement of all financial targets as well as ongoing efficiency efforts.

Administration is recommending a 0.0 per cent increase to the Stormwater rate, which is 2.5 per cent lower than the One Calgary approved 2021 and 2022 rates. The result is that the stormwater management rate for 2021 and 2022 will remain the same as for 2020.

The tables below summarize previous reported and current proposed stormwater rates and drivers for 2021 and 2022.

Table 1: Stormwater rate change

	One Calgary Approved 2021 & 2022	Proposed Change	Revised 2021 & 2022 Recommended Rates
Stormwater rate change	+2.5%	-2.5%	0.0%

Table 2: Estimated Stormwater Management drivers / impacts

STORMWATER	Total	Change in operating costs	Change in capital related costs	Off-site levy shortfall	Contribute to sustainment reserve
Impact on typical monthly utility bill $15.63 in 2020	0.0%	1.0%	-1.0%	0.0%	0.0%

Table 3: Impact on typical utility bill

Line of Service	2020 monthly bill	2021 incremental change	2021 monthly bill	2022 incremental change	2022 monthly bill
Stormwater Management	$15.63	$0.00	$15.63	$0.00	$15.63