



## AGENDA

### PRIORITIES AND FINANCE COMMITTEE

May 18, 2021, 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](https://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](#)*

*Council Members may be participating remotely.*

1. CALL TO ORDER
2. OPENING REMARKS
3. CONFIRMATION OF AGENDA
4. CONFIRMATION OF MINUTES
  - 4.1. Minutes of the Regular Meeting of the Priorities and Finance Committee, 2021 April 27
5. CONSENT AGENDA
  - 5.1. DEFERRALS AND PROCEDURAL REQUESTS  
None
  - 5.2. BRIEFINGS
    - 5.2.1. Status of Outstanding Motions and Directions, PFC2021-0677

6. POSTPONED REPORTS

*(including related/supplemental reports)*

None

7. ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES

7.1. Calgary Economic Development - Economic Strategy Update, PFC2021-0556

7.2. Opportunity Calgary Investment Fund Terms of Reference, PFC2021-0608

7.3. University of Calgary – Citizen Scientist Wearables Program – Update, PFC2021-0626  
**Time Specific: Immediately following the lunch break**

7.4. 2020 Year-end Capital and Operating Budget Revisions Report, PFC2021-0571

7.5. 2022 Budget Update (Verbal), PFC2021-0655

7.6. Affordable Housing Development Financing, PFC2021-0445  
Attachment 6 held confidential pursuant to Sections 24 (Advice from officials) and 25 (Disclosure harmful to economic and other interests of a public body) of the *Freedom of Information and Protection of Privacy Act*.

**Review By: 2026 January 1**

7.7. 2021 Assessment and Tax Circumstances Report 1, PFC2021-0442

7.8. Online Advertising – Public Works Notices, Property Tax Sale and Annual Report, PFC2021-0503

7.9. Administrative Penalties System Program Update, PFC2021-0781

7.10. Green Line Board Q1 2021 Report, PFC2021-0774

8. ITEMS DIRECTLY TO COMMITTEE

8.1. REFERRED REPORTS

None

8.2. NOTICE(S) OF MOTION

8.2.1. Notice of Motion - 2021 Property Tax Cancellation for Calgary Housing Company Properties, PFC2021-0691  
Councillor Druh Farrell

8.2.2. Notice of Motion - 2021 Tax Cancellation for Silvera for Seniors' Properties Under Construction, PFC2021-0776  
Councillor Ward Sutherland

- 8.2.3. Notice of Motion - Proposed Land Exchange - Minto Communities Inc., PFC2021-0778  
Councillor Ward Sutherland

Held confidential pursuant to Sections 23 (Local public body confidences) and 25 (Disclosure harmful to economic and other interests of a public body) of the *Freedom of Information and Protection of Privacy Act*

**Review By: 2036 May 18**

9. URGENT BUSINESS

10. CONFIDENTIAL ITEMS

10.1. ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES

- 10.1.1. Verbal Update on NOM PFC2019-1510 Calgary Parking Authority Efficient and Effective Parking Management (Verbal), PFC2021-0772  
Held confidential pursuant to Sections 23 (Local public body confidences) and 25 (Disclosure harmful to economic and other interests of a public body) of the *Freedom of Information and Protection of Privacy Act*.

- 10.1.2. Naming of Six City Parks, PFC2021-0631  
Held confidential pursuant to Section 24 (Advice from officials) of the *Freedom of Information and Protection of Privacy Act*.

**Review By: 2021 May 31**

- 10.1.3. Local Authorities Election Act Update (Verbal), PFC2021-0791  
Held confidential pursuant to Section 24 (Advice from officials) of the *Freedom of Information and Protection of Privacy Act*.

10.2. URGENT BUSINESS

11. ADJOURNMENT







## MINUTES

### PRIORITIES AND FINANCE COMMITTEE

**April 27, 2021, 9:30 AM  
IN THE COUNCIL CHAMBER**

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

**ALSO PRESENT:** City Manager D. Duckworth (Remote Participation)  
A/General Manager C. Anthurs (Remote Participation)  
General Manager S. Dalglish (Remote Participation)  
Chief Financial Officer C. Male (Remote Participation)  
A/General Manager D. Morgan (Remote Participation)  
Legislative Coordinator M. A. Cario  
Legislative Advisor L. Gibb

1. **CALL TO ORDER**

Mayor Nenshi called the Meeting to order at 9:30 a.m.

**ROLL CALL**

Councillor Carra, Councillor Chu, Councillor Davison, Councillor Gondek, Councillor Sutherland, Councillor Woolley and Mayor Nenshi.

2. **OPENING REMARKS**

Mayor Nenshi provided opening remarks and a traditional land acknowledgement.

3. **CONFIRMATION OF AGENDA**

**Moved by** Councillor Gondek

That Item 7.5, Real Estate Working Group Update (Verbal), PFC2021-0237 be dealt with immediately following Item 7.1., Expense Investigation Follow-Up Ward 2 Hosting Expenses, PFC2021-0592.

**MOTION CARRIED**

Councillor Farrell joined the meeting at 9:35 a.m.

**Moved by** Councillor Chu

That the Agenda for today's meeting be amended by referring Report PFC2021-0487 back to Administration for further consultation with the Business Improvement Areas (BIA) to return to Council in one month.

ROLL CALL VOTE:

For: (3): Councillor Chu, Councillor Davison, and Councillor Sutherland

Against: (5): Mayor Nenshi, Councillor Carra, Councillor Gondek, Councillor Woolley, and Councillor Farrell

**MOTION DEFEATED**

**Moved by** Councillor Chu

That the Agenda for the 2021 April 27 Priorities and Finance Committee be confirmed, **as amended**.

**MOTION CARRIED**

4. CONFIRMATION OF MINUTES

4.1 Minutes of the Regular Meeting of the Priorities and Finance Committee, 2021 March 16

**Moved by** Councillor Chu

That the Minutes of the 2021 March 16 Regular Meeting of the Priorities and Finance Committee be confirmed.

**MOTION CARRIED**

5. CONSENT AGENDA

**Moved by** Councillor Chu

That the Consent Agenda be approved as follows:

5.1 DEFERRALS AND PROCEDURAL REQUESTS

5.1.1 Deferral – Working with Business Sector Task Force on further relief options returning to Council 2021 May, PFC2021-0622

5.2 BRIEFINGS

5.2.1 Status of Outstanding Motions and Directions, PFC2021-0576

5.2.2 Council Innovation Fund and Council Community Fund Status Update, PFC2021-0534

**MOTION CARRIED**

6. POSTPONED REPORTS

None

7. ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES

7.1 Expense Investigation Follow-Up Ward 2 Hosting Expenses, PFC2021-0592

**Moved by** Councillor Gondek

That with respect to Report PFC2021-0592, the following be approved:

That the Priorities and Finance Committee:

1. Confirm that of the \$1,380.99 in total hosting expenses for Councillor Magliocca identified on Attachment 2, that \$348.70 has been determined to be eligible as appropriate hosting expenses;
2. Confirm that of the \$1,380.99 in total hosting expenses for Councillor Magliocca identified on Attachment 2, that \$1,032.29 has been determined to be ineligible as appropriate hosting expenses; and
3. Recognize the receipt of \$3,762.88 in voluntary reimbursements for the \$1,032.29 ineligible hosting and \$2,730.59 for airfare upgrades. This amount concludes the financial obligations of Councillor Magliocca related to this investigation.

For: (8): Mayor Nenshi, Councillor Chu, Councillor Carra, Councillor Davison, Councillor Gondek, Councillor Sutherland, Councillor Woolley, and Councillor Farrell

**MOTION CARRIED**

Committee then dealt with Item 7.5.

7.2 Resilient Calgary Strategy Update Report, PFC2021-0429

A presentation entitled "Resilient Calgary Strategy Update Report " was distributed with respect to Report PFC2021-0429.

**Moved by** Councillor Woolley

That with respect to Report PFC2021-0429, the following be approved:

That the Priorities and Finance Committee recommend that Council:

1. Release \$81 million in funding, previously committed for flood recovery within the Fiscal Stability Reserve, as a result of the completion of The City of Calgary's 2013 Southern Alberta Flood Disaster Recovery Program (DRP) submissions and recovery of funding from the Government of Alberta;
2. Receive this update report of the *Resilient Calgary* strategy for the Corporate Record; and
3. Direct Administration to provide an annual update report of the *Resilient Calgary* strategy to the Priorities and Finance Committee.

For: (7): Mayor Nenshi, Councillor Chu, Councillor Carra, Councillor Davison, Councillor Sutherland, Councillor Woolley, and Councillor Farrell

**MOTION CARRIED**

7.3 Resilient Roofing Rebate Program, PFC2021-0575

Mayor Nenshi declared a Pecuniary Interest and abstained from discussion and voting with respect to Report PFC2021-0575, because of financial implications.

Mayor Nenshi left the Council Chamber at 11:05 a.m. and Vice-Chair Chu assumed the Chair remotely.

The following documents were distributed with respect to Report PFC2021-0575:

- A letter of support from Paul Kovacs, Executive Director, Institute for Catastrophic Loss Reduction; and
- A presentation entitled "Resilient Roofing Rebate Program – PFC2021-0575: Response to Mitigating the Impacts of Severe Weather Events in Calgary – PFC2021-0194."

**Moved by** Councillor Woolley

That with respect to Report PFC2021-0575, the following be approved:

That the Priorities and Finance Committee recommend that Council:

1. Approve \$2.175 million from the Fiscal Stability Reserve investment income for one-time operating budget to fund year one of the Resilient Roofing Rebate Program.
2. Approve the Resilient Roofing Rebate Program as identified in Attachment 2, and direct Calgary Building Services to return to Priorities and Finance Committee no later than Q2 2022 with a monitoring report on the program's progress, lessons learned, and approach for the subsequent years of the program.

For: (5): Councillor Carra, Councillor Davison, Councillor Sutherland, Councillor Woolley, and Councillor Farrell

Against: (1): Councillor Chu

**MOTION CARRIED**

Mayor Nenshi resumed the Chair at 11:25 a.m. after the vote was declared and Councillor Chu returned to his regular seat in Committee remotely.

7.4 Post-Pandemic Economic Recovery, PFC2021-0579

A presentation entitled "PFC2021-0579 Post-Pandemic Economic Recovery" was distributed with respect to Report PFC2021-0579.

Councillor Gondek returned to the Remote Meeting at 11:34 a.m.

**Moved by** Councillor Farrell

That with respect to Report PFC2021-0579, the following be approved:

That the Priorities and Finance Committee, direct Administration:

1. Through the Service Owner Network, to track progress on Calgary's post-pandemic economic recovery support, including communication with the broader Calgary community;
2. To report on economic recovery progress, including benefits realized, every six months starting with a 2021 November update, with Briefings thereafter; and
3. To incorporate concluding recommendations of the Economic Resilience Task Force (ERTF) in the 2021 November update.

For: (8): Mayor Nenshi, Councillor Chu, Councillor Carra, Councillor Davison, Councillor Gondek, Councillor Sutherland, Councillor Woolley, and Councillor Farrell

**MOTION CARRIED**

7.5 Real Estate Working Group Update (Verbal), PFC2021-0237

This Item was dealt with following Item 7.1.

A presentation entitled "Priorities and Finance Committee: Real Estate Working Group Verbal Update - PFC2021-0237" was distributed with respect to Report PFC2021-0237.

The following speakers addressed Committee with respect to Report PFC2021-0237:

1. Paul Marsden, Colliers
2. Dave Mewha, Altus Group.

Councillor Gondek left the remote meeting at 10:30 a.m.

**Moved by** Councillor Sutherland

That with respect to Verbal Report PFC2021-0237, the following be approved:

That the Priorities and Finance Committee receive the presentation for the Corporate Record.

For: (7): Mayor Nenshi, Councillor Chu, Councillor Carra, Councillor Davison, Councillor Sutherland, Councillor Woolley, and Councillor Farrell

**MOTION CARRIED**

Committee then dealt with Item 7.2.

7.6 2020 Year-End Accountability Report, PFC2021-0221

A presentation entitled "PFC2021-0221 2020 Year-End Accountability Report: Reporting on the 2019-2022 Service Plans and Budgets " was distributed with respect to Report PFC2021-0221.

By General Consent, pursuant to Section 6(1) of Procedure Bylaw 35M2017, Committee suspended Section 78(2)(a) of the Procedure Bylaw in order to complete the remaining Agenda Items prior to the lunch recess.

Mayor Nenshi left the Chair at 12:10 p.m. and Vice-Chair Chu assumed the Chair remotely. Mayor Nenshi resumed the Chair at 12:12 p.m. and Councillor Chu returned to his regular seat on Committee remotely.

**Moved by** Councillor Woolley

That with respect to Report PFC2021-0221, the following be approved:

The Priorities and Finance Committee recommends that Council receive this report for the Corporate Record.

For: (8): Mayor Nenshi, Councillor Chu, Councillor Carra, Councillor Davison, Councillor Gondek, Councillor Sutherland, Councillor Woolley, and Councillor Farrell

**MOTION CARRIED**

7.7 Designated Officer Bylaw and Banking Delegation of Authority, PFC2021-0559

**Moved by** Councillor Chu

That with respect to Report PFC2021-0559, the following be approved:

That the Priorities and Finance Committee recommend Council:

1. Approve adoption of a bylaw continuing the position of City Treasurer and establishing the positions of Chief Financial Officer and Deputy City Treasurer as designated officers pursuant to section 210 of the *Municipal Government Act*;
2. Repeal the current Banking Resolution; and
3. Repeal Bylaw 31M2004

For: (8): Mayor Nenshi, Councillor Chu, Councillor Carra, Councillor Davison, Councillor Gondek, Councillor Sutherland, Councillor Woolley, and Councillor Farrell

**MOTION CARRIED**

7.8 Conclusion of Cash-in-Lieu Parking Program and Fund Allocation, PFC2021-0487

Mayor Nenshi left the Chair at 12:17 p.m. and Vice-Chair Chu assumed the Chair remotely. Mayor Nenshi resumed the Chair at 12:20 p.m. and Councillor Chu returned to his regular seat on Committee remotely.

A presentation entitled "Conclusion of Cash-in-Lieu Parking Programs and Fund Allocation " was distributed with respect to Report PFC2021-0487.

**Moved by** Councillor Woolley

That with respect to Report PFC2021-0487, the following be approved:

That the Priorities and Finance Committee recommend that Council direct Administration to:

1. Transfer \$750,000 from the Cash-in-Lieu of Parking Fund to program 854 (17 Ave Redevelopment Program) for improvements to 16 Avenue SW; and further direct Administration to work with the 17th Avenue Business Improvement Area (BIA) on final design of the project.

**ROLL CALL VOTE:**

For: (5): Mayor Nenshi, Councillor Carra, Councillor Gondek, Councillor Woolley, and Councillor Farrell

Against: (3): Councillor Chu, Councillor Davison, and Councillor Sutherland

**MOTION CARRIED**

**Moved by** Councillor Woolley

That with respect to Report PFC2021-0487, the following be approved:

That the Priorities and Finance Committee recommend that Council direct Administration to:

2. Transfer funds from the Cash-in-Lieu of Parking Fund to the Parking Revenue Reinvestment Reserve using the table in attachment 2.
3. Review the terms of the Parking Revenue Reinvestment Reserve to earn investment income.
4. Direct that Attachment 3 remain confidential under Section 24 (Advice from officials) of the *Freedom of Information and Protection of Privacy Act*.

**MOTION CARRIED**

**8. ITEMS DIRECTLY TO COMMITTEE**

**8.1 REFERRED REPORTS**

None

**8.2 NOTICE(S) OF MOTION**

**Moved by** Councillor Carra

That the following Notices of Motion be forwarded to the 2021 May 10 Combined Meeting of Council for consideration:

8.2.1 Notice of Motion - Pilot Program - Public Consumption of Alcohol in Calgary Parks, PFC2021-0618

8.2.2 Notice of Motion - Long Term Planning for the Bridgeland Place Building – 736 McDougall Court NE, PFC2021-0619

For: (8): Mayor Nenshi, Councillor Chu, Councillor Carra, Councillor Davison, Councillor Gondek, Councillor Sutherland, Councillor Woolley, and Councillor Farrell

**RRIED**

9. URGENT BUSINESS

None

10. CONFIDENTIAL ITEMS

10.1 ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES

None

10.2 URGENT BUSINESS

None

11. ADJOURNMENT

**Moved by** Councillor Chu

That this meeting adjourn at 12:50 p.m.

**MOTION CARRIED**

The following items have been forwarded on to the 2021 May 10 Combined Meeting of Council:

CONSENT

- Resilient Calgary Strategy Update Report, PFC2021-0429
- Resilient Roofing Rebate Program, PFC2021-0575
- 2020 Year-End Accountability Report, PFC2021-0221
- Conclusion of Cash-in-Lieu Parking Program and Fund Allocation, PFC2021-0487

ITEMS FROM OFFICERS, ADMINISTRATION AND COMMITTEES

- Designated Officer Bylaw and Banking Delegation of Authority, PFC2021-0559
- Notice of Motion - Pilot Program - Public Consumption of Alcohol in Calgary Parks, PFC2021-0618
- Notice of Motion - Long Term Planning for the Bridgeland Place Building – 736 McDougall Court NE, PFC2021-0619

The next Regular Meeting of the Priorities and Finance Committee is scheduled to be held on 2021 May 18 at 9:30 a.m.

CONFIRMED BY COMMITTEE ON

---

CHAIR

---

ACTING CITY CLERK



# BRIEFING

Page 1 of 1

Item # 5.2.1

**Chief Financial Officer's Briefing to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0677**

## **Status of Outstanding Motions and Directions**

---

### **PURPOSE OF BRIEFING**

Identify outstanding items for the Priorities and Finance Committee as of 2021 April 09.

Due to the timing of the last meeting of Priorities and Finance Committee and the next Council meeting, this briefing does not capture decisions made at Priorities and Finance Committee on 2021 April 18. Rather this briefing and attachment will be updated for the June Priorities and Finance Committee meeting.

### **SUPPORTING INFORMATION**

On 2012 April 03, the Priorities and Finance Committee directed Administration to provide the Committee with a schedule of Status of Outstanding Motions and Directions.

This report is in alignment with the mandate of the Priorities and Finance Committee.

This report tracks outstanding motions and directions from the Priorities and Finance Committee to Administration. By continuing to maintain and update the monthly status of outstanding motions and directions, Administration is attempting to mitigate the risk of not responding to or losing track of, Committee and Council direction. Any risks associated with specific directions or motions in Attachment 1 will be dealt with in the context of the report on that specific direction or motion.

### **ATTACHMENT(S)**

1. Attachment 1 – Status of Outstanding Items for the Priorities and Finance Committee



DATE BACK TO COMMITTEE	ITEM	DATE OF REQUEST	SOURCE	SUBJECT
As soon as possible	<b>COUNCIL EXPENSE AUDIT FOLLOW-UP</b>	2020 October 13	PFC2020-1143	That the Priorities and Finance Committee:  2. Direct the Council Expense Working Group to report back to the Priorities and Finance Committee as soon as possible on the findings related to certain hosting expenses where follow up or location of the named attendees is still outstanding for the PricewaterhouseCoopers (PWC) report.
	<b>EXPENSE INVESTIGATION FOLLOW UP – COUNCILLOR MAGLIOCCA WARD 2 HOSTING</b>	2021 February 16	PFC2021-0260	This item was referred back to Administration during Confirmation of Agenda.
2018 Q4	<b>PROPOSED CODE OF CONDUCT FOR ELECTED OFFICIALS BYLAW26M2018</b>	2018 May 28	PFC2018-0554	That with respect to PFC2018-0554, the following Motion arising be adopted:  That Council direct the Ethics Advisor to investigate how to enhance reporter protection, including but not limited Councillors staff and Report back to the Priorities and Finance Committee no later than Q4 2018.
2019 Q2	<b>ECONOMIC DEVELOPMENT INVESTMENT FUND GOVERNANCE AND TERMS OF REFERENCE</b>	2018 March 06	PFC2018-0187	7. As part of the proposed reporting process for the Wholly Owned Subsidiary, direct Administration to work with the EDIF Wholly Owned Subsidiary to bring a report to the Priorities & Finance Committee that reviews the pilot EDIF governance structure no later than 2019 Q2.

2021 (Revised under C2020-0698)	<b>OPPORTUNITY CALGARY INVESTMENT FUND GOVERNANCE STRUCTURE</b>	2019 July 02	PFC2019-0841	Deferral.
2022 Q1       2020 January (Revised under C2020-0698 2021 Q2)	<b>CITY PLANNING &amp; POLICY PRIORITIES AND WORKPLAN REPORT</b>	2021 February 08	PUD2021-0046	<p>The Standing Policy Committee on Planning and Urban Development recommend that Council direct Administration to adjust the reporting timelines for:</p> <ol style="list-style-type: none"> <li>5. New community full operating cost model (PFC2019-1062), to return to Council, through Priorities and Finance Committee, no later than 2022 Q1.</li> </ol> <ol style="list-style-type: none"> <li>5. Explore the phasing out of the growth management overlay, and report back to the 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.</li> </ol>
2020 Q2  (Revised under C2020-0698) Q1 2021	<b>RESILIENT CALGARY</b>	2019 June 17	PFC2019-0617	<p>That with respect to Report PFC2019-0617, the following be adopted:</p> <ol style="list-style-type: none"> <li>2. Direct Administration to report back with an update to the Priorities and Finance Committee no later than Q2 2020.</li> </ol>

2020 Q4	<b>NOTICE OF MOTION PROCESS FLOW AND CHECKLIST</b>	2019 September 30	PFC2019-0913	That Council:
2021 March		2020 December	PFC2020-1374	4. Direct the City Clerk's Office to provide an update of this process to the Priorities and Finance Committee by Q4 2020.
2021 July	<b>DEFERRAL REQUEST – UPDATES TO THE PROCEDURE BYLAW DUE Q1 2020</b>	2021 March 16	PFC2021-0226	Deferral to 2021 March
				Deferral to 2021 July
2021 Q1	<b>NOTICE OF MOTION – RENAMING JAMES SHORT PARK AND JAMES SHORT PARKADE</b>	2020 July 20	PFC2020-0802	That Council:
				1. Direct Administration to revise the Municipal Naming, Sponsorship and Naming Rights Policy CP2016-01 as follows:
				2. DIRECT administration to develop a process by which citizen requests to re-examine an existing name of a city asset will be handled, ensuring that any such process involve community input with final decision-making by Council through the Priorities and Finance Committee as per the existing policy. In addition, this must also involve consultation with the Anti-Racism Advisory Committee once it is operational, with the report returning through the Priorities and Finance Committee no later than Q1 2021.
2021 Q4	<b>DEFERRAL REQUEST – REPORTING ON RE- EXAMINATION OF CITY ASSET NAMES PROCESS TO Q4 2021</b>	2021 March 16	PFC2021-0284	Deferral request.

2021 Q2	<b>UNIVERSITY OF CALGARY – CITIZEN SCIENTIST WEARABLES PROGRAM</b>	2019 September 30	PFC2019-1096	<p>That with respect to Report PFC2019-1096, the following be adopted: That Council:</p> <ol style="list-style-type: none"> <li>1. Approve this application for the Council Innovation Fund for the University of Calgary Citizen Scientist Wearable Program in the amount of \$57,500; and</li> <li>2. Direct Administration to report back to Priorities and Finance Committee indicating how the money was spent and the outcomes of the projects no later than Q2 2021, as per the Council Innovation Fund Terms of Reference.</li> </ol>
2021 Q2	<b>FINANCIAL TASK FORCE RECOMMENDATIONS – IMPLEMENTATION NEXT STEPS</b>	2020 December 01	PFC2020-1351	<p>That the Priorities and Finance Committee recommends that Council:</p> <ol style="list-style-type: none"> <li>2. Direct Administration to incorporate engagement plan implications in the 2021 Q2 Semi-Annual FTF Implementation Update Report to the Priorities and Finance Committee.</li> </ol>

2021 Q2	<b>NEW COMMUNITY GROWTH STRATEGY</b>	2020 November 01	PFC2020-0963	<p>That Report PFC2020-0963 be amended by adding the following:</p> <p>6. That Council direct Administration to work with Belvedere landowners and consider options for adjustments/ reallocation and sequencing of existing GMO removals and proposed Business Cases for targeted GMO removals along the 17 AV MAX Purple BRT transit corridor.</p> <p>That the following proposed amendments, Recommendations 7 and 8, be referred to Administration until early results are available from Recommendation 6 and to identify a funding source for this work to report to Council through the Priorities and Finance Committee as soon as possible:</p> <p>7. Establish a funding and timing framework for the prioritization of the 17 AV MAX Purple BRT transit corridor; and,</p> <p>8. Report back to Priorities and Finance Committee no later than Q2 of 2021.</p> <p>That with respect to Report PFC2020-0963, the following Motion Arising be adopted:</p> <p>Council directs Administration to report to Council through Priorities and Finance no later than Q1 2021 with a report on the development of the aforementioned framework, business case evaluation template, and any necessary resources to ensure strategic alignment between the City's approved climate targets and future growth decision-making.</p>
------------	--	---------------------	--------------	---

2021 April	<b>NOM – PROVIDING INCENTIVE TO RESIDENTIAL DEVELOPMENT IN THE DOWNTOWN CORE</b>	2020 December 14	C2020-1439	<p>That with respect to Notice of Motion C2020-1439, the following be adopted, as amended:</p> <p>NOW THEREFORE BE IT RESOLVED that Council direct City Administration to explore the potential creation of regulatory and financial investment incentives for the development of new high-density residential complexes and the conversion of office buildings to various forms of residential occupancy or other uses within the downtown generally, but with a focus on the Downtown Core, to coordinate with the work of the Real Estate Working Group and Urban Initiatives Downtown Strategy team.</p> <p>AND FURTHER BE IT RESOLVED that Administration report to the Priorities and Finance Committee with its findings no later than the end of April 2021.</p>
2021 Q3	<b>OFF-SITE LEVY INVESTMENT INCOME Q1 UPDATE (VERBAL)</b>	2021 February 16	PFC2021-0246	That the Priorities and Finance Committee recommend that Council direct Administration to provide the final off-site levy investment income update to Council through the Priorities and Finance Committee no later than 2021 Q3.
2021 Q3	<b>BENEFIT DRIVEN PROCUREMENT UPDATE</b>	2021 March 16	PFC2021-0395	<p>That the Priorities and Finance Committee recommend that Council:</p> <p>4. Direct Administration to return to the Priorities and Finance Committee with a Council policy inclusive of Benefit Driven Procurement no later than Q3 2021.</p>



2021 September	<b>COUNCIL INNOVATION FUND APPLICATION FOR VIRTUAL REALITY FIRE AND LIFE SAFETY EDUCATION PILOT</b>	2020 July 14	PFC2020-0784	<p>That with respect to Report PFC2020-0784, the following be adopted:</p> <p>That Council:</p> <ol style="list-style-type: none"> <li>1. Approve this one-time application to allocate \$75,000 from the Council Innovation Fund for the Virtual Reality Fire and Life Safety Education Pilot.</li> <li>2. Direct Administration to report back to the Priorities and Finance Committee on the outcomes of this project by September 2021.</li> </ol>
2021 Q4	<b>HAWKWOOD OUTDOOR RECREATION FACILITY PROJECT</b>	2020 July 20	PFC2020-0696	<p>That with respect to Report PFC2020-0696, the following be adopted:</p> <p>That Council:</p> <ol style="list-style-type: none"> <li>1. Consider this application for the Council Community Fund for the Hawkwood Community Capital project in the amount of \$500,000 one-time funding request; and</li> <li>2. Direct Councillor Magliocca's office and the applicant to report back to the Priorities and Finance Committee within 12 months of project completion.</li> </ol>
2021 Q4	<b>COUNCIL INNOVATION FUND APPLICATION – HERITAGE CALGARY NAMING, RENAMING AND COMMEMORATION PROCESS DESIGN</b>	2021 February 16	PFC2021-0096	<p>That Council:</p> <ol style="list-style-type: none"> <li>2. Direct Administration to report back to the Priorities and Finance Committee on outcomes no later than Q4 2021.</li> </ol>

2021 Q4	<b>CIF APPLICATION – CALGARY ECONOMIC DEVELOPMENT LEARNING CITY COMMUNITY PILOT</b>	2021 February 16	PFC2021-0189	<p>That the Priorities and Finance Committee recommend that Council:</p> <p>2. Direct Administration to report back to the Priorities and Finance Committee on outcomes no later than Q4 2021.</p>
2021 Q4	<b>GOLF COURSE OPERATIONS EXPRESSION OF INTEREST &amp; REAL ESTATE ASSESSMENT</b>	2020 October 13	PFC2020-0952	<p>That the Priorities and Finance Committee recommend that Council receive for the Corporate record the results of the assessment of market interest in a long-term contract to provide public golf service, and direct Administration to:</p> <p>a. Direct RE&amp;DS to bring back a real estate feasibility assessment that substantiates Corporate needs at the remaining land at Richmond Green, and the Richmond Green Operations Workplace Centers (OWC), to determine further disposition opportunities and report to Priorities and Finance Committee (PFC) on or before Q4 2021;</p> <p>That Council add a new Recommendation #5, as follows, and renumber:</p> <p>5. Direct administration to develop a scoping report for the costs of the Request for Proposal for the contracting out of golf course operations, and a confidential Labour Relations Report returning to Council through the Priorities and Finance Committee for approval prior to proceeding and releasing the Request for Proposal as soon as possible.</p>

2021 Q4	<b>MOTION ARISING FROM GUIDEBOOK FOR GREAT COMMUNITIES</b>	2021 March 22	PUD2021-0015	<p>That Council: Direct Administration to develop a more user-friendly and inclusive Public Hearing process that includes but is not limited to:</p> <ol style="list-style-type: none"> <li>1. Creating a collaboration between the City Clerk and the Chief Information Technology Officer to identify the best method to implement an integrated and automated registration system for Public Hearings;</li> <li>2. Exploring the feasibility of holding Public Hearings at more accessible times; and</li> <li>3. Developing an endorsement statement for members of the public to sign when they register for Public Hearings which outlines the City of Calgary's commitment to anti-racism, equity, diversity and inclusion.</li> </ol> <p>Returning to the next Priorities and Finance Committee no later than end of Q4 2021 with the recommended approach.</p>
2021 Q4	<b>CITY OF CALGARY CITIZEN PRIVACY DATA PRACTICES: 2019-2021 PRIVACY FRAMEWORK WORKPLAN DELIVERABLES</b>	2021 March 22	C2021-0373	<p>That with respect to report C2021-0373, the following be adopted as amended:</p> <ol style="list-style-type: none"> <li>2. Direct the City Clerk to provide a status update on the <i>Privacy Management Program Framework</i> within the annual report to the Priorities and Finance Committee on The City's Privacy Management Program; and</li> <li>3. Report back to PFC with a work plan no later than Q4 2021 with the intention of bringing resource requests, if any, to the budget adjustment process in November 2021.</li> </ol>

ANNUALLY	<b>CITY OF CALGARY CITIZEN PRIVACY DATA PRACTICES</b>	2020 January 27	C2020-0039	2. Direct the City Clerk/FOIP Head to provide an annual report to the Priorities and Finance Committee on The City's Privacy Management Program.
2022 January	<b>2020 GROWTH STRATEGY MONITORING REPORT</b>	2020 October 19	PFC2020-0962	That with respect to Report PFC2020-0962, the following be approved:  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.
2022 February	<b>CITYWIDE GROWTH STRATEGY INDUSTRIAL</b>	2021 March 03	PUD2021-0150	That the Standing Policy Committee on Planning and Urban Development recommends that Council direct Administration to undertake the Citywide Growth Strategy: Industrial Action Plan as identified in Attachment 3, and report back to Council through the Priorities and Finance Committee no later than 2022 February.
2022 February	<b>MOUNT ROYAL UNIVERSITY – AI DIGITAL TWIN FOR TRUCKS</b>	2021 February 16	PFC2021-0025	That with respect to Report PFC2021-0025 the following be approved: That the Priorities and Finance Committee:  2. Direct Administration to report back to the Priorities and Finance Committee indicating how the money was spent and the outcomes of the project within 12 months of its end date, as per the Council Innovation Fund Terms of Reference.
2022 Q1	<b>HERITAGE CONSERVATION TOOLS AND INCENTIVES UPDATE REPORT</b>	2020 July 27	PUD2020-0758	That Council direct Administration to:  b. Return to the Priorities and Finance Committee no later than Q1 2022 with the residential tax credit financial incentive package for consideration in the 2023-2026 budget deliberations.

2022 Q2	<b>SUPPLEMENTAL REPORT – RESPONDING TO COUNCIL QUESTIONS ON THE COUNCIL INNOVATION FUND APPLICATION FOR DOWNTOWN ACCELERATOR PROGRAM – 1MILLION SQUARE FEET</b>	2020 May 25	C2020-0600	That with respect to Report C2020-0600, the following be adopted:  4. Direct Administration to report back to the Priorities and Finance Committee on the outcomes of this project by Q2 2022.
2022 Q2	<b>WATER UTILITY INDICATIVE RATES – REVISED FOR 2021 AND 2022 AND FINANCIAL PLAN UPDATE</b>	2020 October 19	PFC2020-1140	c. Direct Administration to report back on rates and limits for Wastewater extra strength surcharge parameters by Q2 2022.
2022 Q4	<b>UPDATE ON MOVING TO AN EXTERNAL OPERATOR FOR CITY GOLF COURSES</b>	2021 February 16	PFC2021-0045	That Council:  Refer this Item to Administration to consider after the implementation of the Golf Course Sustainability Framework, returning to Council through the Priorities and Finance Committee with a recommendation on whether to continue with the contracting out of all or some golf course operations no later than Q4 2022.
2022 Q4	<b>CIVIC CENSUS REVIEW</b>	2020 February 03	PFC2020-0094	3. Direct the Returning Officer to report back with an evaluation of discussions with Statistics Canada and the provincial government and the ongoing value of a civic census by Q4 2022.

2023 Q1	<b>COUNCIL INNOVATION FUND REQUEST FOR THE FUTURE OF STEPHEN AVENUE – ACTIVATE + EXPERIMENT</b>	2020 March 10	PFC2020-0274	<p>That the Priorities and Finance Committee recommends that Council:</p> <p>1. Approve this application to the Council Innovation Fund for The Future of Stephen Avenue: Activate &amp; Experiment, in the amount of \$300,000; and</p> <p>2. Direct Administration to report back to Priorities and Finance Committee on the outcomes of this project by Q1 2023 as per the fund guidelines.</p>
2023 Q2	<b>ROADSIDE NATURALIZATION PILOT</b>	2020 February 24	C2020-0265	<p>That with respect to Report C2020-0265, the following be adopted:</p> <p>That Council:</p> <p>4. Direct Administration to report back to the Priorities and Finance Committee on the outcomes of this project no later than Q2 2023, with interim reports on project progress and return-on-investment as information becomes available.</p>

**Community Services Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0556  
Page 1 of 4**

**Calgary Economic Development - Economic Strategy Update**

**RECOMMENDATION:**

That the Priorities and Finance Committee receive this report for the Corporate Record.

**HIGHLIGHTS**

- This report provides an update on implementation of *Calgary in the New Economy: An economic strategy for Calgary* (the Strategy) since the last update to the Priorities and Finance Committee in 2020 September.
- **What does this mean to Calgarians?** The Strategy, approved by Council and stewarded by Calgary Economic Development Ltd., is a roadmap that guides collaborative community economic development activities and establishes shared priorities across government, industry, community and educational institutions to support a strong, vibrant and diversified economy.
- **Why does this matter?** Given the challenging economic conditions in 2020 and significant impact of COVID-19, having shared goals, leveraging resources, and undertaking collective action to strengthen the foundations of a strong and vibrant local economy is critical. With its focus on innovation and technology, attraction of new companies focused in these areas, and the support for the rapid adoption of digital technologies during COVID, *Calgary in the New Economy* is proving to be the right strategy for Calgary's recovery.
- Attachment 2 provides a detailed update on Strategy implementation from Calgary Economic Development Ltd., on behalf of the community. It presents information about the activities and results within each of the Strategy's four pillars: Talent, Innovation, Place and Business Environment.
- The foundations of the current Strategy continue to be the right approach to a quickly evolving environment. In 2021 Calgary Economic Development is undertaking a minor refinement of the Strategy to pressure test the Strategy against current and future global trends to ensure long term shared prosperity and resilience, and better monitor and measure progress towards achieving outcomes under each pillar and the vision of the Strategy. The Strategy continues to guide The City's work including alignment with plans and strategies including Calgary's Greater Downtown Plan approved 2021 April 26 (PUD2021-0220).
- On 2020 September 8 Council received PFC2020-0969 Economic Strategy Update for information.
- Strategic Alignment to Council's Citizen Priorities: A prosperous city
- Background and Previous Council Direction is included as Attachment 1.

**DISCUSSION**

Calgary Economic Development Ltd., a City of Calgary wholly owned subsidiary and Civic Partner, stewards implementation of the Council approved *Calgary in the New Economy: An economic strategy for Calgary* (the Strategy). The Strategy is delivered through a coordinated community effort that brings together community and business leaders, educators, government, entrepreneurs, innovators and partners to collectively establish and build on Calgary's core strengths and shared priorities. Together, stakeholders work collectively towards the Strategy's

**Community Services Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0556  
Page 2 of 4**

## **Calgary Economic Development - Economic Strategy Update**

vision that *Calgary is the city of choice in Canada for the world's best entrepreneurs who are embracing advanced technology to solve the world's greatest challenges: cleaner energy, safe and secure food, efficient movement of goods and people, and better health solutions.* The Calgarians who led the creation of the Strategy are its leading ambassadors, championing its implementation within their organizations and sectors, and the broader community.

The Strategy is organized into four pillars: Talent, Innovation, Place, and Business Environment. It focuses on seven key sectors: energy, agribusiness, transportation and logistics, tourism, creative industries, life sciences and financial services. Governance of each pillar is structured to align with the work on that particular pillar, and includes community leaders and diverse stakeholders. Calgary Economic Development leads the Talent and Innovation pillars, and has representatives on the Business Environment and Place pillars. The City of Calgary leads the Business Environment pillar with key support provided for internal collaboration and coordination through the Business and Local Economy team. The Innovation pillar is co-chaired by Platform Calgary, a Civic Partner, and Calgary Economic Development. As the steward, Calgary Economic Development leads the collective actions, supports the overall resilience and relevance of the Strategy, and annually provides a progress update to the Priorities and Finance Committee.

A detailed progress update from Calgary Economic Development including performance measures, activities and results for each of the four pillars is included in Attachment 2 and results are presented in an updated format. Due to the impact of COVID-19, the last progress report was presented to the Priorities and Finance Committee in 2020 September. To avoid duplication of information, key activities reported for each area of focus are reported for the period from 2020 September to 2021 March. For data consistency over time, key performance measures are reported for the full year of 2020.

During 2020, economic conditions in Calgary continued to shift, however, the fundamental approach of the Strategy remained consistent. With changing economic conditions, 2021 is the right time to pressure test the Strategy against current and future global trends and ensure the Strategy is resilient and meets the needs of the community. This work will also identify stronger interconnections between each of the pillars.

A snapshot of key highlights from each pillar in 2020 that are further detailed and expanded in Attachment 2 include:

**Talent:** Programs supported Calgarians to transition to new careers, and connect with each other and local organizations; SAIT launched a new Digital Transformation Talent Hub downtown; Calgary Economic Development ran a globally recognized and award winning Live Life. Love Tech. campaign with objective to changing perceptions and attracting talent; and AltaML announced a new applied AI/ML lab that will provide experiential learning opportunities through internships.

**Innovation:** In 2020, Calgary experienced a record venture capital deal volume and the largest investment funding rounds in Alberta's history took place (Series A and Series B funding); Calgary saw its fourth start up company valued at \$1 billion in two years - a "unicorn" company (Benevity); and a new study estimated Calgary's investment on technology and services that will enable a digital transformation of business practices, products and services will be \$7.5 billion by 2022. At the end of 2020, Calgary Economic Development transitioned the successful Startup Calgary program to Platform Calgary to better serve entrepreneurs.



**Community Services Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0556  
Page 3 of 4**

## **Calgary Economic Development - Economic Strategy Update**

---

**Place:** Council approved the Greater Downtown Plan to update the current City Centre Plan on April 26 2021 (PUD2021-0220); Council approved the Green Line LRT project; and major capital projects reached key milestones including the Arts Commons Transformation Project, Glenbow Museum renovation, BMO Expansion, and Events Centre.

**Business Environment:** COVID-19 relief measures for businesses included waived fees, tax relief, temporary patios; planning was underway for a Digital Playground in the downtown to test and pilot new technology through an expedited process and position Calgary as a national leader in 5G; there was an increased use of The City's online permitting services; and The City established a Business Sector Task Force and Economic Resilience Task Force.

For full details and results, please refer to Attachment 2.

Following previous direction from Council, the next update to the Priorities and Finance Committee will be by 2022 May.

### **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

The detailed progress update included in Attachment 2 was gathered by Calgary Economic Development through stakeholder engagement and consultation with its broad network of business leaders, community leaders and organizations, entrepreneurs, innovators, and members of Administration that collaboratively implement the Strategy. The outcomes and indicators in Attachment 2 were developed collaboratively by Calgary Economic Development and key stakeholders within each pillar.

### **IMPLICATIONS**

#### **Social**

In terms of supporting the social well being of Calgary and Calgarians, one of the core values of the Strategy is inclusion, with inclusivity and diversity of different populations built into several pillars, most notably Talent and Place. Related outcomes in the Strategy include that Calgary is safe, welcoming and diverse; is a community that values individual contributions and provides the opportunity to make a meaningful life and has a shared sense of ownership in decision-making and implementing initiatives.

#### **Environmental**

Implementation of the Strategy, in particular the work under the Place pillar, aligns with the *Resilient Calgary* strategy that focuses on the future of Calgary's natural infrastructure, and developing future-ready infrastructure. The Place pillar speaks to building a resilient city, and aligns with the 2020 Municipal Development Plan and Transportation Plan.

**Community Services Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0556  
Page 4 of 4**

**Calgary Economic Development - Economic Strategy Update**

---

**Economic**

The Strategy guides Calgary Economic Development, The City, community, and other stakeholder's economic development efforts. The governance and implementation model supports a collaborative approach to economic development in Calgary where stakeholders work together towards shared goals.

As the impact of COVID-19 on the global economy continues to shift the environment, the Strategy's focus on digital transformation across Calgary's key industrial sectors continues to be well positioned to guide Calgary's economic development.

**Service and Financial Implications**

*Existing operating funding - base*

\$10,078,000

In 2020, \$10,078,000 million in operating funding was approved for Calgary Economic Development in the One Calgary budget under the Economic Development and Tourism line of service. Calgary Economic Development stewards the Strategy that guides the services and investments across the line of service. Through implementation of the Strategy, the line of service supports a diversified and resilient economy including a vibrant city centre, encourages employment and growth, helps build Calgary's global reputation, encourages business investment, and supports entrepreneurship and investment.

**RISK**

As steward of the Strategy, Calgary Economic Development Ltd. is responsible for identifying and mitigating risks related to implementation of the Strategy, including assessing the capacity of partners to deliver on actions.

To manage risk, Calgary Economic Development has an Enterprise Risk Matrix in place and implementation of the Strategy is included on Calgary Economic Development's corporate balanced scorecard that is monitored by its board of directors.

**ATTACHMENTS**

1. Background
2. Calgary in the New Economy: Progress Report

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform
Sonya Sharp	Business & Local Economy	Consult

# Background

Economic Strategy Update

## Context

This report provides an update on implementation of Calgary in the New Economy: An economic strategy for Calgary since the last update in 2020 September.

## Previous Council Direction

Please see below for a timeline of the previous Council direction related to this matter.

DATE	DIRECTION/DESCRIPTION	REPORT NUMBER
9/8/2020	That the Priorities and Finance Committee recommends that Council receive this report for information.	PFC2020-0969 Economic Strategy Update
5/19/2019	That the Priorities and Finance Committee recommends that Council receive this report for information.	PFC2020-0604 Economic Strategy Update
3/19/2018	That Council 1. Approve the creation of a new non-profit Wholly Owned Subsidiary of The City of Calgary to govern the Economic Development Investment Fund (EDIF); 2. Subject to the approval of Recommendation 1, and the holding of a shareholder meeting: a. Endorse the Mayor to serve as an ex-officio member on the board of directors of the Wholly Owned Subsidiary; and b. Endorse the current Council appointment to the Calgary Economic Development Ltd. board of directors (currently Councillor Jeff Davison) as an ex-officio member on the board of directors of the Wholly Owned Subsidiary. 3. Receive the biographies of the proposed EDIF Governance Board members for information; 4. Approve the EDIF Terms of Reference; 5. Approve the EDIF Reserve Terms and Conditions; 6. Approve the EDIF funding approval levels and decision-making authority as follows: a. Up to \$10 million, EDIF Wholly Owned Subsidiary; b. Greater than \$10 million, Priorities & Finance Committee and Council; and 7. As part of the proposed reporting process for the Wholly Owned Subsidiary, direct Administration to work with the EDIF Wholly Owned Subsidiary to bring a report to the Priorities & Finance Committee that reviews the pilot EDIF governance structure no later than 2019-Q2.	PFC2018-0187 Economic Development Investment Fund Governance and Terms of Reference

6/19/2017	That Council 1. Approve the creation of an Economic Development Investment Fund (EDIF); 2. Approve the conceptual scope and criteria for the EDIF; 3. Approve the intake model and governance structure of the EDIF; 4. Approve \$10 million from the Fiscal Stability Reserve (FSR) to initiate the short-term start-up of the EDIF; and Direct Administration to return to Council during the 2018 budget deliberations process in November 2017 to present terms of reference, and identify the long-term recommended value and funding sources of the EDIF.	C2017-0370 Economic Development Investment Fund
5/29/2017	That Council receive this report for information.	PFC2017-0472 10 Year Economic Strategy Update
4/10/2017	That Council 1. Receive this report for information. 2. Approve the release of \$325 thousand from the Community Economic Resiliency Fund to Calgary Economic Development for the pilot detailed in this report [Startup Calgary]; and 3. Request that Calgary Economic Development include evaluation results for the first year of the three-year pilot as part of the annual report on implementation of the 10 Year Economic Strategy by 2018 May.	PFC2017-0298 Community Economic Resiliency Fund-Innovation Funding
6/13/2016	That Council receive this report for information.	PFC-2016-0396 10 Year Economic Strategy Update
2/22/2016	That Council 1. Receive this report for information; and 2. Direct Calgary Economic Development to report back with Innovate Calgary and Administration to the Priorities and Finance Committee with a plan to develop an Innovation Framework for Calgary for approval no later than 2016 May prior to release of \$325 thousand of the \$7 million referenced in recommendation 1 of PFC2016-0081.	C2016-0176 Community Economic Resiliency Fund Report (PFC2016-0081) Supplementary Report

2/2/2016	<p>That the Priorities and Finance Committee recommend that Council: 1. Approve a one-time increase to operating budget program 449 - Calgary Economic Development by \$7 million from the Community Economic Resiliency Fund to carry out the initiatives detailed in Attachment 1 and direct Calgary Economic Development to report back on the use of the funds through their 10-Year Economic Strategy updates to the Priorities and Finance Committee; and that Administration Recommendation 4 contained in Report PFC2016-0081 be approved, as amended, as follows: That the Priorities and Finance Committee recommend that Council: 4. Direct Administration to provide a supplementary report to the 2016 February 22 Meeting of Council containing more information as requested at today's meeting, with respect to Recommendations 1 and 2.</p>	PFC2016-0081 Community Economic Resiliency Fund Report
12/15/2015	<p>That Council approve the 10 Year Economic Strategy Update (PFC2015-0821) and direct Calgary Economic Development to provide an annual report to the Priorities and Finance Committee no later than May each year, commencing 2016 May.</p>	PFC2015-0821 10 Year Economic Strategy Update



# ***Calgary in the New Economy: Progress Report***

---

**Calgary Economic Development is a conduit, connector, catalyst and storyteller that collaborates with stakeholders to advance economic growth and diversification.**

18 MAY 2021 PROGRESS REPORT TO PRIORITIES AND FINANCE COMMITTEE

## Executive Summary

*Calgary in the New Economy's* vision is for Calgary to be the city of choice in Canada for the world's best entrepreneurs who are embracing advanced technology to solve the world's greatest challenges: cleaner energy, safe and secure food, efficient movement of goods and people, and better health solutions. *Calgary in the New Economy* is primarily focused on the digital transformation and emerging trends across seven sectors identified as having the greatest potential to sustain economic growth and job creation in Calgary and region: energy, agribusiness, transportation & logistics, tourism, creative industries, life sciences and financial services.

Calgary is at an inflection point. The impact of COVID-19 and structural changes to the oil and gas sector as it transitions to a lower-carbon future created "twin economic challenges" for our city and Canada's energy industry. The pandemic also changed the way workforces worldwide interacted with where they live and the importance they placed on location. Despite the challenges in 2020 and 2021, the city and the province experienced positive signs of a changing economy.

It is exciting to showcase results of work done under *Calgary in the New Economy*:

- Calgary attracted \$353 million in venture capital investment in local companies in 2020 led by the technology sector with over 33 deals<sup>1</sup>, double the amount in 2019.
- Infosys, a global technology services company from India, announced plans to expand in Calgary that will create 500 jobs from 2021–2023.
- mCloud, a clean technology firm from Vancouver focused on ESG reporting using artificial intelligence, moved its headquarters to Calgary.
- Lovingly Made Ingredients, a United Kingdom (U.K.)-based company, established its Canadian headquarters in Calgary.
- Exro Technologies, an e-vehicle company from Vancouver, moved its headquarters to Calgary.
- National Capital Angel Organization (NACO) announced plans to set up a Western Canadian headquarters in Calgary.
- Endeavor, a global scaling accelerator, established its Canadian headquarters in Calgary.
- LodgeLink located the headquarters for its expanded company in Calgary, expecting to create 600 jobs, most in technology.
- The Southern Alberta Institute of Technology (SAIT) announced a \$30 million investment into a School for Advanced Digital Transformation (SADT). Opportunity Calgary Investment Fund (OCIF) invested \$8.2 million of \$19.8 million to create a downtown Digital Transformation (DX) Tech Hub to enable building foundational competencies for digital transformation in traditional industries.
- Startup Calgary moved to Platform Calgary to better serve local entrepreneurs.
- The Greater Downtown Plan, along with a Notice of Motion to incentivize office-to-residential conversions, was developed with strategic actions and investments to create a vibrant neighbourhood and the cultural and economic heart of the city.
- Calgary was identified as a national leader in 5G technology readiness, compared with peer cities in Canada, in a study conducted for Calgary Economic Development.
- Calgary post-secondary institutions saw 3,900 Science, Technology, Engineering, and Mathematics (STEM) student completions in 2020.

<sup>1</sup> Venture Capital Association of Alberta. March 24, 2021. Alberta posts a record year for venture capital investment, where 2020 saw C\$455 million invested across 51 deals. Retrieved from: <https://www.vcaa.ca/news/2020-alberta-record-year-of-investment>.



- The *Live Tech. Love Life.* campaign, showcasing Calgary's tech and innovation ecosystem, won several international awards. It helped increase perceptions of Calgary in target markets (Seattle, San Francisco, Toronto, and Vancouver) and 85 per cent of leaders (up five per cent year over year) and 73 per cent of workers (up eight per cent) have positive impressions of Calgary.

The highlights of accomplishments are aligned with the four pillars of *Calgary in the New Economy* - Talent, Innovation, People, and Business Environment. Each pillar supports and enables the others and this interaction is where the most significant impact occurs. As an example, a revitalized, vibrant greater downtown attracts people to its amenities and services; and becomes advantageous to support talent and company attraction and retention in the area.

2021 will likely be another defining year in Calgary with unprecedented change from the momentum that began late in 2020 continuing to build for years. *Calgary in the New Economy* has been the guiding strategy and OCIF has been a key tool to enable the momentum that will pay dividends for decades.

## HOW CALGARY RESPONDED TO COVID-19

It is also critical to highlight work done in response to COVID-19. The vision and direction established by *Calgary in the New Economy* has positioned Calgary to be resilient through disruptions and shocks such as COVID-19.

- Calgary Film Centre reopened after weeks of closure on June 12 for safe film and television production, one of the first jurisdictions in North America.<sup>2</sup>
- Creation of Connecting YYC<sup>3</sup> and YYC Business Marketplace, a job board for Calgarians displaced by COVID-19 and a platform to support local businesses, respectively, by Calgary Economic Development to ensure Calgary's local businesses survive through this disruption.
- An Economic Resilience Task Force, to identify strategies and opportunities to support economic recovery, and Business Sector Task Force, to hear from and support local businesses, were created to support businesses through initiatives like the digital main street program ShopHERE, to help businesses create online storefronts. The City also waved or froze business and development permit fees saving businesses \$2.2 million.
- The City of Calgary installed adaptive roadways on Memorial and Elbow Drives, 11<sup>th</sup> Street SE in Inglewood, and in Crescent Heights to provide more space for pedestrians and cyclists. The roadways were reinstated for 2021 and those in Inglewood and Crescent Heights are now permanent.
- The City allowed restaurants and bars to create temporary patios on public land. These initiatives proved successful and were continued in 2021.
- Commitment to maintaining Calgary's arts and culture was evident through proposed funding of the Arts Commons Transformation and Glenbow Museum Renovation.
- Mount Royal University launched BounceBack YYC engaging 80 bright minds and future civic leaders in a virtual hackathon to help accelerate the restart, recovery, and return of the Calgary experience economy.
- The Alberta Innovation Corridor advocated for local start-ups and gig workers to receive the emergency wage subsidy to retain critical talent.

<sup>2</sup> Retrieved from: <https://www.calgaryfilmcentre.com/resources>

<sup>3</sup> Retrieved from: <https://www.connectingyyc.com/>

## Highlights from 2020

### TALENT

- Two cohorts of EDGE-UP, a reskilling program aimed at displaced energy worker and funded by Future Skills Canada, helped over 100 workers develop skills to make mid-career transitions into Calgary's tech sector.
- SAIT's School of Advanced Digital Technology launched the Digital Transformation Talent Hub downtown (supported by \$8.2 million from OCIF).
- Calgary Economic Development launched Connecting YYC, an online platform to help Calgarians find jobs with local companies and help post-secondary students get work experience with local companies affected by COVID-19.
- AltaML launched the Applied Artificial Intelligence/Machine Learning Lab (supported by \$3.2 million from OCIF) to provide experiential learning opportunities tackling real-world problems. The program has drawn participants from global tech hot spots.
- The *Live Tech. Love Life* Campaign was deployed in key North American cities with a positive impact on perceptions, particularly in markets such as Seattle, San Francisco, and Vancouver where significant gains were made on perceptions of Calgary as a growing technology sector destination.
- Calgary Economic Development's talent attraction events, live and virtual, engaged with over 5,500 people. We worked with over 50 local companies to raise awareness about Calgary and employment opportunities in the technology and innovation ecosystem.

### INNOVATION

- 452 core tech companies now call Calgary home, demonstrating community support and progress towards achieving the north star goal of 1,000 core tech and 2,300 startup companies.
- Canadian Venture Capital Association reported record deal volume in Alberta in 2020 with \$455 million in 51 deals, double the 2019 record high. Calgary captured over 64 per cent of the deals and more than three quarters of the dollars invested, \$353 million in 33 deals.
- Two Calgary-based technology companies, Neo Financial and Symend, completed the largest Series A (\$50 million) and Series B (\$73 million) funding rounds, respectively, in recent Alberta history. Neo Financial was created at Harvest Builders, which received support from OCIF in 2020.
- Calgary saw its fourth unicorn valuation in two years: Benevity surpassed \$1 billion valuation as U.K.-based private equity investor Hg Capital bought majority control.
- International Data Corporation (IDC) Canada forecast Calgary companies will lead the \$20 billion that will be spent on digitalization across Alberta industries by 2024.
- Local investment is being generated by successful repeat technology company founders creating a healthy investment flywheel for new start-ups.
- The Life Sciences Innovation Hub at the University of Calgary, which received support from OCIF, has seen great demand, with 29 companies leasing lab and/or office space for 90 and 95 per cent occupancy rates in lab and office space, respectively. From April 2020 to March 2021, 12 new start-ups were incorporated.

## PLACE

- The Downtown Ambassador Program, part of the 9 Block Program, had approximately 1,300 interactions with community members, referred 200 people to social services supports, and conducted 350 wellness checks with members from Calgary's vulnerable population from September to December 2020.
- Greater Downtown Plan was developed to transform the greater downtown into a vibrant economic and cultural heart of Calgary integrating more residential, parks and modes of transportation, along with key infrastructure investments such as the BMO Centre. Expansion, Glenbow Museum Renovation, Arts Commons Transformation Project, New Event Centre<sup>4</sup>, Platform Calgary Innovation Centre and Parkade.
- Chinook Blast Winter Festival was planned and successfully held in February 2021, an achievement in adapting during COVID-19.
- The City of Calgary approved the Green Line LRT, Calgary's largest infrastructure project in history, and continues to work with the Government of Alberta to begin construction.
- Notice of Motion 2020-1439 Providing Incentive to Residential Development in the Downtown Core was passed.
- Tourism Calgary deferred and rescheduled 45 events, including securing the Curling Canada 2021 bubble, and pivoted its business support and marketing efforts to showcase Calgary amenities to local Calgarians.
- Adaptive roadways were instituted on Memorial Drive, Elbow Drive, 11 Street, and Crescent Heights to encourage activity in the outdoors; 11 Street and Crescent Heights have been made permanent, while all will continue in 2021.
- City of Calgary established its Anti-Racism Action Committee in 2020.

## BUSINESS ENVIRONMENT

- \$2.2 million saved in business costs from the City of Calgary COVID-19 Relief Package which included waived and deferred Planning & Development fees, property tax relief, Business Improvement Area tax relief, and deferral of waste, water, and recycling charges.
- Calgary was identified as a national leader in 5G readiness and preparedness, especially for the most municipally owned fibre in Canada and working with wireless service providers and other organizations to create a digital zone downtown to test and pilot new technologies.
- YYC Calgary International Airport saw an 11 per cent increase in air cargo landings from 2019 to 2020. YYC Calgary International Airport was one of only four airports open during COVID-19 and continued to lead the country in connecting flights (43 per cent of passengers are connecting, most are domestic).
- Use of the City of Calgary's online permitting services increased 43 per cent from 2019, reducing time and effort required to apply and receive required permits to start a business.
- Government of Alberta revised the Alberta film and television tax credit to be more competitive and capitalize on an increased demand for film production and attract more major productions to the region.
- City of Calgary set up a "film friendly" team to expedite film permitting process.
- Calgary is the first city in North America able to mass test unmanned aerial vehicle flight beyond line of sight, attracting collaborations such as SkySensus, led by Peraton Canada, bringing together Alberta-based small businesses: Canadian UAVs, AERIUM Analytics, and Foremost UAS Range.

---

<sup>4</sup> While there is long term commitment to build the Event Centre, it is currently paused to resolve budget and program requirement challenges.

## Alignment and Engagement in 2020

*Calgary in the New Economy* is a beacon for citizens and businesses in Calgary and all orders of government as the vision for our future. From the outset, Calgary Economic Development worked closely with The City of Calgary, civic partners, and community stakeholders to ensure the economic strategy aligned with other initiatives of The City of Calgary and other stakeholders. Initiatives, committees, and roundtables launched since the last update aligned with *Calgary in the New Economy* include:

- Real Estate Sector Advisory Committee
- Notice of Motion working group for office to residential conversion incentives
- Greater Downtown Plan
- Guidebook for Great Communities
- Business Environment pillar focus group
- Economic Resilience Task Force
- Business Sector Task Force
- Place pillar focus group
- Downtown Strategy Leadership Team and Working Group
- Innovation Agenda Team
- Tech Talent roundtables
- The Alberta Innovation Corridor
- Calgary Brand Committee
- LearningCITY

## Impact of COVID-19

Early in 2020, the world experienced the largest “Black Swan” economic event in recent history. Spreading rapidly worldwide, COVID-19 infected over 139 million people and led to more than 3 million deaths in a little more than a year. After our update to Council in Fall 2020, many students across Alberta returned to school and many businesses remained open. After a significant increase in cases in December, the Government of Alberta reinstituted stricter measures including prohibiting indoor and outdoor gathering, shutting down in-person retail and food and beverage businesses, recreational and cultural activities and facilities, among other restrictions. Before 2020 came to an end, vaccine rollouts began in many countries, including Canada.

As 2021 began, it was evident COVID-19 had an unequal impact on sectors across Canada and had changed the relationship employers and employees have with office space, downtowns, and remote talent. COVID-19 began spreading in Canada at the same time as Saudi Arabia and Russia began a costly oil price war early in 2020.<sup>5</sup> The price war exacerbated falling prices due to drastic demand reduction brought on by COVID-19 globally.

For Canada’s oil and gas industry it triggered a downturn that resulted in significant company consolidations including: the merger of Husky Energy and Cenovus, merger of Seven Generations and Arc Resources, acquisition of Painted Pony by Canadian Natural Resources, and Whitecap

<sup>5</sup> Blas, J., Wardany, S., Smith, G. Saudi Arabia and Russia end their oil-price war with output cut agreement. April 9, 2020. Retrieved from: <https://www.worldoil.com/news/2020/4/9/saudi-arabia-and-russia-end-their-oil-price-war-with-output-cut-agreement>

Resources purchase of NAL Resources. Calgary had one of Canada's highest unemployment rate and 2020 saw energy companies lay off thousands of workers. While unemployment was above 15 per cent by June 2020 in Calgary, it dropped to 10.0 per cent in March 2021.

The energy industry continues to face pressure from governments, investors, and the public on multiple fronts including moving towards net zero greenhouse gas (GHG) emissions, decreasing long-term demand for petroleum products for internal combustion engines and liabilities for reclamation of shut-in or abandoned wells. The agribusiness industry is coping with food security issues and increasing demand for staple foodstuffs due to the pandemic, requiring flexibility and adaptability in the transportation and logistics sector.

Tourism, hospitality and airline industries have been hit hard with travel within and outside Canada severely impacted by restrictions on non-essential travel and increasing quarantine requirements. Arts and cultural festivals and events have been cancelled, while arts organizations struggle to maintain audiences and programming.

The shutdown also slowed Foreign Direct Investment (FDI). In its 2020 Investment Trends Monitor Report, the United Nation's Conference on Trade and Development stated global FDI inflows fell 42 per cent in 2020, from \$1.5 trillion US in 2019 to \$859 billion US. This is the lowest level since the 1990s and 30 per cent below the 2008-2009 financial crisis.

FDI decline in Canada was lower than most developed countries, largely due to a decrease of FDI from U.S. multi-national corporations, typically a significant source of Canada's FDI inflows. Return to post-pandemic FDI levels is likely contingent upon vaccine roll outs and the ability for investors and economic development agencies to return to out-of-market activities. With Canada's initial vaccine rollouts lagging other developed countries, it will be important to monitor how the speed of vaccine roll outs in 2021 impact FDI levels and broader economic recovery.

The Canadian Federation of Independent Businesses (CFIB) estimates the number of Canadian businesses at risk of closing due to COVID-19 is between 71,000 and 222,000 (between 7 per cent and 21 per cent of all businesses). The CFIB noted the percentage of businesses at risk for closure in Alberta would average 22 per cent with the hospitality sector at 57 per cent and arts and recreation organizations estimating 44 per cent of businesses could shut down.

It is critical to highlight women were significantly impacted by the pandemic. The Government of Canada estimates 100,000 women left the workforce because of COVID-19. Lockdowns and health restrictions, and COVID-19, meant women-dominant industries including travel and hospitality, food and retail services, healthcare and caregiving, cleaning, and education were disrupted disproportionately.<sup>6</sup>

Eighty per cent of single parent households in Canada are led by single mothers, and as school's shutdown it meant women were often forced to stay home and exit the workforce. In Calgary, women bore the brunt of the 6,300 jobs lost between December 2019 and December 2020 (loss of 6,800 jobs), while employment for men increased (gain of 500 jobs).

One evident trend is the rapid shift to digital and remote working and flexible work-from-home arrangements for employees. The extent to which COVID-19 has changed the relationship between businesses and physical office space is still unknown, but a McKinsey Institute survey of 800 global senior executives found 15 per cent of executives would allow 10 per cent of their workforce to continue a one to two-day work-

---

<sup>6</sup> Canadian Women's Foundation. (March 24, 2020). The Difficult Economic Side-Effects of COVID-19 on Women. Retrieved from: <https://canadianwomen.org/blog/the-difficult-economic-side-effects-of-covid-19-for-women/>

from-home flexible arrangement. Sixty-seven<sup>7</sup> per cent of those executives said their companies have accelerated automation and artificial intelligence, with 85 per cent accelerating the use of technology to collaborate and interact.<sup>8</sup>

COVID-19 has also revealed Calgary's downtown needs to be reimagined to better enable how our citizens interact with their city and its amenities. 2020 saw collaboration between the City of Calgary, the private sector, and organizations like the University of Calgary's School of Architecture, Planning, and Landscape to create a new vision for Calgary's downtown through the Greater Downtown Plan.

With office vacancy in the fourth quarter in 2020 at 29.5 per cent and 32.3 per cent in Q1 2021<sup>9</sup>, the City of Calgary is working to create a resilient, vibrant downtown as the heart of the economic centre of the city through the Greater Downtown Plan and approval of the Notice of Motion to convert office space to residential opportunities. In 2020 the City of Calgary also formed the Economic Resilience Task Force and Business Sector Support Task Force to respond to the needs of local small and medium-sized businesses in Calgary. These task forces were a conduit for businesses to better understand the supports available to them during this difficult time, and for partners organizations and multiple layers of government to come together to identify opportunities to support economic recovery both in the short and long term.

## 2021 Strategy Refinement

Given the fundamental changes in 2020-21, some of the data points previously part of the Annual Progress Report on *Calgary in the New Economy* may no longer be as relevant and have been updated to reflect programs and initiatives undertaken by Calgary organizations and businesses to address the impacts of COVID-19 on their operations. Throughout this report, new data points will be denoted as such.

Calgary Economic Development's 2021 Business Plan includes prioritizing and capitalizing on the momentum in the last several years with *Calgary in the New Economy*. In late 2020, work began on scoping a minor refinement and pressure testing of the strategy. The refinement will include refining each pillars' key outcomes and key performance indicators (KPIs) through engagement with diverse stakeholders from across our community including youth, emerging leaders, and our Indigenous community; and highlighting the interconnections between the pillars to demonstrate the criticality of system-level interactions between talent, business environment, innovation, and place. In future reports there will be greater clarity on the macro-impact of each pillar within the strategy. The minor refinement will also test the resilience of the strategy against global trends such as those accelerated and highlighted during COVID-19 (e.g., climate action, equity, diversity, and inclusion, future of work and workplace, food and energy security).

This Progress Report incorporates work underway with an updated format for reporting on each pillar to better showcase key outcomes, key activities to achieve the outcomes, and KPIs to measure progress. The next iteration of this Report will better showcase the system-level view of economic development across all pillars. The information in this Progress Report reflects tactical and strategic progress made across each of the pillars: Talent, Innovation, Place, and Business Environment.

<sup>7</sup> McKinsey Global Institute. September 23, 2020. Retrieved from: <https://www.mckinsey.com/featured-insights/future-of-work/what-800-executives-envision-for-the-postpandemic-workforce>

<sup>8</sup> Ibid.

<sup>9</sup> CBRE, Calgary Downtown Office Q1 2021, Marketview. Retrieved from:

[http://cbre.vo.llnwd.net/grgservices/secure/Calgary\\_Downtown\\_Office\\_MarketView\\_Q1\\_2021\\_mrEq.pdf?e=1620695255&h=12812d2e1c8d822ce0a90eebf0fcc3ff](http://cbre.vo.llnwd.net/grgservices/secure/Calgary_Downtown_Office_MarketView_Q1_2021_mrEq.pdf?e=1620695255&h=12812d2e1c8d822ce0a90eebf0fcc3ff)

## Governance and Management

*Calgary in the New Economy* is stewarded by Calgary Economic Development. Our role includes ensuring the strategy is resilient and relevant, now and in the future, reporting on progress toward the vision of the strategy and playing leadership roles in two of the pillars, Talent and Innovation. Calgary Economic Development is also represented on the Business Environment and Place pillars, which are primarily led by the City of Calgary and other civic partners including Calgary Municipal Land Corp., Tourism Calgary and Calgary Arts Development.

Each pillar is managed in a common way with pillar-specific differences, where appropriate. All work within a pillar includes community leaders and diverse stakeholders with representation from different groups in their ecosystem. Stakeholders are brought together to provide thought leadership, collaborate and activate the strategy.

## TALENT

*Calgary in the New Economy* sets the vision of **Calgary being Canada's destination for talent**. The ability to develop, attract, and retain talent of all experience levels and, especially, in specific high-demand skills is imperative for long-term prosperity. This pillar focuses on traditional methods of talent development, attraction, and retention as well as innovative new ways to mobilize organizations and businesses such as the Calgary Public Library, Calgary Board of Education, education-focused start-ups, reskilling programs, post-secondary institutions, and individual businesses to create a city in which learning is innate and curiosity is expected.

The concept of talent took on new dimensions and urgency as disruptive forces converged in 2020. The transition to a digital and lower-carbon future continued to create near-term uncertainty in the sectors that traditionally provide a foundation of quality employment in Calgary.

### 2020 Talent Outcome Progress

#### **OUTCOME 1: NURTURE A THRIVING, ADAPTIVE, AND COORDINATED SKILLS-DEVELOPMENT ECOSYSTEM THAT ENABLES ALL CALGARIANS TO PURSUE UNIQUE AND PRODUCTIVE INDIVIDUAL LIFE-LONG LEARNING JOURNEYS**

COVID-19 exposed systemic inequalities in Calgary's work force and labour markets with the emergence of persistent and potentially structural unemployment. It demands consideration for the inclusivity of Calgary's labour markets and how to help all Calgarians participate in the economy to their maximum potential. 2020 disrupted conventional thinking about Calgary's talent landscape and priorities and will establish key baselines for how resilient and equitable Calgary's future economy will be.

The relevancy of job-specific skills is increasingly short-lived. The half-life of many of technical skills is now years and make the traditional educational models of linear single path learning outcomes less compatible with the flexibility and adaptability needed by individuals and industries. The evolution of skills-development ecosystems to provide meaningful learning opportunities that complement formal educational systems is critical to enabling Calgarians to pursue unique lifelong learning journeys.

SAIT's DX Talent Hub was launched in September 2020. In support of the school's aim to be a champion of digital growth and opportunities for everyone including systemically excluded and underserved learners, OCIF contributed \$8.2 million to establish the Talent Hub. It serves a critical role in building foundational digital literacy at a community-scale and widen Calgary's digital talent development pipeline.

Calgary Economic Development's Energy to Digital Growth Education and Upskilling Project (EDGE-UP), funded by Future Skills Canada, helped 98 displaced energy industry workers develop digital skills for mid-career transitions to tech. More than 1,300 applications were received for the first two cohorts. An expanded EDGE UP 2.0 was announced in April 2021 and will help nearly 350 Calgarians from a variety of professional backgrounds.

Calgary's post-secondary technology training ecosystem saw the addition of 38 new programs introduced in 2020. This enabled Calgarians to complete over 1,300 skills development experiences specifically designed to grow digital capabilities in Calgary's talent pool were part of the pilot in 2020 and an expanded iteration of the Project was approved to launch in 2021.



Energy companies, recognizing the value of embodied skills and experiences of employees who may face displacement from digitalization and energy transition, are providing reskilling and redeployment opportunities to these people to help companies retain institutional and industry knowledge while building new digital capabilities.

### *Progress and performance measurement*

#### KPI #1: Secondary education completion rates

Core educational systems provide Calgarians with strong learning “backbones” to support continued development of skills through their lives. Alberta’s K-12 education system performs well globally according to Program for International Student Assessment results. Calgarians with solid foundations of enabling skills that empower adaptability and lifelong learning form the primary building blocks of Calgary’s talent pipeline.

Program	Enrollments
All (public and other)	Over 211,000 enrollments across all Calgary schools
Calgary Board of Education	125,300 in Calgary Board of Education

#### KPI #2: Post-secondary enrollments and completion rates

Post-secondary education institutions (PSIs) play important roles in enhancing Calgary’s workforce and talent landscapes. PSIs currently provide Calgarians with opportunities to develop advanced technical skills and domain competencies. Important research and innovation activities at Calgary’s PSIs contribute to local skills development and the city’s attractiveness to global talent. The scale of Calgary’s local talent pipeline is reflective of the accessibility of post-secondary education and volume of learners completing programs.

Program	Enrollments	Completions
All	<ul style="list-style-type: none"> <li>65,489 full-load equivalents (1.5 per cent increase from 2019)</li> <li>Over 10,000 international students enrolled</li> </ul>	<ul style="list-style-type: none"> <li>18,150 (5.5 per cent decrease from 2019)</li> <li>2,510 international student completions (21 per cent increase from 2019)</li> </ul>
STEM	See Innovation pillar section for data	3,900 (3.2 per cent increase from 2019)

### *2021 actions planned*

Formal launch of the LearningCITY ecosystem is targeted for the end of 2021. A community-based learning ecosystem was conceived from the High-Impact Talent Roundtable in 2019 with a series of reports developed in 2020 to outline principles and key infrastructure needed to support effective collaboration between stakeholders.

One component of foundational infrastructure for the LearningCITY ecosystem is a competency model to enable different stakeholders to understand and communicate about skills. This model will be integrated into two initiatives to be completed through 2021 - an audit of city-

wide skills development supply capacity and a community-based prototyping of tools to improve employment outcomes of systemically excluded Calgarians. City Council approved funding from the Council Innovation Fund for Calgary Economic Development and Mount Royal University to conduct the prototype.

Activation of partners across the LearningCITY ecosystem will enable the tracking of two additional proposed KPIs indicative of the scale and vibrancy of Calgary's skills-development capacities.

## **OUTCOME 2: FOSTER RESPONSIVE AND RECIPROCAL RELATIONSHIPS BETWEEN EMPLOYERS, CITIZENS, AND SKILLS PROVIDERS THAT FACILITATE GLOBALLY ATTRACTIVE LEARNING, CREATIVE, AND ENTREPRENEURIAL OPPORTUNITIES**

Relevancy is a powerful driver of decisions with respect to skills development and opportunities. As careers become less linear and more integrated with lifelong-learning, the lines between prioritizing material outcomes and skills-development are increasingly blurred. Ensuring Calgary's employers and skills providers are collaboratively offering relevant opportunities will help develop and attract top talent.

### *2020 key activities*

AltaML launched the Advanced AI/ML Lab in July 2020 with \$3.25 million support from OCIF. The Lab will provide up to 240 internships over three years where participants will gain experience solving real-world industry problems. Of the first 1,000 applications received, more than one-third of participants to date are from Black, Indigenous, People of Colour (BIPOC) communities. In 2021, this unique program continues to provide Calgary's talent community with a critical mass of data science and AI/ML skills. These experiential learning opportunities were in addition to the nearly 50 per cent of programs in Calgary's tech training ecosystem providing all participants with work-integrated learning (WIL) experiences.

Alberta IoT's Entrepreneur Fast Track Program was launched in November 2020 with \$150,000 of support from OCIF. In 2021, the program will connect 90 Industrial Internet of Things (IIoT) companies with 15 high-potential entrepreneurs to help them scale, increase revenues, access new markets, and increase sectoral collaboration. The capacity building investment and growth of this sector is expected to create 300 jobs in Calgary.

Calgary Economic Development launched Connecting YYC to help Calgarians help each other through the COVID-19 pandemic. By connecting Calgarians whose jobs were disrupted by COVID with local businesses and organizations that needed extra help in response to the pandemic, the job board enabled Calgarians to do what they are famous for in the face of unprecedented challenges to our communities. This platform will continue to be accessible throughout 2021.

### *Progress and performance measurement*

#### KPI #1: Employment rate

Globally desirable talent develops and is attracted to opportunity-rich environments. The proportion of Calgarians employed is reflective of the city's talent development capacity. The inclusive participation of all citizens in the city's job market is indicative of the equality and resiliency of Calgary's economic and social fabrics.

Characteristic	Employment Rate
Status	<ul style="list-style-type: none"> <li>• Full time – 52.0 per cent (7 per cent decrease from 2019)</li> <li>• Part time – 10.9 per cent (12 per cent decrease from 2019)</li> </ul>
Gender	<ul style="list-style-type: none"> <li>• Male – 66.8 per cent</li> <li>• Female – 58.9 per cent</li> </ul>

#### KPI #2: Enrollment of participants (local and non-local) in skills-development offerings with ecosystem partners

Enrollment in learning activities across Calgary's skill-development ecosystem is indicative of the desirability of the offerings available. As increasingly mobile talent is able pursue opportunities around the world, the choice of talent to participate in Calgary-based learning opportunities demonstrates the global competitiveness and attractiveness of Calgary's talent development capacities.

Programs	Enrollments	Completions
Tech Training Ecosystem	7,400 (16 per cent increase from 2019)	1,300 (22 per cent increase from 2019)
PSI International Students	10,400 (14 per cent increase from 2019)	Data not currently available

#### *2021 actions planned*

Calgary's PSIs acknowledge the importance of WIL and committed to the ambitious goal of providing 100 per cent of students with meaningful WIL opportunities before 2030. A consortium of seven Calgary PSIs is collaborating with Calgary Economic Development to launch a single portal for WIL in Calgary to reduce barriers for employers and learners. The launch of the WIL portal / Secretariat and LearningCITY ecosystem will enable more comprehensive tracking of KPIs that related to WIL participation and global attractiveness of Calgary's skills-development offerings.

### **OUTCOME 3: EARN AND MAINTAIN GLOBALLY RECOGNIZED REPUTATION AS A GLOBALLY ATTRACTIVE HOME FOR ENTREPRENEURS AND PEOPLE WITH VALUABLE SKILLS**

Calgary's civic and community identity and brand are powerful drivers of whether skilled Calgarians decide to develop their entrepreneurial ideas at home and if global talent sees Calgary as their home. The stories Calgarians tell each other and share with the world reflect the collective values and aspirations of our city and its citizens. The alignment and resonance of these narratives with the desires and interests of global talent, paired with objective qualifiers of Calgary's competitiveness as a global city, reinforce Calgary's status as one of the world's top destinations for skilled and entrepreneurial people.

## 2020 key activities

Despite the challenges of COVID-19, Calgary Economic Development attended and coordinated local tech company participation in six signature talent attraction activations (in national and local markets) that engaged 50 local Calgary companies and 5,500 prospective employees from Calgary and around the world.

The *Live Tech. Love Life.* and social media campaigns amplified the stories of 30 influencers and companies in Calgary's tech community. Through over 99 million impressions in 2020, perceptions of Calgary improved in four international markets targeted, including an increase of 22 per cent in Seattle in belief Calgary has a diverse economy. There was an 11 per cent increase in San Francisco perceptions of Calgary having a growing tech sector.

Companies continue to see Calgary as a home-base for growth. The rapid scaling of LodgeLink in Calgary was announced in December, with an OCIF investment of \$3 million. LodgeLink will hire 600 positions, of which 300 will be technology-related jobs. Unity, the world's largest gaming company, will grow in Calgary after acquiring OCIF-support recipient Finger Food Advanced Technology Group in May. Finger Food was an OCIF recipient, receiving \$3.5 million in September 2019.

In 2020 Calgary Economic Development focused on taking advantage of the impending expiration of United States H1B work visas. Calgary Economic Development identified Fortune 100 companies most at risk of losing highly skilled workers due to visa expirations, reiterating the opportunity for these companies to have Canadian satellite offices to retain these highly valuable employees.

Calgary Economic Development worked with Mobsquad, an OCIF supported company that helps firms retain H1B employees by streamlining the visa process through relocation to Canada, and several new business opportunities arose. It was identified Alberta is at a disadvantage with respect to the federal Global Entry program as the province with the highest minimum threshold salary. This makes it more challenging to attract international talent and companies. Calgary Economic Development continues to work with all orders of government to adjust the program.

## Progress and performance measurement

### KPI #1: Population change from migration

Disruptive relocations are big decisions indicative of the belief the destination offers worthwhile opportunity. Calgary's ability to draw people from across Canada and around the world is reflective of the city's reputation of offering desirable lives and livelihoods. While pandemic-related international travel restrictions have impacted the volume and pace of physical migration of individuals, Calgary's net population continued to grow. As much of the world gained an appreciation of digital workplaces and vital logistics / supply chains in our lives, Calgary continues to be an important global hub for people and goods.

Migration	Change
Net population change	29,254 (4 per cent decrease from 2019)
Intra-provincial	2,176 (14 per cent decrease from 2019)

Inter-provincial	1,931 (1,757 per cent increase from 2019)
International	15,792 (13 per cent decrease from 2019)

#### KPI #2: Educational attainment of migrants (international)

The education and skills that people bring to Calgary are reflective of their potential to contribute to the city's economic and innovation systems. Higher levels of education also typically correlate with an individual's global mobility. The educational attainment of people moving to Calgary is indicative of the potential being added to the city's workforce and the attractiveness of the city as a global destination.

Entry Category	Secondary or less (per cent)	Post-secondary (per cent)	Post-graduate (per cent)	Level not stated (per cent)
Economic (55 per cent)	10	20	4	66
Sponsored Family (32 per cent)	39	48	12	2
Resettled Refugee and Protected Persons (12 per cent)	68	25	4	2
Other (2 per cent)	47	42	3	8

#### *2021 actions planned*

Calgary Economic Development will participate in talent engagement activations in Canadian markets targeting the attraction of strategic high-demand skills and experience profiles. Stakeholder participation in activations in U.S. and other global markets will depend on the pandemic lockdowns. The *Live Tech. Love Life.* campaign will continue to evolve based on stakeholder feedback and strategic opportunities that may arise.

Two immigration streams were launched to facilitate the attraction of global entrepreneurs. The [Foreign Graduate Startup Visa \(FGSVS\)](#) and [Start-Up Visa \(SUV\)](#) programs streamline the immigration process for newcomers who have the plans and abilities to start businesses in Alberta. Platform Calgary will be delivering both programs that aim to bring new innovators to Alberta.

## INNOVATION

As we embrace advanced technology and innovative thinking to create solutions to some of the world's greatest challenges in energy, food, transportation, and health, Calgary's innovation ecosystem and its growth will play a critical role. The Innovation Pillar of *Calgary in the New Economy* sets out a vision for Calgary **to be the leading business-to-business (B2B) innovation ecosystem in Canada**. Having the greatest Canadian share of per-capita headquarters and global decision makers, in addition to being home to major industrial sectors, Calgary has a unique advantage in the B2B market. As a city of innovators with a long history of serving large industrial sectors, Calgary is perfectly positioned to take advantage of the job creation and economic opportunities arising from the growing community of entrepreneurs and innovators.

### *Governance and Management*

The Innovation pillar is guided by the Innovation Agenda Team, co-chaired by the CEO of Platform Calgary and the Director of Strategy from Calgary Economic Development. This committee was formed using the Rise of the Rest Ecosystem Playbook and the Seven Spokes model which identifies seven areas of focus to strengthen start-up ecosystems: local government, post-secondary institutes, investors, start-up support organizations (incubators, accelerators, etc.), corporations, local media, and start-up/tent pole companies. This group of community leaders, assembled to be representative of the Seven Spokes framework, ensures a broad coverage of the innovation ecosystem with diversity of perspective. The Innovation Agenda Team provides thought leadership to validate, prioritize and advance initiatives to grow Calgary's ecosystem in achievement of the vision.

## 2020 Innovation Outcomes Progress

### **OUTCOME 1: INCREASE THE NUMBER OF EARLY STAGE AND GROWTH START-UPS**

Growing the number of innovative companies in Calgary depends on the creation and growth of new start-ups. These companies require many inputs at the various stages of growth including programming, office/lab space, mentorship, research and development (R&D) capacity, industry connections, talent, market access, and more that are provided by support organizations. Calgary's entrepreneurial ecosystem is known for having a strong network of highly connected support organizations with a growing number of global connections.

The Regional Innovation Network (RIN) in Calgary, the Calgary Innovation Coalition (CIC) have grown to over 45 member organizations that support the ecosystem of start-ups. In 2020 the ecosystem became mobilized around a community-developed goal of achieving 1,000 core tech companies by 2031. Reaching this goal requires a high performing ecosystem focused on the quality and velocity of companies, in addition to having many very early-stage start-ups.

### *2020 key activities*

In 2020 it was evident Calgary was drawing repeat technology company founders. Repeat tech company founders and serial entrepreneurs are selecting Calgary to continue their entrepreneurial careers, allowing experienced founders to reinvest their profits, talent, and expertise back into the ecosystem. This creates a compounding effect in the ecosystem, generating new companies faster, and shortening time to scaling those ventures (e.g., Harvest Builders, Neo Financial, Symend). All of this contributes to Calgary's growing number of core technology companies.

Critical to the growth of core tech companies in Calgary are the city's PSIs. In 2020, Mount Royal University reported 19 alumni since 2015 through its LaunchPad program, while in June, SAIT Applied Research and Innovation Services and Platform Calgary renewed their Regional Innovation Network funding together for future terms.

In a year that highlighted the criticality of home-grown healthcare and biomanufacturing capabilities, Calgary's Life Sciences Innovation Hub (LSIH) as part of Innovate Calgary at the University of Calgary has been incredibly successful. An OCIF recipient in 2019, the LSIH currently has 29 companies leasing lab and office space, resulting in 90 per cent and 95 per cent occupancy, respectively. From April 2020 to March 2021, 12 new start-ups were incorporated, and four patents filed into those start-ups.

Throughout 2020 new and existing ecosystem support organizations expanded opportunities available to improve the velocity of companies through various programming commitments, including CDL Rockies adding the Agriculture Stream supporting at the seed-stage; Zone Start-ups Calgary, an accelerator for pilot-ready tech start-ups, partnered with United Farmers of Alberta Co-operative to support early-stage AgTech companies; and the Founder Institute launched the sixth Canadian chapter in Calgary.

Mount Royal University saw 90 applicants for 25 spots in its three programs: LaunchPad (start-ups), Growth Catalyst (scaleups), and Innovation Accelerator (scaleups) which resulted in 23 graduates. The A100 launched its associated membership which provides direct access to A100 Charter Members for 1:1 mentorship and network connections and the opportunity to participate in select A100 events such as Masterclasses, Advising Roundtables, and Socials.

#### *Progress and performance measurement*

##### KPI #1: Number of technology companies in Calgary

In January 2021 Calgary tracked 721 tech companies via the butterfly collection data gathering at Zinc Ventures. Of these, 452 were categorized as "core tech companies" qualified as having five or more employees, and 269 were classified as start-ups with one-to-four employees. The one-to-four-person company category or "start-ups" signifies a growing ecosystem as a certain level of failure is to be expected. Thus, a larger pool of start-ups is needed to sustain year over year growth. These 721 identified companies account for approximately 19,000 jobs.

Foreign attraction of established companies and adding new early-stage companies to the ecosystem is another source of growing the number of tech companies in the local market. Both Calgary Economic Development's FDI efforts and programs such as Startup Visa contribute to the overall increase.

Indicators	2020	2019 <sup>10</sup>
<b>Total number of tech companies</b>	<b>721</b>	686
<b>1-4 employee companies</b>	<b>269</b>	251
<b>5+ employee companies</b>	<b>452</b>	435
<b>Calgary Economic Development company attraction</b> (not including film/TV)	<b>17</b>	37

<sup>10</sup> 2019 data was reported in the summer of 2020. These values are over-stated due to not having regular data collection intervals (i.e. new structure and COVID-19).

Startup Visa companies	6	37
------------------------	---	----

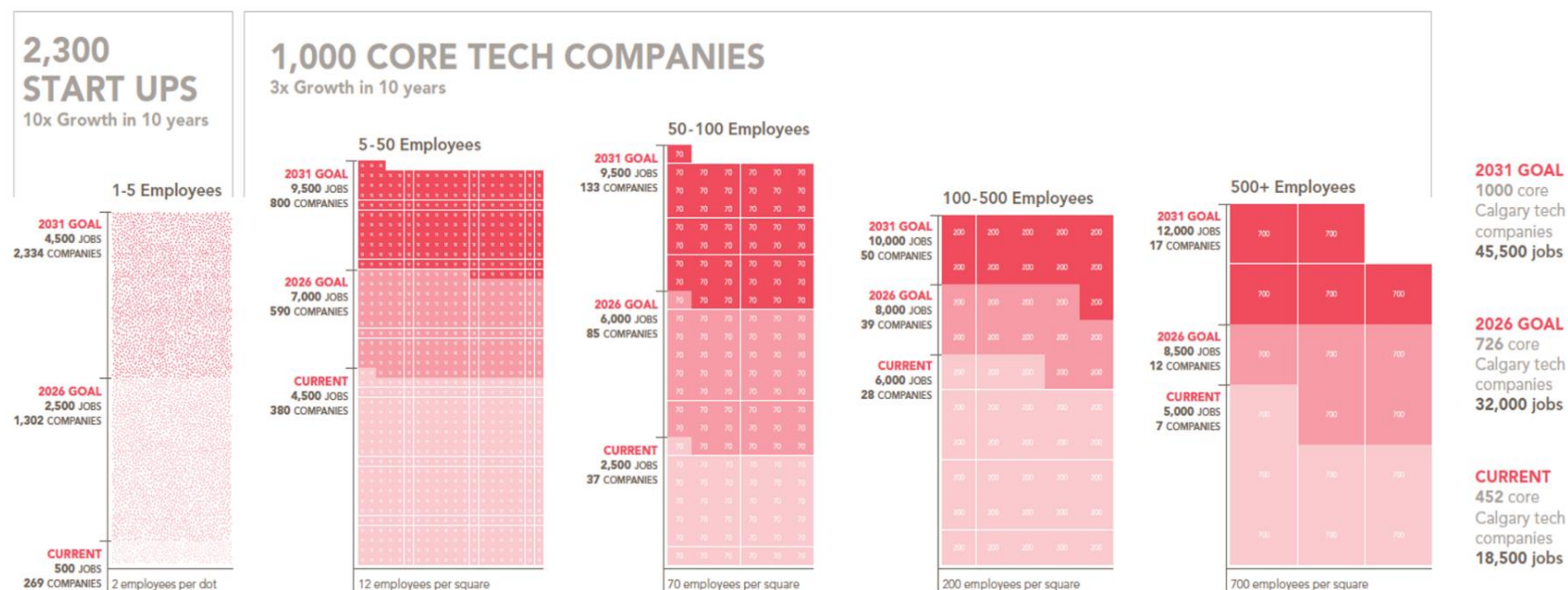


Figure 1. Butterfly Collection by Zinc Ventures

## KPI #2: Velocity of companies - Performance of accelerators and programs

Velocity of companies, or the rate at which they progress through the phases of development, is largely supported by programming offered to companies at each stage. The performance of those programs is largely measured by qualitative data, such as the number of applicants, competitiveness of accessing and completing the program, anticipated outcomes for graduates, access to funding through the program, and quality of mentorship within the program. The demand for these programs in Calgary continues to rise and new capacity is becoming available to meet the need.

Indicators	2020	2019
Incubators & Accelerators Ecosystem Support Organizations	9 19	12 active <sup>11</sup>

<sup>11</sup> This data was tracked differently in 2019 and is not directly comparable to 2020 data.



<b>Mentors:</b> <b>Platform Advisors</b> <b>VMSA</b>	<b>7</b> <b>41 mentors and 25 entrepreneurs</b>	9 29 mentors and 19 entrepreneurs
--	--	--------------------------------------

### KPI #3: Quality of companies

In 2020 Calgary was ranked 34<sup>th</sup> of 50 for its tech talent in its first year on a CBRE North American ranking of top markets for tech talent. As an emerging innovation ecosystem in North America this ranking demonstrates growing accessibility for quality talent locally. It signifies a growing ability to compete and sustain future growth as the number of new companies and scale-ups increase. While customer and market development are more difficult to track and measure, one indicator of improving competitiveness, and thereby quality, is the ability for a company to acquire global customers.

Calgary Economic Development's Trade Accelerator Program (TAP) provides knowledge, tools, and connections to help businesses, including start-ups in Calgary's innovation ecosystem, expand into new international markets. TAP's 54 graduates in 2020, 18 of which were start-ups, also demonstrates the increasing quality of companies, as local companies look to export products and services internationally. One example of success is [Righteous Gelato](#). It joined Calgary Economic Development's Seattle trade mission for food producers. In June it began exporting locally made gelato to Whole Foods across the U.S. Pacific Northwest. Calgary Economic Development is working with Righteous Gelato on future expansion.

### KPI #4: PSI impact on company creation and growth

PSIs are an essential contributor to an innovation ecosystem. They contribute to the development of talent through various programs and courses, with STEM programs being a leading indicator of tech talent. PSIs are increasingly focused on developing pathways to start-up formation and commercialization of technologies. Traditionally an advantage of research universities developing intellectual property (IP) for commercialization, now all types of PSIs make strategic corporate partnerships or have entrepreneur development courses/programming to serve students.

Growing a technology company or creating innovations requires a unique way of thinking and problem solving, often referred to as an entrepreneurial mindset. PSIs are a primary support in fostering an entrepreneurial mindset in the student population.

<b>PSI Indicators<sup>12</sup></b>	
<b>STEM Program Graduates:</b> <ul style="list-style-type: none"> <li>University of Calgary:</li> <li>MRU:</li> </ul>	<b>5.1 per cent growth rate</b> (2020 graduates over 2019 graduates) <b>237 graduates</b>
<b>Local IP:<sup>13</sup></b>	

<sup>12</sup> PSI's report on school year timing of September 2019 to September 2020.

<sup>13</sup> University of Calgary data only.

<ul style="list-style-type: none"> <li>Number of patents issued with an investor or assignee address in the Greater Calgary Metropolitan area for calendar year 2020</li> <li>Number of patents with an assignee that is a corporation for calendar year 2020</li> </ul>	<b>782</b>  <b>651</b>
<b>Commercialization:<sup>14</sup></b> <ul style="list-style-type: none"> <li>Unique inventors listed on invention disclosure forms disclosed to Innovate Calgary and University of Calgary Research Services Office in calendar year 2020</li> </ul>	<b>228</b>

Entrepreneur Development Courses	Programs/Courses	Students Participating
Platform Calgary	11	968
University of Calgary	44	3,163 (2,119 unique)
MRU	15	1,758
SAIT <sup>15</sup>	2019/2020 was another year of growth for ARIS, with an estimated total revenue of close to \$10 million.	<p>ARIS team averaged 164 students per year. In 2018/19, ARIS met its target to increase student engagement to over 200 students.</p> <p>In 2019/2020 SAIT aimed to maintain this engagement level and engaged 162 students prior to the closures in March (due to COVID-19).</p>
Bow Valley College	<b># of Programs:</b>	<b># of Participants:</b>
	150 start-ups program	995 students in 26 skill-building sessions
	Lancing page competition	25 students competed
	Lean startup challenges	14 challenges
	Innovation Rodeo 2020 (virtual) recorded 220 per cent more people engaging in the Startup Bootcamp, 90 per cent more people completing mentor training, 580 per cent more student registrations	256 students registered for Innovation Rodeo
	Launched MVP Mondays and Tech Sales Tuesdays programming	Saw a global audience; over 350 participants in MVP Mondays.

### 2021 actions planned

In 2021 there is growing momentum toward reaching 1,000 core tech companies by 2031. OCIF cited this goal in the funding announcements for the two Request for Proposals (RFPs) for \$27.5 million for an early-stage fund manager and new accelerator programs. The \$25 million [RFP](#)

<sup>14</sup> University of Calgary data only.

<sup>15</sup> SAIT's Applied Research and Innovation Services department supports start-ups, entrepreneurs and multinational corporations with technology problem solving and development. ARIS helps businesses large and small develop and test their ideas.

[from Alberta Innovates for scaleup and growth accelerators](#) will also support the generation and growth of innovative companies. Together the three RFPs demonstrate a commitment from both the City of Calgary and province of Alberta to increase the quality and quantity of new innovative companies.

In 2021, SAIT's ARIS is working with the University of Calgary to deliver a Natural Sciences and Engineering Research Council Collaborative Research and Development Grant Program with Canada's Oil Sands Innovation Alliance and Suncor Energy to study erosion and corrosion in Once Through Steam Generators. This work demonstrates the willingness of organizations to partner in support of innovative solutions built locally.

The Platform Innovation Centre is scheduled to open in Fall 2021. The 50,000 square foot facility will be a hub that provides a single point of access to resources, supports, programming and events to help start-ups successfully launch and grow their business. It will serve as a physical asset to the community where collisions of innovators will happen and navigating the ecosystem will be simplified.

Demand for space at the Life Sciences Innovation Hub is strong and growing. The Hub is preparing to add six more labs and will likely need another building to meet demand over the next five years. The Hub is gaining national and international recognition and intends to leverage this model to other accelerators and hubs and expand its focus to North America and globally to recruit high-potential early-stage life science opportunities to Calgary.

## **OUTCOME 2: INCREASE ACCESS TO FUNDING IN THE ECOSYSTEM**

Access to capital continues to play a critical role in developing and nurturing a robust innovation ecosystem. The funding spectrum for innovation is broad and investment is essential at various stages of development. Funding from a variety of sources (including founders, friends and family; angel investors and family offices; government/corporate grants; crowd funding; debt/financing; venture capital; private equity; and IPOs) can support an innovation ecosystem and provide necessary capital.

Active investors with an equity position in a company play an important role through critical feedback, rigorous due diligence, and ensuring high accountability from applicant companies. For the small percentage successful in getting funded from venture capitalists and angel investors, they typically offer guidance and mentorship.

### *2020 key activities*

Consulting firm Hockeystick reported 34 deals in Calgary during 2020, representing \$307 million invested into Calgary companies. In 2019, Hockeystick reported \$163.1 million invested over 27 deals. Hockeystick noted a healthy distribution of funding across deal sizes in 2020, with an increasing opportunity for funding of very early-stage companies (funding at less than \$250,000). Hockeystick reported 62 investors in 2020, reflecting an increase of 195 per cent over 2019.

The Canadian Venture Capital Association (CVCA) reported record venture capital deal volume in Alberta for 2020 with \$455 million in 51 deals, surpassing the 2019 record high by 100 per cent. Calgary captured over 64 per cent of all Alberta deals representing more than three quarters of the dollars invested, with \$353 million across 33 deals.

Examples of Calgary-based company seed and/or angel successes include Neo Financial and Symend, who completed the largest Series A (\$50 million) and Series B (\$73 million) funding rounds, respectively, in recent Alberta history. LaunchPad companies secured \$70,000 in seed stage capital across six deals. 2020 also saw Calgary's fourth unicorn valuation in two years. Benevity surpassed the \$1 billion valuation mark as private equity investor Hg bought majority control. The deal closed in January 2021.

### *Progress and performance measurement*

#### KPI #1: Private capital invested into Calgary companies

Private investors that take an equity position in a company, primarily angel investors, venture capitalists, and private equity firms, take on a shared risk with the companies. These investments are a strong indicator of the health of the funding landscape as they represent the opportunity value to risk tolerance relationship. The frequency of funding and total funds contributed quantifies the amount of value or opportunity investors can obtain. As deal volume increases in Calgary, we will see capital deployed for market development, talent/hiring, operations all of which contribute to improving the company and by association the local ecosystem.

The longer-term value comes from a liquidity event when the company achieves their "exit" and the value is paid out to the participating investors, including the founders. An exit can offer the founding team a literal exit from the company, and with a payout in hand they are often well positioned to restart their entrepreneurial journey in a new venture or reinvest their money as angel investors with founder experience. Unicorn status the highest rank of exit available to a founder or company, occurring when the company valuation exceeds a billion dollars.

Investment deals with Calgary companies	2020		2019	
	Number of deals	Dollars (millions)	Number of deals	Dollars (millions)
<b>Hockeystick</b>	<b>34</b>	<b>\$307</b>	27	\$163.1
<b>CVCA</b>	<b>33 (#4 in Canada)</b>	<b>\$353</b>	19 (#4 in Canada)	\$136

#### KPI #2: Public funding invested into the innovation ecosystem

Public funding can be a great tool to catalyze private investment and spur innovation. Funding into the innovation ecosystem in the form of government funding typically comes with a much lower risk tolerance, low accountability, and a lack of critical feedback. Successful public funding mechanisms are often ones that utilize the expertise and engagement of the private sector to co-fund and create a multiplicative effect on investment. Other effective public investments are those made into infrastructure and facilities that can generate new companies, technologies, and talent (e.g. labs). Funding of activities in the ecosystem is another beneficial use of public dollars, as they can invest into grants and initiatives that support innovators and start-ups in ways that private investors will not, for a lack of high returns.

Public Funding:	2020	2019
<b>Opportunity Calgary Investment Fund<sup>16</sup></b>	\$18.55 million across: • \$8.2 million into SAIT Digital School	\$23.5 million

<sup>16</sup> The Opportunity Calgary Investment Fund Ltd. is a City of Calgary wholly owned subsidiary established to manage the Opportunity Calgary Investment Fund Reserve to create an environment in Calgary that encourages economic recovery and growth, help reduce the impact of the economic downturn, and capital on new opportunities.

	<ul style="list-style-type: none"> <li>• \$4.0 million in Harvest Builders</li> <li>• \$3.25 million AltaML</li> <li>• \$3.0 million LodgeLink</li> <li>• \$100,000 Alberta IoT</li> </ul>	
<b>Alberta Innovates:</b> <ul style="list-style-type: none"> <li>• <b>Regional Innovation Network Funding</b><sup>17</sup></li> <li>• <b>Research and innovation activities</b><sup>18</sup></li> <li>• <b>Emissions Reduction Alberta</b></li> </ul>	<ul style="list-style-type: none"> <li>• \$3.16 million (for a total of \$13.7 million invested over three years, since 2019).</li> <li>• \$57 million into research and innovation activities (health care, the resource sector, start-up companies, the entrepreneurial ecosystem and post-secondary institutions) providing funding and support to researchers, entrepreneurs and innovative companies helps to ensure the work they're engaged in will continue.</li> <li>• \$58 million announced for natural gas innovations worth \$155 million. ERA supports 20 projects that create jobs, attract investment, and reduce emissions.<sup>19</sup></li> <li>• \$150 million announced for shovel-ready projects that cut costs and emissions in Alberta. Federal and provincial joint funding opportunity targets projects that can rapidly create jobs and stimulate economic opportunities in the province.<sup>20</sup></li> </ul>	N/A
<b>University of Calgary</b>	University of Calgary launched UCEED, a pre-seed and seed funding program for ventures in child health and general health.	-
<b>Federal Strategic Innovation Fund</b>	<ul style="list-style-type: none"> <li>• Attabotics received \$34 million.<sup>21</sup></li> <li>• Clean Resource Innovation Network (CRIN) received \$100 million over four years.<sup>22</sup></li> </ul>	N/A

<sup>17</sup> Alberta Innovates. (May 25, 2020). Support for small and medium-sized businesses in Alberta's research & innovation ecosystem. Retrieved from: <https://albertainnovates.ca/impact/newsroom/support-for-small-and-medium-sized-businesses-in-albertas-research-innovation-ecosystem/>

<sup>18</sup> <https://albertainnovates.ca/impact/newsroom/57-million-to-alberta-researchers-and-innovators/>

<sup>19</sup> <https://www.globenewswire.com/en/news-release/2020/07/21/2065101/0/en/58-million-announced-for-natural-gas-innovations-worth-155-million.html>

<sup>20</sup> <https://www.globenewswire.com/en/news-release/2020/11/02/2118850/0/en/150-million-announced-for-shovel-ready-projects-that-cut-costs-and-emissions-in-Alberta.html>

<sup>21</sup> Innovation, Science and Economic Development Canada. (December 15, 2020). Government of Canada announces contribution to next-generation robotic warehouse solution. Retrieved from: <https://www.canada.ca/en/innovation-science-economic-development/news/2020/12/government-of-canada-announces-contribution-to-next-generation-robotic-warehouse-solution.html>

<sup>22</sup> Innovation, Science and Economic Development Canada. (October 22, 2020). Government of Canada invests in clean technology ecosystems. Retrieved from: <https://www.canada.ca/en/innovation-science-economic-development/news/2020/10/government-of-canada-invests-in-clean-technology-ecosystems.html>

## 2021 actions planned

Calgary has seen significant local activity support the funding landscape as OCIF announced three investments in 2021. Two will be delivered via RFP to support early-stage companies, including a fund manager for early-stage investments into Calgary companies, and funding for new accelerator programs to be launched in Calgary. The third investment supported was [Endeavor](#), as it announced Calgary will be the location for its Canadian office for its global scaling accelerator.

The RFP from Alberta Innovates to support scale-up and growth accelerators in the province is another strong indicator of funding potential. The RFPs from OCIF and Alberta Innovates represent investment of more than \$50 million into growing the quality of companies in the region ensuring they can raise capital when needed. It is expected the Government of Canada will also align its funding making the pool of funding as much as \$60 million between all three orders of government. Similarly, for earlier stages, the CIC is deploying RIN funding for improving coaching capacity, early-stage program delivery collaborations among members, as well as programming for companies in scale-up and growth stages.

As Calgary continues to grow in the long term, these support measures show promise for future investments across the funding spectrum. The supports at very early stages indicate a continued focus on the capital needs for very early-stage start-ups. Lift Accelerator, backed by strategic venture capital partner Tribune Capital, saw this opportunity, and launched its six-phase program in Calgary. Additionally, NACO announced its Western Canadian office managing director and location within the Platform Innovation Centre, and plans to establish an Alberta Advisory Council to amplify Angel activity.<sup>23</sup>

The Clean Resources Innovation Network (CRIN), a national network of organizations and companies focused on the sustainable development of Canada's energy resources, announced \$80 million in project funding will be deployed over three competitions:

- Digital Oil and Gas Technology Competition (\$5 million)
- Reducing Environmental Footprint Technology Competition (\$50 million)
- Low Emission Fuels and Products Technology Competition (\$25 million)

In 2021, we expect to see a new iteration of the Start Alberta platform, focused on increasing access to quality deal flow, international exposure, and high-quality data for investors while also creating transparency on programming and resources for start-ups and entrepreneurs in the province. The Alberta Enterprise Corporation Alberta Tech Deal Flow Study was released in April 2021, showcasing the growth of Alberta's technology and innovation sector.<sup>24</sup> The study found Alberta has over 3,000 technology companies; an increase of 233 per cent since 2012. Fifty-eight per cent of these companies are in Calgary. Almost 40 per cent of Alberta technology companies have revenues over \$1 million, a 66 per cent increase since 2018. With gender diversity, 30 per cent of Alberta's technology companies have female founders or co-founders, higher than the global average.

In April 2021, the Government of Canada released the 2021 Budget which included several key funding supports. A \$450 million Venture Capital Catalyst Initiative is intended to provide venture capital to entrepreneurs, accelerating and de-risking Canada's technology and innovation ecosystems. \$50 million of the \$450 million is to be allocated to life sciences technologies.

<sup>23</sup> Kirkwood, I. (March 15, 2021). Naco launches programming in alberta as part of latest push into province. Betakit. Retrieved from: <https://betakit.com/naco-launches-programming-in-alberta-as-part-of-latest-push-into-province/>

<sup>24</sup> <https://www.newswire.ca/news-releases/2021-study-shows-momentum-in-alberta-s-technology-sector-growth-and-job-creation-801295218.html>

An additional \$7.2 billion will be allocated to the Strategic Innovation Fund (SIF) to support companies in the life sciences, automotive, aerospace, and agriculture sectors, with \$5 billion of the \$7.2 billion specifically going to the Net Zero Accelerator. Calgary has an opportunity to take advantage of the newly allocated SIF given Calgary's burgeoning life sciences sector, supported by LSIH and other significant infrastructure investments, our city's history and strength in agriculture and agtech, and, of course, our competitive advantage in energy.

All indicators of the funding growth seen in 2019 and 2020 point to another significant year for funding opportunities and investment in Calgary, including the February 2021 Series B extension of \$54 million raised by Symend.<sup>25</sup> With 2021 first quarter results reporting Canadian venture funding hitting a record \$3.14 billion we can expect to see an impressive year of investment activity.<sup>26</sup>

### **OUTCOME 3: INCREASE THE ADOPTION OF LOCAL TECHNOLOGIES AND ACCELERATE THE ADOPTION OF DIGITAL TECHNOLOGIES BY LARGE ENTERPRISE**

Large enterprises are creators, adopters and customers of technology and innovation making their participation and leadership a critical component to a thriving ecosystem. Established corporations play a major role in furthering innovation ecosystems when they are engaged as meaningful and collaborative partners. These relationships can offer the corporations access to the ecosystem and further their understanding and adoption of innovation and startup culture, while in return they provide access to mentorship (with industry expertise), capital (alignment to their investment strategy), pilot and commercial opportunities (make them your customer), and M&A opportunities (get acquired).

Large enterprises build strong innovative capacities internally by encouraging their employees to create solutions to their business problems at all levels. Calgary has significant opportunities to deliver local technology and innovation solutions to large enterprises across the globe including those headquartered locally. In conjunction with this, our existing industries must continue to adopt digital technologies to remain competitive and globally recognized. Ideally this becomes a symbiotic relationship where the start-up ecosystem and corporate enterprise are partners and co-create innovation in the community.

#### *2020 key activities*

In 2020, Calgary Economic Development worked with IDC Canada to re-forecast Alberta, and Calgary's, digital transformation spend forecast across all industries from 2021–2024.

We are seeing many examples of Calgary companies using digital technologies to disrupt traditional industries, and stories of locally built technology solutions being deployed by own local enterprises are increasingly prevalent. Highlighting a select number of these companies provides a snapshot of the acceleration and prevalence of digital technologies in Calgary.

---

<sup>25</sup> <https://betakit.com/symend-eyes-global-markets-with-54-million-cad-series-b-extension-led-by-inovia/>

<sup>26</sup> <https://betakit.com/report-canadian-vc-funding-reached-new-record-in-q1-2021/>

Validere is a Calgary data-intelligence platform for oil and gas product quality. More than 50 of North America's leading energy companies rely on Validere's insights to reduce waste and emissions and enhance operational and trading margins.

Another success story is StellarAlgo, a company with a software as a service data platform, leveraging machine learning to help customers organize, analyze, and leverage fan data. Its clients include the Vancouver Canucks, Los Angeles Kings, Los Angeles Galaxy, Las Vegas Golden Knights, Portland Trail Blazers and Calgary Sports and Entertainment Corp.

LodgeLink's digital B2B workplace travel platform facilitates workforce logistics management, provides better visibility and cost control, and creates digital efficiencies for accounts payable technologies, and more. By the end of 2020, LodgeLink was already serving more than 500 companies in Canada and the United States.

Calgary-based robotics supply chain company Attabotics, a local technology company that was an OCIF recipient in 2018, is transforming traditional industries. Its 3D automated storage and retrieval system is the world's first supply chain solution for modern commerce, reducing warehouse needs by 85 per cent. The company currently has six live installations in North America spanning customers across retail, B2B, food and beverage, and one of the largest luxury retailers in the United States, Nordstrom.<sup>27</sup>

#### *Progress and performance measurement*

##### KPI #1: Ecosystem nurturing activities by large enterprises in Calgary

In the early stages of developing an innovation ecosystem, large enterprises view the start-up ecosystem as a source of good ideas. However, as prospective customers, large enterprises prefer to wait until solutions are proven and ready for commercialization. With co-creation of new innovations as the long-term goal, it is important to look to realistic and measurable indicators of large corporations engaging with the innovation community, such as the UFA partnership with ZoneStart-ups in Calgary to support the agriculture sector and its start-ups.

This type of ecosystem nurturing activity provides good outcomes to both partners. ZoneStart-ups provides their client companies with access to industry problems and customer opportunities, and UFA can de-risk collaborating on industry challenges and working with early-stage innovators to solve them.

Engaging the corporate community in the innovation ecosystem has always been difficult. Increasingly we see large enterprises finding a trusted partner with expertise in the start-up ecosystem as a conduit for innovation. In 2020, Platform hosted nine 'Corporate Innovator Roundtables' with 16 corporates, and the 'YYC Trailblazers in AI/ML' sub-committee of the Innovation Pillar, hosted four sessions gathering 50-plus participants for peer-to-peer learning, led by Suncor, Nutrien, Canada's Oil Sands Innovation Alliance (COSIA), and supported by AltaML, Alberta Machine Intelligence Institute, Platform Calgary, and Calgary Economic Development.

As mentioned above, in 2020, [AltaML announced](#) the launch of its applied data science internship program, the AltaML Applied AI Lab, and its final two industry partners, Suncor and TransAlta Corporation, joining ATB Financial and Spartan Controls. The program is a uniquely positioned industry partnership aimed at providing real-world industry problems to the program as well as enabling controlled access to secure data.

<sup>27</sup> <https://www.businesswire.com/news/home/20200818005266/en/Attabotics-Raises-50M-USD-to-Bring-Efficiency-and-Scale-to-Supply-Chains>



The City of Calgary can also act as a large enterprise and support the ecosystem. One way the City supports the innovation ecosystem in Calgary is through its Open Calgary initiative, providing open access, free data sets. Free, accessible data enables start-ups and other growing companies to test and pilot applications without spending significant capital on purchasing data and reduces barriers to entry that come with data collection and analysis.

#### KPI #2: Digital transformation (DX) spend

"Digital transformation is the integration of digital technology into all areas of a business, fundamentally changing how you operate and deliver value to customers. It is also a cultural change that requires organizations to continually challenge the status quo, experiment, and get comfortable with failure".<sup>28</sup> These can be internal teams focused on transforming their operations, products, or services through the application of digital technologies.

As reference above, the International Data Corporation (IDC) Canada forecast \$20 billion would be spent on digitalization and innovation across Alberta industries by 2024. Calgary Economic Development launched an interactive [Digital Transformation Dashboard](#) to share this important story.

Large Enterprise by Industry	Alberta DX Spend	Recent Calgary Example
<b>Life Sciences &amp; Health</b>	<b>\$1.3 Billion</b> (\$428 million in Calgary by 2024)	Circle Cardiovascular Imaging is investing \$4.0 million in 2021 alone in AI to revolutionize modern healthcare and life sciences.
<b>Transportation &amp; Logistics</b>  • <b>Aerospace &amp; Defense</b>	<b>\$1.6 Billion</b> (\$790 million in Calgary by 2024)  Of the Calgary total, \$38 million is in Aerospace & Defense	Hexagon's Autonomy & Positioning division has been investing in high-tech development in Calgary for over 25 years. In that time, the company has invested hundreds of millions of dollars into development of high precision GPS digital equipment and autonomous vehicle. Over the next four years, the company is projecting to invest approximately \$225 million in R&D with the compound annual growth rate of 14 per cent to design the next generation of off-road autonomy vehicles in Calgary.
<b>Agribusiness</b>	<b>\$684 million</b> (\$246 million in Calgary by 2024)	UFA & Zone Start-ups (Example listed above)
<b>Financial Services</b>	<b>\$1.5 Billion</b> (\$609 million in Calgary by 2024)	ATB Financial is building, investing and partnering to build on the strengths of Alberta's growing reputation as a global leader in technology and innovation. From advancements in artificial intelligence, data and our extensive suite of digital products and services to leadership in digital identity and trust—ATB is committed to helping to keep Alberta and ATB at the forefront of the digital economy.

<sup>28</sup> <https://enterpriseproject.com/what-is-digital-transformation#:~:text=Digital%20transformation%20is%20the%20integration,and%20get%20comfortable%20with%20failure.>

<b>Energy &amp; Environment</b> <ul style="list-style-type: none"> <li><b>Oil &amp; Gas</b></li> </ul>	<b>\$5.8 Billion</b> (\$2.3 billion in Calgary by 2024)  Of the Alberta total, \$2.5 billion is in O&G	Suncor Energy invested \$830 million in technology development, including DX in 2019. Another \$1.4 billion in low-carbon power cogeneration is being invested at its Oil Sands Base Plant.
--	---	---

#### *2021 actions planned*

There is a growing momentum in 2021 toward collaboration between large enterprise and the technology and innovation ecosystem in Calgary.

Infosys, a major global IT company, announced it would be expanding to Calgary and bringing 500 jobs over three year. This expansion includes a plan to establish Calgary as one of its “tech and innovation hubs”, highlighting their commitment to develop the technology talent pool, nurture the innovation ecosystem and collaborate with local PSIs.

In April 2021 mCloud, a now Calgary-headquartered AI company focused on ESG monitoring and reporting, announced it had oversubscribed its \$14.49 million public offering, lead by ATB Capital Markets. There is a growing trend of digitalization in the energy sector as companies use digital technologies such as AI to reduce costs and meet emission reduction targets. In 2021 TransAlta is working with AltaML through the Applied AI Lab to integrate AI into its operations. For TransAlta, it creates an opportunity for an established industry leader to reinvent the way it does business as the world, and the company, undergoes a digital transformation.<sup>29</sup>

#### **OUTCOME 4: ENHANCE AWARENESS OF CALGARY’S ECOSYSTEM AT HOME AND ACROSS NORTH AMERICA**

The innovation ecosystem requires a broader awareness and acknowledgement from the region in which it operates to thrive. Locally, this heightened awareness provides new opportunities and creates openings for new participants to enter and support the multitude of activities happening. Abroad and across North America, when Calgary is more well-known, awareness means easier attraction of top talent, companies, and new innovators to our city. Enhancing the overall awareness of Calgary’s innovation ecosystem starts locally to ensure all Calgarians have an understanding that Calgary has a thriving tech ecosystem.

#### *2020 key activities*

To build awareness of Calgary’s burgeoning innovation ecosystem, Calgary Economic Development launched its *Live Tech. Love Life.* campaign in Canada, the United Kingdom, and the United States, running from October through December 2020. In 2020 the campaign delivered over 73 million impressions in the global marketplace. It supported improved perceptions of Calgary’s innovation ecosystem abroad. In a 2020 survey, 85 per cent of business leader respondents in Seattle, 90 per cent of leaders in San Francisco, and 83 per cent of leaders in London, U.K. indicated an increased perception of Calgary as an innovative city where new ideas, businesses, and people thrive. Calgary’s growing and established technology ecosystem is also gaining international traction, with double digit growth in perceptions of our ecosystem in Seattle and San Francisco business leaders from 2019 to 2020.

<sup>29</sup> <https://calgaryeconomicdevelopment.com/newsroom/ocif-funded-altaml-makes-a-crucial-difference-for-calgary-companies/>

In aggregate, Calgary Economic Development's marketing and communications delivered over \$64.1 million in ad equivalency, a metric demonstrating the cost to buy the total press coverage received, leading to 1.4 billion impressions across online news, blogs, and television mediums.

Also in 2020, to support start-ups in marketing their companies and successes, Startup Calgary and Platform initiated a Patreon partnership with Betakit, a technology publication, to advise start-ups on pitching to media and getting their company stories highlighted.

Calgary companies gained national and international recognition throughout 2020, enhancing the awareness of our city's innovation ecosystem. For example, while the news broke in January 2021, in 2020 Calgary-based Providence Therapeutics began developing their own mRNA COVID-19 vaccine.<sup>30</sup> Next Generation Manufacturing Canada, the industry-led organization behind Canada's Advanced Manufacturing Supercluster, announced it would grant \$5 million to Providence and Northern RNA to build out manufacturing capacity for the vaccine.

Venture For Canada (VFC) supported 341 externships in Alberta in 2020. This was the first year VFC operated in Alberta and accounted for roughly one third of VFC's overall placement of interns. In 2020, Alberta had the highest concentration of VFC interns of anywhere in Canada.

### *Progress and performance measurement*

#### KPI #1: Stories in the media on Calgary technology and innovation

An engaged and knowledgeable media community amplifies stories of success and shifts local, national and international perceptions. Calgary and Alberta media outlets need to be connected and made aware of engaging innovation stories to increase the frequency of tech stories being published and therefore change the perception of Calgary's tech and innovation ecosystems.

<b>Media Stories</b>	<b>2020</b>	<b>2019</b>
<b>Calgary-tagged Betakit stories</b>	<b>39<sup>31</sup></b>	<b>43<sup>32</sup></b>
<b>All local and national publications with Calgary tech stories</b>	<b>442</b>	<b>488</b>

#### KPI #2: Growing the audience for Calgary innovation

Growing the audience of people aware of and engaged in the progression of Calgary's innovation ecosystem means broadening the reach of campaigns, social media outreach, and other groups and community organizations to bigger markets. It means highlighting the success stories of Calgary companies and those who receive international and national awards and recognition.

<sup>30</sup> Stephenson, A. (January 26, 2021). Made-in-Canada COVID vaccine to be manufactured in Calgary; clinical trials have now begun. Calgary Herald. Retrieved from: <https://calgaryherald.com/business/local-business/made-in-canada-covid-vaccine-to-be-manufactured-in-calgary-clinical-trials-have-now-begun>.

<sup>31</sup> Startup Calgary and Platform initiated Patreon partnership with Betakit to advise start-ups on pitching to media and getting their company stories highlighted.

<sup>32</sup> Three Betakit writers hosted during Launch Party and Innovation Week in 2019.

Digital Audience Growth	2020	2019
<b>Social Media Engagement</b>  <b>Live Tech. Love Life. (LTLL) Campaign</b>  <i>Future indicator: LinkedIn groups &amp; members</i>	Social Media audience recorded a net growth of 4.9 per cent (15,746) <ul style="list-style-type: none"> <li>Over 23.8 million impressions (60.1 per cent increase)</li> <li>183,308 engagements (25.1 per cent increase)</li> </ul> Over 73 million impressions <ul style="list-style-type: none"> <li>Q4 saw 13 million impressions for LTLL Canadian campaign on digital ad placements, and 4.1 million impressions for the US campaign.</li> </ul>	<i>New indicator, data unavailable</i>
<b>Rainforest <a href="#">scorecard</a></b> (members/audience)  <i>Future indicator: Communities and meetup groups expanding</i>	<b>Score: 686/1000</b> All components of the scorecard saw their highest scores in Calgary, even amid the challenges of 2020. The average score from female respondents increased by more than 100 points, about 17 per cent higher.	Score: 630/1000

Student internships/placements into start-ups	2020	2019
<b>Venture for Canada Externships</b>	<b>341 in Alberta</b>	Canada total was 540 students, and 61 companies
<b>MRU (co-op and work placements)</b>	<b>53</b>	<i>Data unavailable</i>

#### 2021 actions planned

The momentum in Calgary's ecosystem is generating awareness both locally and abroad. Facilities supporting the innovation ecosystem in the Calgary area are a growing source of recognition as they drive innovative outcomes in industry. The international media attention around Carbon XPRIZE highlighted the Calgary facility, the Alberta Carbon Conversion Technology Centre. Two Calgary companies were finalists and awarded the X-Factor awards, Carbon Upcycling-NLT and Carbon Corp.<sup>33</sup> Similarly, TELUS Agriculture was named Olds College 2021 Partner of the Year

<sup>33</sup> <https://www.businesswire.com/news/home/20210419005330/en/XPRIZE-Announces-the-Two-Winners-of-20m-NRG-COSIA-Carbon-XPRIZE-With-Each-Team-Creating-Valuable-Products-out-of-CO2-Emissions>

highlighting the Olds College Smart Farm, a “Living Lab for Agri-Food Development”, where TELUS Agriculture has been testing innovations like security solutions, weather stations, field sensors, and more.<sup>34</sup>

Locally, the VFC externship pilot program launched in Alberta for undergraduate students to gain career clarity by taking on a real-world challenge a business is facing with a volunteer team of like-minded peers. Participating students will get crucial experience in a short time frame without a huge investment of their time. This exposure to local innovative companies will be invaluable for local perceptions of a thriving innovation ecosystem in Calgary our youth are excited to join.

The growing international media attention Calgary garnered in 2020 continues to be amplified in 2021. The Start Alberta platform will be the first jurisdiction in North America to utilize the Dealroom Platform. The Dealroom partnership represents the second iteration of the Start Alberta portal and will unlock a growing international audience of investors and major industry leaders that can evaluate the Calgary ecosystem. The launch in June 2021 is expected to receive significant media attention.

Another organization of note that showcases Calgary-based innovation on a global stage is the CRIN. The activities of CRIN, including the competitions announced in 2021 represent \$85 million in funding to accelerate technology development.<sup>35</sup> These initiatives, among many others, are generating awareness for Calgary’s innovation ecosystem.

---

<sup>34</sup> Olds College. (March 31, 2021). TELUS Agriculture Named Olds College 2021 Partner of the Year. Retrieved from: <https://www.oldscollege.ca/about/news/2021/telus-ag-named-olds-college-2021-partner-of-the-year/index.html>.

<sup>35</sup> <https://cleanresourceinnovation.com/competitions>

## PLACE

The Place pillar sets an ambitious vision to be **Canada's most livable city**; building on ImagineCALGARY's 100-year vision for Calgary to be "A great place to make a living, a great place to make a life." While Calgary has consistently ranked as Canada's most livable city by the Economist Intelligence Unit, there is still much to do to achieve our 100-year vision. This means focusing on key aspects of livability as defined by organizations such as the International Standards Organization (ISO), Economist Intelligence Unit, the United Nations, and Arcadis' Sustainable Cities Index. These aspects include resiliency, clean energy, environmental quality, affordability, transportation, safety, outdoor and public spaces, and attractions and amenities.

## 2020 Place Outcomes Progress

### OUTCOME 1: BUILD A RESILIENT CITY POWERED BY CLEAN ENERGY SOURCES

There are innumerable organizations in our community working to build a resilient city powered by clean energy sources. The City of Calgary approved the Climate Resilience Strategy in June 2018. The Strategy outlines the City's strategies and actions to mitigate and adapt to climate change impacts. Mitigation refers to efforts to reduce greenhouse gas emissions, whereas adaptation speaks to actions taken to reduce the impacts of climate change on infrastructure and services when they do occur. The Climate Resilience Strategy also sets the city's GHG emissions reduction target at 80 per cent reduction by 2050 from a 2005 baseline.

To provide strategic advice and support to facilitate the implementation of actions from the Climate Resilience Strategy, the City created the Calgary Climate Panel, a collaboration between industry, community, and the City. As well, the 2020 Municipal Development Plan (MDP) and Calgary Transportation Plan (CTP) both integrate sustainability principles and climate change mitigation and adaptation strategies, thus supporting and enabling the Climate Resilience Strategy. Specifically, the 2020 MDP and CTP includes a commitment to 100 per cent zero-emissions community vehicle fleet by 2050.

#### *2020 key activities*

In 2020, to support building a resilient city powered by clean energy sources, including greener transportation, the City of Calgary currently has over 175 electric vehicle charging stations, including 46 in City of Calgary parkades. The 2020 update to the MDP and CTP now focuses on 14 core indicators as part of the 60-year vision, including three captured below relevant to building a resilient city: district energy, impervious surfaces, and tree canopy coverage. It should be noted as part of the Next20 initiative, the district energy and impervious surface KPIs were identified as needing review for effectiveness. Increasing the tree canopy cover is a top priority for the City of Calgary.

#### *Progress and performance measurement*

#### KPI #1: Tonnes of CO2 equivalent (CO2e) emitted per capita<sup>36</sup>

---

<sup>36</sup> This data is from the 2019 Climate Resilience Strategy Progress Report and is the most recent data available.

Reducing GHG emissions is the goal of climate change mitigation efforts. Understanding a city's GHG emissions per capita is a measure of efficiency: How efficient are our city's operations, buildings, transportation, industrial practices, per person living in Calgary. While Calgary's GHG emissions have grown 18 per cent between 2005 and 2019, the per capita GHG emissions decreased, demonstrating increased efficiency.

2019	2005
<b>14.47 tonnes of CO<sub>2</sub>e/capita</b>	16.53 tonnes of CO <sub>2</sub> e/capita

#### KPI #2: Climate change mitigation and adaptation efforts

Tracking progress on key climate mitigation and adaptation initiatives ensures Calgary continues to build a resilient city for its citizens. Solar power capacity at City of Calgary facilities demonstrates commitment to powering Calgary with cleaner energy sources, reducing the City's impact on climate change. Adaptation efforts are often characterized by actions related to improving biodiversity, creating green spaces, and watershed health to reduce the impacts of natural disasters when they do occur. The MDP and Climate Resilience Strategy work together to attain, or surpass, these targets.

Indicators	Data	60-year targets
<b>kW of solar power online at City of Calgary facilities</b>	<b>3,083<sup>37</sup></b> <b>Note: Sarcee Operations Work Centre powers 56.2kW of solar power and is included in this calculation.</b>	Not applicable
<b>kW of total solar power installed in Calgary</b>	<b>11,181<sup>38</sup></b>	Not applicable
<b>Percentage of land area with densities supportive of district energy systems<sup>39</sup></b>	<b>2.6 per cent</b>	1.7 per cent
<b>Percentage of city area covered by impervious surfaces<sup>40</sup></b>	<b>44 per cent</b>	10 per cent – 20 per cent
<b>Percentage of city area covered by tree canopy<sup>41</sup></b>	<b>8.25 per cent</b>	14 per cent – 20 per cent

#### 2021 actions planned

<sup>37</sup> This data is calculated from the City of Calgary Solar Edge Dashboard, accessed on March 22, 2021.

<sup>38</sup> This data is sourced from the 2019 Update Climate Resilience Strategy, with 2018 as the most recent data available.

<sup>39</sup> This indicator is aligned to the 14 core indicators in the 2020 Municipal Development Plan and Calgary Transportation Plan.

<sup>40</sup> See footnote 39.

<sup>41</sup> See footnote 39.

In 2021 the City will continue to track progress against 2020 MDP core indicators and review the effectiveness of the district energy systems and impervious surfaces KPIs as part of the 2020 MDP and its 60-year targets. Per the Next20 initiative, the City is prioritizing tree canopy cover as a core indicator of a resilient, healthy city. Improving green spaces is also a strategic move in The Greater Downtown Plan.

## **OUTCOME 2: CREATE A CITY WHERE ALL CALGARIANS ARE WELCOME, SAFE, AND ABLE TO BUILD A MEANINGFUL LIFE**

Creation of a welcoming and safe city where all citizens can build a meaningful life is not overseen and managed by one single organization. The Downtown Strategy Leadership Team and Working Group contribute to this outcome through the Downtown Strategy focus areas: play, live, work, and connect. The safety of Calgary's downtown is a priority for the City of Calgary while organizations like Vibrant Community Calgary, Enough for All, and Momentum work to make Calgary a welcoming, inclusive city for all people.

### *2020 key activities*

2020 was a difficult year for many Calgarians, and Calgary organizations worked hard to support as many citizens as possible. Many in-person services could not be provided to low-income Calgarians, but Momentum responded by hosting their Money Management workshop online in 2020, with the workshop being accessed over 500 times. Momentum also launched an online savings app with a Canadian financial technology company, QUBER, to support low-income Calgarians manage and save money.<sup>42</sup>

Finally, Momentum released a report demonstrating its contribution to reforming Alberta's high-cost credit industry, reducing interest rates from \$23 for each \$100 borrowed to \$15, which is the lowest in Canada (i.e., short-term loans). Launched in September 2020 as part of the 9 Block Program, the Downtown Ambassador Program focuses on outreach, safety, cleanliness within the nine blocks surrounding the Calgary Municipal Building and Stephen Avenue downtown. The program has seen hundreds of support interactions with the community since its launch and is one way the City of Calgary is working to improve perceptions of safety downtown.

### *Progress and performance measurement*

#### KPI #1: Market Based Measure (MBM) incidence of low-income in Calgary

Tracking low-income incidence in Calgary is critical to understanding our citizens' abilities to build a meaningful life in our city. Market Basket Measure (MBM) is Canada's official poverty line. It measures the cost of a 'basket' of goods and services that represent a modest, basic standard of living and determines low-income based on this amount. In 2019, the MBM was \$24,731 for a single person and \$49,462 for a couple with two children.

In 2019, the most recent year for which data is available, 5.7 per cent of Calgarians (or 89,000) were low-income, a decrease from 12.3 per cent in 2018. The Enough for All target for Calgary is a 30 per cent reduction in incidence of low-income from 2015 figures.

Indicator	2019 <sup>43</sup>
-----------	--------------------

<sup>42</sup> Retrieved from: <https://momentum.org/programs-services/manage-your-money/savings-app/>

<sup>43</sup> MBM data is sourced from Statistics Canada Table 11-10-0136-01 Low income statistics by economic family type.



<b>MBM incidence of low-income in Calgary</b>	<b>5.7 per cent</b>
---	---------------------

#### KPI #2: Living wage<sup>44</sup>

Living wage demonstrates affordability and is determined by calculating average expenses, taxes, and government transfers using local costs. It is not minimum wage; instead, considering the basic needs of two working parents with two children, including additional costs incurred to participate, thrive, and build human and financial assets. In 2020 the living wage increased 27 per cent from 2018 and is 39 per cent above Alberta's minimum wage of \$15 per hour.

<b>2020</b>	<b>2018<sup>45</sup></b>
<b>\$20.69 per hour</b>	<b>\$16.45 per hour</b>

#### KPI #2: Affordable (non-market) housing

Calgary has less supply of non-market housing than the Canadian average of 6 per cent, and it is estimated Calgary will need 15,000 new units of non-market housing to bring Calgary to the national average. It is critical for Calgary to provide the fundamentals for its citizens to live with security, dignity, and opportunity for the future.

<b>Indicators</b>	<b>Data</b>
<b>Percentage of non-market housing in Calgary</b>	3.6 per cent <sup>46</sup>
<b>Inventory of non-market homes available in Calgary Housing Company's portfolio</b>	7,108 <sup>47</sup>

#### KPI #3: Registered Education Savings Plans (RESPs) opened<sup>48</sup>

The ability to open a RESP demonstrates financial literacy and capacity to provide an opportunity to complete high school education and higher academic programs, influence post-secondary enrollment and completion, and reduces and prevents intergenerational poverty. Aspire Calgary tracks the number of RESPs opened across eight partner organizations on an annual basis as an indicator of poverty prevention and reduction. The organizations running Education Savings programs, contributing to opening RESPs include: BowWest Community Resource Centre,

<sup>44</sup> The Living Wage data is sourced from Vibrant Community Calgary (VCC) and Enough For All 2020 Living Wage Brief, released on March 17, 2021, and reported on an annual basis.

<sup>45</sup> Due to COVID-19, the 2020 living wage in Calgary was compared to the 2018 living wage, released in 2019.

<sup>46</sup> This data is sourced from the 2019 Annual Report of Calgary Housing Company (CHC), released on June 22, 2020, and is the most recent data available.

<sup>47</sup> See footnote 43. This data is as of 2019.

<sup>48</sup> This data is sourced from the 2019 Annual Report of Aspire Calgary and is the most recent data available.

Immigrant Education Society, Calgary Immigrant Women's Association (CIWA), Carya, Centre for Newcomers, Discovery House, Momentum, and Sunrise Community Link Resource Centre.

<b>2019</b>
847

#### KPI #4: Safety measures from Downtown Ambassador Program

Safety is subjective and not everyone perceives safety in the same way. In 2020, the City of Calgary used proactive, community-based measures to improve the safety of the nine blocks near the Municipal Building downtown. The Downtown Ambassador Program was deployed to create visibility and accessibility to information for those who need it.

Indicators	2020 <sup>49</sup>
<b>Interactions with the community</b>	1,302
<b>Referrals to social services supports</b>	200
<b>Wellness checks performed with members from Calgary's vulnerable population</b>	350

#### 2021 actions planned

In 2021, the successful Downtown Ambassador Program is expected to continue, while Momentum, Enough For All, and Vibrant Communities Calgary continue providing much-needed supports to low-income Calgarians in another tumultuous year.

The Calgary Municipal Housing Corporation understands approximately 81,240 households as of 2016 struggle with housing costs; a number expected to rise to 100,000 by 2026. CHC continues to focus on its strategic priorities to provide housing options for all Calgarians.

### OUTCOME 3: BUILD VIBRANT NEIGHBOURHOODS CONNECTED BY DIVERSE AND ACCESSIBLE MOBILITY OPTIONS FOR ALL

Given the scale of this outcome, there are many groups working towards achieving it.

The Downtown Strategy Leadership Team and Working Group implement the Downtown Strategy and the new Greater Downtown Plan, which aims to revitalize Calgary's downtown. The Downtown Strategy is structured across four focus areas: place, live, work, and connect, each with their own initiatives. The Leadership Team meets monthly to provide direction and oversight on the execution of the Downtown Strategy and the Working Group meets monthly and includes stakeholders from the City of Calgary's Urban Initiatives, Business and Local Economy, and Recreation departments, as well as representatives from Calgary Economic Development.

<sup>49</sup> Data from September 2020 to December 2020.

## 2020 key activities

Vibrant neighbourhoods became critical in 2020 as Calgarians were forced to stay close to home, where often one of the only ways to leave home was to get outside. Recognizing Calgary's downtown no longer served the city's needs, in 2020 there was a significant focus on the repurposing and redesign of greater downtown. In 2020 the Greater Downtown Plan was developed with the vision for downtown to be the economic and cultural heart of Calgary. It aims to create a resilient and vibrant place for everyone, with welcoming neighbourhoods, active streets, and well-used public spaces. City Council approved the Plan in April 2021. This Plan highlights bold strategic moves to revitalize Calgary's greater downtown including:

- Create mixed-use neighbourhoods with gathering places, housing choices and all of the amenities residents need close by.
- Build a green network by connecting parks, natural spaces and river frontage with downtown's main streets.
- Design streets for walkers and wheelers first, with regional pathways stretching along the riverbanks and underpasses, and bridges and on-street mobility tracks connecting to neighbouring communities.
- Make transit the quickest, safest and most cost-effective way to travel to and through downtown.
- Encourage innovation to accommodate and attract innovative businesses, testing and economic enterprise from the global technology sector.

Alongside the Greater Downtown Plan, the Real Estate Sector Advisory Committee (RESAC) took responsibility for progressing the approved Notice of Motion 2020-1439 *Providing Incentive to Residential Development in the Downtown Core*. This led to an understanding of the North American landscape for office to residential conversion incentives and the investment and potential solutions required to reduce vacancy in Calgary's Greater Downtown. This work concluded approximately six million square feet of office space needs to be removed by 2031 to reduce vacancy to 14 per cent.

In 2020, work continued on the development of the Guidebook for Great Communities, a toolkit to build future-focused, multi-generational, amenity-rich communities with a diverse selection of housing options.

Also worth noting were key placemaking initiatives that occurred downtown in 2020, namely 20 new murals were created as part of the Beltline Urban Mural Project, High Park and Park Park were created as public and event spaces, and East Village built a cross county ski loop at Fort Calgary to ensure outdoor activities were accessible to downtown residents.

## Progress and performance measurement

### KPI #1: Investments in public space projects

COVID-19 highlighted the importance of public spaces in a year when public spaces were often the only places individuals could see and meet one another. There were several key public space projects initiated, opened, continued or progressed, or completed in 2020, while major construction projects were announced and initiated.

Project name	Details
--------------	---------

<b>High Park and Park Park</b>	Public City Architecture Inc. worked with the Calgary Parking Authority to bring the multi-faceted, interactive installations to Calgary. HIGH PARK created over 90,000 square feet of public space.
<b>Cycle tracks on 9<sup>th</sup> Avenue SE</b>	There are new cycle tracks on 9 <sup>th</sup> Avenue SE between East Village and Macleod Trail, making it easier to get in and out of Inglewood and East Village.
<b>Castell Building canopy and lighting</b>	The University of Calgary's School of Architecture Planning and Landscape worked with the City of Calgary's 9 Block Program to enhance security and safety in the area.
<b>Adaptive roadways</b>	Pathways were widened to enable more people to use them during COVID-19 (and beyond) on specific city streets including Memorial Drive, Elbow Drive, 11 Street SE, and Crescent Heights.
<b>Firepits in city parks</b>	The City of Calgary provided free-to-use bookable fire pits during the winter in community and regional parks to enable safe outdoor gatherings.
<b>Temporary patios</b>	The City of Calgary enabled businesses to have temporary patios on public land. This enabled businesses to continue to operate in accordance with provincial health restrictions throughout 2020.

<b>Infrastructure project name</b>	<b>Expected economic impacts</b>
<b>Arts Commons Transformation Project</b>	<ul style="list-style-type: none"> <li>• \$386 million – estimated amount added to Calgary's gross domestic product (GDP) during construction of both phases of work.</li> <li>• ~3,155 jobs will be created during construction, generating \$239 million in labour income.</li> <li>• ~683 permanent jobs supported upon completion.</li> <li>• \$53 million in annual contribution to Calgary's GDP.</li> </ul>
<b>BMO Centre Expansion</b>	<ul style="list-style-type: none"> <li>• 1,800+ jobs created during construction.</li> <li>• 1,700+ jobs created after opening.</li> <li>• \$223 million – annual economic impact for Alberta.</li> </ul>
<b>Event Centre<sup>50</sup></b>	<ul style="list-style-type: none"> <li>• \$400.3 million projected returns to The City of Calgary over 35 years: <ul style="list-style-type: none"> <li>○ \$9.5 million community engagement programming</li> <li>○ \$138.7 million incremental Rivers District property tax</li> <li>○ \$155.1 million City facility fee</li> <li>○ \$2.5 million share of naming rights (10-year agreement)</li> <li>○ \$19.4 million street-facing retail property tax</li> <li>○ \$75 million community impact through Community Sports Payments</li> </ul> </li> </ul>

<sup>50</sup> While there is long term commitment to build the Event Centre, it is currently paused to resolve budget and program requirement challenges.

### KPI #2: Connectivity and accessibility of neighbourhoods

The following KPIs demonstrate whether Calgarians live in neighbourhoods connected by transportation options and whether these neighbourhoods are close to activity centres and main streets, or corridors. It should be noted these KPIs are two of the 14 core indicators from the 2020 Municipal Development Plan and Calgary Transportation Plan and will be tracked every four years. Connectivity to primary transit networks is a priority for the City of Calgary and is being accelerated to achieve the 60-year target. Accessibility to daily needs (i.e., population within Major and Community Activity Centres) is on track to achievement of the 60-year target.

Indicators	2018	60-year targets
<b>Percentage of population within 400m of Primary Transit Network<sup>51</sup></b>	37 per cent	45 per cent
<b>Percent of population within Major and Community Activity Centres, and 600m of Urban and Neighbourhood Corridors<sup>52</sup></b>	21 per cent	30 per cent

### KPI #3: Transportation services<sup>53</sup>

Diverse transportation and mobility options means Calgarians can access fundamental amenities, their workplaces, and their social circles in an inclusive way. It is important for a healthy and resilient city to provide multiple types of transportation.

The following KPIs are three of the 14 core indicators from the 2020 MDP and CTP and will be tracked every four years. All the transportation KPIs are priorities for the City of Calgary and align to the Future of Transportation strategy and the 2020 CTP for Calgary.

These indicators do not illustrate the impact of COVID-19 on walking, cycling, and public transit trips in 2020. COVID-19 has impacted public transit ridership in unforeseeable ways. In April 2020, ridership was at 10 per cent of 2019 levels, having since increased to 25 percent of 2019 levels.<sup>54</sup> When surveyed, only half of transit customers expect to resume using transit as frequently as before COVID-19, providing reasons such as discomfort with using public spaces during and post-pandemic and changing needs for using public transit. As routines change and more flexibility is provided with remote work, public transit to and from downtown may be structurally changed.

Indicators	2018	60-year targets
------------	------	-----------------

<sup>51</sup> This data is sourced from the Next20 initiative, a review of the 14 core indicators for Land Use and Mobility, as part of the 2020 update to the Municipal Development Plan and Calgary Transportation Plan.

<sup>52</sup> See footnote 39.

<sup>53</sup> See footnote 39.

<sup>54</sup> City of Calgary. (July 22, 2020). Calgary Transit Ridership, Revenue and RouteAhead Update. Retrieved from: [https://pub-calgary.escrimemeetings.com/filestream.ashx?DocumentId=135378#:~:text=As%20of%202020%20July%208,Alberta%20\(2020%20March%209\).&text=The%20lowest%20point%20in%20ridership,approximately%2077%2C000%20boardings%20per%20weekday](https://pub-calgary.escrimemeetings.com/filestream.ashx?DocumentId=135378#:~:text=As%20of%202020%20July%208,Alberta%20(2020%20March%209).&text=The%20lowest%20point%20in%20ridership,approximately%2077%2C000%20boardings%20per%20weekday).

<b>Percent of trips using walking and cycling transportation (all purpose trips, 24 hours, city-wide)</b>	18 per cent	25 per cent
<b>Percent of trips using transit transportation (all purpose trips, 24 hours, city-wide)</b>	8 per cent	15 per cent – 20 per cent
<b>Annual transit service hours per capita</b>	2.24	3.7

#### KPI #4: Downtown transportation modal split<sup>55</sup>

Calgary specifically tracks transportation modes inbound and outbound to downtown to understand how Calgarians travel to and from work in the downtown. This information is critical to inform future infrastructure investments for Calgarians who not only commute into downtown for work, but who live and play downtown and wish to access amenities outside the downtown.

In 2020, this data is not available or relevant given the provincial health restrictions requiring working from home for most of the year, and public perception of public transit being unsafe during the pandemic. As vaccines continue to roll out in Alberta, there is speculation many employers will continue to have flexible work-from-home policies and this will impact the absolute number of Calgarians commuting into downtown; structurally changing the downtown use case.

<b>Indicators</b>	<b>2019</b>	<b>2018</b>
<b>Percent of trips inbound walking (16 hours)</b>	<b>9.6 per cent</b>	9.9 per cent
<b>Percent of trips inbound cycling (16 hours)</b>	<b>2.0 per cent</b>	2.7 per cent
<b>Percent of trips inbound single car driving (16 hours)</b>	<b>55.1 per cent</b>	53.9 per cent
<b>Percent of trips inbound using transit (16 hours)</b>	<b>33.2 per cent</b>	33.5 per cent

<sup>55</sup> This data is sourced from the Calgary Downtown Cordon Activity Modal Split dataset, with 2019 being the most recent data available. 2020 modal split data is not available as efforts were made to conduct a partial study, but no vehicle occupancy information was retrieved. 2020 data, and potentially 2021 data, will not be used to conduct year over year comparisons.

#### KPI #5: Sliding scale transit passes sold

As an indicator of inclusivity, sliding scale transit passes provide the opportunity for all Calgarians to access daily amenities. While the number of sliding scale transit passes sold decreased 32.5 per cent in 2020, this was likely due to COVID-19 restrictions reducing the need for transportation around the city and precautions taken by the public not to use public transportation to move around the city.

2020	2019
270,035	480,915

#### *2021 actions planned*

In February 2021, City Council approved the 2020 MDP and CTP, Calgary's long-range land use and transportation plans that look 60 years into the future. These plans help shape how the communities we live and work in grow, develop, and evolve over time. Monitoring and review of progress occurs every four years, with the most recent review occurring in 2018, meaning the next progress report will be released in 2022.

For the remainder of 2021 and ongoing efforts to develop vibrant neighbourhoods, City Council asked for the Guidebook for Great Communities be further refined by City of Calgary administration. Work to execute on the strategic moves in the Greater Downtown Plan will move ahead as City Council approved the Plan in April 2021. Ongoing and planned infrastructure investments included in the Greater Downtown Plan include:

- New Event Centre
- Arts Commons Transformation Project
- BMO Centre Expansion
- Glenbow Museum Renovations
- Riverfront and Eau Claire Public Realm
- Green Line
- 17 Avenue S.E. Extension
- Platform Innovation Centre and Parkade

Related to this is the work to create 'Tomorrow's Chinatown'. This initiative will help support Chinatown's future as a vibrant, culturally rich place to live, work, and visit; and is expected to be completed by the end of 2021. Finally, work continues to develop policies and incentives for office to residential conversions in the downtown.

#### **OUTCOME 4: ENGAGE CALGARIANS IN ARTS AND CULTURE AND SPORTS AND RECREATION, LEVERAGING OUR TOURISM ASSETS**

This key outcome is managed and executed by multiple organizations across Calgary. Calgary Economic Development works with the City of Calgary, Tourism Calgary, Calgary Arts Development Authority (CADA), the Calgary Public Library, and other Civic Partners to provide a city-wide view of progress. These organizations work tirelessly to achieve their organizations' and city's objective to enhance tourism, culture, and recreation assets.

## *2020 key activities*

2020 was a difficult year for Calgary's tourism, sports and recreation, and arts and culture organizations and businesses. Events could not be held, artists could not showcase their craft, recreation facilities were closed or seriously impeded for much of the year, and tourism focused on local (or in some cases out of province) Calgarians experiencing Calgary's attractions.

That said, organizations and businesses were innovative, resilient and continued to provide Calgarians with new experiences. Supported by funding from Western Economic Diversification, the Chinook Blast Winter Festival was collaboratively planned by The City and nine key partners and held in February 2021, a remarkable accomplishment given the adaptations and logistics required to manage risks and restrictions from COVID-19. Chinook Blast Winter Festival is meant to bolster tourism in Calgary throughout the year and laid important groundwork to showcase winter as a tourist season in downtown. CADA started Rise Up in partnership with the Calgary Hotels Association and Hotels Live to respond to COVID-19 and initiated Living a Creative Life web series to highlight Calgarians creative works during COVID-19. City Council allocated funding for CADA's COVID Emergency Resiliency Fund to support the recovery and resiliency of arts organizations impacted by COVID-19.

Tourism Calgary focused tourism on raising awareness of local businesses and assets, while also deferring 45 events to future years and securing 64 new events to Calgary. One example was securing Calgary as the host city for Curling Canada's entire 2021 event bubble.

The Calgary Public Library, facing service disruption and location closures, quickly pivoted to program experiences online, launching hundreds of different programs for all ages, backgrounds, and interests. In 2020 professional skills and virtual meeting tools were amongst the most popular online learning and skill development courses for adults.

In sports and recreation, the ActiveCITY Playbook 2030 was drafted as a guidebook to build Canada's most livable region, encompassing all facets of the active economy to ensure Calgary creates a healthy ecosystem of active businesses and citizens to support the economic, human, social, and environmental prosperity of our city and region. A funding request was made to the Government of Canada to create the Canadian Centre for Excellence in Winter Sport in Calgary.

To better understand the impact of COVID-19 on sport in Calgary, Sport Calgary conducted a survey in April 2020.<sup>56</sup> The survey found sports organizations across Calgary are going through a generational challenge, with 46 per cent of respondents expecting to feel lasting impacts up to six months, and 28 per cent expect the impacts to last up to a year. Given the current circumstances, it is likely the sports community will be managing decreased revenue and participation for years. 91 per cent of multi-sport facilities in Calgary have laid off employees, and 97 per cent of organizations have experienced a decline in revenues from user fees.

## *Progress and performance measurement*

### KPI #1: Public arts engagement

---

<sup>56</sup> Sport Calgary. (April 27 2020). Retrieved from: <https://www.sportcalgary.ca/news-releases/2020/4/27/impact-of-covid-19-pandemic-on-local-sport>



CADA monitors and tracks contributions made to the arts and culture community in Calgary. Key services and supports CADA provides include public art placement and decision making, funding to support the creative economy and activations downtown, grants for arts organizations, and sponsorship for arts and culture events across the city.

No event-related data is reported for 2020 as all arts and culture performances and large-scale events were cancelled due to COVID-19. Instead, it is a testament to CADA to showcase the support arts and culture organizations received in 2020. In 2020, the dollar amounts provided to arts organizations through CADA's grant investment programs increased 30 per cent from necessary COVID-19 supports from the COVID-19 Emergency Resiliency Funds from the City of Calgary. These funds were dispersed through 846 grants in 2020.

Key infrastructure projects were also maintained despite COVID-19: Glenbow Museum Renovations and Arts Commons Transformation Project, approved in 2020 and to be initiated in 2021 and 2024, respectively. The Glenbow Museum Renovations will cost \$115 million; the Government of Alberta has committed up to \$40 million, however the Glenbow is still seeking funding for its renovations. Design on the Arts Commons Transformation Project started in 2020. The remaining portion of the funding for the \$240 million Road House (Phase 1) was approved at City Council on April 26, 2021, subject to receipt of the increase to the Canada Community Building Fund; funding for the Resident House (Phase 2) is to be determined.

As Calgary recovers from the impacts of COVID-19, the KPIs below may be updated to showcase public arts and culture events and participation of the community.

Indicators	2020	2019
<b>Investment dollars from Cultural Activation Fund to support the creative economy, downtown strategy, and winter strategies</b>	<b>\$689,525</b>	\$663,000
<b>CADA grant investment programs</b>	<b>\$12,727,315</b>	\$9,789,980
<b>CADA total number of grants</b>	<b>846</b>	452
<b>Number of Indigenous artists and organizations supported across CADA grant programs</b>	<b>65</b>	40 <sup>57</sup>

#### KPI #2: Sports and recreation accessibility

A key component of wellbeing is physical activity, and Calgary is touted as one of the most active cities in Canada. In 2020, due to COVID-19, access to City recreation facilities dropped significantly as provincial health restrictions closed facilities for extended periods of time throughout 2020. Similarly, the number of Calgarians approved for the Fair Entry Program declined likely due to the impact of COVID-19 on the opportunity for Calgarians to use indoor recreation facilities, including recreation centres and ice rinks.

Indicators	2020	2019
<b>Number of visits to Calgary recreation facilities</b>	<b>1,299,713</b>	4,199,539

<sup>57</sup> This number is not directly comparable to 2020 data. In 2019, 40 Indigenous artists or Indigenous-led organizations were funded by the Original People's Investment Program. In 2020, 65 Indigenous artists and Indigenous-led organizations were supported across all CADA grant programs.

<b>Number of Calgarians approved for the Fair Entry Program</b>	<b>66,000</b>	96,523 <sup>58</sup>
---	---------------	----------------------

### KPI #3: Economic impact of Tourism Calgary

The economic impact of tourism and the work done by Tourism Calgary is critical to Calgary's economic future. Tracking economic impact of events hosted and sponsored by Tourism Calgary and the leadership of Tourism Calgary for the sector demonstrate how Calgary successfully leverages our tourism assets to advance *Calgary in the New Economy*.

The impact of COVID-19 has been severe for the tourism industry in Calgary; however, Tourism Calgary has done incredible work to pivot their efforts to a local focus, reschedule 45 events to future years, and confirm 64 new events to take place in Calgary, ensuring continued economic contributions in years to come. It is a testament to the work of Tourism Calgary that, despite COVID-19's negative impact on the industry, perceptions of Tourism Calgary increased to 94 per cent in 2020.

<b>Indicators</b>	<b>2020</b>	<b>2019</b>
<b>Economic impact (\$CAD) of Tourism Calgary events<sup>59</sup></b>	<b>Q1 2020: \$22,428,540 Q2 – Q4 2020: \$61,421,645, not realized<sup>60</sup></b>	\$153,000,000
<b>Events supported by Tourism Calgary</b>	<b>Q1 2020: 25 Q2 – Q4 2020: 45, rescheduled<sup>61</sup></b>	67
<b>Perception of Tourism Calgary as an effective champion for the industry</b>	<b>94 per cent</b>	93 per cent

### KPI #4: Calgary Public Library engagement

The Calgary Public Library system is an integral part of Calgary's learning ecosystem and its arts and culture. Without a vibrant and utilized library system, a city cannot support life-long learning and growth of all ages. Furthermore, a library system, as demonstrated through the KPIs below, provides more than an equal opportunity to access books. Calgary's libraries provide online skills and training resources, webinars, tax education and services, computer access and loans, printing services, and free meeting spaces.

Due to COVID-19, many KPIs reported in 2019 and in September 2020 are no longer relevant, such as number of visits to Calgary libraries or library programs. While libraries themselves were closed for much of 2020, circulation only declined 18 per cent from 2019 to 2020. As well, the Calgary Public Library responded to a significant trend of online learning and skill development amongst adults. Courses on professional

<sup>58</sup> This number is not directly comparable to 2020 data. In 2019, 96,523 people were enrolled and used Recreation's Fee Assistance Program. In 2020, 66,000 were approved by Fair Entry and indicated they wanted to use the Fee Assistance Program.

<sup>59</sup> Includes meetings and conventions, and sport, cultural and major events.

<sup>60</sup> Due to the COVID-19 pandemic, this economic impact has been deferred to future years and was not realized in 2020.

<sup>61</sup> Due to the COVID-19 pandemic, these events were deferred to future years.

skills and virtual meeting tools were amongst the most popular in 2020, with the Library hosting over 150,000 participants through their online courses.

Indicators	2020	2019
<b>Total library circulation</b>	<b>12,249,432</b>	14,938,332
<b>Online course participation through Calgary Public Library</b>	<b>150,523</b>	556,392 <sup>62</sup>

### *2021 actions planned*

Unfortunately, the beginning of 2021 continued the uncertainty imposed by COVID-19 on Calgary's arts and culture, tourism, and sports and recreation organizations and businesses. As of April 7, 2021, arts rehearsals and performances can no longer be conducted in person, recreation facilities are open only for one-on-one training, and the possibility of large in-person events such as concerts, sports games, and festivals is unknown.

That said, planning has already begun for 2022 Chinook Blast winter festival given its success in 2021. CADA continues to support Rise Up and Hotels Live alongside the Calgary Hotels Association. New CADA grants in 2021 include the Organization Structural Change Grant to support organizations with critical changes to create a stronger sector in the future and Artist Microgrants to support artists with professional development needs.

Calgary is currently hosting the 2021 Curling Canada event bubble from February to May 2021, which will generate \$11 million in economic impact, and has successfully deferred 45 events originally scheduled for 2020. In addition, 64 new events have been scheduled for future years including the 2024 International Institute of Municipal Clerks Annual Conference anticipated to generate \$2.6 million in economic impact. Tourism Calgary will continue focusing their marketing efforts on local businesses through the #LoveYYC program to inspire support of local businesses and attraction year-round. Tourism Calgary will evaluate and enhance its partnership program to support industry partners manage post-COVID-19 and continues to monitor sentiment and confidence in meeting and convention markets to inform its sales approach going forward.

---

<sup>62</sup> This number is not directly comparable to 2020 data. In 2019, the Calgary Public Library hosted 556,392 participants through its programs mostly in person. In 2020, 150,523 participated in online learning courses and skill development.

## BUSINESS ENVIRONMENT

Our economic strategy positions Calgary to become **Canada's most business-friendly city**. The City of Calgary defines business-friendly as: the balancing between the needs of our residents, customers and communities with the needs of our business community. Business environment refers to both the ease of conducting business and the level of business activities in Calgary. While other pillars of the economic strategy are critical to talent and business attraction, retention, and expansion, the ease and cost of doing business is consistently perceived as one of the most important factors driving relocation. This pillar is not only focused on creating a low tax environment. It is also focused on making development and building permit processes, business license applications, and other regulations and requirements easier to navigate. The pillar has also been expanded to encompass connectivity from a physical and digital infrastructure perspective, as a key component of doing business in Calgary. Ensuring the City of Calgary is a partner in innovation through policy and regulations on data sharing, testing facilities and pilot programs, and 5G infrastructure.

### *Governance and Management*

The City of Calgary's Business and Local Economy Team was created to advance and manage the initiatives and programs of the Business Environment pillar. Council's Business Advisory Committee acts as a conduit to address perceived City of Calgary barriers that business stakeholders face in their everyday operations. The Business Advisory Committee's external working group is made up of key business leaders in Calgary who provide feedback and direction on priorities. The Living Labs Team at the City of Calgary works to formalize and simplify the process to make public spaces, transportation corridors and land more accessible for the research and testing of innovative solutions. The City of Calgary's Information Technology (IT) Team is responsible for the city's digital infrastructure, while YYC Calgary International Airport is a critical partner in keeping Calgary globally connected to key trading and business partners.

## 2020 Business Environment Outcomes Progress

### **OUTCOME 1: BUILD A GLOBALLY AND DIGITALLY CONNECTED CITY**

#### *2020 key activities*

From both a physical and digital connectivity perspective, work done in 2020 progressed the achievement of this outcome.

2020 was undeniably difficult for YYC Calgary International Airport. It is important to note Canadian airports did not receive targeted federal support during COVID-19, while airports across the United States did receive funding. This will inevitably create an unequal recovery for airports across North America. Levels of passenger throughput were reduced to those last seen in 1993. However, YYC Calgary International Airport was one of only four Canadian airports open during COVID-19 and continued to have the highest percentage of connecting flights in the country (43 per cent of passengers are connecting), compared to Vancouver's 35 per cent and Toronto's 30 per cent. In 2020, connecting flights were critical to maintaining some level of operations as most connecting flights to and from YYC Calgary International Airport are domestic. Another important trend to note is the growing demand for e-commerce, resulting in a significant increase in cargo capacity requirements. YYC Calgary International Airport has spent \$100 million over the past 15 years in cargo and logistics infrastructure, including 130,000 square feet of cargo-specific assets to ensure cargo receives the same priority as passenger travel, a rarity among international airports worldwide. In 2020, YYC Calgary International Airport saw an 11 per cent increase in cargo landings mostly from personal protective equipment and e-commerce. This

increase is not expected to decline post-COVID-19; therefore, YYC Calgary International Airport is well set up to support future increases in cargo.

To prepare for the recovery and return of air travel in 2020, YYC Calgary International Airport received the Airports Council International (ACI) Health Accreditation and is working on #FlyHealthyYYC to improve perception and confidence in safety measures. As well, YYC Calgary International Airport began identifying terminal innovations for a contactless airport experience, through check-in to self bag drops to tap and go parking.

With respect to digital connectivity infrastructure, a study commissioned by Calgary Economic Development in 2020, and released in 2021, showcased Calgary as a national leader in 5G preparedness and building the necessary components of a digital ecosystem. When compared to other Canadian municipalities including Vancouver, Edmonton, Winnipeg, Toronto, Ottawa, Montreal, and Halifax, Calgary was the only municipality to meet all defined criteria to build an effective digital ecosystem. Perhaps most importantly, Calgary was the only municipality at the time of the study, other than Montreal, currently working with national wireless service providers (WSPs) to build a digital playground downtown for testing and piloting 5G enabled applications. The City of Calgary already has guidelines and processes in place for WSPs and other businesses to build 5G infrastructure.

#### *Progress and performance measurement*

##### KPI #1: Kilometers of municipally-owned fibre

Municipally-owned fibre demonstrates commitment to, and support for, a city's digital infrastructure ecosystem. A study commissioned by Calgary Economic Development, and authored by Gregory Taylor, Associate Professor at the University of Calgary's Department of Communications, Media and Film, demonstrated the importance of municipally-owned fibre for attracting innovative companies and connecting Calgarians in preparation for 5G technology. In 2020, as 5G technology began launching in Calgary, the City of Calgary continued to build municipally-owned fibre infrastructure to support Calgary's digital ecosystem.

2020	2019
600 km	586 km

##### KPI #2: Number of Internet Exchange Point (YYCIX) members

YYCIX is the fourth largest internet exchange point (IXP) in Canada and is important physical infrastructure supporting Calgary's digital ecosystem and readiness for 5G technology. The existence and strength of a city's IXP means data can transfer between devices faster as the distance travelled is shorter. This leads to lower latency (greater responsiveness of devices) and the ability for more data to be shared. These capabilities are critical for the next generation of digital applications and demonstrate a digitally connected city ready for the new economy.

2020	2019
79	66

### KPI #3: YYC Calgary International Airport volumes and flights

YYC Calgary International Airport is a critical component of Calgary's connectivity to national and international jurisdictions. The ease with which Calgary companies can connect to their trade partners and export destinations is critical for expansion and retention of local companies, while the connectedness of Calgary is also a key factor driving company attraction to the city. Of course, while YYC Calgary International Airport was one of only four Canadian airports open during COVID-19, there were significant declines in passenger volumes and direct non-stop flights from 2019 to 2020. Pre-pandemic, the airport generated \$8 billion in GDP for Calgary and the region, with 50,000 jobs indirectly tied to the airport.

Indicators	2020	2019
<b>Number of passengers at YYC Calgary International Airport</b>	<b>5,700,000</b>	18,000,000
<b>Air cargo landings at YYC Calgary International Airport</b>	<b>~4,780 landings (11 per cent increase)</b>	4,305 landings
<b>Number of direct non-stop flights</b>	<b>42</b>	88

### *2021 actions planned*

In 2021 the City of Calgary intends to launch a Digital Playground in downtown in alignment with exploration of creating an Innovation District in Calgary.

Looking at global connectivity and YYC Calgary International Airport, the airport expects recovery from COVID-19 to occur over the next five years. Key factors YYC Calgary International Airport is tracking and believes are critical to the recovery include: lifting of restrictions in conjunction with continued roll out of vaccinations around the world; the financial health of airlines coming out of the pandemic; and public confidence in travel post-COVID-19. Importantly, the financial health of airlines is dependent upon business travel as a key revenue generator; business travel may never return to pre-COVID-19 levels. There are many uncertainties related to each factor and YYC Calgary International Airport is conducting comprehensive scenario planning to prepare for all possible recovery timelines. The airport is also looking at development of land around YYC to support supply chain view of goods and services movement and target innovative companies to support supply chain. As the home to WestJet, the number two national carrier, the recovery and success of WestJet is top of mind for Calgary. As the sector recovers, it is noteworthy WestJet did not receive federal support unlike Air Canada, who received \$5.9 billion from the federal government.

## **OUTCOME 2: IDENTIFY AND UNDERSTAND GLOBAL TRENDS TO HELP BUSINESSES GROW, THRIVE AND MAKE DATA DRIVEN DECISIONS**

### *2020 key activities*

2020 was an unprecedented year for Calgary businesses impacted by both the prolonged decline of the energy industry and impacts of COVID-19 on business operations. These two crises not only impacted the short-term survival of Calgary's small and medium-sized businesses, but

also has long-term implications such as office space vacancy in Calgary's downtown. The structural changes occurring in the energy industry such as the transition to cleaner energy, digitization of remote, in-field work and efficiency of production with fewer workers, will inevitably reduce the number of jobs required to sustain the industry. Beginning in late 2020, the RESAC and the Urban Initiatives Department at the City of Calgary worked to better understand the implications, and potential solutions, to Calgary's growing office vacancy through a more vibrant and reimagined Greater Downtown.

The continuation of key infrastructure projects in 2020 also demonstrates commitment to Calgary's future. For example, investment in the BMO Convention Centre Expansion provides Calgary the opportunity to host large conventions, conferences, and other events, generating income for the city. From a provincial and municipal perspective, the Government of Alberta committed \$3 billion to capital maintenance and renewal across the province, while Calgary Municipal Land Corporation (CMLC) continues to work on key development plans for East Village and East Victoria Park to achieve their 20-year vision for Calgary's Culture and Entertainment District. 2020 also saw the completion of key milestones for the Green Line LRT, Calgary's largest ever infrastructure investment.

All three levels of government provided support for businesses impacted by COVID-19. Federally, COVID-19 supports available to businesses included the Canada Emergency Wage Subsidy (CEWS) and Canada Emergency Recovery Benefit (CERB), available to compensate for employee income and business revenues lost due to COVID-19. As of January 16, 2020, 391,690 CEWS claims were approved for Alberta businesses, equalling \$10,671,564,000.<sup>63</sup> The Government of Alberta is mobilizing funds to support business re-opening in 2021 (see 2021 Actions Planned section below). The City of Calgary also supported local businesses throughout 2020. The Business and Local Economy Team at the City of Calgary met bi-weekly with business owners through the Business Sector Task Force to help local businesses understand available supports and to better understand key challenges businesses faced throughout the year. From a financial and ease of doing business perspective, the COVID-19 Relief Package resulted in \$2.2 million waived fees for businesses. The ShopHERE pilot program was launched in 2020 to support local businesses create an online presence when in person retail shopping was not allowed due to COVID-19 restrictions. As well, over 16,000 video inspections were conducted virtually to allow Calgary's construction industry to proceed during COVID-19.

### *Progress and performance measurement*

#### KPI #1: Square feet of downtown office space absorbed

Reducing vacant office space signals a vibrant downtown where businesses grow and thrive. It also provides the City with investment dollars to further support businesses through property taxes – an important positive feedback loop. Negative absorption means more office space is available in the office market, increasing supply and depressing prices of real estate. While Calgary continues to have the highest square feet of available office space in Canada, Calgary also continues to have the highest square feet of office space occupied in Canada. Since 2015, the City has lost \$16 billion in downtown office value and over \$320 million in property tax revenues. In 2020-21 the negative absorption is largely attributed to the massive consolidation in the energy industry that eclipsed the move of technology companies into downtown. Per forecasts from the City of Calgary, if no measures are taken to actively eliminate six million square feet from the downtown, office vacancy will remain high at 23.2 per cent by 2031, and it will remain difficult to convince owners and developers to invest in their assets to improve attractiveness for companies and talent. This is a more severe forecast than in the report brought forward to City Council in February 2017, which indicated a return to \$80 oil by 2020 and mid-teen vacancy rate by 2032.

<sup>63</sup> Canada Revenue Agency. Table 2i: Approved Canada Emergency Wage Subsidy (CEWS) Claims by Period and Industry Sector, Alberta. Retrieved from: [https://www.canada.ca/content/dam/cra-arc/serv-info/tax/business/topics/cews/statistics/cews\\_p1-p12\\_tbl2i\\_ab\\_e.pdf](https://www.canada.ca/content/dam/cra-arc/serv-info/tax/business/topics/cews/statistics/cews_p1-p12_tbl2i_ab_e.pdf)

2020	2019
<b>656,295 square feet, negative absorption</b>	109,760 square feet, negative absorption

#### KPI #2: Construction value generated

Construction value is an outcome-based indicator demonstrating the economic impact construction has on the local economy.

2020
<b>\$3.4 billion, city-wide building permits</b>

#### KPI #3: Headquarters per capita

Headquarters are a symbol of power and decision making. Cities with headquarters are seen as a center of business where important decisions are made. Given the current economic condition in Calgary, continuing to maintain the highest number of headquarters per capita in Canada is an impressive showcase of Calgary's resilience and continued reputation as a place for some of Canada's most prestigious and fast-growing companies, including Canadian Pacific Railway, WestJet, Suncor, Benevity, Symend, Attabotics, and others. The data for this KPI is taken from the F500 list and is not reflective of start-up companies or small and medium-sized businesses headquartered or started in Calgary. In future years, this KPI may need to be updated to reflect a broader definition of company headquarters including scaling technology companies, many becoming large employers.

2020	2019
<b>117</b>	118

#### KPI #4: Business support and perceptions

The following data points illustrate initiatives and programs available for businesses to grow and thrive, as well as business perceptions of their ability to grow and thrive with the support of the City of Calgary. Where noted, the data is captured from the City Business panel surveys, often conducted quarterly, of businesses in Calgary. In 2020, many of the survey questions were updated to understand business needs because of COVID-19; and some questions were not asked on a quarterly basis due to the disruptions related to COVID-19. Many of the survey questions around business support and perceptions from the Calgary business community were updated for 2020 to better understand COVID-19's impact on business and trust in the City to manage and find solutions to COVID-19.

Indicators	2020	2019
<b>Dollars distributed as part of the COVID-19 Relief Package</b>	<b>\$2.2 million</b>	Not applicable



<b>#SupportLocalYYC campaign impressions</b>	<b>15,255, 772</b>	Not reported
<b>Number of businesses supported by Digital Mainstreets (ShopHERE initiative)</b>	<b>157<sup>64</sup></b>	Not applicable
<b>Business trust in the City (percentage of survey respondents)</b>	<b>35 per cent<sup>65</sup></b>	21 per cent
<b>Business awareness of City efforts to limit the spread of COVID-19 (percentage of survey respondents)</b>	<b>62 per cent<sup>66</sup></b>	Not applicable
<b>Business confidence the City will work with the private sector to find solutions during COVID-19 (percentage of survey respondents)</b>	<b>40.5 per cent<sup>67</sup></b>	Not reported <sup>68</sup>

#### KPI #5: Available City of Calgary open datasets

To grow and thrive, businesses need data to make data-driven decisions in their best interest. A business-friendly city provides open access data to its community to enable entrepreneurialism and create the conditions necessary for success in a world increasingly driven by data and the ability to analyze and use data for insights and foresight.

<b>2020</b>	<b>2019</b>
<b>340</b>	295

#### *2021 actions planned*

In 2021 work will continue on key infrastructure projects described above including Arts Commons Transformation Project, BMO Centre Expansion, and Platform Innovation Centre and Parkade will be complete by Fall 2021.

In terms of key business supports for COVID-19, in 2021, the Government of Alberta will distribute over \$620 million to businesses through the Small and Medium Enterprise Relaunch Grant and Enhanced COVID-19 Business Benefit to offset costs of re-opening and implementing necessary public health measures. Calgary Economic Development also saw ConnectingYYC.ca uptake in early 2021, with 1,502 pageviews in Q1 2021.

<sup>64</sup> The ShopHERE pilot supported businesses move online to a Shopify site to increase resilience/business access when no in person shopping was allowed due to COVID-19.

<sup>65</sup> Average across Q1, Q2, and Q3 2020. This question was not asked in Q4 2020 due to COVID-19.

<sup>66</sup> Asked once during 2020 and replaced 2019 question on 'what's going on in the City'.

<sup>67</sup> Average across Q2 and Q3 2020. This question was not asked in Q1 2020 and missing one quarter of data due to COVID-19.

<sup>68</sup> In 2019 the question was asked: "I have confidence in The City to work closely with the private sector to develop investment solutions". Results in 2020 are not comparable.

Many of the municipal supports for businesses created and implemented in 2020 will continue through 2021. The ShopHERE pilot program will continue and has already received 250 applicants for Phase 2 of the program. As well, the fee freezes implemented in 2020 will continue through 2021, with a request for extension of the COVID-19 Relief Package brought to City Council on April 12, 2021. Funding is also available to help Business Improvement Areas support and promote their local areas.

### **OUTCOME 3: ANTICIPATE AND REDUCE BARRIERS TO DOING BUSINESS**

#### *2020 key activities*

The Business and Local Economy Team at the City of Calgary worked tirelessly in 2020 to ensure businesses could do business easily and find the information needed to manage their businesses considering COVID-19. This was evident in the 43 per cent increase in online permit services and applications seen from 2019 to 2020. It was also evident in the bi-weekly Business Sector Task Force meetings with local businesses to ensure their voices were heard and needs met.

One of the most popular initiatives implemented by the City of Calgary were temporary patios in the summer of 2020. There were 116 applications approved in 2020 with fees waived for the application. These patios enabled restaurants and bars, breweries, and cafes across the city to remain open and comply with provincial health restrictions.

#### *Progress and performance measurement*

##### KPI #1: Webpage visits to myBusiness hub and COVID-19 support page

The City of Calgary's Business and Local Economy Team works diligently to support businesses across Calgary start, operate, and sustain in all economic conditions. The myBusiness hub and COVID-19 support webpages were set up to support businesses and make it easier for businesses to find the information they needed to operate. While the number of webpage visits to the myBusiness hub declined in 2020, this could be due to the uptake in webpages visits to the COVID-19 support page.

Indicators	2020	2019
<b>Increase in online applications</b>	<b>43 per cent<sup>69</sup></b>	Not reported
<b>Webpage visits to myBusiness hub</b>	<b>43,409</b>	50,627
<b>Webpage visits to COVID-19 support page</b>	<b>33,974 (January – December 2020)</b>	Not applicable

##### KPI #2: City Centre Enterprise Area results

<sup>69</sup> As of September 30, 2020 online intake of applications has increased by 43 per cent. Customers can apply for permits online from their homes, 24 hours a day, 7 days a week, 365 days a year.

The City Centre Enterprise Area applies to downtown Calgary and Beltline. This area is where change of use, additions, or modifications to a building are exempt from requiring a development permit. Areas like these in Calgary reduce time and costs to businesses and streamline impediments to growing a business.

Indicators	2020	2019
<b>Building permits and tenancy certificates ratio approved without development permits</b>	<b>69 building permits : 73 tenancy certificates</b>	Not reported
<b>Customer time saved</b>	<b>3,209 hours</b>	Not reported
<b>City of Calgary staff time saved</b>	<b>345 days</b>	Not reported
<b>Fees saved</b>	<b>\$36,000<sup>70</sup></b>	Not reported

### KPI #3: Applications for temporary patios on public land

In 2020, gathering outside was often the only option for Calgarians to socialize with friends and family. Temporary patios on public land were a lifeline for the restaurateurs, brewers, and other nightlife in Calgary as they struggled to stay open without indoor dine-in options. More than this, this initiative showcases the City of Calgary's nimbleness and willingness to try new ways of creating vibrancy and community and making it easier to do business in Calgary.

2020	2019
<b>116</b>	Not reported

### 2021 actions planned

Many of the initiatives from 2020 will continue into 2021, including the temporary patios on public land. In 2021, 140 applications have already been received for temporary patios. These patios are proving to be a lifeline for restaurants, breweries, and bars as COVID-19 infection rates continue to increase in Calgary and indoor dining and gathering remain restricted.

Importantly, the City of Calgary has already consolidated the content from the myBusiness hub, COVID-19 business support, and all other business support content, into a [single website](#). As well, the City of Calgary will pilot a new Business Experience Representative position for the Restaurants and Breweries sector. This position is intended to be a single point of contact for business needs related to approvals and inspections required for opening a business. The site aims to provide a seamless and accessible user experience for businesses and entrepreneurs looking for information to support their needs.

<sup>70</sup> The dollars in fees saved would have equalled \$73,000 without the May permit fee waiver, a special support for businesses during COVID-19.

## Conclusion

In 2020, Calgary faced a harsh new reality: low oil prices, a plunge in FDI, the biggest decrease in GDP of any province in the country, businesses struggling to survive and our unemployment rate doubling in six months. But 2020 also demonstrated the compassion, resilience, and determination of Calgarians, and that *Calgary in the New Economy* is the right strategy for the city. There was, and continues to be, a growing number of business, government, and community leaders embracing the vision of the economic strategy.

There were transformations across the city in all sectors of the economy. Calgary companies broke venture capital records amid a global pandemic. Calgary saw its fourth unicorn technology company in two years. All levels of government recognized Calgary's undeniable opportunity as a centre for global climate action and clean tech. Multiple life sciences companies were created from the Life Science Innovation Hub. When it comes to talent, Calgary was the only municipality in Canada with a positive influx of people across all age groups and our city continues to have the highest workforce participation rate in the country. This is a testament to our incredible quality of life and the opportunity to not only make a living, but to make a life.

Looking ahead to the remainder of 2021, Alberta is expected to lead the country in GDP growth. Calgary will continue to see significant venture capital investment, spurring the creation of the next generation of high-growth companies. From a vibrant downtown, to a future-ready economy, to a city that places value on shared prosperity, the success of our city will come from working together. This is our time and *Calgary in the New Economy* is the right strategy with the right vision to enable us to achieve our ambitious goals of being the city of choice for smart people to come, embrace technology and solve world challenges.

## Opportunity Calgary Investment Fund Terms of Reference

### RECOMMENDATIONS:

That the Priorities and Finance Committee recommends that Council:

1. Approve the revised Opportunity Calgary Investment Fund Terms of Reference included as Attachment 3;
2. Approve the Opportunity Calgary Investment Fund Investment Policy Statement included as Attachment 4;
3. Approve that Opportunity Calgary Investment Fund Ltd. can direct up to \$10 million in Opportunity Calgary Investment Fund monies to investment vehicles established and operated by third parties subject to terms and conditions in the Terms of Reference, Investment Policy Statement, and Operating and Funding Agreement; and
4. Direct Administration to update the Operating and Funding Agreement with Opportunity Calgary Investment Ltd. as required.

### HIGHLIGHTS

- This report proposes amendments to the Economic Development Investment Fund Terms of Reference previously approved by Council in 2018. The proposed amendments will enable Opportunity Calgary Investment Fund Ltd. that manages the funds to direct up to \$10 million to investment vehicles established and operated by third parties. In terms of a general housekeeping amendments, the changes reflect the change from “Economic Development Investment Fund” to “Opportunity Calgary Investment Fund” (OCIF).
- **What does this mean to Calgarians?** OCIF is managed by Opportunity Calgary Investment Fund Ltd. (OCIF Ltd.), a wholly owned subsidiary of The City of Calgary to serve as a catalyst to increase the viability of projects that can facilitate economic development in Calgary in the short, medium and long term. Adjusting the Terms of Reference (Attachment 3) to expand how the funds can be invested will improve the tools available to achieve the purposes of OCIF.
- **Why does this matter?** The challenging economic conditions in 2020 and 2021, including the impact of the COVID-19 pandemic, highlight the importance of having a variety of economic development tools and approaches to support a strong and vibrant local economy and deliver on goals in *Calgary in the New Economy: An economic strategy for Calgary*.
- Attachment 2 is a summary from OCIF Ltd. outlining the proposed approach, and benefits of adding this investment option to the allowable uses of OCIF.
- Administration and OCIF Ltd. have jointly prepared an *Opportunity Calgary Investment Fund Investment Policy Statement* (Attachment 4) for Council approval that balances the proposed approach with the due diligence and oversight required when stewarding public funds.
- On 2018 September 8 Council adopted the recommendations in PFC2018-0187 Economic Development Fund Governance and Terms of Reference as detailed in Attachment 1.
- Strategic Alignment to Council’s Citizen Priorities: A prosperous city
- Background and Previous Council Direction is included as Attachment 1.

## **Opportunity Calgary Investment Fund Terms of Reference**

---

### **DISCUSSION**

The Economic Development Investment Fund Terms of Reference were approved by Council in 2018, and following their approval, The City established Opportunity Calgary Investment Fund Ltd. (OCIF Ltd.) as a wholly owned subsidiary to manage the funds, and executed an Operating and Funding Agreement with OCIF Ltd. The mandate of OCIF Ltd. is to manage the Opportunity Calgary Investment Fund (OCIF) effectively and in a manner that creates an environment within the city of Calgary that encourages economic recovery and growth, helps reduce the impact of the downturn on City of Calgary citizens and businesses, and capitalizes on new opportunities to support the city of Calgary's economic success into the future. Under the previously approved Terms of Reference this is achieved through grant investment in projects that meet the approved criteria.

To meet its mandate, the OCIF Ltd. board of directors is recommending that Council approve the amended Terms of Reference (Attachment 3) to allow up to \$10 million of OCIF to be invested in investment vehicles established and operated by third parties. This would enable the deployment of capital on a long-term investment basis to an underserved segment of the Calgary market. A gap exists between Seed to Series A level capital where companies have early revenues and are starting to grow. Providing capital primarily dedicated to this space is expected to promote job creation as well as economic growth and diversification within Calgary. *Fueling Growth in Calgary's Innovation Ecosystem* developed by OCIF Ltd. and included as Attachment 2 provides an overview of this approach.

In addition to general housekeeping amendments proposed for the Terms of Reference, the following amendments are put forward for Council's consideration to allow the direction of OCIF funds to an investment fund managed by a third party: requirement for an RFP process; investments to be consistent with the TOR, any stated City investment policy, and any law regarding City investment activities; and The City to be the beneficial and registered owner of any securities issued and any distribution would be to The City and credited to the OCIF reserve.

To balance the expansion of how OCIF can be invested with the due diligence and oversight required when stewarding public funds, Administration has worked with OCIF Ltd. to develop an *Opportunity Calgary Investment Fund Investment Policy Statement* (Attachment 4) for Council's approval. The policy statement establishes and maintains practices and procedures to invest OCIF funds in accordance with the Terms of Reference. It identifies the responsibilities of the OCIF Ltd. board of directors, The City of Calgary and third-party custodians or trustees; outlines the objective, risk tolerance, and time horizon; specifies the asset mix, preferences and constraints; and identifies reporting requirements.

If the amended Terms of References are approved, the Operating and Funding Agreement between The City and with OCIF Ltd. would be adjusted as required.

### **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

## **Opportunity Calgary Investment Fund Terms of Reference**

This report and attachments were developed in partnership with OCIF Ltd. and Calgary Economic Development who supports the OCIF Ltd. board of directors through a service agreement.

### **IMPLICATIONS**

#### **Social**

OCIF is a tool OCIF Ltd. uses to deliver on Council Directives for *One Calgary 2019-2022*, in particular those related to a Prosperous City. OCIF investments also support delivery of the Economic Development and Tourism Line of Service, and *Calgary in the New Economy: An economic strategy for Calgary*.

#### **Environmental**

Investing OCIF funds supports implementation of Calgary's economic strategy, and the economic strategy aligns with The City's *Resilient Calgary* strategy that supports a focus on the future of Calgary's economy, an inclusive future, the future of Calgary's natural infrastructure, and developing future-ready infrastructure.

#### **Economic**

OCIF is a tool that creates an environment that encourages economic recovery and growth, helps reduce the impact of the economic downturn on citizens and businesses, and capitalizes on new opportunities to support Calgary's economic success into the future.

OCIF aligns and supports *Calgary in the New Economy: An economic strategy for Calgary*. As of 2021 March 31 over \$43 million in OCIF funds had been committed to 15 projects.

#### **Service and Financial Implications**

OCIF aligns under One Calgary's Economic Development and Tourism Line of Service and its investments further implementation of *Calgary in the New Economy* and the line of service by focusing on anchor company and ecosystem investments.

OCIF Ltd.'s operating budget is funded through interest earned on the OCIF reserve. Annually, under the terms of the Operating and Funding Agreement, Opportunity Calgary Investment Fund Ltd.'s budget is approved by The City of Calgary's Chief Financial Officer and City Manager. \$1,368,982 was approved for OCIF Ltd.'s 2021 operating budget.

### **RISK**

Risks related to allowing OCIF Ltd. to direct funds to investment vehicles managed by third parties are mitigated in part through the amended Terms of Reference, proposed Investment Policy Statement, and adjustments to the Operating and Funding Agreement.

Under the proposed new activity, The City will be the owner of record of any investment assets. The City's Finance business unit, through the Treasury division, will be involved in contracting and fund set up as well as custody of investments to ensure The City has long-term oversight.

As steward of OCIF, OCIF Ltd. is responsible for identifying and mitigating risks related to investment decisions, including assessing the capacity of project partners and fund managers to deliver results. Support in this area is provided by Calgary Economic Development through a

**Community Services Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0608  
Page 4 of 4**

### **Opportunity Calgary Investment Fund Terms of Reference**

service agreement with OCIF. OCIF mitigates risk by executing grant contribution agreements with all funding recipients.

In terms of managing overall risk, OCIF has risk management policies and procedures in place to identify and mitigate operational risks.

The City's exposure to risk related to OCIF as a City of Calgary Civic Partner and wholly owned subsidiary is also identified, tracked, and mitigated through existing controls under The City of Calgary's Principal Corporate Risk program (Partnership Risk) and the Service Risk Register for the Economic Development and Tourism Line of Service. Mitigation includes OCIF's participation in the accountability framework for Civic Partners, including an annual financial review and inclusion in the Civic Partner Audit Report. In 2020, an Administrative audit was undertaken to assess the effectiveness of the fund administration processes including the design and operation of process controls that mitigate financial and reputational risks. OCIF committed to implementing action plans to address all recommendations in the audit.

### **ATTACHMENTS**

1. Background
2. Fueling Growth in Calgary's Innovation Ecosystem
3. Opportunity Calgary Investment Fund Revised Terms of Reference
4. Opportunity Calgary Investment Fund Investment Policy Statement

#### **Department Circulation**

General Manager/Director	Department	Approve/Consult/Inform
Carla Male	Chief Financial Office	Inform



# Background

## Previous Council Direction

The following is a summary of previous Council direction related to the Opportunity Calgary Investment Fund.

DATE	REPORT NUMBER	DIRECTION/DESCRIPTION
6/4/2019	PFC2019-0187	<p><b>Economic Development Investment Fund Governance and Terms of Reference</b></p> <p>1. Approve the creation of a new non-profit Wholly Owned Subsidiary of The City of Calgary to govern the Economic Development Investment Fund (EDIF); 2. Subject to the approval of Recommendation 1, and the holding of a shareholder meeting: a. Endorse the Mayor to serve as an ex-officio member on the board of directors of the Wholly Owned Subsidiary; and b. Endorse the current Council appointment to the Calgary Economic Development Ltd. board of directors (currently Councillor Jeff Davison) as an ex-officio member on the board of directors of the Wholly Owned Subsidiary. 3. Receive the biographies of the proposed EDIF Governance Board members for information; 4. Approve the EDIF Terms of Reference; 5. Approve the EDIF Reserve Terms and Conditions; 6. Approve the EDIF funding approval levels and decision-making authority as follows: a. Up to \$10 million, EDIF Wholly Owned Subsidiary; b. Greater than \$10 million, Priorities &amp; Finance Committee and Council; and 7. As part of the proposed reporting process for the Wholly Owned Subsidiary, direct Administration to work with the EDIF Wholly Owned Subsidiary to bring a report to the Priorities &amp; Finance Committee that reviews the pilot EDIF governance structure no later than 2019-Q2.</p>

DATE	REPORT NUMBER	DIRECTION/DESCRIPTION
6/19/2017	C2017-0370	<p><b>Economic Development Investment Fund</b></p> <p>1. Approve the creation of an Economic Development Investment Fund (EDIF); 2. Approve the conceptual scope and criteria for the EDIF; 3. Approve the intake model and governance structure of the EDIF; 4. Approve \$10 million from the Fiscal Stability Reserve (FSR) to initiate the short-term start-up of the EDIF; and, 6. Direct Administration to return to Council during the 2018 budget deliberations process in November 2017 to present terms of reference, and identify the long-term recommended value and funding sources of the EDIF.</p>
12/18/2017	PFC2017-1081	<p><b>Request for Reconsideration- Economic Development Investment Fund</b></p> <p>1. Approve an additional allocation of \$90 million for the long-term funding value of the Economic Development Investment Fund (EDIF) for a total of \$100 million; 2. Direct Administration and CED to report to Priorities &amp; Finance Committee with the EDIF Terms of Reference, including a strong governance structure, no later than 2018-Q1; and adopted the following recommendation as amended: 3. Approve the transfers from the following reserve funds to a newly created Economic Development Investment Fund (EDIF) reserve: From the CBS and CCS – Business License Sustainment Reserve: \$20M for 2017 and \$20M for 2018; From the anticipated savings in Corporate Programs \$25M for 2017; From the Budget Savings Account \$25M for 2018; and, 4. Direct Administration to return to Council with the terms and conditions for the newly created EDIF reserve fund for approval with the EDIF governance structure, no later than 2018 Q1.</p>

9/11/2017	C2017-0643	<p><b>Request for Reconsideration- Economic Development Investment Fund</b></p> <p>1. Reconsider their decision for Administration to report to Council on the EDIF at a regular meeting of Council by November 2017 during the 2018 budget deliberations process. This decision is contained in the Minutes of the Strategic Meeting of Council, 2017 June 19; and 2. Direct that Administration's recommendation on the EDIF's terms of reference, long term recommended value and funding sources be brought to the 2017 December 05 Priorities and Finance Committee Meeting for consideration.</p>
-----------	------------	---

## Bylaws, Regulations, Council Policies

### Investing in Partnerships Policy (CPS2017-01)

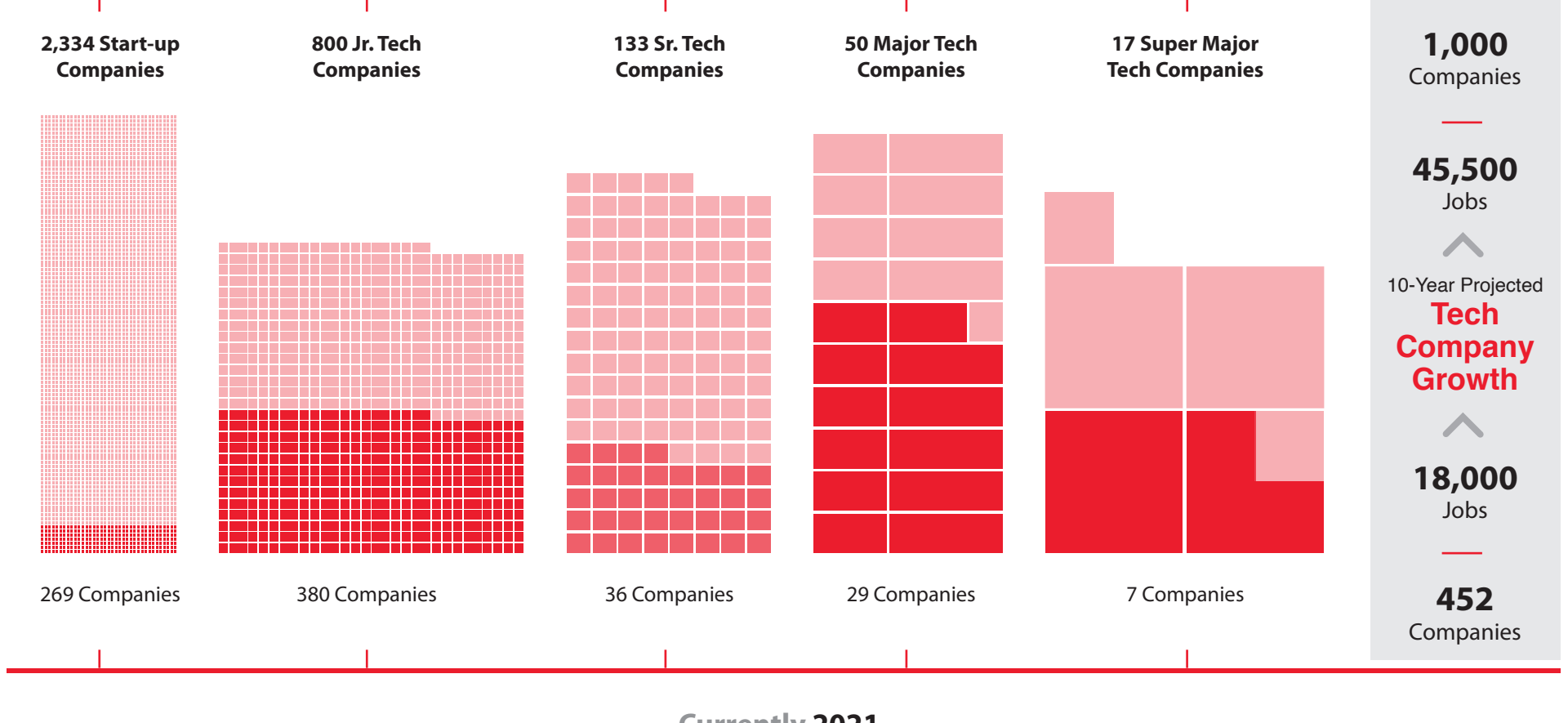
The *Investing in Partnerships Policy* classifies City of Calgary partners into categories that drive accountability and other requirements. Civic Partners are partners with are classified into two categories: Strategy Delivery, and Program and Service Delivery. The Policy supports a clear line of sight between The City's investment in a partnership and the results achieved; consolidated data to inform decision-making; greater effectiveness through clearer accountabilities, reporting, and risk management; and greater efficiency and cost-savings through improved knowledge transfer and reduced duplication of administrative time and effort.



# Fueling Growth In CALGARY'S INNOVATION ECOSYSTEM

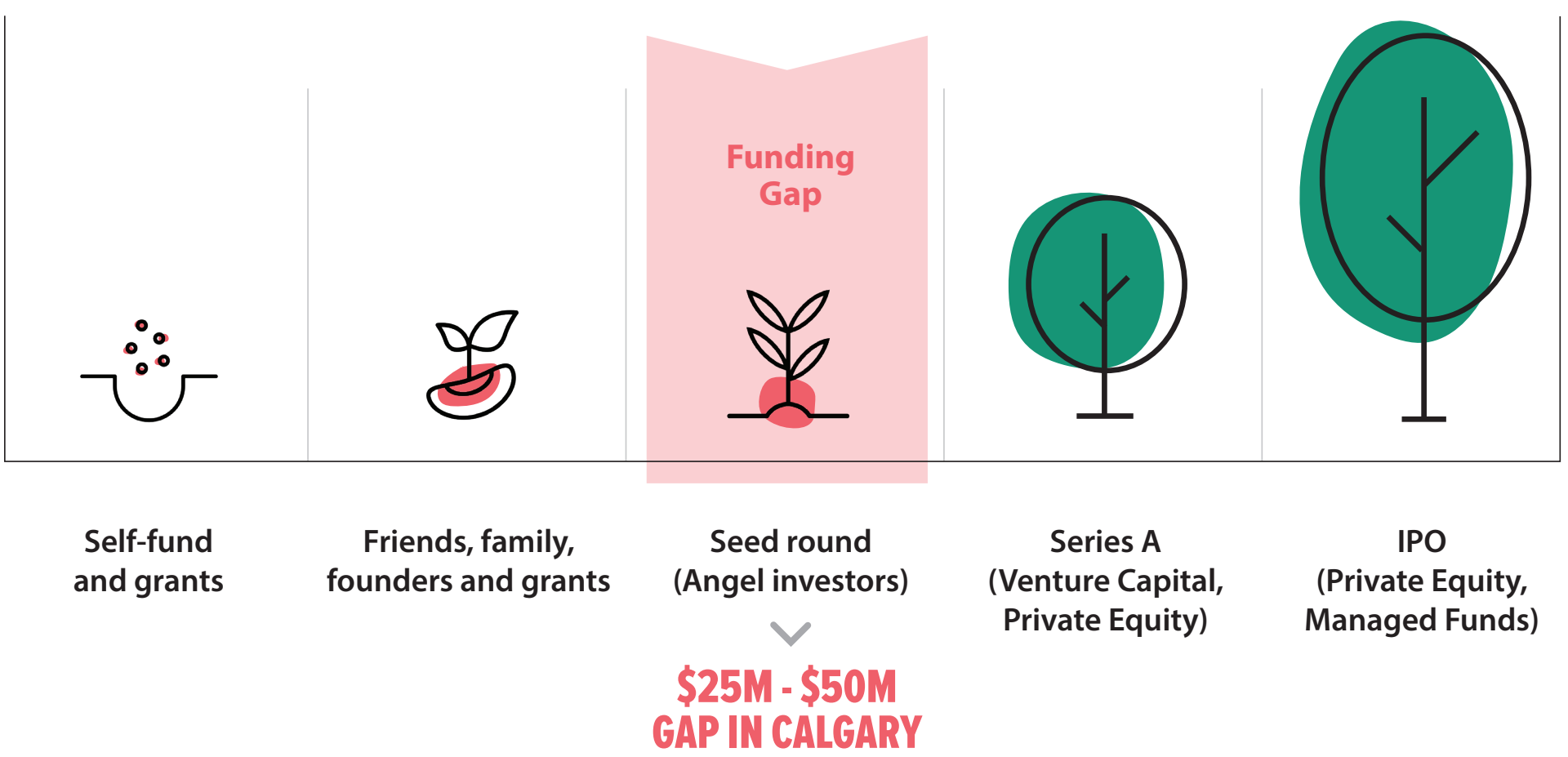
## COMMUNITY'S LONG-TERM GOAL

1,000 innovation-driven, high-growth,  
global market tech companies by 2031.



## THE GAP

But, we know there's a Gap. Pre-Series A funding gap  
exists for most start-up ecosystems world wide.



## THE SOLUTION

*The OCIF Fund Manager will act to address a critical need in the pre-seed funding gap in Calgary.*

### Fund Manager Partnership

OCIF will partner with a fund manager to invest in a fund and leverage more investment dollars, doubling the dollars going into the community.



Fund Manager  
**\$7.5M**



OCIF  
**\$7.5M**

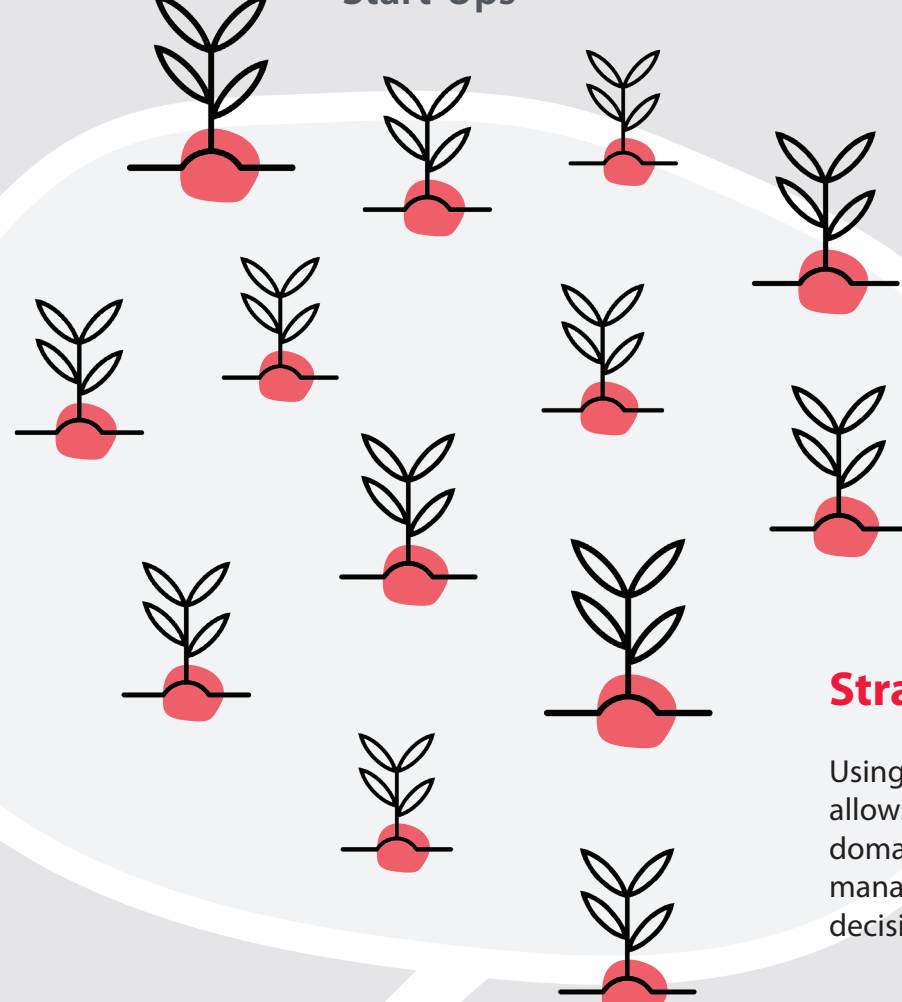
### New Investment Fund

The Fund will focus on the gap between Seed to Series A level capital where companies have early revenues and are starting to grow.

This will act as a catalyst to support the approximately 50% of OCIF applicants that didn't qualify under the current criteria.

**\$15M**

### Start-Ups



### Strategic Investments

Using a private sector fund manager allows us to take advantage of sector domain expertise in the market to manage and expedite investment decisions and distributions.

### Scaling Growth

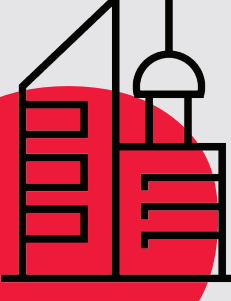
Additional outside investors brought in to scale and accelerate business growth for companies that have become established and further develop and monetize the company.

### Innovation Ecosystem

The fund will accelerate the growth of our tech ecosystem to achieve the community's goal of 2,334 startups and 1,000 core tech companies by 2031.

### Potential Exit on Sale

The fund may generate a return that would be reinvested in to OCIF to create more opportunities for the fund and investments in Calgary entrepreneurs.



OCIF

Back to OCIF for Reinvestment



**~~Economic Development~~ Opportunity Calgary Investment Fund (~~EDIF~~ OCIF) - Terms of Reference**

1.	INTRODUCTION	3
1.1	Background <u>and Goals of OCIF Reserve</u>	3
1.2	Status	3
1.3	Purpose	3
2.	TERMS OF REFERENCE	<del>34</del> <u>34</u>
2.1	Mandate of <del>the WOS</del> <u>OCIF</u>	<del>3</del> <u>4</u>
2.2	Area of Applicability	<del>34</del> <u>34</u>
2.3	Purpose <del>Of The Economic Development</del> <u>of the Opportunity Calgary</u> Investment Fund	<del>34</del> <u>34</u>
2.4	<del>Type Of Fund</del> <u>The OCIF Reserve</u>	4
2.5	Acceptance of these Terms	4
2.6	Idea Generation and Initial Review	<del>45</del> <u>45</u>
2.6.1	Pre-screen/Initial Stages	<del>45</del> <u>45</u>
2.6.2	Governance	<del>45</del> <u>45</u>
2.6.3	<u>Advisory Groups</u>	<u>5</u>
2.6.4	<u>Dialogue with Stakeholders</u>	5
2.7	<del>APPLICATION PROCESS</del> <u>Application Process</u>	5
2.7.1	Requirements	5
2.7.2	Timelines	<del>56</del> <u>56</u>
2.8	<del>FUND ALLOCATION</del> <u>Fund Allocation</u>	6
2.8.1	Allocation Principles	6
2.8.2	Evaluation:	6
2.8.3	Other considerations:	<del>67</del> <u>67</u>
2.8.4	Cancellation And Delay Of Funded Projects	<del>67</del> <u>67</u>
2.9	<del>MONITORING</del> <u>Monitoring</u>	7
2.9.1	Regular Monitoring Report	7
2.9.2	Project Accountability	7
2.10	Lifespan of the <del>EDIF</del> <u>OCIF Reserve</u>	7
2.11	Handling of <del>monies</del> <u>Monies</u>	<del>7</del> <u>8</u>
2.11.1	Interest	<del>78</del> <u>78</u>
2.11.2	Accounting	<del>78</del> <u>78</u>
2.11.3	Payment of Funds to Receiving Projects	<del>78</del> <u>78</u>
2.11.4	<u>Receipt of Funds from Investments</u>	<u>8</u>

[2.11.5](#) Minimum Balance ..... 8

~~2.11.5~~[2.12](#) ..... Review And Amendments  
8

~~2.11.6~~[2.13](#) ..... Effective Date  
~~89~~

Appendix A: Conceptual Scope/Criteria of the ~~Economic Development Investment Fund (EDIF)~~ [9OCIF Reserve 10](#)

Appendix B: ~~EDIF~~[OCIF Reserve](#) Stage Gating (Workflow) ..... ~~10~~[11](#)



## OPPORTUNITY CALGARY INVESTMENT FUND TERMS OF REFERENCE

### 1. INTRODUCTION

~~The City of Calgary's~~ Opportunity Calgary Investment Fund Ltd. ("OCIF") was established on April 19, 2018 as a wholly-owned subsidiary of The City of Calgary ("The City"). OCIF has the mandate of administering a fund established by The City, formerly referred to as the Economic Development Investment Fund-(EDIF), and now called the "OCIF Reserve". The OCIF Reserve is a commitment by The City of Calgary to invest in catalyst projects, by way of providing funding to local projects in the form of grants, or by entering into equity investments with third party fund managers, all with an aim to strengthen the local economy. The EDIF OCIF Reserve is a source of The City's funding for accessible to civic and community partners and The City's business units to access, intended to address a need, that is outside of their budget, but within the scope of their work and aligned to the fund's principles these Terms of Reference. Similar funds exist in other jurisdictions across North America and have been successful in achieving their objectives.

#### 1.1 Background and Goals of OCIF Reserve

At the Strategic Meeting of ~~Council~~ The City's Municipal Council ("Council") on 2017 June 19, Council agreed to the \$10 million start-up of the ~~made-in-Calgary-EDIF~~ OCIF Reserve. In 2017 December 18, Council approved an additional \$90 million for a total ~~EDIF~~ OCIF Reserve of \$100 million.

The goals of ~~the EDIF~~ OCIF include, but are not limited to:

- ~~•~~ • Help create the right conditions for growth
- ~~•~~ • Diversify the local economy
- ~~•~~ • Leverage municipal funds for additional private and public sector investments
- ~~•~~ • Create employment lands and stimulate employment
- ~~•~~ • Create a return on investment (both direct and indirect)
- ~~•~~ • Support The City's downtown vacancy challenges
- ~~•~~ • Increase The City's tax assessment base

#### 1.2 Status

On 2017 December 18, Council agreed to ~~the a commitment of~~ \$100 million ~~creation of to~~ the ~~made-in-Calgary-EDIF~~ OCIF Reserve.

OCIF has been established with an independent board of directors to manage the OCIF Reserve, approve and enter into agreements with beneficiaries of the OCIF Reserve, monitor beneficiary compliance with agreements, and report to the City on outcomes.

As at March 31, 2021, \$43.05 million dollars has been delivered or committed for grants to beneficiaries of the OCIF Reserve.

#### 1.3 Purpose

The purpose of this document is to define the Terms of Reference (TORs) of the ~~EDIF~~ OCIF Reserve, providing guiding principles to OCIF in their administration of the OCIF Reserve. The TORs are ~~for applicable to both applicants to the EDIF and the non-profit Wholly Owned Subsidiary that manages the EDIF (WOS)~~ the OCIF Reserve as well as to OCIF.

## 2. TERMS OF REFERENCE

### 2.1 ~~MANDATE OF THE WOS~~Mandate of OCIF

The mandate of ~~the WOS~~OCIF is to manage the ~~EDIF~~OCIF Reserve effectively and in a manner that creates an environment that encourages economic recovery and growth, helps reduce the impact of the economic downturn on citizens and businesses, and capitalizes on new opportunities to support Calgary's economic success into the future.

### 2.2 ~~AREA OF APPLICABILITY~~Area of Applicability

The ~~EDIF~~OCIF Reserve applies to all areas and quadrants of the city of Calgary.

### 2.3 ~~Purpose Of The Economic Development~~of the Opportunity Calgary Investment Fund

The purpose of the ~~EDIF~~OCIF is to serve as a catalyst to increase the viability of projects that can facilitate economic development in Calgary in the short, medium and long term. Due to the wide variety and nature of projects that can support economic development, ~~the EDIF~~OCIF's governance is arranged to be both nimble and broad, thereby facilitating a greater opportunity to capitalize on potential projects that can support Calgary's economic strategy. ~~The EDIF~~OCIF represents one strategic tool at Calgary's disposal to leverage for any future circumstances that can positively impact Calgary's economic development activities.

### 2.4 ~~Type Of Fund~~The OCIF Reserve

The ~~EDIF~~OCIF Reserve is an interest-bearing capital and operating fund administered by the City Manager's Office Business Unit of ~~the~~The City ~~of Calgary~~. All ~~City of Calgary~~ policies applicable to The City shall also apply to ~~it~~the OCIF Reserve.

The ~~EDIF~~OCIF Reserve is funded by:

1. \$10 million from the Fiscal Stability Reserve (FSR) to initiate the short-term startup of the ~~EDIF~~OCIF Reserve
2. \$20M from the Calgary Building Services (CBS) and the Calgary Community Standards (CCS) – Business License Sustainment Reserve for 2017
3. \$20M from the CBS and CCS – Business License Reserve for 2018
4. \$25M from the anticipated savings in Corporate Programs for 2017
5. \$25M from the Budget Savings Account for 2018

The regulations of The City ~~of Calgary's~~ financing program apply to ~~it~~the OCIF Reserve as well as The City ~~of Calgary's~~ Triennial Reserve Review process performed by an Administrative Reserve Review Committee.

### 2.5 ~~ACCEPTANCE OF THESE TERMS~~Acceptance of these Terms

~~The terms of reference~~

These TORs are for ~~the WOS~~OCIF to uphold. For applicants to ~~the EDIF~~OCIF, by applying for and accepting EDIFOCIF Reserve funding, the applicant also accepts these TORs.

## **2.6** ~~IDEA GENERATION AND INITIAL REVIEW~~Idea Generation and Initial Review

### **2.6.1** ~~Pre-screen/Initial Stages~~

Ideas that have the potential to facilitate economic development in Calgary will be triaged by ~~Calgary Economic Development (CED)~~OCIF. ~~All ideas~~As more fully set out in Article 2.7 herein, all ideas shall be put before OCIF by way of a written application and will be analyzed through the in-scope and out of scope criteria ~~as approved by The City of Calgary's Council (Appendix A)~~set out in Appendix A hereto applicable to a beneficiary directly, or to an investment fund. ~~CED~~OCIF will provide the initial review of projects or investment funds (collectively, "projects") per the stage gating process as identified in Appendix B.

### **2.6.2** ~~Governance~~

~~The WOS~~OCIF will steward ~~Calgary's EDIF~~and administer the OCIF Reserve. Given the decision-making associated with the ~~EDIF~~, ~~the WOS may request that CED, as appropriate, utilize~~OCIF Reserve, OCIF may directly, or with third party resources ~~for objective~~retained by OCIF, undertake requisite analysis and review of any project ~~and applicable~~ business case that may qualify for funding from the EDIFOCIF Reserve.

~~The WOS~~OCIF must at all times be fully aware of the internal and external factors that are impacting Calgary's economy, including solutions to ensure that the ~~EDIFOCIF Reserve's~~ outcomes and goals are met. Intimate knowledge of ~~CED's Economic Strategy~~Calgary in the New Economy: An economic strategy for Calgary, as may be amended, supplemented or replaced from time to time, and focus areas, as well as The City ~~of Calgary's~~ Capital Investment Plan are important factors.

Information about ~~the WOS~~OCIF governance structure is detailed in ~~the WOS~~certain OCIF governance documents including a unanimous shareholder agreement and bylaws, which are approved by ~~Calgary~~The City's Council as the representatives of The City ~~as, the~~ sole shareholder of OCIF.

### **2.6.3** ~~Advisory Groups~~

~~The WOS~~OCIF will have access to a series of advisory supports that are knowledgeable about Calgary's economic environment. ~~These groups include City of Calgary departments and business units, Calgary Economic Development (CED), and the partnerships as available to both stakeholders, e.g. CED Board, CED Sector Advisory Committees, Financial Services, Smart Agriculture (SASC), Clean Resource Innovation Network (CRIN), Leadership and Implementation Team (Economic Strategy), Post-Secondary Institutions, agriculture, etc.~~

### **2.6.4** ~~2.6.3~~ **Dialogue with Stakeholders**

~~CED and the WOS~~OCIF must be well aware of business units' and other stakeholders' planning activities that can support economic development activities such as those of Transportation, Roads, Transit, Planning and Development, Utilities, Urban Strategy, etc. in order to ensure that the outcomes and the goals of the EDIFOCIF Reserve are achieved. Dialogue may occur by inviting representatives of business units or other stakeholders to meetings.

## 2.7 ~~APPLICATION PROCESS~~ Application Process

### 2.7.1 Requirements

To be considered for funding through the ~~EDIF~~OCIF Reserve, a project must be submitted to ~~CED~~OCIF for review. The ~~EDIF~~OCIF Reserve application process is not time bound, and ~~CED~~OCIF will accept submissions throughout the year and on an ongoing basis, with applications aligned to the OCIF Annual Business Plan and Strategy. This applies ~~both~~ to projects that are initiated by City business units/departments ~~as well as~~ and projects proposed by external community stakeholders.

~~An EDIF~~ A business case template is available to applicants and it is at the discretion of ~~CED~~OCIF to ask for additional and/or supporting information including use of an RFP process. Projects that are eligible for the ~~EDIF~~OCIF Reserve can be found in Appendix A.

~~CED~~OCIF will conduct all requisite due diligence of proposed ~~EDIF~~ projects, and will obtain third party review if ~~required~~ considered by OCIF to be necessary or desirable. Once an application has passed the initial screen, ~~CED will bring~~ the business case or RFP response will be brought to the board of directors of ~~the WOS~~OCIF for their decision-making. Only projects that are vetted by ~~CED~~OCIF will be brought to the attention of the ~~WOS~~OCIF Board.

~~The EDIF WOS~~OCIF may also invite applicants to attend a Committee or Board meeting to discuss the proposal or provide a presentation of its contents. In advance of presenting to the ~~WOS, CED~~OCIF Board, OCIF personnel (or third parties retained for this purpose) must review ~~all project~~ documents and must consult with City relevant business units/departments of The City that may be affected by, or involved in, the project.

### 2.7.2 Timelines

The principles of the ~~EDIF~~OCIF Reserve are to be fast, nimble, and responsive. Therefore all initial business cases will be reviewed in a timely manner. For a high level overview and timeline of an application, please see Appendix B.

## 2.8 ~~FUND ALLOCATION~~ Fund Allocation

### 2.8.1 Allocation Principles

The ~~EDIF~~OCIF Reserve applies to all areas of Calgary. No set allocation principles will be established. As long as a project meets the evaluation criteria as set out in these TORs, it ~~will~~ may be considered.

### 2.8.2 Evaluation:

~~CED~~OCIF, as the initial intake of the ~~EDIF~~OCIF Reserve applications, and the ~~WOS~~OCIF board of directors, will evaluate projects and investments on the basis of:

- ▲ Strategic alignment
  - ▲ Council Priorities (and applicable Citizen Priorities)
  - ▲ The City of Calgary's Capital Investment Plan
  - ▲ Calgary Economic Development 10 Year Economic Strategy
  - Calgary in the New Economy: An economic strategy for Calgary
  - ▲ The City of Calgary's Resilience Strategy

## OCIF Annual Business Plan and Strategy

### Criteria

- The proposed project aligns well with the ~~EDIF~~OCIF Reserve goals and guiding principles;
- Stimulate employment – jobs created within the city of Calgary;
- Generate a return on investment (direct and indirect); and
- Stimulate property tax assessment base.

An ~~EDIF~~OCIF Reserve scorecard, which shall include the evaluation criteria noted above, will be utilized to determine the potential impact of a project to Calgary.

~~CEED~~OCIF will leverage ~~City of Calgary~~ best practices in corporate governance, project management and stage gating and will inform the applicant of what stage of the process they are in. The stage gating process diagram can be found in Appendix B.

### **2.8.3 Other considerations:**

A project's ability to augment and complement other orders of government funding will be considered an important consideration. Conversely, and for ~~City~~any business units and departments of The City, projects that qualify for other ~~City of Calgary~~ funding (~~Community Revitalization Levy, Community Investment Fund, and Council Strategic Investment Fund, etc.~~) from The City will be a lower priority. ~~City business~~Business units and departments of The City must explore other sources of internal funding options prior to submitting a business case to ~~CEED~~OCIF for review against ~~EDIF~~OCIF Reserve objectives. If an applicant is a ~~City of Calgary~~ business unit or department of The City, approved ~~EDIF~~OCIF Reserve projects must be reflected in their work plans and business planning processes. In addition to Council's approved scope - per Appendix A - the ~~EDIF~~OCIF Reserve will not be intended to support business operations, of events, festivals or sports tournaments.

### **2.8.4 Cancellation And Delay Of Funded Projects**

In the event that an ~~EDIF~~OCIF Reserve-funded project is cancelled, ~~the WOS~~OCIF will remove the commitment placed against the ~~EDIF~~OCIF Reserve and make the funds available for other projects.

In the event that a project cannot proceed and funding has been disbursed, the applicant will ~~fully be~~ required, pursuant to any grant or funding agreement between OCIF and the application, to reimburse The City ~~of Calgary~~ within 30 days of being notified. ~~The WOS~~OCIF will build in ~~security~~ mitigation measures against risk of such default into their processes and documentation.

If an ~~EDIF~~OCIF Reserve-funded project is delayed, ~~i.e.~~ by more than six months, or put on hold indefinitely, ~~the WOS shall~~OCIF may cancel the project immediately and remove the commitment placed against the ~~EDIF~~OCIF Reserve and make the funds available for other projects. Funds that have been disbursed for the delayed or cancelled project shall be reimbursed by the applicant back to The City of Calgary within 30 business days and credited to the OCIF Reserve.

## **2.9 ~~MONITORING~~Monitoring**

### **2.9.1 Regular Monitoring Report**

As a non-profit ~~Wholly Owned Subsidiary~~wholly-owned subsidiary of The City ~~of Calgary, the WOS will be,~~OCIF is accountable to The City as sole shareholder through Council and ~~would report~~reports through an annual shareholder meeting, and other special meetings or ad-hoc ~~meeting~~meetings as required.

### **2.9.2 Project Accountability**

At its discretion, ~~the WOS~~OCIF may ~~request that CED call upon~~retain third-party resources to conduct ~~objective~~an analysis of potential ~~EDIF~~OCIF Reserve qualifying projects.

## **2.10 ~~LIFESPAN OF THE EDIF~~Lifespan of the OCIF Reserve**

The lifespan of the ~~EDIF~~OCIF Reserve and ~~the non-profit WOS is until funds are deemed to be fully utilized~~OCIF shall be set out in any applicable funding agreements between The City and OCIF.

## **2.11 ~~HANDLING OF MONIES~~Handling of Monies**

### **2.11.1 Interest**

~~EDIF~~OCIF Reserve will earn interest according to ~~City~~generally applicable [reasonable] procedures established and determined by The City. The amount of interest may be used to cover direct cost of administrating the ~~EDIF~~OCIF Reserve subject to the prior approval of ~~the~~The City's Chief Financial Officer and the City Manager ~~of The City of Calgary.~~ Direct cost of administrating the ~~fund~~OCIF Reserve includes, but are not limited to, costs such as third party reviews, and direct staffing costs of ~~the WOS~~OCIF. Any costs associated with The City ~~of Calgary Administrative's administrative~~ staff are not eligible direct costs of the ~~EDIF~~OCIF Reserve.

### **2.11.2 Accounting**

Accounting of the funds will be done by ~~The City of Calgary's~~ Chief Financial Officer's Department (CFOD) or any successor thereto. Administrative staff ~~including~~shall be responsible for tracking the balance of the fund, distribution of the funds, interest income earned, direct cost of administrating the ~~fund~~OCIF Reserve, deposits into the ~~fund~~OCIF Reserve, and any commitments against the ~~fund~~OCIF Reserve. Staff will keep a schedule for the commitments and non- allocated monies. Financial reporting of the ~~fund~~OCIF Reserve will be completed at least once a month for the duration of when the ~~EDIF~~OCIF Reserve remains an active reserve within The City of Calgary. When decisions are made to allocate funds to a beneficiary, the Administrative staff within CFOD will execute the distribution of the ~~fund~~funds in the timeframe as outlined in the approval document. A commitment will be placed against the ~~fund~~OCIF Reserve at the time the project is approved to the time the payment is made to the beneficiary to ensure commitments are reserved for the approved project.

### **2.11.3 Payment of Funds to Receiving Projects**

Upon authorization from ~~the WOS~~OCIF, The City ~~of Calgary~~ will transfer allocated monies from the ~~EDIF~~OCIF Reserve to the beneficiary in a form of ~~a cheque or~~ wire transfer. This can entail either the

entire funding amount or [approved](#) incremental [milestone](#) amounts until the full allocation has been achieved.

#### **2.11.4 Receipt of Funds from Investments**

OCIF may invest a portion of the OCIF Reserve in investment funds with a mandate consistent with the objective of the TORs. Any investment of the OCIF Reserve must be consistent with any stated investment policy of The City, and must be consistent with applicable law regarding the investment activities of municipalities. The City shall be the beneficial or registered owner (as the case may require) of any and all securities issued on the making of any investment approval by OCIF or The City from the OCIF Reserve. Any distribution from such investments, whether by dividend, return of capital, distribution of surplus on windup and liquidation, or otherwise shall be to The City and credited to the OCIF Reserve.

#### **2.11.5 ~~2.11.4~~ Minimum Balance**

There is no minimum balance required for the ~~EDIF~~[OCIF Reserve](#).

#### **2.12 ~~2.11.5~~ Review And Amendments**

The success of the processes defined in these terms should be monitored on an ongoing basis.

#### **2.13 ~~2.11.6~~ Effective Date**

These Terms of Reference, [as amended](#), are effective on the date that they are approved by Council.

## Appendix A: Conceptual Scope/Criteria of the ~~Economic Development Investment Fund (EDIF)~~ OCIF Reserve

PFC2017-1081 [\[new number\]](#)

In scope <del>EDIF</del> <u>OCIF Reserve</u> criteria*	Out of scope <del>EDIF</del> <u>OCIF Reserve</u> criteria
<ul style="list-style-type: none"> <li>▲= City-wide, including the downtown Centre City</li> <li>▲= Opportunities to partner, e.g. land purchases that are strategic</li> <li>▲= Targeted infrastructure to support economic development</li> <li>▲= Land for public or non-profit institutions</li> <li>▲= Fund City process improvements</li> <li>▲= Investment in technology</li> <li>▲= Partnerships with federal and provincial governments</li> <li>▲= Augment existing or new City granting programs to create business and economic development</li> <li>▲= Job training</li> <li>▲= Trade and investment attraction / export program</li> <li>▲= Brownfield redevelopment</li> <li>▲= Innovation clusters and zones</li> <li>▲= Optimizing use of vacant space</li> <li>▲= Strategic relocation of industrial land</li> <li>▲= <del>**</del>Retention or creation of employment/jobs</li> <li>· <u>Investments in accordance with applicable City investment policy</u></li> </ul>	<ul style="list-style-type: none"> <li>▲= Communications, marketing or public relations</li> <li>▲= <del>*</del>No municipal tax relief</li> <li>▲= <del>*</del>No loans</li> </ul>

### Notes:

~~\*Revised to align with the Municipal Government Act (MGA).~~

~~\*\*Revised to reflect retention or creation of employment/jobs (in general).~~



Appendix B: ~~EDIF~~OCIF Reserve Stage Gating (Workflow)

Document comparison by Workshare 10.0 on Wednesday, May 05, 2021 1:55:49 PM

Input:	
Document 1 ID	iManage://VDMS/Active/10857243/1
Description	#10857243v1<Active> - OCIF - Terms of Reference
Document 2 ID	iManage://VDMS/Active/10857243/8
Description	#10857243v8<Active> - OCIF - Terms of Reference
Rendering set	BDP - strikethrough, no moves

Legend:	
<a href="#">Insertion</a>	
<del>Deletion</del>	
<del>Moved from</del>	
<a href="#">Moved to</a>	
Style change	
Format change	
<del>Moved deletion</del>	
Inserted cell	
Deleted cell	
Moved cell	
Split/Merged cell	
Padding cell	

Statistics:	
	Count

Insertions	273
Deletions	232
Moved from	0
Moved to	0
Style change	0
Format changed	0
Total changes	505

**Redline options:**

	Status
Redline Statistics at End of Document	ON
Include Redline Comparison Summary	OFF
Show Change Numbers	OFF
Show Change Bars On Left	ON
Show Hidden Text	OFF
Detect List Numbering Changes	ON
Compare Headers/Footers	ON
Compare Footnotes	ON
Display Workshare Compare Footers	OFF
Ignore Embedded Objects/Images	OFF
Compare at Character Level	OFF
Compare Numbers at Character Level	OFF
Show Moved Deletions	OFF
Show Changes to Spaces	OFF
Show Paragraph Changes	OFF
Ignore Case Changes	OFF
Ignore Text Boxes	OFF
Ignore Field Codes	OFF

Compare field contents as text	ON
Ignore Tables	OFF
Detect Changes to Images	OFF

**INVESTMENT POLICY STATEMENT**

Policy Number	Policy Name
Author	
Attachments	
Approved By: Date Approved	
Last Date Modified	

**I. Statement of Purpose**

The purpose of this Investment Policy for the Opportunity Calgary Investment Fund is to establish and maintain practices and procedures to invest public funds into investment vehicles established and operated by third parties ("**Investment Fund**") in accordance with the Terms of Reference for the Opportunity Calgary Investment Fund as established and approved by City Council ("**TORs**").

**II. Statement of Responsibilities**

**Opportunity Calgary Investment Fund Board of Directors:**

- A.** Select Investment Fund.
- B.** Set the goals, objectives and risk tolerances for the Investment Fund to be invested in and approve terms of investment agreements.
- C.** Exercise the rights of securityholder available to it to approve the appointment and terms of service for all investment managers of the Investment Fund.
- D.** Review activity, performance and compliance of the Investment Fund at intervals determined by The City of Calgary.
- E.** Recommend changes to this Investment Policy Statement to City Council as needed.
- F.** Ensure compliance with the Investment Policy Statement at all times.

**The City of Calgary**

- A.** Provide support to Opportunity Calgary Investment Fund when subscribing to or otherwise making investments into an Investment Fund to ensure The City's requirements (including, but not limited to, Investment Fund structure and reporting obligations) are met.
- B.** Provide support to Opportunity Calgary Investment Fund in the reporting and accounting for all investments.
- C.** Hold the investments in The City's name at a third-party custodian of The City's choosing.
- D.** Appoint Opportunity Calgary Investment Fund its proxy and representative relative to its securityholder rights, unless and until The City determines to revoke such appointment.

**Custodian**

A third-party custodian, selected and contracted by The City of Calgary, will hold all equities, units or other investment holdings relating to any Investment Fund.

## OPPORTUNITY CALGARY INVESTMENT FUND (OCIF)

### INVESTMENT POLICY STATEMENT

#### III. Investment Goals and Objectives

##### Objective

The primary objective is to fulfil the mandate and goals of the Opportunity Calgary Investment Fund established in its TORs through deployment of capital on a long-term investment basis to an underserved segment of the Calgary market. A gap exists between Seed to Series A level capital where companies have early revenues and are starting to grow. Providing capital to this space is expected to promote job creation as well as economic growth and diversification within Calgary.

##### Risk Tolerance

The nature of the venture capital space is that risk tolerance is high. While risk shall be mitigated through careful and strategic construction, governance and management of the Investment Fund, risk will still be high due to (i) where the target companies are in their life-cycle; (ii) the industry in general and economic factors; and, (iii) the requirement that the Investment Fund be focused on projects and investment with a direct economic benefit to Calgary.

##### Time Horizon

It is expected that an Investment Fund will hold investments for the long-term and the life of the Investment Fund will exceed ten years.

#### IV. Asset Mix

The manager of the Investment Fund will have full discretion to manage the Investment Fund subject to restrictions set forth in the *Major Cities Investment Regulation* (Alberta Reg 249/2000) ("Regulation"), the TORs, the applicable Operating and Funding Agreement between The City and Opportunity Calgary Investment Fund Ltd. and any investment agreement between The City and/or Opportunity Calgary Investment Fund and an Investment Fund.

#### V. Investment Preferences and Constraints

The manager of the Investment Fund shall at all times be required to adhere to the "prudent person rule" as understood generally by the investment community in Canada and Alberta and as required of The City under the Regulation. The prudent person rule requires that all investment managers:

- Act in all matters with loyalty, impartiality and prudence.
- Maintain overall Investment Fund risk at a reasonable level in context of purpose of Opportunity Calgary Investment Fund.
- Provide for the reasonable diversification of investments. An investment manager can invest in any allowable asset as long as it meets the requirements of prudent investment and considers the Investment Fund in its entirety.
- Consideration of the purpose of Opportunity Calgary Investment Fund.

## **OPPORTUNITY CALGARY INVESTMENT FUND (OCIF)**

### **INVESTMENT POLICY STATEMENT**

All investments shall meet the requirements as defined in the Opportunity Calgary Investment Fund Operating and Funding Agreement with The City of Calgary.

## **VI. Performance and Reporting**

### **A. Reporting Requirements**

Opportunity Calgary Investment Fund shall ensure that any subscription, limited partnership agreement or other governing documents for the Investment Fund include, at a minimum, the following reporting requirements:

- a. Provide monthly transaction reports
- b. Provide quarterly statements and analysis
- c. Attend at least one Opportunity Calgary Investment Fund meeting per year at the request of the board.
- d. Complete and sign a compliance report each quarter. The compliance report should state whether or not the Investment Fund was in compliance with this policy during the quarter.
- e. Provide investment market value reports which may be prepared in-house, at least annually.





Transportation Report to  
Priorities and Finance Committee  
2021 May 18

ISC: UNRESTRICTED  
PFC2021-0626  
Page 1 of 4

## University of Calgary – Citizen Scientist Wearables Program – Update

### RECOMMENDATION(S):

That the Priorities and Finance Committee recommend that Council receive this report for the Corporate Record.

### HIGHLIGHTS

- Wearable sensor technology (e.g. smartwatches and activity monitors) is one of the fastest growing technology fields in the world. Calgary is well placed to be a global leader in research, product development and job creation in the sector. To meet a growing demand for qualified professionals, the University of Calgary (U of C) launched Canada's first wearables program in 2018 September called Wearable Technology Research and Collaboration (We-TRAC) Training Program. To support U of C's We-TRAC program, Council approved \$57,500 from the Council Innovation Fund in 2019 Q4. The funding enabled the We-TRAC program to hire a local computer scientist to develop a web portal to allow Calgarians to sign-up to volunteer to take part in the program. As part of the funding agreement, U of C matched the funding and was tasked with working with The City to explore research projects that would benefit The City and Calgarians.
- *What does this mean to Calgarians?* For U of C students, they have access to data to conduct research to provide innovative solutions to real world questions. For Calgary companies, professionals with expertise in wearable technology are in high demand and low supply, the program and the database help train the next generation of experts in the field. For citizens, they can volunteer to take part in Canada's only university level wearables program, which can lead to better community health outcomes.
- *Why does it matter?* Calgary is looking to diversify its economy. Calgary's life sciences industry has been identified as an emerging cluster with high-growth potential in the city's latest Economic Strategy. As of 2020, Calgary is home to over 110 life sciences companies, with close to 60% of those identified in the medical devices and digital health sub-sector. In addition, the research provided through the We-TRAC program can help planners and engineers better plan and build our city.
- While the database and wearables program are in its early stages, over 500 Calgarians have volunteered and have uploaded over 140,000 hours of activity. The volunteer data is being used currently for 16 university research projects including:
  - Improving exercise strategies and adherence among cancer survivors;
  - Monitoring gait patterns and identifying risk factors for running related injuries;
  - Training load insights and injury prevention in youth sport;
  - Cyclist Green Wave Study – Coordinating Traffic Signals for Cyclists; and
  - Bow River Pathway study on Cycling Behaviours.
- Strategic Alignment to Council's Citizen Priorities: A prosperous city, and A city of safe and inspiring neighbourhoods
- Previous Council Direction: That the Priorities and Finance Committee direct Administration to report back to PFC indicating how the money was spent and outcomes of the projects no later than Q2 2021, as per the CIF Terms of Reference.

## University of Calgary - Citizen Scientist Wearables Program - Update

---

### DISCUSSION

#### *Wearable Devices*

Wearable technology such as smartwatches, activity monitors, and smartphones, have revolutionized the ability to collect scientifically valid biometric data regarding health and activity. Devices that were once used to track fitness are now being applied in many ways from navigation to monitoring blood pressure. This technology can provide university researchers with an unprecedented opportunity to better understand activity levels, mobility patterns and how environmental conditions effect health and wellbeing.

#### *Wearables program at The University of Calgary*

Researchers at the U of C are currently leading Canada's first graduate training program specializing in wearable technology; the NSERC Wearable Technology Research and Collaboration (We-TRAC) CREATE training program. The We-TRAC program is developing the next generation of wearable technology experts, focusing on using wearable technology to revolutionize sport performance, healthcare, health research, and now city building. The goal is to train upwards of 100 master's and PhD students from multiple faculties between 2018-2024. Students receive training in the biomechanics of human motion, data science, data visualization, knowledge translation, and entrepreneurship. The We-TRAC program is within the Faculty of Kinesiology and involves Schulich School of Engineering departments of electrical and computer engineering, mechanical and materials engineering and biomedical engineering; Haskayne School of Business; Faculty of Science's Department of Computer Science; and the Faculty of Nursing.

#### *Funding Agreement*

As part of the funding agreement with The City, the U of C had to:

1. Match The City's funding to build a portal where citizens can sign up to take part in various research topics

The U of C successfully matched these funds and hired a local computer scientist to build a secure portal for citizens to take part in the We-TRAC Program. The portal was completed and made publicly available in May of 2020. To date, over 500 Calgarians have volunteered and have uploaded over 140,000 hours of activity.

2. Work with The City in order to answer questions pertaining to transportation and urban planning. For example, understanding how people are using the pathway network, in order to build and improve the network.

University of Calgary researchers conducted a workshop with City staff in 2020 January. The workshop produced a variety of research topics that were categorized under the main themes below:

- Infrastructure for Active Modes (Running, Cycling, Walking etc.)
- Public Spaces (Sidewalks, C-train platform, school drop-off zones)
- Vehicle Infrastructure and Roadways
- Recreation Facilities
- Office/Workplace Employee Health

## **University of Calgary - Citizen Scientist Wearables Program - Update**

---

There are a series of potential research questions for each theme. For example: for the categorized theme of Infrastructure for Active Modes (Running, Cycling, Walking etc.) the following research topics of interest were identified:

- Perception of safe/unsafe routes (lighting, congestion levels)
- Desired routes vs Existing routes
- Commuter routes vs Leisure routes
- Perception of pathway quality, need for maintenance, snow removal etc.
- Differing activity levels by community/region of the city
- Physiological response to different routes, sections of pathway

There are currently 16 research projects that are using the database to answer questions pertaining to these and other topics. The We-TRAC program is ongoing, and U of C will research more topics over time as more students join the program.

### *The City's role*

The City is not collecting wearables data or dedicating staff to this research. The City is providing research topic ideas so that students and researchers can answer questions that are meaningful for planning and City service delivery. U of C conducts research and shares findings with City Administration. The City can then utilize the research to create infrastructure and operating improvements e.g. making improvements to a section of pathway where data shows volunteers are physiologically stressed.

From an economic development perspective, by supporting and collaborating with the U of C program, The City is helping to foster training students and researchers that are part of a burgeoning field that will be part of Calgary in the new economy.

## **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

The U of C worked with City staff to identify research questions that would benefit cities. U of C is engaging with the public and onboarding participants.

## **IMPLICATIONS**

### **Social**

There are several current and future research Social topics that could be undertaken by university students and researchers that could benefit the planning, development and operations of cities.

### **Environmental**

There are several current and future Environmental research topics that could be undertaken by university students and researchers that could benefit the planning, development and operations of cities.

**Transportation Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0626  
Page 4 of 4**

**University of Calgary - Citizen Scientist Wearables Program - Update**

---

**Economic**

The global wearable technology market size was valued at USD 32.63 billion in 2019 and is projected to expand at a compound annual growth rate (CAGR) of 15.9% from 2020 to 2027. This growth has been further accelerated by the COVID-19 pandemic where an increased reliance on remote patient monitoring technologies has driven adoption.

With regards to the City's ability to attract investment in the sector, access to a pool of highly skilled talent is a top decision-making factor. Distinct university programs, such as the as U of C's We-TRAC program, help provide the sector with the necessary Life Sciences-related skillsets. The We-TRAC presents researchers and trainees the opportunity to develop solutions in real-world situations responding to end-user needs.

**Service and Financial Implications**

**No anticipated financial impact**

\$0

No additional City funding required. In Q4 2019, \$57,500 from the Council Innovation Fund was approved by Council for the project. \$50,000 of the funding was used to hire a local computer scientist to develop a web portal for Calgarians to volunteer to take part in the program. \$7,500 was required for University Overhead costs. Note that the normal rate for research contracts is 25%. Through The City's Urban Alliance partnership, The City pays a reduced rate of 15%.

**RISK**

*Data Privacy* – the data collected by U of C contains an individual's movements and biometric data. If there were a data breach, the study's participant's personal information could be compromised. To mitigate this concern, U of C is storing the data in a level 4 database. Level 4 Security (L4S) is referred to as the most in-depth and highest security level technology for securing identities and identity documents. The City is not collecting or storing individual data. As per the agreement with U of C, The City will have access to an anonymized aggregate data that will also be open to public use. The City is anticipating acquiring and posting the anonymized aggregate data to The City's open data platform by 2021 Q4.

*Lack of Participants* – The success of the Citizen Scientist program relies on there being a statistically significant amounts of participants and data. The goal is to have 10,000 participants. Activity data sharing programs like Strava, to which users upload their workouts, have attracted over 42 million accounts worldwide and adds approximately 1 million new users every month.

**ATTACHMENT(S)**

1. None.

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform

**Chief Financial Officer's Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0571  
Page 1 of 3**

**2020 Year-end Capital and Operating Budget Revisions Report**

**RECOMMENDATION(S):**

That the Priorities and Finance Committee recommends that Council receive this report for the Corporate Record, and subsequent Council discussion.

**HIGHLIGHTS**

- A revision report provides Council a summary of operating and capital budget changes that have occurred over a particular period of time. These changes can be approved by Council or by Administration if within the authorization limits outlined in Budget Reporting Policy CFO006.
- The revision process allows Administration to adapt to changes in economic conditions and the external environment, incorporate additional information that is available, and allow long term objectives to be met.
- Responding to these changes enables the City to better service our citizens, communities and customers.
- This year-end report provides:
  - capital budget revisions between 2020 July 1 and 2020 December 31;
  - a summary of these revisions and the impacts of the 2020 capital budget carry forwards;
  - operating budget revisions between 2020 July 1 and 2020 December 31; and
  - previous Council decisions and referrals which have an actual or potential future year operating budget impact
- Strategic Alignment to Council's Citizen Priorities: A well-run city and A prosperous city
- Previous Council Direction is included as Attachment 1.

**DISCUSSION**

- The purpose of the revision report is to provide Council with consolidated information on budget changes to maintain continuity and transparency with both the operating and capital budgets. Attachment 2-5 are for Council's collective awareness and all changes are a result of previously approved Council direction or are within Administration's discretion to approve under the Budget Reporting Policy CFO006.

***Capital***

- Attachment 2 outlines the budget revisions that have been approved by Administration within their authority (revisions with a net budget impact under \$400,000 and transfers to capital budget savings) or by Council through separate reports, notices of motion and motions arising.
- For the period from 2020 July 1 to 2020 December 31, Administration and Council approvals included relinquishments, increases and net zero transfers required to reflect updated capital plans resulting in increases totalling \$34.927 million in the 2020 capital budget, and \$159.716 million in 2021-2024+ funded by Capital Reserves, Developer & other contributions, Other Federal & Provincial Grants, and Self-supported debt.
  - The increase in 2020 is primarily due to budget approval for Calgary's Rapid Housing Initiative Investment Plan funded by Other Federal Grants (C2020-1424).

**Chief Financial Officer's Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0571  
Page 2 of 3**

## **2020 Year-end Capital and Operating Budget Revisions Report**

- The increase in 2021-2024+ is driven primarily by Council's approval of the Capital Investment Application Recommendations for Municipal Stimulus Program (PFC2020-0894).
- Attachment 3 provides a summary by service of the budget continuity between 2020 July 1 to 2020 December 31. In addition, this attachment shows the impact of the carry forward of unspent 2020 capital budget.
  - The revised budget is \$2.130 billion in 2020 and \$7.898 billion in 2021-2024+.

### ***Operating***

- Attachment 4 shows the changes to the 2020 net operating service budget that have either been previously approved by Council or are within the scope of Administration to authorize as per Council Policy CFO006. During this period, there was no change to the total City net budget. The main changes to service budgets were:
  - Proposed carry forwards of one-time budgets from 2020 to 2021 approved in C2020-1215 of \$10.4 million offset by one-time adjustments of (\$0.4) million;
  - Transfers of \$0.8 million from corporate contingencies to service budgets;
  - Transfers of \$0.6 million from corporate to service budgets through the Corporate Work Force Planning process; and
  - Transfers between business units due to organizational changes

Attachment 5 lists Council decisions and referrals which have an actual or potential future year operating budget impact. This is provided to meet the requirement of NM2008-53 to track Council decisions and referrals.

## **STAKEHOLDER ENGAGEMENT AND COMMUNICATION (EXTERNAL)**

☒ Public Communication or Engagement was not required

The One Calgary 2019-2022 business plans and budgets were developed through engagement with various internal and external stakeholders. Revision reports brought forward throughout the cycle reflect the operating and capital budget changes that are driven by actual experiences and/or new Council direction.

## **IMPLICATIONS**

### **Social, Environmental and Economic Implications**

The social, environmental and economic landscape impacts business units in various ways. Revisions to the operating and capital budgets reflect changes that have been made to respond to these factors.

### **Service and Financial Implications**

#### **Existing operating funding**

There is no net impact to the operating budget. Operating budget revisions reflect recommended changes based on Council and Administrative approvals and are already included in the approved operating budgets.

**Chief Financial Officer's Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0571  
Page 3 of 3**

**2020 Year-end Capital and Operating Budget Revisions Report**

**New capital funding request**

Capital budget revisions between 2020 July 1 and 2020 December 31, resulted in a \$34.927 million increase to the 2020 capital budget and an increase of \$159.716 million in 2021-2024+ funded by Capital Reserves, Developer & other contributions, Other Federal & Provincial Grants, and Self-supported debt. With 2020 carry forwards, the 2021-2024+ capital budget increased by \$965.984 million.

**RISK**

The risk associated with the revisions for information would have been identified at the time of approval.

**ATTACHMENT(S)**

1. Attachment 1 - Previous Council Direction
2. Attachment 2 - Capital Budget Revisions – Previously Approved
3. Attachment 3 - Capital Budget Continuity Schedule
4. Attachment 4 - Operating Budget Continuity Schedule
5. Attachment 5 - Council Decisions/Referrals Having Actual or Potential Future Year Operating Budget Impacts

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform
Carla Male	Chief Financial Officer's Department	Approve
Les Tochor	Chief Financial Officer's Department	Approve





## Background & Previous Council Direction

The purpose of the revision report is to provide Council with consolidated information on all changes to budgets in order to maintain continuity and transparency with both the operating and capital budgets.

### Context

This year-end report provides a summary of the capital and operating budget revisions approved through Council reports or by Administration if within the authorization limits outlined in Budget Reporting Policy CFO006 between 2020 July 1 and 2020 December 31.

### Previous Council Direction

The One Calgary 2019-2022 Service Plans and Budgets were approved by Council 2018 November 14. The following is a list of the most recent reports that were brought forward throughout the cycle reflecting the operating and capital budget changes driven by actual experiences and/or new Council direction.

DATE	REPORT NUMBER	DIRECTION/DESCRIPTION
2020 November 23	C2020-1215	<b>Mid-Cycle Adjustments to the One Calgary 2019-2022 Service Plans and Budgets</b>
2020 November 2	PFC2020-1075	<b>2020 Mid-year Capital and Operating Revisions Report</b>
2020 September 14	PFC2020-0894	<b>Capital Investment Application Recommendations for the Municipal Stimulus Program</b>
2018 November 14	C2018-1158	<b>One Calgary 2019-2022 Service Plans and Budgets</b>
2008 November 28	NM20018-53	<b>To track Council decisions and referrals which have an actual or potential future year budget impact</b>

### Bylaws, Regulations, Council Policies

The following policy defines the budget changes that are within Administration's threshold to approve:

#### **CFO006 - Budget Reporting Policy**



**CAPITAL BUDGET REVISIONS - PREVIOUSLY APPROVED - FOR INFORMATION**  
(\$000s)

**FOR THE PERIOD 2020 JULY 1 TO DECEMBER 31**

**Purpose:** To provide capital budget changes previously approved by Administration and Council from 2020 July 1 to December 31

Citizen Priority	Service	Budget ID	Budget ID Name	2020 Increase/ (Decrease)	2021 Increase/ (Decrease)	2022 Increase/ (Decrease)	2023 Increase/ (Decrease)	TOTAL Increase/ (Decrease)
<b>Previously Approved by Administration</b>								
<b>Relinquishments</b>								
<b>A City That Moves</b>	Sidewalks & Pathways	616_000	Centre City Initiatives	Previously Approved Budget Remaining	127	-	-	127
				<b>Relinquishment</b>	<b>(127)</b>	-	-	<b>(127)</b>
				Revised Budget	-	-	-	-
				Budget relinquishment of \$127 thousand, funded by Capital Reserves (Mall Programming Fund Reserve), due to project completion.				
	Specialized Transit	947_001	Victoria Park Garage / Ertlon@Victoria Park LRT	Previously Approved Budget Remaining	415	-	-	415
				<b>Relinquishment</b>	<b>(415)</b>	-	-	<b>(415)</b>
				Revised Budget	-	-	-	-
				Budget relinquishment of \$415 thousand, funded by Capital Reserves (net proceeds from the sale of surplus transit assets held within the Lifecycle Maintenance & Upgrade Reserve) and the Disaster Recovery Program (2013 Flood), due to project completion.				
				Previously Approved Budget Remaining	275	-	17,000	17,275
				<b>Relinquishment</b>	<b>(8)</b>	-	-	<b>(8)</b>
				Revised Budget	267	-	17,000	17,267
				Budget relinquishment of \$8 thousand, funded by Tax-Supported debt, as borrowings are not required because all remaining project costs are budgeted and funded by private contributions.				
<b>A Healthy and Green City</b>	Parks & Open Spaces	423350	Land Acquisition JUCC	Previously Approved Budget Remaining	124	145	120	389
				<b>Relinquishment</b>	<b>(32)</b>	<b>(145)</b>	<b>(120)</b>	<b>(297)</b>
				Revised Budget	92	-	-	92
				Budget relinquishment of \$297 thousand, funded by the Disaster Recovery Program (2013 Flood), due to project completion.				
	Parks & Open Spaces	932_001	Flood Pathways	Previously Approved Budget Remaining	318	575	250	1,143
				<b>Relinquishment</b>	<b>-</b>	<b>(110)</b>	<b>(250)</b>	<b>(360)</b>
				Revised Budget	318	465	-	783
				Budget relinquishment of \$360 thousand, funded by the Disaster Recovery Program (2013 Flood), due to project completion.				
	Parks & Open Spaces	932_004	Flood Other Parks	Previously Approved Budget Remaining	139	-	-	139
				<b>Relinquishment</b>	<b>(139)</b>	-	-	<b>(139)</b>
				Revised Budget	-	-	-	-
				Budget relinquishment of \$139 thousand, funded by Tax-Supported debt, due to project completion.				
<b>A Well-Run City</b>	Facility Management	768_061	CPB Heritage Buildings	<b>Total Relinquishment</b>	<b>(722)</b>	<b>(255)</b>	<b>(370)</b>	<b>(1,347)</b>

**CAPITAL BUDGET REVISIONS - PREVIOUSLY APPROVED - FOR INFORMATION**  
**(\$000s)**
**FOR THE PERIOD 2020 JULY 1 TO DECEMBER 31**
**Purpose:** To provide capital budget changes previously approved by Administration and Council from 2020 July 1 to December 31

Citizen Priority	Service	Budget ID	Budget ID Name	2020 Increase/ (Decrease)	2021 Increase/ (Decrease)	2022 Increase/ (Decrease)	2023 Increase/ (Decrease)	TOTAL Increase/ (Decrease)
<b>Increases</b>								
<b>A City of Safe and Inspiring Neighbourhoods</b>	Calgary 9-1-1	045_010	Emergency Services Quality Assurance Program	Previously Approved Budget Remaining	284	-	-	284
				<b>Increase</b>	<b>45</b>	-	-	<b>45</b>
				Revised Budget	329	-	-	329
				Budget increase of \$45 thousand, funded by Capital Reserves (911 Communications Centre Capital Financing Reserve), due to unbudgeted costs associated with additional software license requirements.				
	Calgary 9-1-1	045_015	Calgary 911 Facility Lifecycle Maintenance	Previously Approved Budget Remaining	519	-	-	519
				<b>Increase</b>	<b>342</b>	-	-	<b>342</b>
				Revised Budget	861	-	-	861
				Budget increase of \$342 thousand, funded by Capital Reserves (911 Communications Centre Capital Financing Reserve), due to higher than anticipated equipment costs.				
	City Cemeteries	504_633	Cemetery Lifecycle	Previously Approved Budget Remaining	33	150	100	283
				<b>Increase</b>	<b>205</b>	-	-	<b>205</b>
				Revised Budget	238	150	100	488
				Budget increase of \$205 thousand, funded by Capital Reserves (Perpetual Care of the Municipal Cemeteries Reserve and Parks Endowment & Sustainment Reserve), for building lifecycle/upgrades at Queens Park Cemetery.				
<b>A City That Moves</b>	Public Transit	668_02W	Fare Collection Equipment & System	Previously Approved Budget Remaining	6,126	225	405	6,756
				<b>Increase</b>	<b>346</b>	-	-	<b>346</b>
				Revised Budget	6,472	225	405	7,102
				Budget increase of \$346 thousand, funded by Other Federal Grants, due to unforeseen project costs and funding source obtained for the Fare Collection System project.				
	Sidewalks & Pathways	503_931	Pathways & Trails Development	Previously Approved Budget Remaining	869	50	-	919
				<b>Increase</b>	<b>348</b>	-	-	<b>348</b>
				Revised Budget	1,217	50	-	1,267
				Budget increase of \$348 thousand, funded by Developer & other contributions, due to unbudgeted project costs for temporary shoring construction of Glenmore Regional Pathway.				
	Sidewalks & Pathways	612_000	Main Streets	Previously Approved Budget Remaining	24,198	7,885	19,774	56,328
				<b>Increase</b>	<b>121</b>	-	-	<b>121</b>
				Revised Budget	24,319	7,885	19,774	56,449
				Budget increase of \$121 thousand, funded by Developer & other contributions, due to unforeseen project costs and funding source obtained for public realm improvements along Bowness Road Main Street.				

**CAPITAL BUDGET REVISIONS - PREVIOUSLY APPROVED - FOR INFORMATION**  
**(\$000s)**

**FOR THE PERIOD 2020 JULY 1 TO DECEMBER 31**

**Purpose:** To provide capital budget changes previously approved by Administration and Council from 2020 July 1 to December 31

Citizen Priority	Service	Budget ID	Budget ID Name	2020 Increase/ (Decrease)	2021 Increase/ (Decrease)	2022 Increase/ (Decrease)	2023 Increase/ (Decrease)	TOTAL Increase/ (Decrease)
	Streets	128_100	Streetlight - Upgrade & Maintenance					
			Previously Approved Budget Remaining	8,331	5,000	5,000	-	18,331
			<b>Increase</b>	<b>336</b>	-	-	-	<b>336</b>
			Revised Budget	8,666	5,000	5,000	-	18,666
			Budget increase of \$336 thousand, funded by Developer & other contributions, due to unforeseen project costs and funding source received for streetlight installation.					
	Streets	128_130	Traffic Signals/Ped Corridors Lifecycle					
			Previously Approved Budget Remaining	5,086	3,600	3,600	-	12,286
			<b>Increase</b>	<b>390</b>	-	-	-	<b>390</b>
			Revised Budget	5,476	3,600	3,600	-	12,676
			Budget increase of \$390 thousand, funded by Developer & other contributions, for unbudgeted construction expenditures for traffic signals.					
	Streets	481352	Dev Infrastructure - AD					
			Previously Approved Budget Remaining	19,517	7,673	3,713	-	30,902
			<b>Increase</b>	<b>182</b>	-	-	-	<b>182</b>
			Revised Budget	19,699	7,673	3,713	-	31,084
			Budget increase of \$182 thousand, funded by Developer & other contributions, due to unbudgeted project costs required for the Auburn Meadows Dr 52st SE new signal.					
	Streets	481355	Operational Improvements					
			Previously Approved Budget Remaining	602	750	750	-	2,102
			<b>Increase</b>	<b>57</b>	-	-	-	<b>57</b>
			Revised Budget	659	750	750	-	2,159
			Budget increase of \$57 thousand, funded by Developer & other contributions, due to unbudgeted project costs associated with the construction of the East Village Cycling Improvements Project.					
	Streets	481356	Signal Communications					
			Previously Approved Budget Remaining	2,473	1,500	1,500	-	5,473
			<b>Increase</b>	<b>400</b>	-	-	-	<b>400</b>
			Revised Budget	2,873	1,500	1,500	-	5,873
			Budget increase of \$400 thousand, funded by Other Federal and Other Provincial Grants, due to unbudgeted project costs to test applications for safety and traffic efficiency.					

**CAPITAL BUDGET REVISIONS - PREVIOUSLY APPROVED - FOR INFORMATION**  
**(\$000s)**

**FOR THE PERIOD 2020 JULY 1 TO DECEMBER 31**

**Purpose:** To provide capital budget changes previously approved by Administration and Council from 2020 July 1 to December 31

Citizen Priority	Service	Budget ID	Budget ID Name		2020 Increase/ (Decrease)	2021 Increase/ (Decrease)	2022 Increase/ (Decrease)	2023 Increase/ (Decrease)	TOTAL Increase/ (Decrease)	
A Healthy and Green City	Parks & Open Spaces	500_006	Park Upgrades	Previously Approved Budget Remaining	8,818	19,458	15,673	10,850	54,799	
				Increase	174	-	-	-	174	
				Revised Budget	8,991	19,458	15,673	10,850	54,973	
				Budget increase of \$174 thousand, funded by funded by Capital Reserves (Parks Endowment & Sustainment Reserve), for unforeseen park upgrades required in Clearwater Park, Somerset Spray Park and West Eau Claire.						
	Parks & Open Spaces	500_008	Park Lifecycle	Previously Approved Budget Remaining	12,436	20,035	7,780	5,000	45,251	
				Increase	100	-	-	-	100	
				Revised Budget	12,536	20,035	7,780	5,000	45,351	
				Budget increase of \$100 thousand, funded by funded by Capital Reserves (Parks Endowment & Sustainment Reserve), for an unforeseen park lifecycle project relating to baseball diamond safety fencing.						
	A Well-Run City	Infrastructure Support	480702	Survey Control Program	Previously Approved Budget Remaining	491	309	477	-	1,277
					Increase	22	-	-	-	22
					Revised Budget	512	309	477	-	1,299
					Budget increase of \$22 thousand, funded by Developer & other contributions, due to unbudgeted project costs associated with Field Surveying Services.					
Infrastructure Support		819_234	Sustainable Infrastructure Capital Program (SICP)	Previously Approved Budget Remaining	2,225	4,470	500	-	7,195	
				Increase	387	-	-	-	387	
				Revised Budget	2,612	4,470	500	-	7,582	
				Budget increase of \$387 thousand, funded by Other Provincial Grants and Developer & other contributions, due to unbudgeted project costs for an Alternative Fuel Study and the Varsity Integrated Civic Facility Planning Sustainability project.						
IT Solutions & Support		741_102	Multi-Data Centre Strategy	Previously Approved Budget Remaining	694	-	-	-	694	
				Increase	-	400	-	-	400	
				Revised Budget	694	400	-	-	1,094	
				Budget increase of \$400 thousand, funded by Capital Reserves (Information Technology Reserve), due to unanticipated cost increases in the overall program due to scoping and design changes, accelerated purchase of some internal equipment, and larger than expected costs on the emergency power uplift project.						
Total Increase				3,453	400	-	-	3,853		

**CAPITAL BUDGET REVISIONS - PREVIOUSLY APPROVED - FOR INFORMATION**  
(\$000s)

**FOR THE PERIOD 2020 JULY 1 TO DECEMBER 31**

**Purpose:** To provide capital budget changes previously approved by Administration and Council from 2020 July 1 to December 31

Citizen Priority	Service	Budget ID	Budget ID Name	2020 Increase/ (Decrease)	2021 Increase/ (Decrease)	2022 Increase/ (Decrease)	2023 Increase/ (Decrease)	TOTAL Increase/ (Decrease)
Transfers								
A City That Moves	Sidewalks & Pathways	223_000	Pedestrian Bridge Replacement and Upgrading	46	-	-	-	46
	Streets	949_001	Pedestrian Bridges	(46)	-	-	-	(46)
			Total	-	-	-	-	-
			Budget transfer of \$46 thousand, funded by Capital Reserves (Reserve for Future Capital), for critical, unforeseen project costs relating to the pedestrian bridge replacement project.					
A Healthy and Green City	Recreation Opportunities	507_632	Recreation Upgrade Retrofit	(37)	-	-	-	(37)
	Recreation Opportunities	507_700	Aquatic Centre Upgrade	(1)	-	-	-	(1)
	Corporate Programs	888_001	Capital Corporate Programs	38	-	-	-	38
			Total	-	-	-	-	-
			Budget transfer of \$38 thousand to capital budget savings, funded by Capital Reserves (Community Investment Reserve) and the Municipal Sustainability Initiative, due to project completion.					
A Healthy and Green City	Environmental Management	815_14F	Environmental Programs	-	(50)	-	-	(50)
A Well-Run City	Organizational Health, Safety & Wellness	815_12F	Technology	-	(50)	-	-	(50)
	Corporate Programs	888_001	Capital Corporate Programs	-	100	-	-	100
			Total	-	-	-	-	-
			Budget transfer of \$100 thousand to capital budget savings, funded by Capital Reserves (Pay-As-You-Go), due to less capital funding than previously required through fulfilling technology needs with lower cost options than previously anticipated and applying new cost-sharing arrangements than hiring consulting support originally planned.					
A Healthy and Green City	Recreation Opportunities	519_130	Facility Lifecycle	(5,000)	(1,800)	(1,750)	-	(8,550)
A Well-Run City	Facility Management	405701	Rec Facility Lifecycle	5,000	1,800	1,750	-	8,550
			Total	-	-	-	-	-
			Budget transfer of \$8,550 thousand, funded by Capital Reserves (Community Investment Reserve), in relation to the Corporate Coordination of Operations & Maintenance (CCOM) program.					
A Prosperous City	Affordable Housing	489_AHS	Increase Affordable Housing Supply 2012-2014	204	-	-	-	204
	Affordable Housing	489_BGD	Bridgeland	(72)	-	-	-	(72)
	Affordable Housing	489_CHB	Crescent Heights Build	(133)	-	-	-	(133)
			Total	-	-	-	-	-
			Budget transfer of \$204 thousand, funded by Capital Reserves (Corporate Housing Reserve) and Other Provincial Grants, for unforeseen capital costs required to increase the supply of Affordable Housing.					
A Well-Run City	IT Solutions & Support	741_101	Client Computing	(13)	-	-	-	(13)
	Corporate Programs	888_001	Capital Corporate Programs	13	-	-	-	13
			Total	-	-	-	-	-
			Budget transfer of \$13 thousand to capital budget savings, funded by Capital Reserves (Pay-As-You-Go), due to project completion.					
Total Transfers				-	-	-	-	-
Total Previously Approved by Administration				2,731	145	(370)	-	2,506

**CAPITAL BUDGET REVISIONS - PREVIOUSLY APPROVED - FOR INFORMATION**  
(\$000s)

**FOR THE PERIOD 2020 JULY 1 TO DECEMBER 31**

**Purpose:** To provide capital budget changes previously approved by Administration and Council from 2020 July 1 to December 31

Citizen Priority	Service	Budget ID	Budget ID Name	2020 Increase/ (Decrease)	2021 Increase/ (Decrease)	2022 Increase/ (Decrease)	2023 Increase/ (Decrease)	TOTAL Increase/ (Decrease)
<b>Previously Approved by Council</b>								
<b>Increases</b>								
<b>A City That Moves</b>	Streets	147_148	Local Improvement - Paving, Sidewalk C&G	Previously Approved Budget Remaining	3,794	-	-	3,794
				<b>Increase</b>	<b>933</b>	-	-	<b>933</b>
				Revised Budget	4,727	-	-	4,727
				Council report C2020-0778 approved an increase of \$933 thousand, funded by Self-Supported debt, for local improvements.				
<b>A Healthy and Green City</b>	Urban Forestry	502_028	UF Lifecycle	Previously Approved Budget Remaining	3,494	2,800	4,243	10,537
				<b>Increase</b>	-	<b>2,500</b>	<b>2,500</b>	<b>5,000</b>
				Revised Budget	3,494	5,300	6,743	15,537
				Council report C2020-1215 approved an increase of \$5,000 thousand, funded by Capital Reserves (Fiscal Stability Reserve), to be used solely for the purpose of improving Calgary's Tree Canopy.				
<b>A City That Moves</b>	Public Transit	481409	52 St BRT Phase 1	Previously Approved Budget Remaining	-	1,200	-	1,200
				<b>Increase</b>	<b>500</b>	<b>12,639</b>	-	<b>13,139</b>
				Revised Budget	500	13,839	-	14,339
<b>A City That Moves</b>	Streets	481358	MSP Critical IS Renewal	Previously Approved Budget Remaining	-	(1,200)	-	(1,200)
				<b>Increase</b>	-	<b>25,000</b>	-	<b>25,000</b>
				Revised Budget	-	23,800	-	23,800
<b>A Healthy and Green City</b>	Parks & Open Spaces	500_006	Park Upgrades	Previously Approved Budget Remaining	8,391	11,458	15,673	46,373
				<b>Increase</b>	<b>600</b>	<b>8,000</b>	-	<b>8,600</b>
				Revised Budget	8,991	19,458	15,673	54,973
<b>A Healthy and Green City</b>	Parks & Open Spaces	500_008	Park Lifecycle	Previously Approved Budget Remaining	11,536	5,035	7,780	29,351
				<b>Increase</b>	<b>1,000</b>	<b>15,000</b>	-	<b>16,000</b>
				Revised Budget	12,536	20,035	7,780	45,351
<b>A Healthy and Green City</b>	Recreation Opportunities	519_130	Facility Lifecycle	Previously Approved Budget Remaining	19,505	17,418	30,960	67,883
				<b>Increase</b>	-	<b>3,715</b>	-	<b>3,715</b>
				Revised Budget	19,505	21,133	30,960	71,598
<b>A Healthy and Green City</b>	Stormwater Management	897_000	Drainage Facilities & Network	Previously Approved Budget Remaining	115,543	66,045	63,677	253,506
				<b>Increase</b>	-	<b>32,994</b>	-	<b>32,994</b>
				Revised Budget	115,543	99,039	63,677	286,500



**CAPITAL BUDGET REVISIONS - PREVIOUSLY APPROVED - FOR INFORMATION**  
**(\$000s)**

**FOR THE PERIOD 2020 JULY 1 TO DECEMBER 31**

**Purpose:** To provide capital budget changes previously approved by Administration and Council from 2020 July 1 to December 31

Citizen Priority	Service	Budget ID	Budget ID Name	2020 Increase/ (Decrease)	2021 Increase/ (Decrease)	2022 Increase/ (Decrease)	2023 Increase/ (Decrease)	TOTAL Increase/ (Decrease)					
A Prosperous City	Affordable Housing	489_AHS	Increase Affordable Housing Supply 2012-2014	Previously Approved Budget Remaining	7,782	13,746	10,908	-	32,436				
				Increase	395	5,305	-	-	5,700				
				Revised Budget	8,177	19,051	10,908	-	38,136				
	Affordable Housing	489_014	Lifecycle Maintenance	Previously Approved Budget Remaining	9,575	9,299	4,371	-	23,245				
				Increase	120	9,180	-	-	9,300				
				Revised Budget	9,695	18,479	4,371	-	32,545				
	Economic Development & Tourism	633_002	Civic Partners Infrastructure Grant	Previously Approved Budget Remaining	10,623	4,547	7,128	-	22,298				
				Increase	-	18,924	-	-	18,924				
				Revised Budget	10,623	23,471	7,128	-	41,222				
	A Well-Run City	Facility Management	480772	MSP Heritage Revitalization	Previously Approved Budget Remaining	-	5,000	-	-	5,000			
Increase					500	11,000	-	-	11,500				
Revised Budget					500	16,000	-	-	16,500				
Infrastructure Support		819_234	Sustainable Infrastructure Capital Program (SICP)	Previously Approved Budget Remaining	2,612	500	500	-	3,612				
				Increase	-	3,970	-	-	3,970				
				Revised Budget	2,612	4,470	500	-	7,582				
IT Solutions & Support		751_001	Fibre Optics	Previously Approved Budget Remaining	2,495	2,000	6,000	-	10,495				
				Increase	-	6,000	-	-	6,000				
				Revised Budget	2,495	8,000	6,000	-	16,495				
				Council report PFC2020-0894 approved an increase of \$154,842 thousand, funded by Other Provincial Grants and Developer & other contributions, for the Municipal Stimulus Program investments in response to the economic downturn and the COVID-19 pandemic.									
A Prosperous City	Affordable Housing	489_RHI	Rapid Housing Initiative	Previously Approved Budget Remaining	-	-	-	-	-				
				Increase	24,599	-	-	-	24,599				
				Revised Budget	24,599	-	-	-	24,599				
				Council report C2020-1424 approved an increase of \$24,599 thousand, funded by Other Federal Grants, to be disbursed to the non-profit housing providers.									
	Land Development & Sales	403784	Golf Courses Redevelopment	Previously Approved Budget Remaining	-	-	-	-	-				
				Increase	-	750	-	-	750				
				Revised Budget	-	750	-	-	750				
				Council report PFC2020-0952 approved an increase of \$750 thousand, funded by Capital Reserves (Real Estate Services Reserve), to conduct an assessment of Richmond Green Golf Course Land to explore redevelopment options and sales opportunities.									
	A Well-Run City	Infrastructure Support	819_234	Sustainable Infrastructure Capital Program (SICP)	Previously Approved Budget Remaining	564	4,470	500	-	5,534			
					Increase	2,048	-	-	-	2,048			
Revised Budget					2,612	4,470	500	-	7,582				
							Council report PFC2020-0607 approved an increase of \$2,048 thousand, funded by Other Provincial Grants for the solar panel project.						
Total Increases				30,695	154,977	2,500	-	188,171					

**CAPITAL BUDGET REVISIONS - PREVIOUSLY APPROVED - FOR INFORMATION**  
(\$000s)

**FOR THE PERIOD 2020 JULY 1 TO DECEMBER 31**

**Purpose:** To provide capital budget changes previously approved by Administration and Council from 2020 July 1 to December 31

Citizen Priority	Service	Budget ID	Budget ID Name	2020 Increase/ (Decrease)	2021 Increase/ (Decrease)	2022 Increase/ (Decrease)	2023 Increase/ (Decrease)	TOTAL Increase/ (Decrease)				
Confidentiality Lifted												
A City That Moves	Sidewalks & Pathways	583_001	Douglasdale McKenzie Slope	Previously Approved Budget Remaining	2,923	-	-	2,923				
				Confidentiality lifted	1,501	63	2,402	3,966				
				Revised Budget	4,424	63	2,402	6,889				
				Confidentiality of Council approved report TT2015-0816 was lifted for a budget increase of \$3,966 thousand, funded by Capital Reserves (Reserve for Future Capital), for Douglasdale McKenzie Slope.								
				Total Confidentiality Lifted	1,501	63	2,402	-	3,966			
				Total Previously Approved by Council				32,196	155,040	4,902	-	192,137
				Total Previously Approved by Administration & Council				34,927	155,184	4,532	-	194,643

**Capital Budget Continuity Schedule - For Information  
By Citizen Priority and Service  
(\$000s)**

**Purpose:** To provide a summary of capital adjustments to maintain continuity and transparency of the capital budget.

	As at 2020 November 30 <sup>1, 4</sup> (C2020-1215)		Previously Approved Revisions (2020 July to December 31) (Attachment 1) <sup>1</sup>		Revised Budget as at 2020 December 31 <sup>1</sup>		Budget Carry-forward from 2020 <sup>1, 3</sup>	Adjusted Opening Budget <sup>1</sup>	
Citizen Priority/Service	2020 Budget	2021-2024+ Budget	2020 Revisions	2021-2024+ Revisions	2020 Revised Budget	2021-2024+ Revised Budget	2020 Budget Carry-forward	2021 Adjusted Budget	2022-2025+ Adjusted Budget
<b>A Prosperous City</b>									
Affordable Housing	24,210	149,450	25,114	14,485	49,324	163,935	26,414	72,389	117,960
Arts & Culture	7,954	17,659	-	-	7,954	17,659	7,943	6,144	19,458
Business Licensing	1,028	200	-	-	1,028	200	497	647	50
Community Strategies	-	-	-	-	-	-	-	-	-
Economic Development & Tourism	29,906	324,727	-	18,924	29,906	343,651	10,184	67,856	285,979
Land Development & Sales	40,299	214,158	-	750	40,299	214,908	21,979	45,423	191,465
Library Services	3,180	5,972	-	-	3,180	5,972	1,385	4,254	3,102
Social Programs	-	-	-	-	-	-	-	-	-
<b>TOTAL - A Prosperous City</b>	<b>106,576</b>	<b>712,166</b>	<b>25,114</b>	<b>34,159</b>	<b>131,690</b>	<b>746,325</b>	<b>68,403</b>	<b>196,714</b>	<b>618,014</b>
<b>A City of Safe &amp; Inspiring Neighbourhoods</b>									
Building Safety	5,220	16,195	-	-	5,220	16,195	2,227	3,227	15,195
Bylaw Education & Compliance	492	410	-	-	492	410	244	449	205
Calgary 9-1-1	6,563	7,250	387	-	6,950	7,250	861	5,111	3,000
City Cemeteries	2,621	8,281	205	-	2,826	8,281	(1,472)	2,341	4,468
City Planning & Policy	2,094	31,000	-	-	2,094	31,000	1,984	14,021	18,963
Development Approvals	7,918	6,420	-	-	7,918	6,420	6,852	6,852	6,420
Emergency Management & Business Continuity	5,198	3,171	-	-	5,198	3,171	3,370	5,131	1,410
Fire & Emergency Response	35,773	106,544	-	-	35,773	106,544	29,351	49,844	83,590
Fire Inspection & Enforcement	-	-	-	-	-	-	-	-	-
Fire Safety Education	-	-	-	-	-	-	-	-	-
Neighbourhood Support	-	-	-	-	-	-	-	-	-
Pet Ownership & Licensing	541	349	-	-	541	349	253	428	175
Police Services	35,726	68,125	-	-	35,726	68,125	16,419	69,727	14,817
<b>TOTAL - A City of Safe &amp; Inspiring Neighbourhoods</b>	<b>102,145</b>	<b>247,744</b>	<b>592</b>	<b>-</b>	<b>102,737</b>	<b>247,744</b>	<b>60,090</b>	<b>157,130</b>	<b>148,243</b>
<b>A City That Moves</b>									
Parking	84,212	23,750	-	-	84,212	23,750	78,251	92,201	9,800
Public Transit	387,471	4,984,472	846	12,639	388,317	4,997,111	191,533	572,840	4,615,804
Sidewalks & Pathways	68,079	78,515	1,888	2,465	69,967	80,980	38,692	63,780	55,892
Specialized Transit	3,003	180	(415)	-	2,588	180	2,574	2,664	90
Streets	308,890	396,512	2,252	25,000	311,142	421,512	108,827	328,293	195,936
Taxi, Limousine & Vehicles-for-Hire	494	560	-	-	494	560	393	723	230
<b>TOTAL - A City That Moves</b>	<b>852,148</b>	<b>5,483,989</b>	<b>4,571</b>	<b>40,104</b>	<b>856,720</b>	<b>5,524,093</b>	<b>420,269</b>	<b>1,060,500</b>	<b>4,877,752</b>

	As at 2020 November 30 <sup>1, 4</sup> (C2020-1215)		Previously Approved Revisions (2020 July to December 31) (Attachment 1) <sup>1</sup>		Revised Budget as at 2020 December 31 <sup>1</sup>		Budget Carry-forward from 2020 <sup>1, 3</sup>	Adjusted Opening Budget <sup>1</sup>	
Citizen Priority/Service	2020 Budget	2021-2024+ Budget	2020 Revisions	2021-2024+ Revisions	2020 Revised Budget	2021-2024+ Revised Budget	2020 Budget Carry-forward	2021 Adjusted Budget	2022-2025+ Adjusted Budget
<b>A Healthy &amp; Green City</b>									
Environmental Management	589	580	-	(50)	589	530	246	531	245
Parks & Open Spaces	25,578	79,046	1,833	22,375	27,411	101,421	4,336	47,825	56,772
Recreation Opportunities	60,654	99,619	(5,038)	165	55,616	99,784	35,410	66,149	69,045
Stormwater Management	121,031	132,475	-	32,994	121,031	165,469	66,815	160,366	71,918
Urban Forestry	3,494	7,043	-	5,000	3,494	12,043	329	5,629	6,743
Waste & Recycling	33,641	70,140	-	-	33,641	70,140	6,293	43,607	32,826
Wastewater Collection & Treatment	334,875	331,861	-	-	334,875	331,861	85,017	238,091	178,787
Water Treatment & Supply	174,751	236,697	-	-	174,751	236,697	73,200	153,666	156,231
<b>TOTAL - A Healthy &amp; Green City</b>	<b>754,613</b>	<b>957,460</b>	<b>(3,206)</b>	<b>60,484</b>	<b>751,407</b>	<b>1,017,944</b>	<b>271,647</b>	<b>715,864</b>	<b>572,567</b>
<b>A Well-Run City</b>									
Appeals & Tribunals	113	-	-	-	113	-	5	5	-
Citizen Engagement & Insights	319	287	-	-	319	287	265	408	143
Citizen Information & Services	4,241	3,860	-	-	4,241	3,860	2,528	4,058	2,330
City Auditor's Office	-	-	-	-	-	-	-	-	-
Corporate Governance	11	-	-	-	11	-	-	-	-
Corporate Security	2,844	6,123	-	-	2,844	6,123	1,718	4,322	3,519
Council & Committee Support	24	-	-	-	24	-	-	-	-
Data Analytics & Information Access	3,253	4,686	-	-	3,253	4,686	1,739	3,667	2,759
Executive Leadership	-	-	-	-	-	-	-	-	-
Facility Management	71,175	119,088	5,361	14,550	76,536	133,638	36,034	82,015	85,485
Financial Support	1,549	628	-	-	1,549	628	1,090	1,437	280
Fleet Management	90,811	104,634	-	-	90,811	104,634	49,350	89,899	64,085
Human Resources Support	819	-	-	-	819	-	464	464	-
Infrastructure Support	6,152	4,294	2,456	3,970	8,609	8,264	6,380	12,117	2,527
Insurance & Claims	96	-	-	-	96	-	12	12	-
IT Solutions & Support	40,383	58,862	(13)	6,400	40,370	65,262	12,021	46,022	31,261
Legal Counsel & Advocacy	67	389	-	-	67	389	67	262	195
Mayor & Council	276	-	-	-	276	-	27	27	-
Municipal Elections	2,829	380	-	-	2,829	380	1,761	2,141	-
Organizational Health, Safety & Wellness	360	214	-	(50)	360	164	205	264	105
Procurement & Warehousing	4,260	1,524	-	-	4,260	1,524	3,692	4,757	459
Property Assessment	4,951	8,600	-	-	4,951	8,600	2,930	5,930	5,600
Real Estate	34,901	21,773	-	-	34,901	21,773	15,564	31,899	5,438
Records Management, Access & Privacy	1,595	779	-	-	1,595	779	1,235	1,515	500
Strategic Marketing & Communications	257	9	-	-	257	9	244	249	4
Taxation	650	1,100	-	-	650	1,100	501	1,051	550
<b>TOTAL - A Well-Run City</b>	<b>271,937</b>	<b>337,228</b>	<b>7,804</b>	<b>24,870</b>	<b>279,742</b>	<b>362,098</b>	<b>137,831</b>	<b>292,519</b>	<b>205,239</b>

	As at 2020 November 30 <sup>1, 4</sup> (C2020-1215)		Previously Approved Revisions (2020 July to December 31) (Attachment 1) <sup>1</sup>		Revised Budget as at 2020 December 31 <sup>1</sup>		Budget Carry- forward from 2020 <sup>1, 3</sup>	Adjusted Opening Budget <sup>1</sup>	
Citizen Priority/Service	2020 Budget	2021-2024+ Budget	2020 Revisions	2021-2024+ Revisions	2020 Revised Budget	2021-2024+ Revised Budget	2020 Budget Carry- forward	2021 Adjusted Budget	2022-2025+ Adjusted Budget
CORPORATE CAPITAL PROGRAMS	7,692	-	52	100	7,744	100	7,744	7,844	-
TOTAL CITY <sup>2</sup>	2,095,112	7,738,588	34,927	159,716	2,130,039	7,898,304	965,984	2,430,570	6,421,815

**Notes:**

- 1. Figures may not add due to rounding
- 2. Excludes confidential budget remaining from previously approved reports in 2021-2024+ (\$86.582 million), which will be allocated to services as confidentiality is lifted.
- 3. In accordance with CFO006, authorized overspends have been deferred to the year in which budget resides.
- 4. Refinements to the As at 2020 November 30 budget figures include:
  - Public Transit: due to rounding differences between Council approved Greenline report (GC2020-0616) and actual budget
  - Infrastructure Support: impact from contract with Enmax for solar panels (PFC2020-0607)



**Operating Budget Continuity Schedule - For Information  
By Citizen Priority and Service  
(\$000s)**

**Purpose:** The purpose of this schedule is to provide a summary of operating changes from 2020 July 1 to December 31 to maintain continuity and transparency.

**Explanation for common types of changes in the schedule:**

Corporate Workforce Planning (CWP) revisions are to intentionally manage staffing resources. Staffing resources are centralized in Corporate Programs and redistributed to services as required.

Net zero transfers between services are due to reorganizations or to refine the operating budget to align with business needs and service requirements.

	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> <small>(includes one-time carry-forward from 2020 approved in C2020-1215)</small>	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30) (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>A PROSPEROUS CITY</b>										
<b>Affordable Housing</b>										Net budget change of (\$1,426) in 2020 and \$377 in 2021 due to: -One-time carry-forward of (\$1,049) in 2020 (C2020-1215) -One-time adjustment of (\$377) in 2020 and \$377 in 2021
Expenditures	23,528	(2,423)	21,104	22,087	474	22,561	20,796	-	20,796	
Recoveries	(187)	-	(187)	(187)	-	(187)	(187)	-	(187)	
Revenues	(9,246)	997	(8,249)	(8,401)	(97)	(8,498)	(7,501)	-	(7,501)	
<b>Net budget</b>	<b>14,095</b>	<b>(1,426)</b>	<b>12,669</b>	<b>13,499</b>	<b>377</b>	<b>13,876</b>	<b>13,108</b>	<b>-</b>	<b>13,108</b>	
<b>Arts &amp; Culture</b>										Net base budget change of \$1 in 2020 and (\$76) in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$1 in 2020 to 2022 -Net zero transfer of (\$77) in 2021 to 2022 to Facility Management
Expenditures	26,231	1	26,231	27,626	(76)	27,550	29,181	(76)	29,105	
Recoveries	(864)	-	(864)	(864)	-	(864)	(864)	-	(864)	
Revenues	(1,669)	-	(1,669)	(1,669)	-	(1,669)	(1,669)	-	(1,669)	
<b>Net budget</b>	<b>23,697</b>	<b>1</b>	<b>23,698</b>	<b>25,092</b>	<b>(76)</b>	<b>25,017</b>	<b>26,647</b>	<b>(76)</b>	<b>26,572</b>	
<b>Business Licensing</b>										
Expenditures	10,747	10	10,757	10,607	15	10,622	10,866	15	10,880	
Recoveries	(2,989)	(1)	(2,990)	(2,878)	(1)	(2,879)	(2,949)	(1)	(2,950)	
Revenues	(7,758)	(9)	(7,768)	(7,729)	(14)	(7,744)	(7,916)	(14)	(7,931)	
<b>Net budget</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>-</b>	<b>0</b>	<b>0</b>	<b>-</b>	
<b>Community Strategies</b>										Net base budget change of \$4 in 2020 and (\$886) in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$4 in 2020 and \$6 in 2021 to 2022 -CWP centralization of salary & wage budget approved for New Investments of (\$1,050) in 2021 to 2022 (C2020-1215) and CWP return of centralized budget of \$158 in 2021 to 2022
Expenditures	3,636	4	3,640	6,140	(886)	5,255	6,144	(886)	5,259	
Recoveries	(744)	-	(744)	(744)	-	(744)	(744)	-	(744)	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>2,892</b>	<b>4</b>	<b>2,897</b>	<b>5,396</b>	<b>(886)</b>	<b>4,511</b>	<b>5,400</b>	<b>(886)</b>	<b>4,515</b>	
<b>Economic Development &amp; Tourism</b>										Net budget change of (\$1,172) in 2020 due to: -One-time carry-forward of (\$1,172) in 2020 (C2020-1215)
Expenditures	37,632	(1,172)	36,460	38,056	-	38,056	40,526	-	40,526	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>37,632</b>	<b>(1,172)</b>	<b>36,460</b>	<b>38,056</b>	<b>-</b>	<b>38,056</b>	<b>40,526</b>	<b>-</b>	<b>40,526</b>	
<b>Land Development &amp; Sales</b>										
Expenditures	52,571	-	52,571	53,980	-	53,980	56,555	-	56,555	
Recoveries	(7,782)	-	(7,782)	(8,271)	-	(8,271)	(8,271)	-	(8,271)	
Revenues	(44,392)	-	(44,392)	(45,321)	-	(45,321)	(47,896)	-	(47,896)	
<b>Net budget</b>	<b>397</b>	<b>-</b>	<b>397</b>	<b>388</b>	<b>-</b>	<b>388</b>	<b>388</b>	<b>-</b>	<b>388</b>	

	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> <small>(includes one-time carry-forward from 2020 approved in C2020-1215)</small>	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30 (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>Library Services</b>										
Expenditures	53,693	-	53,693	53,993	-	53,993	54,243	-	54,243	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>53,693</b>	<b>-</b>	<b>53,693</b>	<b>53,993</b>	<b>-</b>	<b>53,993</b>	<b>54,243</b>	<b>-</b>	<b>54,243</b>	
<b>Social Programs</b>										Net base budget change of \$5 in 2020 and \$7 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$5 in 2020 and \$7 in 2021 to 2022
Expenditures	65,518	(403)	65,116	72,850	(450)	72,400	63,966	(450)	63,516	
Recoveries	(2,971)	-	(2,971)	(2,971)	-	(2,971)	(2,971)	-	(2,971)	
Revenues	(34,261)	407	(33,854)	(34,381)	457	(33,924)	(34,381)	457	(33,924)	
<b>Net budget</b>	<b>28,286</b>	<b>5</b>	<b>28,291</b>	<b>35,498</b>	<b>7</b>	<b>35,505</b>	<b>26,614</b>	<b>7</b>	<b>26,621</b>	
<b>TOTAL - A PROSPEROUS CITY</b>										
Expenditures	273,556	(3,983)	269,573	285,339	(922)	284,417	282,277	(1,397)	280,880	
Recoveries	(15,537)	(1)	(15,538)	(15,915)	(1)	(15,915)	(15,986)	(1)	(15,987)	
Revenues	(97,326)	1,395	(95,931)	(97,501)	346	(97,155)	(99,363)	443	(98,920)	
<b>Net budget</b>	<b>160,693</b>	<b>(2,588)</b>	<b>158,104</b>	<b>171,923</b>	<b>(577)</b>	<b>171,346</b>	<b>166,927</b>	<b>(954)</b>	<b>165,973</b>	
<b>A CITY OF SAFE &amp; INSPIRING NEIGHBOURHOODS</b>										
<b>Building Safety</b>										
Expenditures	82,308	(914)	81,394	38,213	(907)	37,306	39,371	(907)	38,464	
Recoveries	(2,472)	-	(2,472)	(2,472)	-	(2,472)	(2,472)	-	(2,472)	
Revenues	(77,210)	914	(76,296)	(35,741)	907	(34,834)	(36,899)	907	(35,992)	
<b>Net budget</b>	<b>2,625</b>	<b>(0)</b>	<b>2,625</b>	<b>0</b>	<b>(0)</b>	<b>-</b>	<b>0</b>	<b>(0)</b>	<b>-</b>	
<b>Bylaw Education &amp; Compliance</b>										Net budget change of (\$876) in 2020, \$127 in 2021, and \$3 in 2022 due to: -One-time carry-forward of (\$875) in 2020 (C2020-1215) -One-time adjustment (\$3) in 2020 and \$3 in 2021 -Transfer of funds from Corporate Programs to services of \$2 in 2020 and \$3 in 2021 to 2022 -Council approved one-time budget for Financial Task Force \$121 in 2021 (C2020-0815)
Expenditures	12,633	(876)	11,757	12,889	127	13,016	12,051	3	12,054	
Recoveries	(1,250)	-	(1,250)	(1,720)	-	(1,720)	(1,720)	-	(1,720)	
Revenues	(435)	-	(435)	(485)	-	(485)	(485)	-	(485)	
<b>Net budget</b>	<b>10,948</b>	<b>(876)</b>	<b>10,072</b>	<b>10,684</b>	<b>127</b>	<b>10,811</b>	<b>9,846</b>	<b>3</b>	<b>9,849</b>	
<b>Calgary 9-1-1</b>										Net budget change of \$26 in 2020, \$98 in 2021, and \$38 in 2022 due to: -Transfer of funds from Corporate Programs to services of \$26 in 2020 and \$38 in 2021 to 2022 -Council approved one-time budget for Financial Task Force \$60 in 2021 (C2020-0815)
Expenditures	47,683	26	47,708	42,168	98	42,267	42,143	38	42,181	
Recoveries	(715)	-	(715)	(967)	-	(967)	(967)	-	(967)	
Revenues	(13,812)	-	(13,812)	(8,259)	-	(8,259)	(8,259)	-	(8,259)	
<b>Net budget</b>	<b>33,156</b>	<b>26</b>	<b>33,181</b>	<b>32,943</b>	<b>98</b>	<b>33,041</b>	<b>32,918</b>	<b>38</b>	<b>32,955</b>	
<b>City Cemeteries</b>										
Expenditures	8,675	-	8,675	8,623	-	8,623	8,624	-	8,624	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	(7,358)	-	(7,358)	(7,358)	-	(7,358)	(7,358)	-	(7,358)	
<b>Net budget</b>	<b>1,318</b>	<b>-</b>	<b>1,318</b>	<b>1,266</b>	<b>-</b>	<b>1,266</b>	<b>1,266</b>	<b>-</b>	<b>1,266</b>	
<b>City Planning &amp; Policy</b>										Net budget change of (\$275) in 2020, \$5 in 2021, and \$6 in 2022 due to: -One-time carry-forward of (\$281) in 2020 (C2020-1215) -One-time adjustment of \$2 in 2020 and (\$2) in 2021 -Transfer of funds from Corporate Programs to services of \$4 in 2020 and \$6 in 2021 to 2022
Expenditures	25,891	(323)	25,568	26,773	(43)	26,730	26,406	(42)	26,364	
Recoveries	(318)	0	(318)	(318)	-	(318)	(318)	-	(318)	
Revenues	(2,961)	48	(2,913)	(2,727)	48	(2,679)	(2,724)	48	(2,676)	
<b>Net budget</b>	<b>22,611</b>	<b>(275)</b>	<b>22,337</b>	<b>23,728</b>	<b>5</b>	<b>23,733</b>	<b>23,364</b>	<b>6</b>	<b>23,370</b>	



	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> <small>(includes one-time carry-forward from 2020 approved in C2020-1215)</small>	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30) (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>Development Approvals</b>										
Expenditures	37,895	952	38,847	39,780	957	40,717	40,765	957	41,721	
Recoveries	(161)	-	(161)	(161)	-	(161)	(161)	-	(161)	
Revenues	(37,734)	(952)	(38,686)	(39,599)	(957)	(40,556)	(40,604)	(957)	(41,560)	
<b>Net budget</b>	-	(0)	-	(0)	(0)	-	(0)	(0)	-	
<b>Emergency Management &amp; Business Continuity</b>										Net base budget change of \$4 in 2020 and \$6 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$4 in 2020 and \$6 in 2021 to 2022
Expenditures	4,922	4	4,926	4,803	6	4,809	4,804	6	4,810	
Recoveries	(85)	-	(85)	(85)	-	(85)	(85)	-	(85)	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	4,837	4	4,841	4,718	6	4,724	4,719	6	4,725	
<b>Fire &amp; Emergency Response</b>										Net base budget change of \$29 in 2020 and \$43 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$29 in 2020 and \$43 in 2021 to 2022
Expenditures	225,251	29	225,280	224,441	43	224,484	224,632	43	224,675	
Recoveries	(780)	-	(780)	(1,705)	-	(1,705)	(1,705)	-	(1,705)	
Revenues	(3,628)	-	(3,628)	(3,363)	-	(3,363)	(3,363)	-	(3,363)	
<b>Net budget</b>	220,843	29	220,871	219,373	43	219,416	219,564	43	219,607	
<b>Fire Inspection &amp; Enforcement</b>										Net budget change of (\$240) in 2020 due to: -One-time carry-forward of (\$240) in 2020 (C2020-1215)
Expenditures	10,145	(240)	9,905	10,037	-	10,037	9,983	-	9,983	
Recoveries	(63)	-	(63)	(63)	-	(63)	(63)	-	(63)	
Revenues	(3,041)	-	(3,041)	(3,041)	-	(3,041)	(3,201)	-	(3,201)	
<b>Net budget</b>	7,041	(240)	6,801	6,934	-	6,934	6,719	-	6,719	
<b>Fire Safety Education</b>										
Expenditures	1,180	-	1,180	1,176	-	1,176	1,179	-	1,179	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	1,180	-	1,180	1,176	-	1,176	1,179	-	1,179	
<b>Neighbourhood Support</b>										
Expenditures	9,230	75	9,305	9,230	-	9,230	9,230	-	9,230	
Recoveries	(3,001)	-	(3,001)	(3,001)	-	(3,001)	(3,001)	-	(3,001)	
Revenues	-	(75)	(75)	-	-	-	-	-	-	
<b>Net budget</b>	6,229	-	6,229	6,229	-	6,229	6,229	-	6,229	
<b>Pet Ownership &amp; Licensing</b>										Net budget change of (\$176) in 2020, \$405 in 2021, and \$250 in 2022 due to: -One-time carry-forward of (\$185) in 2020 (C2020-1215) -One-time adjustment of (\$34) in 2020 and \$34 in 2021 -CWP return of centralized budget of \$29 in 2020 and \$229 from 2021 to 2022 -Transfer of funds from Corporate Programs to services of \$14 in 2020 and \$21 in 2021 to 2022 -Council approved one-time budget for Financial Task Force \$121 in 2021 (C2020-0815)
Expenditures	10,155	(176)	9,979	9,931	405	10,336	9,763	250	10,013	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	(5,670)	-	(5,670)	(5,687)	-	(5,687)	(5,704)	-	(5,704)	
<b>Net budget</b>	4,485	(176)	4,309	4,244	405	4,649	4,059	250	4,309	
<b>Police Services</b>										
Expenditures	517,570	-	517,570	517,612	-	517,612	517,795	-	517,795	
Recoveries	(2,600)	-	(2,600)	(2,600)	-	(2,600)	(2,600)	-	(2,600)	
Revenues	(100,618)	-	(100,618)	(100,618)	-	(100,618)	(100,618)	-	(100,618)	
<b>Net budget</b>	414,352	-	414,352	414,394	-	414,394	414,577	-	414,577	

	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> <small>(includes one-time carry-forward from 2020 approved in C2020-1215)</small>	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30) (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>TOTAL - A CITY OF SAFE &amp; INSPIRING NEIGHBOURHOODS</b>										
Expenditures	993,538	(1,444)	992,094	945,659	685	946,344	946,746	347	947,094	
Recoveries	(11,445)	0	(11,445)	(13,092)	-	(13,092)	(13,092)	-	(13,092)	
Revenues	(252,468)	(65)	(252,533)	(206,878)	(2)	(206,880)	(209,215)	(2)	(209,217)	
<b>Net budget</b>	<b>729,625</b>	<b>(1,509)</b>	<b>728,117</b>	<b>725,689</b>	<b>683</b>	<b>726,372</b>	<b>724,439</b>	<b>345</b>	<b>724,784</b>	
<b>A CITY THAT MOVES</b>										Net base budget change of \$6 in 2020 and \$7 in 2021 to 2022 due to: -Net zero transfer of \$6 in 2020 to 2022 from Sidewalks and Pathways -Transfer of funds from Corporate Programs to services of \$1 in 2021 to 2022
<b>Parking</b>										
Expenditures	2,968	6	2,974	2,970	7	2,976	2,972	7	2,978	
Recoveries	(1,362)	-	(1,362)	(1,362)	-	(1,362)	(1,362)	-	(1,362)	
Revenues	(1,605)	-	(1,605)	(1,605)	-	(1,605)	(1,605)	-	(1,605)	
<b>Net budget</b>	<b>1</b>	<b>6</b>	<b>7</b>	<b>3</b>	<b>7</b>	<b>9</b>	<b>5</b>	<b>7</b>	<b>11</b>	
<b>Public Transit</b>										Net base budget change of \$135 in 2020 and \$199 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$135 in 2020 and \$199 in 2021 to 2022
Expenditures	444,109	135	444,243	446,638	199	446,837	452,693	199	452,892	
Recoveries	(12,822)	-	(12,822)	(12,822)	-	(12,822)	(12,822)	-	(12,822)	
Revenues	(189,674)	0	(189,674)	(189,868)	-	(189,868)	(193,687)	-	(193,687)	
<b>Net budget</b>	<b>241,613</b>	<b>135</b>	<b>241,747</b>	<b>243,948</b>	<b>199</b>	<b>244,147</b>	<b>246,184</b>	<b>199</b>	<b>246,383</b>	
<b>Sidewalks &amp; Pathways</b>										Net budget change of (\$1,135) in 2020, (\$264) in 2021 and \$192 in 2022 due to: -One-time carry-forward of (\$1,676) in 2020 (C2020-1215) -One-time adjustment of \$455 in 2020 and (\$455) in 2021 -Transfer of funds from Corporate Programs to services of \$21 in 2020 and \$31 in 2021 to 2022 -CWP return of centralized budgets of \$76 in 2020, \$171 in 2021 and \$172 in 2022 -Net zero transfer of (\$11) from 2020 to 2022 to Parking and Streets
Expenditures	62,535	(1,133)	61,403	55,817	(260)	55,556	54,963	196	55,159	
Recoveries	(6,571)	(3)	(6,574)	(6,571)	(4)	(6,575)	(6,571)	(4)	(6,575)	
Revenues	(3,599)	-	(3,599)	(2,900)	-	(2,900)	(2,949)	-	(2,949)	
<b>Net budget</b>	<b>52,365</b>	<b>(1,135)</b>	<b>51,230</b>	<b>46,345</b>	<b>(264)</b>	<b>46,081</b>	<b>45,443</b>	<b>192</b>	<b>45,634</b>	
<b>Specialized Transit</b>										Net base budget change of \$13 in 2020 and \$19 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$13 in 2020 and \$19 in 2021 to 2022
Expenditures	43,541	13	43,553	44,709	19	44,727	46,385	19	46,403	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	(2,395)	-	(2,395)	(2,671)	-	(2,671)	(2,947)	-	(2,947)	
<b>Net budget</b>	<b>41,146</b>	<b>13</b>	<b>41,158</b>	<b>42,038</b>	<b>19</b>	<b>42,056</b>	<b>43,438</b>	<b>19</b>	<b>43,456</b>	
<b>Streets</b>										Net budget change of (\$1,182) in 2020, (\$65) in 2021, and \$128 in 2022 due to: -One-time carry-forward of (\$1,490) in 2020 (C2020-1215) -One-time adjustment of \$193 in 2020 and (\$193) in 2021 -Transfer of funds from Corporate Programs to services of \$27 in 2020 and \$40 in 2021 to 2022 -CWP return of centralized budget of \$83 in 2020 to 2022 -Net zero transfer of \$5 in 2020 to 2022 from Sidewalks & Pathways
Expenditures	207,510	(1,180)	206,330	207,400	(61)	207,338	209,363	132	209,494	
Recoveries	(45,637)	(3)	(45,640)	(46,258)	(4)	(46,262)	(46,258)	(4)	(46,262)	
Revenues	(31,501)	-	(31,501)	(26,902)	-	(26,902)	(27,417)	-	(27,417)	
<b>Net budget</b>	<b>130,372</b>	<b>(1,182)</b>	<b>129,190</b>	<b>134,240</b>	<b>(65)</b>	<b>134,175</b>	<b>135,688</b>	<b>128</b>	<b>135,815</b>	
<b>Taxi, Limousine &amp; Vehicles-for-Hire</b>										Net budget change of (\$350) in 2020 due to: -One-time carry-forward of (\$350) in 2020 (C2020-1215)
Expenditures	5,021	(350)	4,671	4,812	-	4,812	4,547	-	4,547	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	(4,503)	-	(4,503)	(4,462)	-	(4,462)	(4,547)	-	(4,547)	
<b>Net budget</b>	<b>517</b>	<b>(350)</b>	<b>167</b>	<b>350</b>	<b>-</b>	<b>-</b>	<b>(0)</b>	<b>-</b>	<b>-</b>	
<b>TOTAL - A CITY THAT MOVES</b>										
Expenditures	765,683	(2,509)	763,175	762,346	(98)	762,248	770,923	551	771,474	
Recoveries	(66,393)	(5)	(66,398)	(67,014)	(8)	(67,022)	(67,014)	(8)	(67,022)	
Revenues	(233,277)	0	(233,277)	(228,408)	-	(228,408)	(233,152)	-	(233,152)	
<b>Net budget</b>	<b>466,013</b>	<b>(2,514)</b>	<b>463,499</b>	<b>466,924</b>	<b>(106)</b>	<b>466,818</b>	<b>470,756</b>	<b>543</b>	<b>471,300</b>	

	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> <small>(includes one-time carry-forward from 2020 approved in C2020-1215)</small>	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30) (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>A HEALTHY &amp; GREEN CITY</b>										Net base budget change of \$61 in 2020 and \$119 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$6 in 2020 and \$9 in 2021 to 2022 -CWP return of centralized budget of \$55 in 2020 and \$110 in 2021 to 2022
<b>Environmental Management</b>										
Expenditures	8,063	61	8,124	8,058	119	8,177	8,058	119	8,177	
Recoveries	(2,138)	-	(2,138)	(1,625)	-	(1,625)	(1,625)	-	(1,625)	
Revenues	(108)	-	(108)	(108)	-	(108)	(108)	-	(108)	
<b>Net budget</b>	<b>5,818</b>	<b>61</b>	<b>5,879</b>	<b>6,325</b>	<b>119</b>	<b>6,445</b>	<b>6,325</b>	<b>119</b>	<b>6,445</b>	
<b>Parks &amp; Open Spaces</b>										Net base budget change of \$67 in 2020 and \$99 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$67 in 2020 and \$99 in 2021 to 2022
Expenditures	77,220	67	77,287	77,130	99	77,229	77,752	99	77,851	
Recoveries	(4,352)	(0)	(4,352)	(4,352)	-	(4,352)	(4,352)	-	(4,352)	
Revenues	(4,528)	-	(4,528)	(4,564)	-	(4,564)	(4,597)	-	(4,597)	
<b>Net budget</b>	<b>68,340</b>	<b>67</b>	<b>68,407</b>	<b>68,214</b>	<b>99</b>	<b>68,313</b>	<b>68,802</b>	<b>99</b>	<b>68,901</b>	
<b>Recreation Opportunities</b>										Net budget change of (\$247) in 2020, (\$7,770) in 2021, and (\$8,588) in 2022 due to: -Transfer of funds from Corporate Programs to services of \$53 in 2020 and \$79 in 2021 to 2022 -Net zero transfer of (\$300) in 2020, (\$8,454) in 2021 and (\$8,667) in 2022 to Facility Management -Council approved one-time budget for Financial Task Force \$605 in 2021 (C2020-0815)
Expenditures	89,596	(247)	89,350	87,117	(7,770)	79,346	86,702	(8,588)	78,114	
Recoveries	(2,294)	-	(2,294)	(2,944)	-	(2,944)	(2,938)	-	(2,938)	
Revenues	(45,931)	-	(45,931)	(43,818)	-	(43,818)	(43,343)	-	(43,343)	
<b>Net budget</b>	<b>41,372</b>	<b>(247)</b>	<b>41,125</b>	<b>40,355</b>	<b>(7,770)</b>	<b>32,585</b>	<b>40,422</b>	<b>(8,588)</b>	<b>31,833</b>	
<b>Stormwater Management</b>										
Expenditures	78,497	-	78,497	84,287	-	84,287	86,925	-	86,925	
Recoveries	(3,487)	-	(3,487)	(3,487)	-	(3,487)	(3,487)	-	(3,487)	
Revenues	(75,011)	-	(75,011)	(80,800)	-	(80,800)	(83,438)	-	(83,438)	
<b>Net budget</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>Urban Forestry</b>										Net base budget change of \$2 in 2020 and \$3 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$2 in 2020 and \$3 in 2021 to 2022
Expenditures	14,530	2	14,531	15,011	3	15,013	15,515	3	15,517	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	(883)	-	(883)	(883)	-	(883)	(883)	-	(883)	
<b>Net budget</b>	<b>13,646</b>	<b>2</b>	<b>13,648</b>	<b>14,127</b>	<b>3</b>	<b>14,130</b>	<b>14,631</b>	<b>3</b>	<b>14,634</b>	
<b>Waste &amp; Recycling</b>										Net base budget change of \$38 in 2020 and \$56 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$38 in 2020 and \$56 in 2021 to 2022
Expenditures	168,760	38	168,798	163,839	56	163,895	165,957	56	166,013	
Recoveries	(14,217)	-	(14,217)	(14,234)	-	(14,234)	(14,252)	-	(14,252)	
Revenues	(135,820)	-	(135,820)	(135,136)	-	(135,136)	(137,616)	-	(137,616)	
<b>Net budget</b>	<b>18,724</b>	<b>38</b>	<b>18,762</b>	<b>14,470</b>	<b>56</b>	<b>14,526</b>	<b>14,090</b>	<b>56</b>	<b>14,146</b>	
<b>Wastewater Collection &amp; Treatment</b>										
Expenditures	434,072	-	434,072	482,352	-	482,352	495,200	-	495,200	
Recoveries	(10,057)	-	(10,057)	(10,057)	-	(10,057)	(10,057)	-	(10,057)	
Revenues	(424,015)	-	(424,015)	(472,295)	-	(472,295)	(485,143)	-	(485,143)	
<b>Net budget</b>	<b>(0)</b>	<b>-</b>	<b>(0)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>Water Treatment &amp; Supply</b>										
Expenditures	319,073	-	319,073	316,445	-	316,445	315,935	-	315,935	
Recoveries	(10,304)	-	(10,304)	(10,304)	-	(10,304)	(10,304)	-	(10,304)	
Revenues	(308,769)	-	(308,769)	(306,141)	-	(306,141)	(305,631)	-	(305,631)	
<b>Net budget</b>	<b>(0)</b>	<b>-</b>	<b>(0)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>TOTAL - A HEALTHY &amp; GREEN CITY</b>										
Expenditures	1,189,812	(79)	1,189,733	1,234,239	(7,493)	1,226,746	1,252,045	(8,311)	1,243,733	
Recoveries	(46,848)	(0)	(46,848)	(47,002)	-	(47,002)	(47,014)	-	(47,014)	
Revenues	(995,065)	-	(995,065)	(1,043,745)	-	(1,043,745)	(1,060,760)	-	(1,060,760)	
<b>Net budget</b>	<b>147,899</b>	<b>(79)</b>	<b>147,820</b>	<b>143,491</b>	<b>(7,493)</b>	<b>135,998</b>	<b>144,270</b>	<b>(8,311)</b>	<b>135,959</b>	
<b>A WELL-RUN CITY</b>										
<b>Appeals &amp; Tribunals</b>										
Expenditures	4,773	-	4,773	4,744	-	4,744	4,744	-	4,744	
Recoveries	(5)	-	(5)	(5)	-	(5)	(5)	-	(5)	
Revenues	(668)	-	(668)	(668)	-	(668)	(668)	-	(668)	
<b>Net budget</b>	<b>4,100</b>	<b>-</b>	<b>4,100</b>	<b>4,071</b>	<b>-</b>	<b>4,071</b>	<b>4,071</b>	<b>-</b>	<b>4,071</b>	

	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> <small>(includes one-time carry-forward from 2020 approved in C2020-1215)</small>	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30) (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>Citizen Engagement &amp; Insights</b>										Net base budget change of \$14 in 2020 and \$20 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$14 in 2020 and \$20 in 2021 to 2022
Expenditures	5,371	14	5,384	5,042	20	5,063	4,991	20	5,012	
Recoveries	(1,002)	-	(1,002)	(1,002)	-	(1,002)	(1,002)	-	(1,002)	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>4,368</b>	<b>14</b>	<b>4,382</b>	<b>4,040</b>	<b>20</b>	<b>4,061</b>	<b>3,989</b>	<b>20</b>	<b>4,010</b>	
<b>Citizen Information &amp; Services</b>										Net base budget change of \$2 in 2020 and \$4 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$2 in 2020 \$4 in 2021 to 2022
Expenditures	12,972	2	12,975	12,448	4	12,452	12,399	4	12,403	
Recoveries	(239)	-	(239)	(239)	-	(239)	(239)	-	(239)	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>12,733</b>	<b>2</b>	<b>12,736</b>	<b>12,209</b>	<b>4</b>	<b>12,213</b>	<b>12,160</b>	<b>4</b>	<b>12,164</b>	
<b>City Auditor's Office</b>										
Expenditures	3,024	-	3,024	3,056	-	3,056	3,057	-	3,057	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>3,024</b>	<b>-</b>	<b>3,024</b>	<b>3,056</b>	<b>-</b>	<b>3,056</b>	<b>3,057</b>	<b>-</b>	<b>3,057</b>	
<b>Corporate Governance</b>										Net budget change of \$6 in 2020, \$311 in 2021, and \$9 in 2022 due to: -Transfer of funds from Corporate Programs to services of \$6 in 2020 and \$9 in 2021 to 2022 -Council approved one-time budget for Financial Task Force \$302 in 2021 (C2020-0815)
Expenditures	16,064	6	16,070	16,000	311	16,311	16,152	9	16,161	
Recoveries	(4,528)	-	(4,528)	(4,528)	-	(4,528)	(4,528)	-	(4,528)	
Revenues	(65)	-	(65)	(84)	-	(84)	(234)	-	(234)	
<b>Net budget</b>	<b>11,471</b>	<b>6</b>	<b>11,477</b>	<b>11,388</b>	<b>311</b>	<b>11,699</b>	<b>11,390</b>	<b>9</b>	<b>11,398</b>	
<b>Corporate Security</b>										
Expenditures	23,814	-	23,814	23,909	-	23,909	24,038	-	24,038	
Recoveries	(14,744)	-	(14,744)	(4,869)	-	(4,869)	(4,869)	-	(4,869)	
Revenues	(130)	-	(130)	(130)	-	(130)	(130)	-	(130)	
<b>Net budget</b>	<b>8,939</b>	<b>-</b>	<b>8,939</b>	<b>18,910</b>	<b>-</b>	<b>18,910</b>	<b>19,038</b>	<b>-</b>	<b>19,038</b>	
<b>Council &amp; Committee Support</b>										Net budget change of (\$300) in 2020 and (\$400) in 2021 due to: -One-time carry-forward of (\$700) in 2020 (C2020-1215) -One-time adjustment of \$400 in 2020 and (\$400) in 2021
Expenditures	4,381	(300)	4,081	4,334	(400)	3,934	3,683	-	3,683	
Recoveries	(55)	-	(55)	(55)	-	(55)	(55)	-	(55)	
Revenues	(19)	-	(19)	(19)	-	(19)	(19)	-	(19)	
<b>Net budget</b>	<b>4,307</b>	<b>(300)</b>	<b>4,007</b>	<b>4,260</b>	<b>(400)</b>	<b>3,860</b>	<b>3,609</b>	<b>-</b>	<b>3,609</b>	
<b>Data Analytics &amp; Information Access</b>										Net budget change of \$1 in 2020, \$731 in 2021, and \$2 in 2022 due to: -Transfer of funds from Corporate Programs to services of \$1 in 2020 and \$2 in 2021 to 2022 -Council approved one-time budget for Financial Task Force \$729 in 2021 (C2020-0815)
Expenditures	9,671	1	9,673	9,608	731	10,340	9,608	2	9,610	
Recoveries	(1,298)	-	(1,298)	(1,298)	-	(1,298)	(1,298)	-	(1,298)	
Revenues	(12)	-	(12)	(40)	-	(40)	(40)	-	(40)	
<b>Net budget</b>	<b>8,361</b>	<b>1</b>	<b>8,362</b>	<b>8,270</b>	<b>731</b>	<b>9,001</b>	<b>8,270</b>	<b>2</b>	<b>8,272</b>	
<b>Executive Leadership</b>										Net budget change of \$8 in 2020, \$540 in 2021, and \$12 in 2022 due to: -Transfer of funds from Corporate Programs to services of \$8 in 2020 and \$12 in 2021 to 2022 -Council approved one-time budget for Financial Task Force \$528 in 2021 (C2020-0815)
Expenditures	11,374	8	11,383	11,598	540	12,138	11,500	12	11,513	
Recoveries	(451)	-	(451)	(451)	-	(451)	(451)	-	(451)	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>10,923</b>	<b>8</b>	<b>10,931</b>	<b>11,147</b>	<b>540</b>	<b>11,687</b>	<b>11,049</b>	<b>12</b>	<b>11,061</b>	
<b>Facility Management</b>										Net budget change of (\$695) in 2020, \$8,634 in 2021, and \$8,808 in 2022 due to: -One-time carry-forward of (\$1,000) in 2020 (C2020-1215) -One-time adjustment of (\$39) in 2020 and \$39 in 2021 -Net zero transfer of \$300 in 2020, \$8,530 in 2021 and \$8,743 in 2022 from Recreation Opportunities and Arts and Culture -Transfer of funds from Corporate Programs to services of \$44 in 2020 and \$65 in 2021 to 2022
Expenditures	82,697	(695)	82,002	77,808	8,634	86,442	77,246	8,808	86,054	
Recoveries	(22,263)	-	(22,263)	(21,913)	-	(21,913)	(21,913)	-	(21,913)	
Revenues	(2,195)	-	(2,195)	(2,195)	-	(2,195)	(2,195)	-	(2,195)	
<b>Net budget</b>	<b>58,239</b>	<b>(695)</b>	<b>57,544</b>	<b>53,699</b>	<b>8,634</b>	<b>62,334</b>	<b>53,138</b>	<b>8,808</b>	<b>61,946</b>	
<b>Financial Support</b>										Net budget change of \$30 in 2020, \$1,517 in 2021, and \$44 in 2022 due to: -Transfer of funds from Corporate Programs to services of \$30 in 2020 and \$44 in 2021 to 2022 -Council approved one-time budget for Financial Task Force \$1,473 in 2021 (C2020-0815)
Expenditures	38,231	30	38,261	38,034	1,517	39,551	38,010	44	38,054	
Recoveries	(14,822)	-	(14,822)	(15,025)	-	(15,025)	(15,025)	-	(15,025)	
Revenues	(102)	-	(102)	(102)	-	(102)	(102)	-	(102)	
<b>Net budget</b>	<b>23,307</b>	<b>30</b>	<b>23,337</b>	<b>22,907</b>	<b>1,517</b>	<b>24,423</b>	<b>22,883</b>	<b>44</b>	<b>22,927</b>	

	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> <small>(includes one-time carry-forward from 2020 approved in C2020-1215)</small>	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30 (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>Fleet Management</b>										
Expenditures	93,148	43	93,191	93,458	63	93,521	92,945	63	93,008	
Recoveries	(90,814)	(43)	(90,857)	(90,732)	(63)	(90,795)	(90,172)	(63)	(90,235)	
Revenues	(2,334)	-	(2,334)	(2,726)	-	(2,726)	(2,773)	-	(2,773)	
<b>Net budget</b>	-	-	-	(0)	0	-	0	-	-	
<b>Human Resources Support</b>										
Expenditures	33,789	169	33,958	33,686	405	34,091	33,387	344	33,731	
Recoveries	(9,482)	-	(9,482)	(9,482)	-	(9,482)	(9,482)	-	(9,482)	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	24,307	169	24,476	24,204	405	24,609	23,905	344	24,249	Net budget change of \$169 in 2020, \$405 in 2021, and \$344 in 2022 due to: -One-time carry-forward of (\$100) in 2020 (C2020-1215) -One-time adjustment of (\$61) in 2020 and \$61 in 2021 -Transfer of funds from Corporate Programs to services of \$30 in 2020 and \$44 in 2021 to 2022 -CWP return of centralized budget of \$300 in 2020 to 2022
<b>Infrastructure Support</b>										
Expenditures	25,494	(1,348)	24,145	25,983	182	26,165	24,554	2	24,557	
Recoveries	(13,967)	-	(13,967)	(13,967)	-	(13,967)	(13,967)	-	(13,967)	
Revenues	(1,501)	-	(1,501)	(1,501)	-	(1,501)	(1,501)	-	(1,501)	
<b>Net budget</b>	10,025	(1,348)	8,677	10,515	182	10,697	9,086	2	9,088	Net budget change of (\$1,348) in 2020, \$182 in 2021, and \$2 in 2022 due to: -One-time carry-forward of (\$1,170) in 2020 (C2020-1215) -One-time adjustment of (\$179) in 2020 and \$179 in 2021 -Transfer of funds from Corporate Programs to services of \$1 in 2020 and \$2 in 2021 to 2022
<b>Insurance &amp; Claims</b>										
Expenditures	33,984	-	33,984	35,617	-	35,617	37,331	-	37,331	
Recoveries	(27,909)	-	(27,909)	(29,462)	-	(29,462)	(31,086)	-	(31,086)	
Revenues	(4,938)	-	(4,938)	(5,018)	-	(5,018)	(5,108)	-	(5,108)	
<b>Net budget</b>	1,138	-	1,138	1,138	-	1,138	1,138	-	1,138	
<b>IT Solutions &amp; Support</b>										
Expenditures	122,331	52	122,383	119,867	77	119,944	119,599	77	119,676	
Recoveries	(58,980)	-	(58,980)	(59,036)	-	(59,036)	(59,605)	-	(59,605)	
Revenues	(1,107)	-	(1,107)	(1,677)	-	(1,677)	(1,137)	-	(1,137)	
<b>Net budget</b>	62,244	52	62,296	59,154	77	59,231	58,857	77	58,934	Net base budget change of \$52 in 2020 and \$77 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$52 in 2020 and \$77 in 2021 to 2022
<b>Legal Counsel &amp; Advocacy</b>										
Expenditures	14,289	1,099	15,387	13,892	1,099	14,990	13,893	1,099	14,991	
Recoveries	(4,664)	(1,099)	(5,763)	(4,664)	(1,099)	(5,763)	(4,664)	(1,099)	(5,763)	
Revenues	(17)	-	(17)	(17)	-	(17)	(17)	-	(17)	
<b>Net budget</b>	9,607	0	9,607	9,210	0	9,210	9,211	0	9,211	

	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> (includes one-time carry- forward from 2020 approved in C2020-1215)	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30 (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>Mayor &amp; Council</b>										Net budget change of (\$95) in 2020 due to: -One-time carry-forward of (\$95) in 2020 (C2020-1215)
Expenditures	11,585	(95)	11,490	11,574	-	11,574	11,435	-	11,435	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>11,585</b>	<b>(95)</b>	<b>11,490</b>	<b>11,574</b>	<b>-</b>	<b>11,574</b>	<b>11,435</b>	<b>-</b>	<b>11,435</b>	
<b>Municipal Elections</b>										
Expenditures	1,960	-	1,960	5,033	(0)	5,032	833	(0)	832	
Recoveries	(5)	-	(5)	(5)	-	(5)	(5)	-	(5)	
Revenues	(339)	-	(339)	(190)	(0)	(190)	(190)	(0)	(190)	
<b>Net budget</b>	<b>1,616</b>	<b>-</b>	<b>1,616</b>	<b>4,838</b>	<b>(0)</b>	<b>4,837</b>	<b>638</b>	<b>(0)</b>	<b>637</b>	
<b>Organizational Health, Safety &amp; Wellness</b>										Net base budget change of \$32 in 2020 and \$109 in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$8 in 2020 and \$12 in 2021 to 2022 -CWP return of centralized budget of \$24 in 2020 and \$97 in 2021 to 2022
Expenditures	12,404	32	12,437	12,574	109	12,683	12,639	109	12,748	
Recoveries	(1,988)	-	(1,988)	(2,108)	-	(2,108)	(2,108)	-	(2,108)	
Revenues	(2,535)	-	(2,535)	(2,535)	-	(2,535)	(2,535)	-	(2,535)	
<b>Net budget</b>	<b>7,881</b>	<b>32</b>	<b>7,914</b>	<b>7,931</b>	<b>109</b>	<b>8,041</b>	<b>7,996</b>	<b>109</b>	<b>8,106</b>	
<b>Procurement &amp; Warehousing</b>										Net base budget change of \$29 in 2020 and (\$793) in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$29 in 2020 and \$43 in 2021 to 2022 -CWP centralization of salary & wage budget approved for New Investments (\$836) in 2021 to 2022 (C2020-1215)
Expenditures	24,797	29	24,826	26,278	(793)	25,485	26,125	(793)	25,332	
Recoveries	(11,364)	-	(11,364)	(11,891)	-	(11,891)	(11,891)	-	(11,891)	
Revenues	(5,490)	-	(5,490)	(5,490)	-	(5,490)	(5,490)	-	(5,490)	
<b>Net budget</b>	<b>7,943</b>	<b>29</b>	<b>7,972</b>	<b>8,897</b>	<b>(793)</b>	<b>8,104</b>	<b>8,744</b>	<b>(793)</b>	<b>7,951</b>	
<b>Property Assessment</b>										Net base budget change of \$6 in 2020 and (\$509) in 2021 to 2022 due to: -Transfer of funds from Corporate Programs to services of \$6 in 2020 and \$9 in 2021 to 2022 -CWP centralization of salary & wage budget approved for New Investments of (\$518) in 2021 to 2022 (C2020-1215)
Expenditures	20,571	6	20,578	20,934	(509)	20,425	20,935	(509)	20,426	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	(50)	-	(50)	(50)	-	(50)	(50)	-	(50)	
<b>Net budget</b>	<b>20,521</b>	<b>6</b>	<b>20,528</b>	<b>20,884</b>	<b>(509)</b>	<b>20,375</b>	<b>20,885</b>	<b>(509)</b>	<b>20,376</b>	
<b>Real Estate</b>										
Expenditures	54,587	-	54,587	63,889	-	63,889	68,592	-	68,592	
Recoveries	(6,473)	-	(6,473)	(4,984)	-	(4,984)	(4,984)	-	(4,984)	
Revenues	(45,362)	-	(45,362)	(56,163)	-	(56,163)	(60,863)	-	(60,863)	
<b>Net budget</b>	<b>2,752</b>	<b>-</b>	<b>2,752</b>	<b>2,742</b>	<b>-</b>	<b>2,742</b>	<b>2,745</b>	<b>-</b>	<b>2,745</b>	
<b>Records Management, Access &amp; Privacy</b>										
Expenditures	3,781	-	3,781	3,905	-	3,905	3,950	-	3,950	
Recoveries	(5)	-	(5)	(5)	-	(5)	(5)	-	(5)	
Revenues	(3)	-	(3)	(3)	-	(3)	(3)	-	(3)	
<b>Net budget</b>	<b>3,773</b>	<b>-</b>	<b>3,773</b>	<b>3,896</b>	<b>-</b>	<b>3,896</b>	<b>3,941</b>	<b>-</b>	<b>3,941</b>	
<b>Strategic Marketing &amp; Communications</b>										Net budget change of \$72 in 2020, \$166 in 2021, and \$106 in 2022 due to: -Transfer of funds from Corporate Programs to services of \$72 in 2020 and \$106 in 2021 to 2022 -Council approved one-time budget for Financial Task Force \$60 in 2021 (C2020-0815)
Expenditures	31,987	72	32,058	29,885	166	30,051	29,956	106	30,062	
Recoveries	(23,969)	-	(23,969)	(21,938)	-	(21,938)	(22,009)	-	(22,009)	
Revenues	-	-	-	-	-	-	-	-	-	
<b>Net budget</b>	<b>8,018</b>	<b>72</b>	<b>8,089</b>	<b>7,947</b>	<b>166</b>	<b>8,113</b>	<b>7,947</b>	<b>106</b>	<b>8,053</b>	
<b>Taxation</b>										
Expenditures	6,772	-	6,772	6,752	-	6,752	6,752	-	6,752	
Recoveries	-	-	-	-	-	-	-	-	-	
Revenues	(342)	-	(342)	(342)	-	(342)	(342)	-	(342)	
<b>Net budget</b>	<b>6,430</b>	<b>-</b>	<b>6,430</b>	<b>6,410</b>	<b>-</b>	<b>6,410</b>	<b>6,410</b>	<b>-</b>	<b>6,410</b>	
<b>TOTAL - A WELL-RUN CITY</b>										
Expenditures	703,850	(874)	702,976	709,908	12,157	722,064	708,354	9,398	717,752	
Recoveries	(309,029)	(1,141)	(310,170)	(297,661)	(1,162)	(298,823)	(299,365)	(1,162)	(300,527)	
Revenues	(67,208)	-	(67,208)	(78,949)	(0)	(78,949)	(83,396)	(0)	(83,396)	
<b>Net budget</b>	<b>327,613</b>	<b>(2,016)</b>	<b>325,598</b>	<b>333,297</b>	<b>10,995</b>	<b>344,292</b>	<b>325,592</b>	<b>8,236</b>	<b>333,828</b>	

	2020 Budget (2020 July 1) (PFC2020-1075) <sup>1</sup>	2020 Change (Incremental) <sup>1</sup>	2020 Budget (2020 December 31) <sup>1</sup>	2021 Budget (2020 November 30) (C2020-1215) <sup>1</sup> <small>(includes one-time carry-forward from 2020 approved in C2020-1215)</small>	2021 Change (Incremental) <sup>1</sup>	2021 Budget (2020 December 31) <sup>1</sup>	2022 Budget (2020 November 30) (C2020-1215) <sup>1</sup>	2022 Change (Incremental) <sup>1</sup>	2022 Budget (2020 December 31) <sup>1</sup>	Comments <sup>1</sup>
<b>Corporate Programs - Common Revenues</b>										Net budget change of \$15,610 in 2020 and (\$3,399) in 2021 due to: -One-time carry-forward of \$16,212 in 2020 (C2020-1215) -One-time adjustment of (\$602) in 2020 and \$602 in 2021 -Council approved one-time budget for Financial Task Force (\$4,000) funded by the Fiscal Stability Reserve in 2021 (C2020-0815)
Expenditures	78,440	-	78,440	81,068	-	81,068	81,480	-	81,480	
Recoveries	(2,000)	-	(2,000)	(2,000)	-	(2,000)	(2,000)	-	(2,000)	
Revenues	(2,449,864)	15,610	(2,434,254)	(2,468,569)	(3,399)	(2,471,969)	(2,519,638)	-	(2,519,638)	
<b>Net budget</b>	<b>(2,373,424)</b>	<b>15,610</b>	<b>(2,357,814)</b>	<b>(2,389,501)</b>	<b>(3,399)</b>	<b>(2,392,900)</b>	<b>(2,440,158)</b>	<b>-</b>	<b>(2,440,158)</b>	
<b>Corporate Programs - Corporate Costs &amp; Debt Servicing</b>										Net budget change of (\$6,905) in 2020, (\$103) in 2021, and \$142 in 2022 due to: -Transfer of funds from Corporate Programs to service budgets of (\$754) in 2020 and (\$1,115) in 2021 to 2022 -One-time carry-forward of (\$5,829) in 2020 (C2020-1215) -One-time adjustment of \$245 in 2020 and (\$245) in 2021 -CWP return of centralized budget of (\$567) in 2020 and (\$990) in 2021 to 2022 -CWP centralization of base salary & wage budget approved for New Investments of \$2,247 in 2021 to 2022 (C2020-1215)
Expenditures	609,329	(6,905)	602,424	611,709	(103)	611,606	670,459	142	670,600	
Recoveries	(1,774)	-	(1,774)	(1,782)	-	(1,782)	(1,791)	-	(1,791)	
Revenues	(65,975)	-	(65,975)	(61,750)	-	(61,750)	(60,496)	-	(60,496)	
<b>Net budget</b>	<b>541,580</b>	<b>(6,905)</b>	<b>534,675</b>	<b>548,177</b>	<b>(103)</b>	<b>548,074</b>	<b>608,172</b>	<b>142</b>	<b>608,313</b>	
<b>TOTAL CITY</b>										
Expenditures	4,614,210	(15,793)	4,598,417	4,630,268	4,226	4,634,494	4,712,284	729	4,713,013	
Recoveries	(453,026)	(1,147)	(454,174)	(444,467)	(1,170)	(445,637)	(446,263)	(1,170)	(447,433)	
Revenues	(4,161,183)	16,940	(4,144,243)	(4,185,801)	(3,056)	(4,188,857)	(4,266,021)	441	(4,265,580)	
<b>Net budget</b>	<b>0</b>	<b>(0)</b>	<b>0</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>Parking - Calgary Parking Authority</b>										
Expenditures	63,421	-	63,421	60,986	-	60,986	61,773	-	61,773	
Recoveries	(50)	-	(50)	(50)	-	(50)	(50)	-	(50)	
Revenues	(91,945)	-	(91,945)	(91,686)	-	(91,686)	(92,995)	-	(92,995)	
<b>Net budget</b>	<b>(28,574)</b>	<b>-</b>	<b>(28,574)</b>	<b>(30,750)</b>	<b>-</b>	<b>(30,750)</b>	<b>(31,272)</b>	<b>-</b>	<b>(31,272)</b>	
<b>TOTAL CITY (with CPA)</b>										
Expenditures	4,677,631	(15,793)	4,661,838	4,691,254	4,226	4,695,480	4,774,057	729	4,774,786	
Recoveries	(453,076)	(1,147)	(454,224)	(444,517)	(1,170)	(445,687)	(446,313)	(1,170)	(447,483)	
Revenues	(4,253,128)	16,940	(4,236,188)	(4,277,487)	(3,056)	(4,280,543)	(4,359,016)	441	(4,358,575)	
<b>Net budget</b>	<b>(28,574)</b>	<b>(0)</b>	<b>(28,574)</b>	<b>(30,750)</b>	<b>-</b>	<b>(30,750)</b>	<b>(31,272)</b>	<b>-</b>	<b>(31,272)</b>	

Notes:

1. Figures may not add due to rounding





## Decisions Referrals Having Actual or Potential Impact - For Information

**Purpose:** To meet the requirement of NM2008-53 to track decisions or referrals that Council has made between 2020 July 1 to December 31 which have an actual or potential future year budget impact

DATE	REPORT #	TITLE	DESCRIPTION	POTENTIAL BUDGET IMPACT (\$000s)
27-Jul-2020	PUD2020-0758	Heritage Conservation Tools and Incentives Update Report	That Council direct Administration to:  3. Return to the Priorities and Finance Committee no later than Q1 2022 with the residential tax credit financial incentive package for consideration in the 2023-2026 budget deliberations.	Yet to be determined
2-Nov-2020	PFC2020-0963	New Community Growth Strategy 2020	That Council direct Administration to:  11. Based on the findings outlined in points 9 and 10 above, direct Administration in collaboration with Established Area Growth and Change Strategy and Infrastructure Calgary, to bring forward a preliminary recommendation, no later than 2021 Q1, that demonstrates how much allocated capital within One Calgary could be redirected from The City's contribution to Off Site Levy Bylaw projects, toward an Established Areas Infrastructure Investment Fund to further support our Municipal Development Plan goals. A full review of all applicable OSL projects and related recommendations will help inform the 2022 budget deliberations to be held in November 2021.	Yet to be determined
14-Dec-2020	PUD2020-1369	New Community Growth Strategy 2020 Motion Arising – Referral to PUD (Verbal),	That Council direct Administration to:  1. Revisit areas where growth management overlay removal has resulted in designation of City of Calgary capital to evaluate whether design or timing of approved infrastructure can be right-sized or postponed; 2. Identify growth-related capital investments in established areas as a priority for capital funding no later than for the 2023-2026 business plan and budget cycle, providing established area growth strategy funding updates leading up to that budget cycle; and 3. Bring forward recommendations for growth funding in all parts of the city (including growth management overlay removal when applicable) as part of November budget process beginning in 2021, so that Council is able to make capital and operating budget decisions based on (1) alignment with MDP/CTP targets, (2) market viability, and (3) financial implications.	Yet to be determined



**Community Services Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0445  
Page 1 of 4**

**Affordable Housing Development Financing**

**RECOMMENDATIONS:**

That the Priorities and Finance Committee recommend that Council;

1. Give first reading of Proposed Bylaw 7B2020 for \$10.0 million for city owned units and Bylaw 8B2021 for \$5.5 million for Rundle, a Calhome Properties Ltd. (operating as Calgary Housing Company (CHC)) owned units, authorizing The City to incur indebtedness for financing the construction of new affordable rental housing projects;
2. Give first reading of Proposed Bylaw 39M2021, being a bylaw authorizing a loan in the amount of \$5.5 million to CHC;
3. Direct Administration to negotiate and execute all definitive documents and agreements and take all actions required to conclude the agreements, arrangements and transactions contemplated in Report PFC2021-0445, such definitive agreements and documents to be in content satisfactory to the GM of Community Services and Chief Financial Officer;
4. Direct Administration to negotiate and enter into agreement(s) with CHC to appoint CHC to perform The City's operational obligations with respect to the Portfolio pursuant to the terms and operational obligations and conditions of the loans;
5. Direct Administration to transfer ownership of the Rundle affordable housing to CHC upon completion of construction;
6. Direct Administration to amend any existing loan agreement(s) between The City and CHC as applicable and in accordance with the Credit Documentation – Loans and Loan Guarantees Policy and Procedures;
7. Withhold second and third reading until the advertising requirements have been met; and,
8. Direct that Attachment 6 remain confidential under Sections 24 (Advice from officials) and 25 (Disclosure harmful to economic and other interests of a public body) of the *Freedom of Information and Protection of Privacy Act* to be reviewed by 2026 January 1.

**HIGHLIGHTS**

- Through Council's approval of the Corporate Affordable Housing Strategy and the Affordable Housing 10 Year Capital Development Program, Calgary Housing has been given the authority to secure additional capital funding to construct new units from other orders of government. This report seeks to secure authority to borrow through two borrowing bylaws a **total** of up to **\$15.5** million to leverage **\$58.3** million in previously secured City and provincial investment and proceed with the creation of **285 new homes**.
- Proposed Bylaw 7B2020 (Attachment 1) authorizes The City to incur indebtedness of up to **\$10.0** million and, in combination with **\$26.9** million of other City and provincial funding, apply these funds to construct an affordable housing portfolio of projects (the "Portfolio"). The Portfolio includes, but is not limited to, the following affordable housing projects: Varsity, Symons Valley, Mount Pleasant, Marda Loop, Mission and Rundle. The Portfolio will be amended as development proceeds to meet affordable housing needs.
- Proposed Bylaw 8B2021 (Attachment 2) authorizes The City to incur indebtedness of up to **\$5.5** million and, in combination with **\$31.4** million of other City and provincial funding, for

## **Affordable Housing Development Financing**

---

The City (Calgary Housing) to construct the redevelopment of 135 units on the Rundle land owned by CHC. Upon construction completion, the building and loan will transfer to CHC with updates to the existing Credit Agreement.

- Proposed Bylaw 39M2021 (Attachment 3) authorizes The City to lend up to \$5.5 million to CHC for the redevelopment of 135 Rundle units.
- Per Council direction (PFC2020-1247) Administration was to continue to advocate for support from other orders of government, including building on existing opportunities to access Government of Canada financing.
- **What does this mean to Calgarians?** The funding will support a **\$73.8** million total investment in the construction of 285 new affordable housing rental units for the benefit of Calgarians in housing need.
- **Why does this matter?** Approving the authority to borrow provides Calgary Housing with a responsible business approach to leverage alternative funding sources at low interest rates.
- Flexibility in accessing government funding opportunities allows The City to continue to build new affordable housing units to support the future sustainability of Calgary Housing Company through portfolio growth enabling a mixed-income operational model.
- Administration is recommending the adoption of the Bylaw 7B2020, Bylaw 8B2021 and Bylaw 39M2021, as per Sections 251 and 258 of the *Municipal Government Act (MGA)* R.S.A. 2000 c. M-26, to authorize The City to incur indebtedness.
- These recommendations support Affordable Housing's 10 Year Capital Development Program approved in principle by Council May 2018 (Attachment 4).
- Strategic Alignment for Council's Citizen Priorities: A prosperous city. The approval of the borrowing and loan bylaws help to increase the supply of affordable housing to ensure people at all income levels can live and work in our city and in turn build a prosperous city.

## **DISCUSSION**

The MGA section 254 states "No municipality may acquire, remove or start the construction or improvement of a capital property that is to be financed in whole or in part through a borrowing unless the borrowing bylaw that authorizes the borrowing is passed." Therefore, if the project is going to be partially financed by borrowing, The City is required to have the bylaw approved prior to the start of construction of a capital property. The Rundle redevelopment is planned to proceed with demolition of the existing units in Q3 2021 and construction will begin in Q4 2021.

Affordable Housing's 10 Year Capital Development Program sets out a plan to develop 1,000 City units by 2026. The City's affordable housing projects rely on funding from the municipal, provincial and federal sources. The Portfolio is intended to operate on a mixed-income basis with the opportunity for revenue from rent to support debt financing. The Portfolio is in various stages of readiness with access to some funding sources dependent on all funding being in place. Administration is exploring various options to secure funding and financing with Canada Mortgage and Housing Corporation, the Province of Alberta (the "Province") or other federal crown corporations.

## **Next Steps**

Following Council approval and the readings of the bylaws, The City will continue to advocate for and seek funding from the federal and provincial governments to complete each project.

**Community Services Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0445  
Page 3 of 4**

## **Affordable Housing Development Financing**

Administration will monitor the requirements of each loan agreement to ensure reporting and compliance over the term of the loan.

### **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

Public communication and engagement was not required as part of this Council report, however through the Bylaw Approval Process set out in the MGA, and the City of Calgary, the Bylaw 7B2020, Bylaw 8B2021 and Bylaw 39M2021 will be included in a public hearing and receive three readings by Council. Moreover, each affordable housing project will undergo a public engagement process, guided by the Engage Policy, Engage Framework and Process that aligns with its individual planning timelines. Stakeholder engagement with The City, CHC, the Province, and federal government has been ongoing since August 2019.

### **IMPLICATIONS**

#### **Social**

Adequate housing enables Calgarians to maximize their contributions to the wider community, removes barriers to access and inclusion for vulnerable low to moderate income Calgarians, and creates better outcomes for safe and affordable housing solutions (Attachment 5).

#### **Environmental**

No environmental impacts to the borrowing bylaws.

#### **Economic**

Affordable housing supports economic resilience by providing homes in close proximity to employment areas and transportation networks. Affordable housing is an important consideration for businesses looking to locate in Calgary and seeking local talent pools. Affordable housing developments contribute to a prosperous City through the creation of jobs. The current 10-year Affordable Housing Capital Development Program leverages multiple funders and funding sources for a total planned investment of \$75.5 million. This investment would generate \$98.3 million in regional GDP and approximately 983 regional jobs.

#### **Service and Financial Implications**

#### **Other: \$0**

Calgary Housing Company Board of Directors reviewed and approved the financial proforma scenario including debt financing for the Rundle redevelopment project (Attachment 6). This report is not seeking any capital budget approvals; the capital budget was approved within the One Calgary council approval in 2018 November (Report C2018-1158). However, the loan liability will be outstanding and amortized up to a 30-year period in full and in accordance with one or more of the following repayment structures:

**Community Services Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0445  
Page 4 of 4**

### **Affordable Housing Development Financing**

- a) in one installment of principal on the maturity date of the borrowing, and a series of installments of interest, as and when due, throughout the term of the borrowing (such installments being no less often than semi-annual);
- b) in installments of principal and interest, as and when due, throughout the term of the borrowing (such installments being no less often than semi-annual); and
- c) interest-only installment payments followed by installments of principal and interest, as and when due, under the terms of the borrowing (such installments being no less often than semi-annual).

In the event of default, The City would be obligated to repay loans with interest and any additional fees. In this case, the amount to be repaid would be determined by the Province or CMHC. Repayment of the \$5.5 million loan for Rundle affordable housing, owned by CHC will be the obligation of CHC. Repayment of the \$10.0 million loan for City-owned affordable housing will be the obligation of The City. The City will seek opportunities to recover funds through generated revenue from rents received for city owned units by CHC.

### **RISK**

Potential risk of project delays and not meeting the objectives of the Corporate Affordable Housing Strategy if the financing cannot be secured. This is mitigated through continued advocacy to the provincial and federal governments to secure funding to fully fund projects.

Calgary Housing is not a revenue generating business unit within the City of Calgary. Therefore, Calgary Housing will work with CHC to identify available revenue from City-owned affordable housing properties to repay the loan agreements. City Finance has assessed the cashflow of CHC and have confirmed the cashflow is adequate to support CHC paying the principle and interest of loans entered into through Bylaw 7B2020 and Bylaw 8B2021.

In addition, the existing Credit Agreement between The City and CHC will be amended to reflect additional loans contemplated under this Bylaw, in accordance with The City's Credit Documentation - Loans and Loan Guarantees Policy and Procedures. The City will finance and construct the new Rundle redevelopment project through a construction license of occupation.

Detailed risks and mitigations are included in Attachment 7.

### **ATTACHMENTS**

1. Borrowing Bylaw Multiple Properties 7B2020
2. Borrowing Bylaw Rundle Property 8B2021
3. Loan Bylaw Rundle 39M2021
4. Affordable Housing 10 Year Capital Development Program
5. Benefits of Affordable Housing
6. CONFIDENTIAL CHC Direction for Borrowing Bylaw
7. Risk Assessment

Department Circulation

Les Tochor	Director of Finance, City Treasurer	Consult
------------	-------------------------------------	---------

**BYLAW NUMBER 7B2020**

**BEING A BYLAW TO AUTHORIZE THE CITY OF  
CALGARY TO INCUR INDEBTEDNESS IN THE  
TOTAL AMOUNT OF UP TO \$10.0 MILLION TO  
FINANCE THE CONSTRUCTION OF A PORTFOLIO  
OF NEW AFFORDABLE RENTAL HOUSING  
PROJECTS**

\*\*\*\*\*

**WHEREAS** Council of The City of Calgary ("**Council**") has reviewed report PFC2021-0445 for the construction of a portfolio of housing projects which include an estimated 150 affordable housing units (collectively, the "**Portfolio**");

**AND WHEREAS** the construction of the Portfolio has an estimated cost of \$36.9 million;

**AND WHEREAS** it is estimated that at least \$26.9 million of the cost of the Portfolio will be funded through sources other than debenture borrowing;

**AND WHEREAS** Council has deemed it advisable to pass a bylaw pursuant to Sections 251 and 258 of the *Municipal Government Act* (R.S.A. 2000 c. M-26) to borrow an amount not exceeding \$10.0 million from Canada Mortgage and Housing Corporation ("**CMHC**"), or the Province of Alberta (the "**Province**") or other federal crown corporations to finance the Portfolio;

**AND WHEREAS** the estimated lifetime of the Portfolio financed under this Bylaw is equal to, or in excess of, thirty (30) years;

**AND WHEREAS** all required approvals for the projects within the Portfolio will be obtained to ensure the projects are in compliance with all acts of the Province of Alberta and all regulations thereunder;

**AND WHEREAS** the amount of the long term debt of The City of Calgary ("**The City**") as at 2020 December 31 is \$2,845 million with \$401 million being tax supported debt, \$214 million being self-sufficient tax supported debt and \$2,229 million being self-supported debt and no part of the principal or interest is in arrears.

**NOW THEREFORE THE COUNCIL OF THE CITY OF CALGARY ENACTS AS FOLLOWS:**

1. The proper officers of The City are hereby authorized borrow to a maximum sum of \$10.0 million to finance the Portfolio.
2. The City will pay interest as and when required (but no less often than in semi-annual instalments), at an interest rate not exceeding 8.00% per annum.
3. The City shall repay the indebtedness over a period of not exceeding thirty (30) years, in full and in accordance with one or more of the following repayment structures:
  - a) in one installment of principal on the maturity date of the borrowing, and a series of installments of interest as and when due throughout the term of the borrowing (such installments being no less often than semi-annual);

- b) in installments of principal and interest, as and when due, throughout the term of the borrowing (such installments being no less often than semi-annual); and
  - c) interest only installment payments followed by installments of principal and interest, as and when due under the terms of the borrowing (such installments being no less often than semi-annual).
- 4) The City shall utilize portions of revenues collected from affordable housing properties owned by The City to repay the said indebtedness. In the event of any revenue deficiency, The City shall levy and raise municipal taxes sufficient to pay the indebtedness.
  - 5) The net amount borrowed under this Bylaw shall be applied only to the purposes specified in this Bylaw.
  - 6) The indebtedness shall be contracted on the credit and security of The City.
  - 7) The Bylaw comes into force on the date it is passed.

READ A FIRST TIME ON THE \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

READ A SECOND TIME ON THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

READ A THIRD TIME ON THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

\_\_\_\_\_  
MAYOR

SIGNED THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

\_\_\_\_\_  
CITY CLERK

SIGNED THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.



**BYLAW NUMBER 8B2021**

**BEING A BYLAW TO AUTHORIZE THE CITY OF CALGARY TO  
INCUR INDEBTEDNESS IN THE TOTAL AMOUNT OF UP TO  
\$5.5 MILLION TO FINANCE THE CONSTRUCTION OF THE  
RUNDLE PROJECT OF NEW AFFORDABLE RENTAL  
HOUSING**

\*\*\*\*\*

**WHEREAS** Council of The City of Calgary ("**Council**") has reviewed report PFC2021-0445 for the construction of the Rundle housing project which includes an estimated 135 affordable housing units (the "**Project**");

**AND WHEREAS** the construction of the Project has an estimated cost of \$36.9 million;

**AND WHEREAS** it is estimated that at least \$31.4 million of the cost of the Project will be funded through sources other than debenture borrowing;

**AND WHEREAS** Council has deemed it advisable to pass a bylaw pursuant to Sections 251 and 258 of the *Municipal Government Act* (R.S.A. 2000 c. M-26) to borrow an amount not exceeding \$5.5 million from Canada Mortgage and Housing Corporation ("**CMHC**"), or the Province of Alberta (the "**Province**"), or other federal crown corporations to finance the Project;

**AND WHEREAS** the estimated lifetime of the Project financed under this Bylaw is equal to, or in excess of, thirty (30) years;

**AND WHEREAS** all required approvals for the Project will be obtained to ensure the Project is in compliance with all acts of the Province of Alberta and all regulations thereunder;

**AND WHEREAS** the amount of the long term debt of The City of Calgary ("**The City**") as at 2020 December 31 is \$2,845 million with \$401 million being tax supported debt, \$214 million being self-sufficient tax supported debt and \$2,229 million being self-supported debt and no part of the principal or interest is in arrears.

**NOW THEREFORE THE COUNCIL OF THE CITY OF CALGARY ENACTS AS  
FOLLOWS:**

1. The proper officers of The City are hereby authorized to borrow a maximum sum of \$5.5 million to finance the Project.
2. The City will pay interest as and when required (but no less often than in semi-annual instalments), at an interest rate up to a maximum rate of 8.00% per annum.
3. The City shall repay the indebtedness not exceeding a period of thirty (30) years in full and in accordance with one or more of the following repayment structures;
  - a) in one installment of principal on the maturity date of the borrowing, and a series of installments of interest as and when due throughout the term of the borrowing (such installments being no less often than semi-annual);
  - b) in installments of principal and interest, as and when due, throughout the term of the borrowing (such installments being no less often than semi-annual); and

- c) interest only installment payments followed by installments of principal and interest, as and when due under the terms of the borrowing (such installments being no less often than semi-annual).
- 4) The City shall obtain funds from Calhome Properties Ltd., operating as Calgary Housing Company (“CHC”) to repay the said indebtedness under the terms of the loan agreement between The City and CHC dated February 17, 2005, as amended and restated from time to time. In the event of any revenue deficiency, The City shall levy and raise municipal taxes sufficient to pay the indebtedness.
- 5) The net amount borrowed under this Bylaw shall be applied only to the purposes specified in this Bylaw.
- 6) The indebtedness shall be contracted on the credit and security of The City.
- 7) The Bylaw comes into force on the date it is passed.

READ A FIRST TIME ON THE \_\_\_\_ DAY OF \_\_\_\_, 2021.

READ A SECOND TIME ON THIS \_\_\_\_ DAY OF \_\_\_\_, 2021.

READ A THIRD TIME ON THIS \_\_\_\_ DAY OF \_\_\_\_, 2021.

\_\_\_\_\_  
MAYOR

SIGNED THIS \_\_\_\_ DAY OF \_\_\_\_, 2021.

\_\_\_\_\_  
CITY CLERK

SIGNED THIS \_\_\_\_ DAY OF \_\_\_\_, 2021.

**BYLAW NUMBER 39M2021**

**BEING A BYLAW OF THE CITY OF CALGARY  
AUTHORIZING MUNICIPAL LOAN OF UP TO \$5.5 MILLION  
TO CALHOME PROPERTIES LTD.**

\*\*\*\*\*

**THE MUNICIPAL COUNCIL OF THE CITY OF CALGARY DULY ASSEMBLED  
ENACTS THE FOLLOWING:**

**Purpose**

1. The purpose of this Bylaw is to authorize the Loan from The City of Calgary to its controlled corporation, Calhome Properties Ltd. ("CHC"), pursuant to section 265 of the MGA and in accordance with subsection 264(1)(b) of the MGA, as modified by subsection 4(11)(a)(i) of the *City of Calgary Charter, 2018 Regulation*, Alta Reg 40/2018..
2. The purpose of the Loan is to fund a new affordable rental housing project.

**Interpretation**

3. In this Bylaw:
  - (a) "CHC" means Calhome Properties Ltd., operating as Calgary Housing Company, a controlled corporation of The City, incorporated under the *Business Corporations Act*, R.S.A. 2000, c. B-9 on June 16, 1978 as a non-profit organization;
  - (b) "Council" means the municipal council of The City;
  - (c) "Lender" means the Canada Mortgage and Housing Corporation, or the Province of Alberta, or other federal crown corporation;
  - (d) "Loan" means the lending of funds from The City to CHC in accordance with the terms of the Loan Agreement and as authorized by this Bylaw;
  - (e) "Loan Agreement" means the loan agreement entered into between The City, as lender, and CHC, as borrower, dated the 17<sup>th</sup> day of February, 2005, as may be amended from time to time;
  - (f) "MGA" means *Municipal Government Act*, RSA 2000, c. M-26; and
  - (g) "The City" means The City of Calgary, a municipal corporation of the Province of Alberta.

**The Loans**

4. (1) The City is authorized to lend to CHC the funds that The City has borrowed from the Lender pursuant to Borrowing Bylaw 8B2021, up to a maximum sum of \$5.5 million. Such loan authorization is made on the condition that the Loan is advanced in accordance with the terms and conditions outlined in the Loan Agreement.

- (2) The Loan shall be advanced by The City to CHC after:
- (a) Council has given three readings to Borrowing Bylaw 8B2021;
  - (b) Council has given three readings to this Bylaw;
  - (c) the existing Loan Agreement between The City and CHC has been amended to reflect additional loans contemplated under this Bylaw, in accordance with The City's Credit Documentation – Loans and Loan Guarantees Policy and Procedures;
  - (d) CHC has provided to The City a Notice of Drawdown in accordance with the terms of the Loan Agreement and satisfied the applicable conditions of advance set out in the Loan Agreement; and
- (3) CHC shall repay to The City the Loan over a period not exceeding thirty (30) years in accordance with the terms set out in the Loan Agreement. The interest rate applicable to the Loan will align with The City's cost of borrowing from the Lender.
- (4) CHC shall pay to The City an administration fee of 0.25% per annum on the outstanding Loan, which amount shall accrue daily and be paid monthly.

**General Matters**

5. This Bylaw comes into force on the day it is passed.

READ A FIRST TIME THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

READ A SECOND TIME THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

READ A THIRD TIME THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

\_\_\_\_\_  
MAYOR  
SIGNED THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

\_\_\_\_\_  
CITY CLERK  
SIGNED THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2021.

Community Services Report to  
Priorities and Finance Committee  
2017 May 01

ISC: UNRESTRICTED  
PFC2018-0491  
Page 1 of 10

## **Affordable Housing Capital Development Program**

---

### **EXECUTIVE SUMMARY**

In July 2016, Council approved Foundations for Home: Calgary's Corporate Affordable Housing Strategy ("the Strategy"). The Strategy identifies inadequate housing supply as the single most pressing challenge facing Calgary's affordable housing sector. The Affordable Housing Capital Development Program ("the Program") creates a long-term pipeline of prioritized projects to increase the supply of affordable housing. The Program includes lifecycle maintenance programs, the development of new units, and redevelopment of existing City-owned properties. The intent of creating a long term affordable housing development pipeline is to allow for thoughtful budgeting practices and detailed development staging to ensure a steady stream of supply of housing over the next ten years.

This Program is partially funded under *Program 489 - Increase Affordable Housing*, and the remainder of the funding will be requested this fall through the unfunded capital development list prepared in support of One Calgary. No new funding decisions are being made through the recommendations within this report. The City has 64 units currently in development and the proposed allocation of the remaining funds within *Program 489* will create 230 additional new units. The City will further increase the supply of affordable housing by 746 units over the next ten years. Additional work to scale up other non-profit housing providers through the provision of land, support with development fee rebates and prioritizing applications will move towards reaching the goal of creating an additional 15,000 units required to move Calgary's percentage of non-market housing from 3.6% to the national average of 6%.

With both the federal and provincial governments signaling their renewed commitment to affordable housing, this Program will help position Calgary to maximize leveraging of these funds, create increased operational sustainability and contribute to an increased supply of affordable homes for Calgarians. The federal government will be launching the next funding allocations under the National Housing Strategy in May 2018 with a priority on communities that have strong capital development programs in place and are ready to initiate development. It is critical to illustrate that Calgary has a strong capital development plan with clear direction on repairing existing units within The City's portfolio and creating new affordable housing, positioning us well to be competitive in a national context.

**Community Services Report to  
Priorities and Finance Committee  
2017 May 01**

**ISC: UNRESTRICTED  
PFC2018-0491  
Page 2 of 10**

**Affordable Housing Capital Development Program**

**ADMINISTRATION RECOMMENDATION:**

That the Priorities and Finance Committee:

1. Receive for information the remaining allocation of funds within Program 489; Activity 403980 - Increase Affordable Housing as outlined in Attachment 1 - Page 8.
2. Adopt in principle the lifecycle maintenance, new builds, and redevelopment programs as outlined in Table 2 Budget Summary of Capital Development Program on page 8 of this report (Details included in Attachments 1 and 2);
3. Refer Attachment 2: Program Budget Overview to 2018 November One Calgary Service Plans and Budget for consideration through the unfunded capital development list;
4. Direct Administration to continue to pursue federal and provincial funding opportunities for developments identified in Attachments 1 and 2; and
5. Request that Attachment 2 remain confidential pursuant to sections 23 and 24 of the *Freedom of Information and Protection of Privacy Act* until such time as the budget for the Program has been approved and released by Council.

**PREVIOUS COUNCIL DIRECTION / POLICY**

In July 2016, Council unanimously approved Foundations for Home: Calgary's Corporate Affordable Housing Strategy. The Strategy identifies six objectives to grow affordable housing including the need to both develop new affordable housing units and renovate and regenerate existing housing stock. Objective III-B of the Strategy specifically addresses the need for Council to adopt in principle an Affordable Housing plan for City-led development and redevelopment projects contained in the short-term targets.

The Strategy confirmed affordable housing as a Council priority which supports citizens' views as captured in the Citizen Satisfaction survey (2017) that found affordable housing was citizens' highest priority for increased investment<sup>1</sup>.

The Affordable Housing Capital Development Program aligns with affordable housing advocacy goals approved by the Intergovernmental Affairs Committee (IGA2016-0789) on 2016 October 13 and furthermore, those recently approved through IGA2017-1105 on 2018 January 22. Some of these advocacy goals included:

1. Create a citizen centric housing system that focuses on people's needs and supports progress through the housing spectrum.
2. All orders of government need to work together to create a strong network of non-profit housing providers.
3. Sustained, expanded and consistent capital funding is required to address deferred maintenance and increase the supply of non-market housing from 3% to 6%.
4. Support housing providers to transition to sustainable operating models with no net loss of high need households served.

**BACKGROUND**

In 2012, Council approved the Increase Affordable Housing budget under Program 489 in recognition of the growing need for affordable housing and the economic and social costs of not meeting the need. The budget contained within a program bucket provided greater flexibility in

<sup>1</sup> 2017 Quality of Life and Citizen Satisfaction Survey (January 2018)

**Community Services Report to  
Priorities and Finance Committee  
2017 May 01**

**ISC: UNRESTRICTED  
PFC2018-0491  
Page 3 of 10**

### **Affordable Housing Capital Development Program**

leveraging federal and provincial funding and allowed The City to strategically respond to development opportunities. Similar to the current funding system for affordable housing, the 2012 funds required leverage by all three levels of government at \$0.70 on the dollar.

The impetus in 2012 was to rethink how The City undertook the development of affordable housing and to look for creative solutions to build more units with less money. As a result, in 2014 the modular stacked townhome was introduced on four City sites. This repeatable built form eliminated wasted interior corridors, allowed for different exteriors to suit the specific community and provided a variety of unit sizes to meet different needs.

Another development initiative came with the approval of the feasibility budget which enabled The City to explore new opportunities for housing prior to committing capital funds. Through this process, The City was able to explore the feasibility of development opportunities which pushed boundaries in terms of design, operations and colocations which might not have been encouraged if solely tied to capital dollars. Remnant parcels are now developable and innovative energy-efficient built forms are explored. Feasibility funds have facilitated a future design competition to challenge the public's perception of what affordable housing looks like and how it operates. In the last three years, three new affordable housing developments located in the communities of Kingsland, Crescent Heights and Bridgeland have opened. Construction on two additional developments in Wildwood and Rosedale are currently underway with delivery in 2018 and 2019.

In 2017, both the federal and provincial governments issued their individual housing strategies and committed future funds for new supply, regenerated units and lifecycle maintenance for existing affordable housing. The share of the new capital funding allocated to Calgary has not yet been announced. However, the federal government has indicated that federal funds will be distributed to communities that have a strong capital development program in place and are ready to initiate development. It is assumed that federal/provincial funding would remain similar to past funding models, which required these funds to be leveraged by 30% municipal funding contribution as a condition of the funding agreement. Based on historic trends, it is estimated that Calgary could potentially receive \$160 M of federal funding from the National Housing Strategy investment plan within the next ten years, and \$49 M from the Provincial Affordable Housing Strategy over five years each to be leveraged with municipal funds. With the federal and provincial governments each signaling their renewed commitment to housing, the Affordable Housing Capital Development Program will help position Calgary to leverage these funds and make affordable housing more readily available to all.

### **INVESTIGATION: ALTERNATIVES AND ANALYSIS**

Foundations for Home: Calgary's Corporate Affordable Housing Strategy identifies six strategic directions which support increasing affordable housing in Calgary.

1. Get the Calgary community building;
2. Leverage City land with sales to qualified non-profit housing providers at below market rates;
3. Design and build new City units by prioritizing new development and redevelopment of City owned properties;
4. Regenerate City-owned properties by leading strategic reinvestment to preserve homes for those in need;

**Community Services Report to  
Priorities and Finance Committee  
2017 May 01**

**ISC: UNRESTRICTED  
PFC2018-0491  
Page 4 of 10**

### **Affordable Housing Capital Development Program**

5. Strengthen intergovernmental relations through collaboration and advocacy for Calgary's share of affordable housing funding; and
6. Improve the housing system by supporting programs that empower tenants to make positive changes within their community.

Each of these six objectives is integral in meeting the vision of increasing non-market housing supply to provide homes to a minimum of 6% of households in Calgary. Currently, only 3.6% of households in Calgary are supported by non-market housing, as compared to the national average of 6%. To accommodate 6% of its households in non-market housing, Calgary would need to add approximately 15,000 new affordable units today.<sup>2</sup> The City has a role to play in directly delivering on this number, but also by enabling non-profit providers to construct more housing and by positioning all providers to receive additional investment from other orders of government. The Strategy's implementation plan clearly identifies initiatives under each objective which work together to meet this objective. The Affordable Housing Capital Development Program incorporates a diversified approach to The City's development program, and like the private development industry, the intent is to allow for thoughtful budgeting practices and detailed development staging to ensure commissioning steady supply with projects moving through each phase of the development process.

The Affordable Housing Capital Development Program focuses on four specific sub-programs:

1. Renovating existing City-owned units through lifecycle maintenance;
2. Increasing the supply of new affordable housing;
3. Redeveloping existing affordable housing sites; and
4. Leveraging the social return on investment of the Green Line LRT.

A brief summary of each program is included below. Attachment 1 provides a detailed analysis of each program.

#### **1. Lifecycle Maintenance**

The City's top priority is to ensure its current affordable housing units are maintained with ongoing funding for lifecycle maintenance. Calgary Housing Company (CHC), The City's operator of affordable housing, is currently completing building condition assessments (BCA) on all of The City's affordable housing buildings. In 2017, Council approved \$3.4M (PFC2017-0355) in emergency lifecycle maintenance for both major capital repairs and suite renovations for The City's existing affordable housing stock. This Program established unit renovation standards to ensure consistent and quality service delivery, and to increase the financial sustainability within existing units irrespective of the client group (social, affordable or low-end-of-market) served. The 2017/ 2018 program has provided suite renovations for approximately 200 units. The BCA's, in combination with unit renovation standards, are designed to prioritize buildings and units in need of both renovation and lifecycle maintenance. Through the Program, a robust system of prioritized buildings and units has been identified for investment. This comes with an unfunded municipal budget requirement of \$39.6M for the next four years which will be included as part of One Calgary budget submission in 2018 November.

---

<sup>2</sup> Housing in Calgary Report (2017). City of Calgary



**Community Services Report to  
Priorities and Finance Committee  
2017 May 01**

**ISC: UNRESTRICTED  
PFC2018-0491  
Page 5 of 10**

## **Affordable Housing Capital Development Program**

### **2. Increased Supply of Affordable Housing**

City-led development of new affordable housing supply will take a variety of forms and sites throughout the city and will be The City's initial contribution to the overall goal established for new units. This sub-program includes affordable housing within Integrated Civic Facilities, mixed-use development, stacked townhomes, heritage redevelopment, Transit Oriented Development (TOD), innovation competitions, private development and acquisition of units. The projects have been through a comprehensive geographic analysis and detailed feasibility review to ensure their locational and site characteristics are conducive for positive outcomes for residents and the community. Providing affordable housing throughout all communities in Calgary helps provide varied choice of tenure, built form and affordability as identified in the Municipal Development Plan. The Increase Supply of Affordable Housing program generates 153 units with an unfunded municipal budget requirement of \$6.4M for the next four years which will be included as part of One Calgary budget submission in 2018 November.

### **3. Regeneration/Redevelopment**

The average age of City of Calgary affordable housing stock is 40 years. As these assets age, it is important to plan for the future of The City's assets and provide a framework to re-imagine the future of affordable housing. Densifying existing older sites provides an opportunity to improve health and safety requirements and incorporate new operational and energy efficiencies. It is anticipated that this program will continue to grow over time. Currently, the Government of Alberta has provided feasibility grants to Calgary Housing to explore regeneration opportunities on two existing affordable housing sites. Calgary Housing is in the process of undertaking a detailed feasibility and master planning review which is anticipated to provide approximately 341 new affordable housing units based on current land use conditions. This represents an unfunded municipal budget requirement of \$39M for the next four years which will be included as part of One Calgary budget submission in 2018 November.

### **4. Green Line**

Plans for affordable housing units located close to the future Green Line LRT have been developed in support of future Transit Oriented Development (TOD) at priority stations. Emphasis has been placed on three station areas within Green Line Stage One, where support services for tenants are more likely to be located. As included in Layer 4- City Shaping (CPS2017-0311), population projections along the Green Line were used in tandem with the analysis of the need for City-owned affordable housing units within the new TOD locations. The section in Attachment 1 on Green Line housing supply represents a total of 252 new units unfunded along the Green Line at a municipal cost of \$2.1M for the next four years which will be included as part of One Calgary budget submission in 2018 November.

Each of the sub-programs is projected to deliver the following units for the 2019 – 2022 and 2023 – 2026 business cycle:

**Community Services Report to  
Priorities and Finance Committee  
2017 May 01**

**ISC: UNRESTRICTED  
PFC2018-0491  
Page 6 of 10**

**Affordable Housing Capital Development Program**

*Table 1: Total Number of New Units Delivered and Upgraded*

<b>PROGRAM</b>	<b>New Units</b>	<b>Existing # Units Requiring Maintenance Upgrade</b>
1. Lifecycle Maintenance		2,175
2. Increased Supply of Affordable Housing	153	
3 Regeneration/Redevelopment	341	
4. Green Line – Housing Supply	252 * begins construction in 2022	
<b>TOTAL</b>	<b>746</b>	<b>2,175</b>

**Stakeholder Engagement, Research and Communication**

Stakeholder engagement is an important component to every affordable housing project. Efforts have been made to continually learn from our engagement sessions to improve the way information is delivered, received and applied.

Internal stakeholder engagement was undertaken with ward councillors and business units to inform the Program. Research to identify needs, areas, built form and opportunities for operational savings was completed with a comprehensive cross-corporate review within City departments and with Calgary Housing Company (CHC), The City's operator of affordable housing. The affordable housing location criteria tool using geographic information systems (GIS) has been instrumental in finding suitable locations for affordable housing based on housing preferences.

Community engagement sessions were also conducted in support of three programs in Varsity, Symon's Valley and Thornhill in conjunction with the Integrated Civic Facility Program during the feasibility stage.

Future engagement has been anticipated and is being planned for. External stakeholder engagement for new affordable housing capital projects is based on a three-phase approach which allows for flexibility to modify due to the individual development opportunities. Phase one includes introducing the project to the community and stakeholders, providing information and education on affordable housing and gathering information on the stakeholders' issues and concerns about development. Phase two provides information to the community and stakeholders on affordable housing and gathers feedback on the design. Phase three includes showcasing the final design. The intent would be to undertake a detailed three-phase engagement program for each of the developments included in this Program as they arise in the future.

**Strategic Alignment**

The Program directly supports the objectives of Foundations for Home: Calgary's Corporate Affordable Housing Strategy (2016) to design and build new City units and regenerate City-owned properties. It also helps to advance the goals and policies of existing City plans that call for increased housing affordability to meet the diverse needs of Calgarians. The Program is

**Community Services Report to  
Priorities and Finance Committee  
2017 May 01**

**ISC: UNRESTRICTED  
PFC2018-0491  
Page 7 of 10**

## **Affordable Housing Capital Development Program**

aligned with the 60-year Calgary Municipal Development Plan which includes the following objective under Part 2.3.1: Housing: “Ensure a choice of housing forms, tenures and affordability to accommodate the needs of current and future Calgarians and create sustainable local communities.” Additionally, The City of Calgary Action Plan 2015-2018 includes Strategy P6, “Increase affordable and accessible housing options,” under its area of focus for a prosperous city.

The Program is also well aligned to the goals of multiple external plans. Calgary’s Updated Plan to End Homelessness (2015) includes “Increasing housing & supports and affordable housing options” as a priority direction. The Seniors Age Friendly Strategy and Implementation Plan (2015) includes a strategy to “Support policy changes and initiatives to increase overall affordable housing supply through the Community Affordable Housing Strategy” (Priority III, Result 2, Strategy A). The Calgary Economic Development Strategy (2014) includes an action to “Build a range of housing options for all ages, income groups and family types to meet the needs of residents today and tomorrow” (Community Energy, Strategy 1, Action 1). The Enough For All Poverty Reduction Initiative (2013) proposes actions to “enhance access to affordable housing” under Priority 4.3.3: “Ensure people’s basic needs are met.”

### **Social, Environmental, Economic (External)**

Great cities are places where everyone can afford to live and work. Affordable housing is a critical component of our great city and a vital contributor to our citizens’ successes. Affordable housing yields tangible social and economic benefits that City residents see every day:

- Affordable housing development creates local jobs. Every billion dollars invested in housing grows Canada’s economy by \$1.4 billion and generates up to 13,000 direct and indirect jobs.<sup>3</sup>
- Affordable housing strengthens residents’ purchasing power and boosts the local economy. With lower housing costs, residents have better opportunities and more disposable income to invest in other goods and services.
- Affordable housing attracts employers with the promise of a stable workforce. When housing costs are prohibitively high, companies, particularly those in the industrial sector, struggle to find and retain the workers they need.
- Affordable housing reduces demand for emergency services. By keeping vulnerable residents off the streets, affordable housing reduces pressure on hospitals and corrections facilities, as well as City spending on policing, bylaw, and fire services. Providing one homeless person with housing has been shown to save taxpayers \$34,000 annually.<sup>4</sup>

A fully mixed housing market creates and retains jobs, attracts new workers, lessens poverty, meets the needs of seniors, individuals and families, and keeps our most vulnerable residents

<sup>3</sup> Federation of Canadian Municipalities. Cities and Communities: Rising to the Moment. FCM Federal Budget Submission. February 2016.

<sup>4</sup> Calgary Homeless Foundation. Calgary’s Updated Plan to End Homelessness. March 2015.

**Community Services Report to  
Priorities and Finance Committee  
2017 May 01**

**ISC: UNRESTRICTED  
PFC2018-0491  
Page 8 of 10**

### **Affordable Housing Capital Development Program**

off the street. This in turn reduces financial stress on the health care system, the justice system, policing, social services, City Administration and other municipal and provincial services. Adequate housing enables all Calgarians to maximize their contributions to the wider community. The City of Calgary has an opportunity to create better outcomes for individuals and communities through the increase in supply of safe, affordable housing solutions.

#### **Financial Capacity**

##### ***Current and Future Operating Budget:***

There are no operating budget impacts associated with this report and recommendations. Any staff positions related to implementing this program will be capitalized or brought forward as part of the One Calgary Budget plan in November 2018. All new affordable housing developed through this program will be operated through a self-sufficient model that does not require any ongoing government operating subsidies.

##### ***Current and Future Capital Budget:***

Calgary Housing's Affordable Housing Capital Development Program total estimated budget (from all sources) is \$319.3M until 2026. Currently The City has Program 489-Increase Affordable Housing budget of \$45.5M which is fully allocated to six projects representing an additional 230 units. In order to continue to meet the objectives of the Corporate Affordable Housing Strategy, additional funds are required to support the Affordable Housing Capital Development Program.

The Program leverages federal, provincial and municipal funding to create affordable housing in all Calgary communities. Using the historic 70% (federal/provincial) and 30% (municipal) funding model, Calgary Housing will be requesting \$157.5M in municipal funding over The City's next two capital budget planning cycles for 2019-2022 and 2023-2026.

**Community Services Report to  
Priorities and Finance Committee  
2017 May 01**

**ISC: UNRESTRICTED  
PFC2018-0491  
Page 9 of 10**

**Affordable Housing Capital Development Program**

*Table 2: Budget Summary of Capital Development Program (2019 – 2026)*

Capital Development Program	Total Budget			Municipal Contribution 30%		
	Budget Cycle 2019-2022	Budget Cycle 2023-2026	Total Budget (2019-2026)	Budget Cycle 2019-2022	Budget Cycle 2023-2026	Total Muni. contribution (2019-2026)
1. Lifecycle Maintenance-City Owned Portfolio (Estimated 2175 Units)	\$39.6 M	\$48.5 M	\$88.1 M	\$39.6 M*	\$48.5 M*	\$88.1 M
2. Increase Supply Affordable Housing – New Builds (153 Units)	\$21.3 M	\$17.0 M	\$38.3 M	\$6.4 M	\$5.1 M	\$11.5 M
3. Regeneration/Redevelopment Program (341 Units)	\$130.0 M	**	\$130.0 M	\$39.0M	**	\$39.0 M
4. Green Line (252 Units)	\$7.1 M	\$55.9 M	\$63.0 M	\$2.1 M	\$16.8 M	\$18.9 M
<b>Total</b>	<b>\$198.0 M</b>	<b>\$121.4 M</b>	<b>\$319.4 M</b>	<b>\$87.1 M</b>	<b>\$70.4 M</b>	<b>\$157.5 M</b>

\* Lifecycle Maintenance has been anticipated at 100% contribution by The City

\*\* Additional budget for Regeneration/Redevelopment Program in 2019-2026 may be requested after building condition assessments are completed.

**Risk Assessment**

Affordable housing is not directly within The City's control since it is a responsibility of all three orders of government. There is potential risk that other orders of government could direct policy changes that could negatively impact Calgary's affordable housing sector and citizens of Calgary. The City must demonstrate the importance it places on affordable housing as both a social benefit and economic priority to mitigate negative policy changes.

Existing provincial operating agreements for City-owned social housing units will begin to expire within the next three years and The City will become fully responsible for the condition of the units.

The federal government has indicated that federal funds will be distributed to communities that have a strong capital development program in place and are ready to initiate development. If Calgary cannot demonstrate a sound capital development plan, there is a risk that we could miss out on Calgary's share of the funding commitments previously announced by the federal

Community Services Report to  
Priorities and Finance Committee  
2017 May 01

ISC: UNRESTRICTED  
PFC2018-0491  
Page 10 of 10

### **Affordable Housing Capital Development Program**

and provincial governments, estimated at \$160.0M and \$49.0M respectively for Calgary. There is also the potential that previous advocacy efforts with both orders of government could generate capital funds that cannot be fully utilized if not matched with municipal funds.

The momentum for affordable housing generated since the adoption of Foundations for Home: Calgary's Corporate Affordable Housing Strategy is invaluable. The Affordable Housing Capital Development Program will help to build on that momentum.

#### **REASON(S) FOR RECOMMENDATION(S):**

The Affordable Housing Capital Development Program will be used to position Calgary for federal and provincial funding to increase the supply of affordable housing and renovate and repair existing City owned affordable housing units.

#### **ATTACHMENT(S)**

1. Attachment 1 – Affordable Housing Capital Development Program
2. Attachment 2 – CONFIDENTIAL



PFC2018-0491  
ATTACHMENT 1  
ISC: UNRESTRICTED

**AFFORDABLE HOUSING  
CAPITAL DEVELOPMENT PROGRAM**

(2016 – 2026)  
Calgary Housing

May 1 2018





## Table of Contents

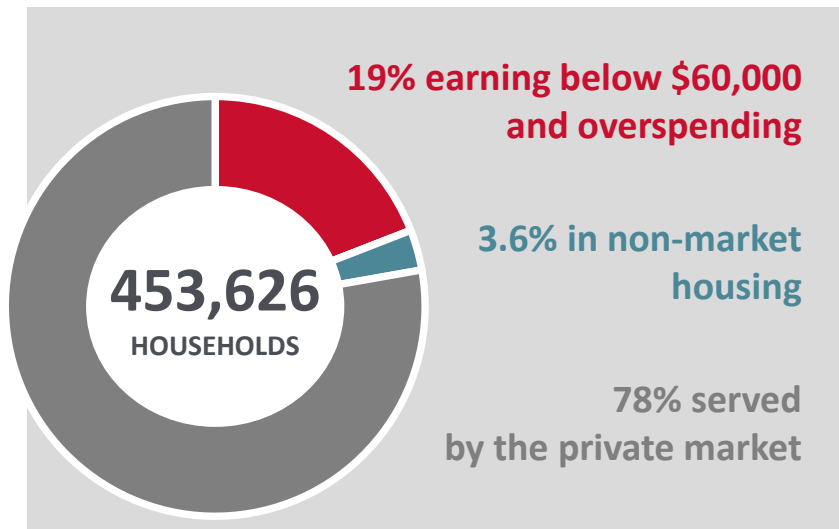
1. Affordable Housing in Calgary
2. Corporate Affordable Housing Strategy
3. Affordable Housing Capital Development Program
4. Allocation of Remaining Funds (*Recommendation 1*)
5. 1. Housing Lifecycle Maintenance
6. 2. Increase Supply Affordable Housing
  - 2A New Builds
  - 2B Integrated Civic Facilities
7. 3. Affordable Housing Redevelopment Program
8. 4. Increase Supply Affordable Housing – Green Line







## Increased Housing Supply



Contribute to an increase in non-market housing supply sufficient to provide homes to a minimum of **6% of households in Calgary**, consistent with the national average.

In 2016, meeting this standard would require **15,000 new units**.

## Improved Housing System



Enable a transformed housing system in Calgary, where collaboration between stakeholders drives **better outcomes for individuals and communities** through safe, affordable housing solutions.



Everyone deserves a safe and stable place to call home, but not everyone can afford one.

**84,000**  
or nearly  
**1 in 5**  **households** are struggling to pay for shelter costs

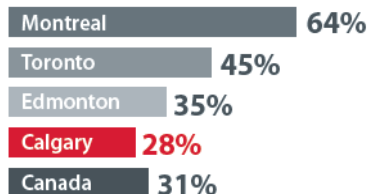
**42,000** households  
at risk of becoming homeless due  
to spending more than 50 per cent  
of income on shelter costs

More than  
**3,200**  
Calgarians are  
homeless



According to The City's  
**definition of**  
**affordable housing**,  
a household is in need  
of affordable housing  
when it earns less than  
\$60,000/year and  
spends more than  
30 per cent of gross  
income on shelter costs

## Percentage rental



Calgary's lowest  
market **rental**  
**rates** are among  
the **highest in**  
**Canada**, and the supply  
is limited

Income needed to  
afford average rent  
for a two-bedroom  
apartment in Calgary

**\$53,000**

Approximately  
of households do not have  
sufficient income  
to afford an  
average rental  
apartment in  
the market

**21%**



## Affordable housing helps everyone

Affordable housing supports  
people of all ages, family  
compositions and demographics.  
People in affordable housing  
have greater chances to:

- Find and keep jobs
- Learn and build skills
- Be active participants in their communities



Keeping vulnerable residents off  
the streets reduces demand and  
pressure on emergency services,  
hospitals and correction facilities.  
Providing housing for one  
homeless person has been shown to save  
taxpayers **\$34,000** annually

Affordable housing boosts  
the local economy by  
increasing the purchasing  
power of residents and  
by attracting employers  
with the promise of a  
stable workforce





## Corporate Affordable Housing Strategy

In 2016, Council unanimously adopted the **Corporate Affordable Housing Strategy – Foundations for Home**, which guides The City's affordable housing direction over the next 10 years through six key objectives:



### Objective 1:

Get the Calgary community building



### Objective 4:

Regenerate City-owned properties



### Objective 2:

Leverage City land



### Objective 5:

Strengthen intergovernmental partnerships



### Objective 3:

Design and build new City units



### Objective 6:

Improve the housing system



## Objective 3: Design and build new City units

The City's affordable housing developments are informed by research on tenant preferences, leading industry practices, and extensive consultation with community stakeholders.

The following program represents funded projects currently under construction.

Under Construction Projects 2018	Unit	Total Budget
Wildwood (in construction)	48	\$10.9 M
Rosedale (in design)	16	\$3.9 M
<b>Total Units to be Delivered in 2019</b>	<b>64</b>	<b>\$14.8 M</b>





## Objective 4: Regenerate City-owned properties

Our long-term regeneration strategy provides financial and social sustainability for **City-owned** properties.

2018- Building condition assessments and unit condition assessments on City Affordable Housing sites allows for prioritizing of lifecycle improvements.



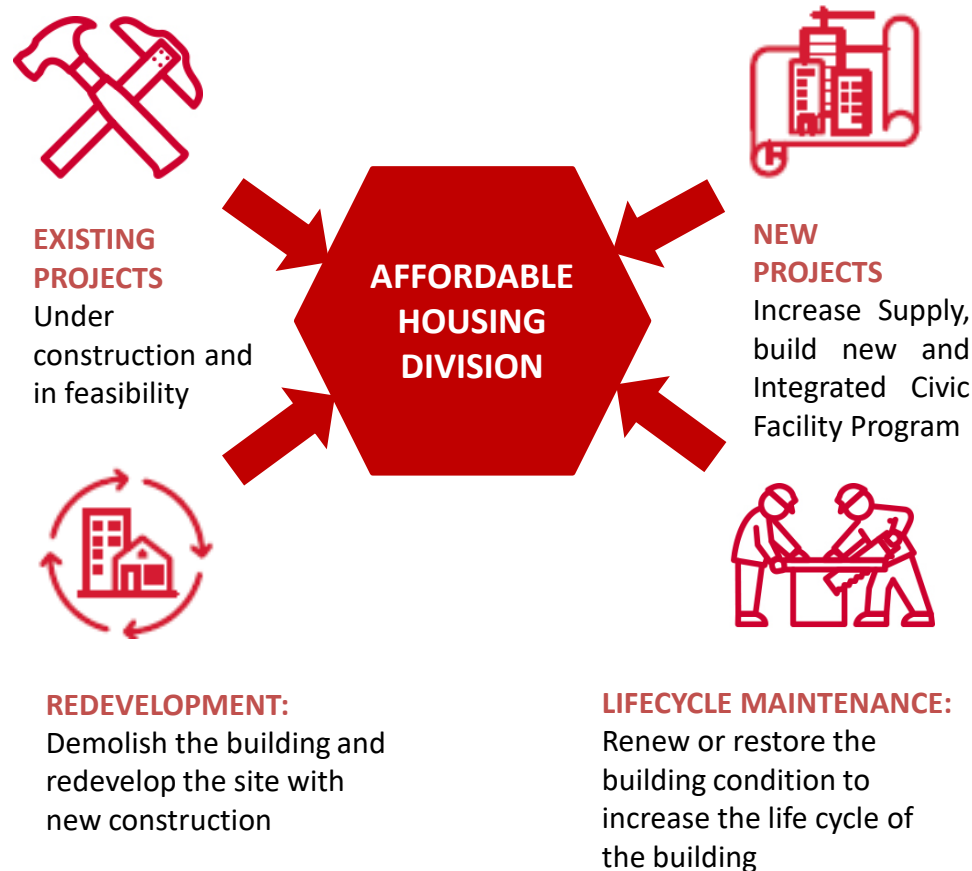


## Affordable Housing Capital Development Program

The capital development program focuses on new City units as it relates to building, partnering or acquiring units and leveraging Federal and Provincial funding.

The creation of a long-term pipeline and prioritizing development and redevelopment projects enables the thoughtful budgeting and allocation of funds.

Equally important is the regeneration/lifecycle maintenance of existing City owned units in order to continually increase the supply of affordable housing.





# Capital Development Affordable Housing Units Summary

ISC: UNRESTRICTED

The **Affordable Housing** development program creates a long-term development pipeline which prioritizes **development** projects, **redevelopment** projects, and **lifecycle maintenance** projects on City-owned assets. The following table represents the allocation of existing funds in the funded column and the prioritized projects that are currently unfunded.

FUNDED CAPITAL DEVELOPMENT PROGRAM	Units	UNFUNDED CAPITAL DEVELOPMENT PROGRAM		UNITS
Wildwood (in Construction)	48	New Builds	Confidential Site #1, Attachment 2	19
Rosedale (in Design)	16		Confidential Site #2, Attachment 2	18
Varsity ICFP (in Feasibility)	48		Armour Block 1	20
Bridlewood (in Feasibility)	62	Integrated Civic Facilities	Symons Valley ICFP	48
Mount Pleasant (in Feasibility)	16		Thornhill ICFP	48
Private Developers (Land Sales & Acquisition of Units), Appendix 2	56	Redevelopment	Confidential Site #3, Attachment 2 (Based on existing land use)	145
North Hill ICFP (in Feasibility)	48		Southview (Based on existing land use)	196
		Green Line	16 <sup>th</sup> Av/ 28 <sup>th</sup> Av N	180
			Inglewood/Ramsay	28
			Ogden	44
<b>TOTAL UNITS</b>	<b>294</b>	<b>TOTAL UNITS</b>		<b>746</b>
<b>Lifecycle Maintenance (City Owned) 2017-2018 (\$3.4 M)</b>	<b>200 estimated</b>	<b>Lifecycle Maintenance (City Owned)</b>		<b>2175 estimated</b>



## Allocation of Remaining Funds (Recommendation 1)

The following program represents funded projects. The City would like to **finalize the allocation all of the remaining funds** under Activity 403980 - Increase Affordable Housing with a plan to complete feasibility and begin design and construction in 2019 – 2022 for the following projects.

Funded Projects in Design and Construction	Units	
Wildwood Stacked Townhomes	48	In Construction
Rosedale	16	In Design
Funded Projects in Feasibility (2019-2022)	Units	Total Budget
Varsity ICFP (Integrated Civic Facilities Program)	48	\$12.0 M
Bridlewood (Stacked Townhome)	62	\$18.1 M
Mount Pleasant (Stacked Townhome)	16	\$4.0 M
Private Program TOD / Land Sales (at least 56 units)		
• Refer to Confidential Attachment 2 pages 7 & 8	56	TBD
North Hill ICFP (Integrated Civic Facilities Program)	48	\$11.5 M
<b>Total Units Delivered in (2019-2022)</b>	<b>294</b>	<b>\$45.6 M</b>

**ALLOCATION OF  
REMAINING  
FUNDS**





## 1. Housing Lifecycle Maintenance - City Owned Portfolio (2019-2026)

Calgary Housing Company (CHC) as The City's affordable housing operator, is currently completing **building condition assessments** (BCA) and **unit condition assessments** (UCA) on all of The City's affordable housing units. The purpose is to ensure consistent, quality service delivery, and to increase financial sustainability within existing units irrespective of the program served (social, affordable, or low-end-of market).

The BCAs in combination with the UCAs are designed to **prioritize** units in need of renovation or lifecycle maintenance. Following the completion of BCAs on all City affordable housing units, this program will **establish a base funding** amount for **deferred maintenance** going forward and be included in the 2019-2026 lifecycle maintenance program.





## 2. Increase Supply Affordable Housing (2019-2026)

2A. Increase Supply Affordable Housing – New Builds	Units
Armour Block 1, New units	20
Confidential Site (1)	19
Confidential Site (2)	18
<b>Total Units</b>	<b>57</b>

2B. Increase Supply Affordable Housing – Integrated Civic Facility Program (ICFP)	Units
Symons Valley (ICFP)	48
Thornhill (ICFP)	48
<b>Total Units</b>	<b>96</b>

Total of **153** additional units within the New Projects Program

\* Refer to Confidential Attachment 2 for more information





## 2A. New Builds

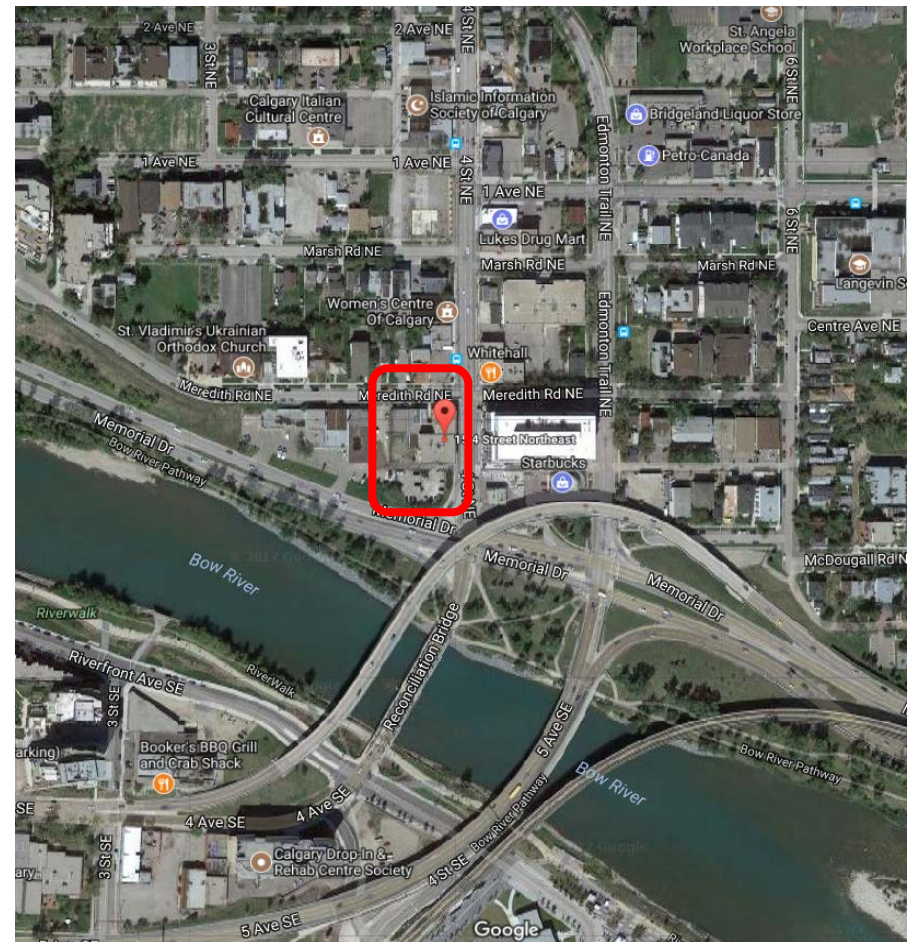
### Armour Block 1

Programs: New and Lifecycle

Address: 15 4th ST NE

Building Type: Heritage Building with  
additional Multi Storey Building

Total Number of new units: **20 units**



## 2B. Integrated Civic Facilities

### Symons Valley

Program: **ICFP/TOD**

Address: 251 Sage Hill Bv NW

Building Type: Multi Storey Building

Total Number of units: **48 units**



ICS: Unrestricted

May 1 2018

Page 24 of 60

14



## 2B. Integrated Civic Facilities

### Thornhill

Program: **ICFP/ TOD / Green Line**

Address: 6715 Centre St. NW.

Building Type: Multi Storey Building

Total Number of units: **48 units**





## Increase Supply Affordable Housing Units Types

The New Projects target is to accommodate **153** new households within the budget cycles **2019-2022** and **2023-2026**.

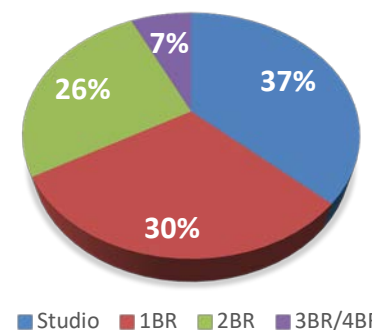
### New Builds

Type of Units	No. of Units
Studio	21
1BR	17
2BR	15
3BR/4BR	4
<b>Total</b>	<b>57</b>

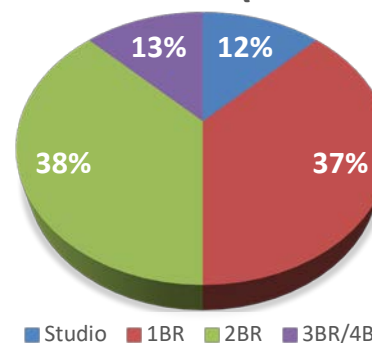
### Integrated Civic Facilities Program

Type of Units	No. of Units
Studio	12
1BR	36
2BR	36
3BR/4BR	12
<b>Total</b>	<b>96</b>

Types of Units (2019-2026)



Types of Units (2019-2026)





### 3. Affordable Housing Redevelopment Program (2019-2022)

Calgary Housing Company received funding from the Province to complete a feasibility study on two sites that were at or near the end of their lifecycle.

In 2012, 96 units of social housing were demolished on the Southview site with the intent of redevelopment. A second site has been identified. The redevelopment of these two sites together allows for a sustainable solution which is operationally viable. The two sites will contain two mixed-use, mixed-income housing developments replacing the 96 social units and including an additional 245 mixed-income units for a total of 341 units. The redevelopment will revitalize both sites, provide affordable housing and community supports, and demonstrate the shared social values of The City of Calgary, and The Province of Alberta.

Redevelopment Projects (2019-2022)	Estimated No. of Units Based on Existing Land Use
Site 1 – (Confidential site 3)	145
Site 2 - Southview	196
<b>Total</b>	<b>341*</b>

\* The total number of units will be determined through a fact-based feasibility study that will be completed in September 2018.



## 4. Increase Supply Affordable Housing - Green Line (2019-2026) ISC: UNRESTRICTED

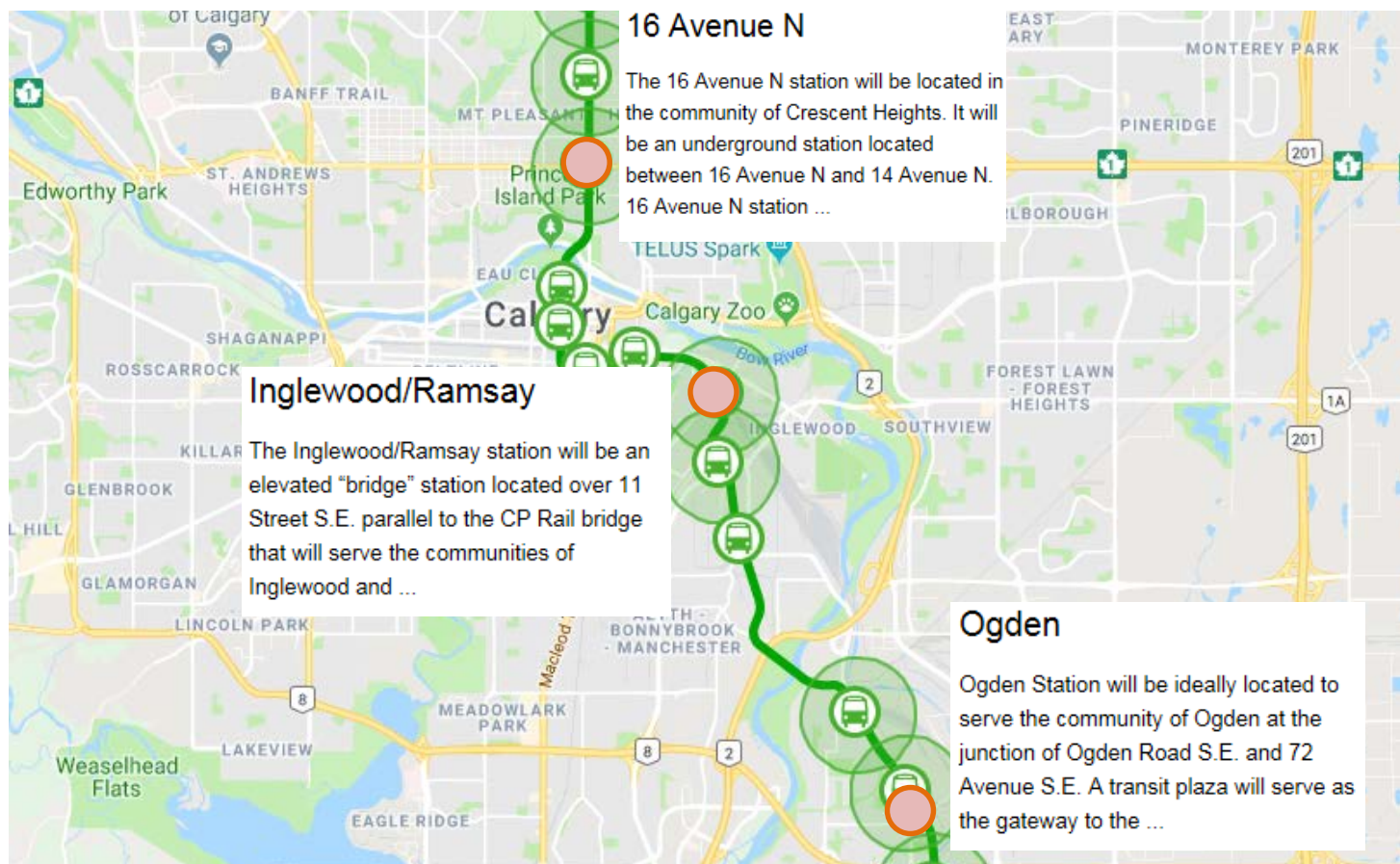
Three priority investment areas as identified in Green Line Layer 3 TOD and Layer 4 - City

Shaping provide an opportunity to leverage transit funding for the social benefit of affordable housing.

Station Name	Priority	Non-Market Housing Households within 1 KM	Projected Population 2026	20% of population AH	# units required (3 ppl/unit)	Projected Households within 1km (2026)	City Contribution to Total AH Market (41%) (2026)	City Contribution to Total AH Market (41%) (5 years Target)
16 Av N / 28 Av N	1	81	11,690	2,338	779	698	286	180
2 Av SW		603	10,655	2,131	710	107	44	28
7 Av SW		470	8,359	1,672	557	87	36	22
Centre St S		546	14,121	2,824	941	395	162	101
4 St SE		171	8,469	1,694	565	394	161	101
Inglewood/Ramsay	1	161	3,451	690	230	69	28	28
26 Av SE		8	770	154	51	43	18	11
Highfield		0	5	1	0	0	0	0
Lynnwood/Millican		100	2,860	572	191	91	37	23
Ogden	1	140	3,693	739	246	106	44	44
South Hill		27	2,079	416	139	112	46	0
Quarry Park		0	2,817	563	188	188	77	48
Douglas Glen		0	2,745	549	183	183	75	47
Shepard		0	3,331	666	222	222	91	57
<b>Subtotal</b>		<b>2,307</b>	<b>75,045</b>	<b>15,009</b>	<b>5,003</b>	<b>2,696</b>	<b>1,105</b>	<b>691</b>
<b>TOTAL UNITS FOR 3 PRIORITY STATIONS (16Ave/28Ave, INGLEWOOD/RAMSAY and OGDEN)</b>								<b>252</b>



## Green Line Station Priority (2019-2026)



<http://www.calgary.ca/Transportation/TI/Pages/Transit-projects/Green-line/map.aspx>

## **Overview Of Program Budgets and Sales Transactions**

### **Calgary Housing**

#### **Affordable Housing Capital Development Program**

May 1 2018



## BUDGET SUMMARY OF CAPITAL DEVELOPMENT PROGRAM (2019-2026)

This program supports the affordable housing service line and supports Council's 2018 Directive under a Prosperous City to work with other orders of government to provide sufficient supply of affordable housing. It aims to increase the acceptance of affordable housing developments through community engagement, creative architecture and place-making to create much needed homes for Calgarians.

CAPITAL DEVELOPMENT PROGRAM	Total Budget			Municipal Contribution 30%		
	Budget Cycle ( 2019-2022)	Budget Cycle ( 20123-2026)	Total Budget (2019-2026)	Budget Cycle ( 2019-2022)	Budget Cycle ( 2023-2026)	Total Muni. contribution (2019-2026)
1. Housing Lifecycle Maintenance- City Owned Portfolio (Estimated 2175 Units)	\$39.6 M	\$48.5 M	\$88.1 M	\$39.6 M*	\$48.5 M*	\$88.1 M
2.a Increase Supply Affordable Housing – New Builds (37 Units)	\$9.3 M	\$5.0 M	\$14.3 M	\$2.8 M	\$1.5 M	\$4.3 M
2.b Increase Supply Affordable Housing - ICFP (116 units)	\$12.0 M	\$12.0 M	\$24.0 M	\$3.6 M	\$3.6 M	\$7.2 M
3. Affordable Housing Redevelopment Program (341 units)	\$130.0 M	**	\$130.0 M	\$39.0	**	\$39.0 M
4. Increase Supply Affordable Housing - Green Line (252 units)	\$7.1 M	\$55.9 M	\$63.0 M	\$2.1 M	\$16.8 M	\$18.9 M
<b>Total</b>	<b>\$198.0 M</b>	<b>\$121.4 M</b>	<b>\$319.4 M</b>	<b>\$87.1 M</b>	<b>\$70.4 M</b>	<b>\$157.5 M</b>

Notes: \* Municipal contribution is 100%

\*\* Additional redevelopment may be requested after the building conditioning assessment completed



# 1. Housing Lifecycle Maintenance-City Owned Portfolio Budget (2019-2026)

Project Name	Budget Cycle ( 2019-2022)				Budget Cycle ( 2023-2026)				Total Budget	Municipal Contribution (100%)
	2019	2020	2021	2022	2023	2024	2025	2026		
Lifecycle Maintenance	\$9.6 M	\$8.6 M	\$8.5 M	\$5.8 M	\$13.4 M	\$16.5 M	\$5.1 M	\$13.5 M	\$81.0 M	\$81.0 M
Armour Block 2 Heritage Building	-	\$7.1 M	-	-	-	-	-	-	\$7.1 M	\$7.1 M
Total	\$9.6 M	\$15.7 M	\$8.5 M	\$5.8 M	\$13.4 M	\$16.5 M	\$5.1 M	\$13.5 M	\$88.1 M	\$88.1 M



## 2. Increase Supply Affordable Housing Budget Analysis (2019-2026)

### 2A Increase Supply Affordable Housing – New Builds

Project Name	Budget Cycle ( 2019-2022)				Budget Cycle ( 2023-2026)				Total Budget	Municipal Contribution (30%)
	2019	2020	2021	2022	2023	2024	2025	2026		
Armour Block 1	-	-	-	-	\$2.5 M	\$2.5 M	-	-	\$5.0 M	\$1.5 M
Marda Loop	\$0.3 M	\$1.6 M	\$2.9 M	-	-	-	-	-	\$4.8 M	\$1.4 M
Mission Road to	\$4.5 M	-	-	-	-	-	-	-	\$4.5 M	\$1.4 M
<b>Total</b>	<b>\$4.8 M</b>	<b>\$1.6 M</b>	<b>\$2.9 M</b>	<b>-</b>	<b>\$2.5 M</b>	<b>\$2.5 M</b>	<b>-</b>	<b>-</b>	<b>\$14.3 M</b>	<b>\$4.3 M</b>

### 2B Increase Supply Affordable Housing – ICFP

Project Name	Budget Cycle ( 2019-2022)				Budget Cycle ( 2023-2026)				Total Budget	Municipal Contribution (30%)
	2019	2020	2021	2022	2023	2024	2025	2026		
Symons Valley – ICFP	-	\$3.0 M	\$4.0 M	\$5.0 M	-	-	-	-	\$12.0 M	\$3.6 M
Thornhill – ICFP	-	-	-	-	\$0.6 M	\$5.9 M	\$5.5 M	-	\$12.0 M	\$3.6 M
<b>Total</b>	<b>-</b>	<b>\$3.0 M</b>	<b>\$4.0 M</b>	<b>\$5.0 M</b>	<b>\$0.6 M</b>	<b>\$5.9 M</b>	<b>\$5.5 M</b>	<b>-</b>	<b>\$24.0 M</b>	<b>\$7.2 M</b>



### 3. Affordable Housing redevelopment Program Budget (2019-2026)

Project Name	Budget Cycle ( 2019-2022)				Budget Cycle ( 2023-2026)				Total Budget	Municipal Contribution (30%)
	2019	2020	2021	2022	2023	2024	2025	2026		
Site 1 – Rundle	\$4.0 M	\$12.5 M	\$25.0 M	\$23.5 M	*	*	*	*	\$65.0 M	\$19.5 M
Site 2 - Southview	\$4.0 M	\$12.5 M	\$25.0 M	\$23.5 M	*	*	*	*	\$65.0 M	\$19.5 M
<b>Total</b>	<b>\$8.0 M</b>	<b>\$25.0 M</b>	<b>\$50.0 M</b>	<b>\$47.0 M</b>	<b>*</b>	<b>*</b>	<b>*</b>	<b>*</b>	<b>\$130.0 M</b>	<b>\$39.0 M</b>

Notes: \* Additional redevelopment funding may be requested after the building conditioning assessment are completed



## 4. Increase Supply Affordable Housing – Green Line (2019-2026)

Station	Budget Cycle ( 2019-2022)				Budget Cycle ( 2023-2026)				Total Budget	Municipal Contribution (30%)
	2019	2020	2021	2022	2023	2024	2025	2026		
Budget of 16 Avenue N station @ 180 units	-	-	-	\$5.1 M	\$15.0 M	\$11.8 M	\$13.1 M	-	\$45.0 M	\$13.5 M
Budget of Inglewood/Ramsey station @ 28 units	-	-	-	\$1.0 M	\$4.1 M	\$1.9 M	-	-	\$7.0 M	\$2.1 M
Budget of Ogden station @ 44 units	-	-	-	\$1.0 M	\$3.0 M	\$7.0 M	-	-	\$11.0 M	\$3.3 M
<b>Total Capital Budget</b>	-	-	-	<b>\$7.1 M</b>	<b>\$22.1 M</b>	<b>\$20.7 M</b>	<b>\$13.1 M</b>	-	<b>\$63.0 M</b>	<b>\$18.9 M</b>



## Sunnyside

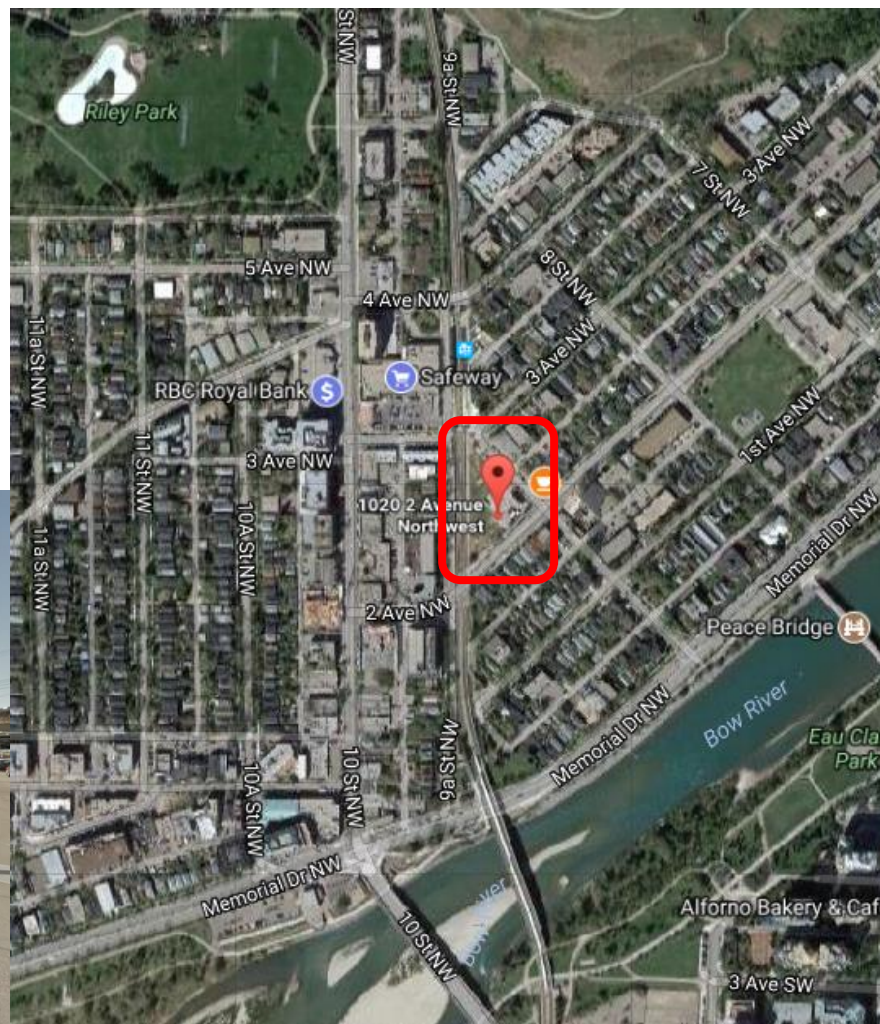
Program: **New Build** Program  
(Acquisition of units)

Surplus: Facility Management

Address: 1020 2 Av NW

Building Type: Multi Story Building

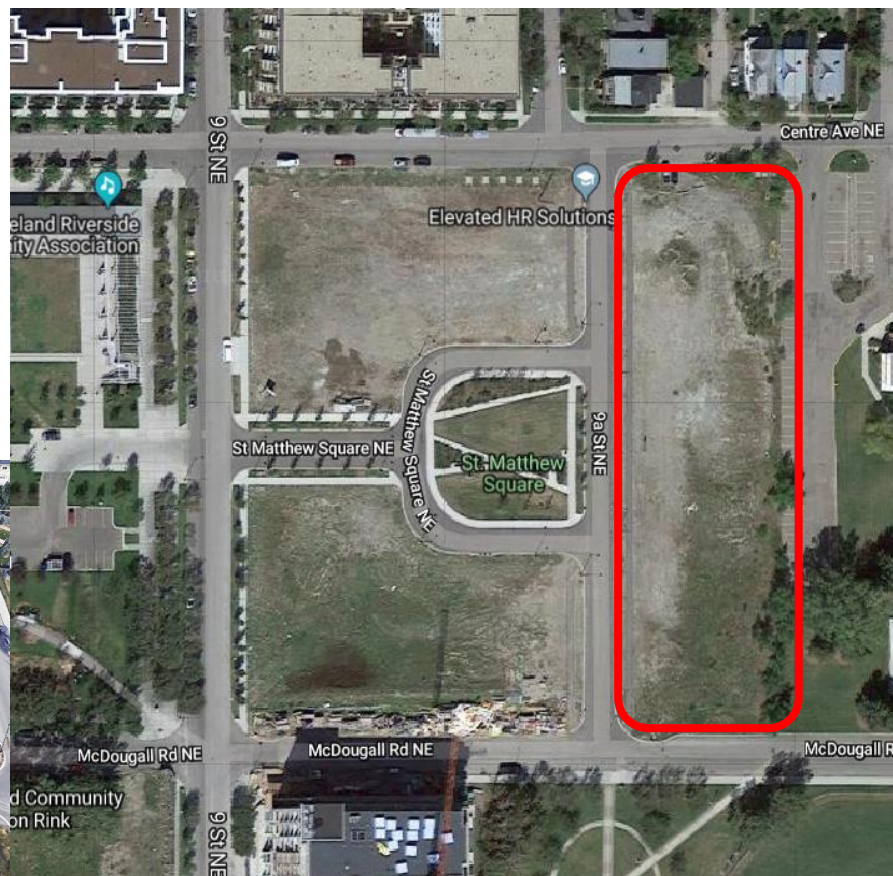
Total Number of units: **30 units**





## The Bridges

Program: **New Build** Program  
(Acquisition of units)  
Surplus: Facility Management  
Address: 70 & 90 9A Street NE  
Building Type: Multi Story Building  
Total Number of units: **26 units**







## Marda Loop - Confidential #1

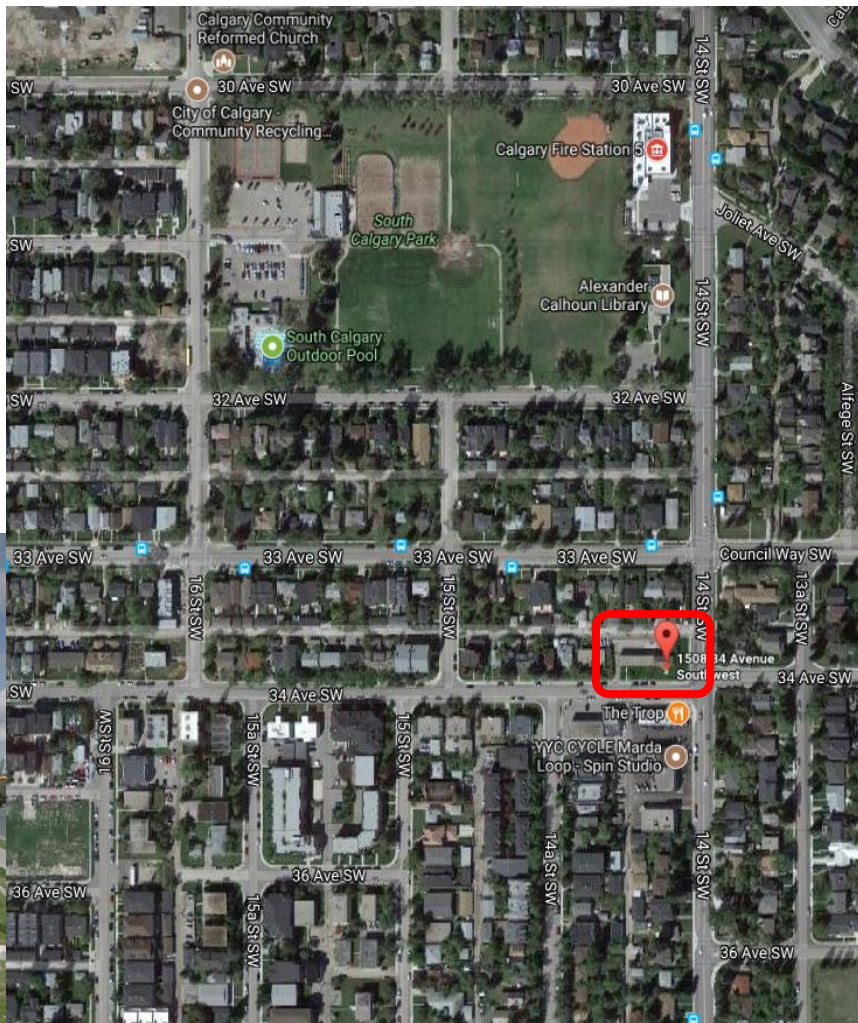
Program: **New Build** Program  
(Heritage)

Surplus: Enmax

Address: 1508 34 AV SW

Building Type: Multi Storey Building

Total Number of units: **19 units**





## Mission - Confidential #2

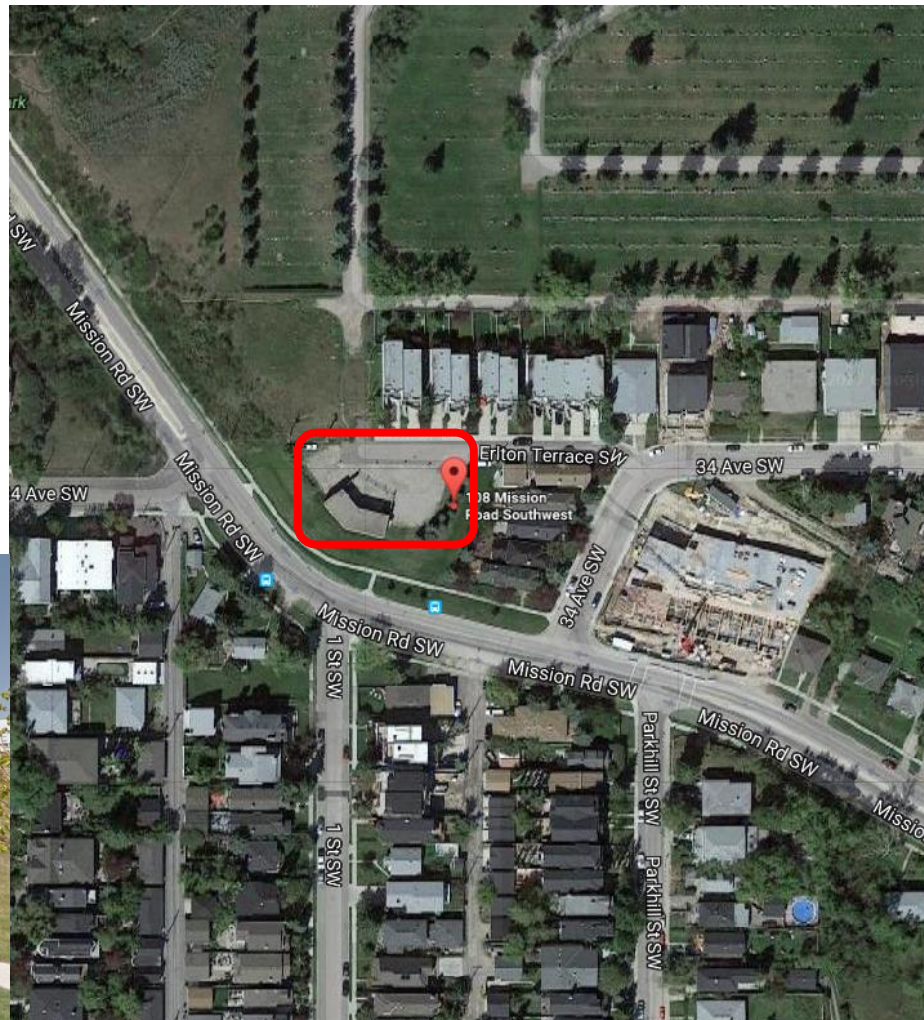
Program: **New Build** Program  
(Design Competition)

Surplus: Enmax

Address: 108 Mission RD SW

Building Type: Multi Storey Building

Total Number of units: **18 units**





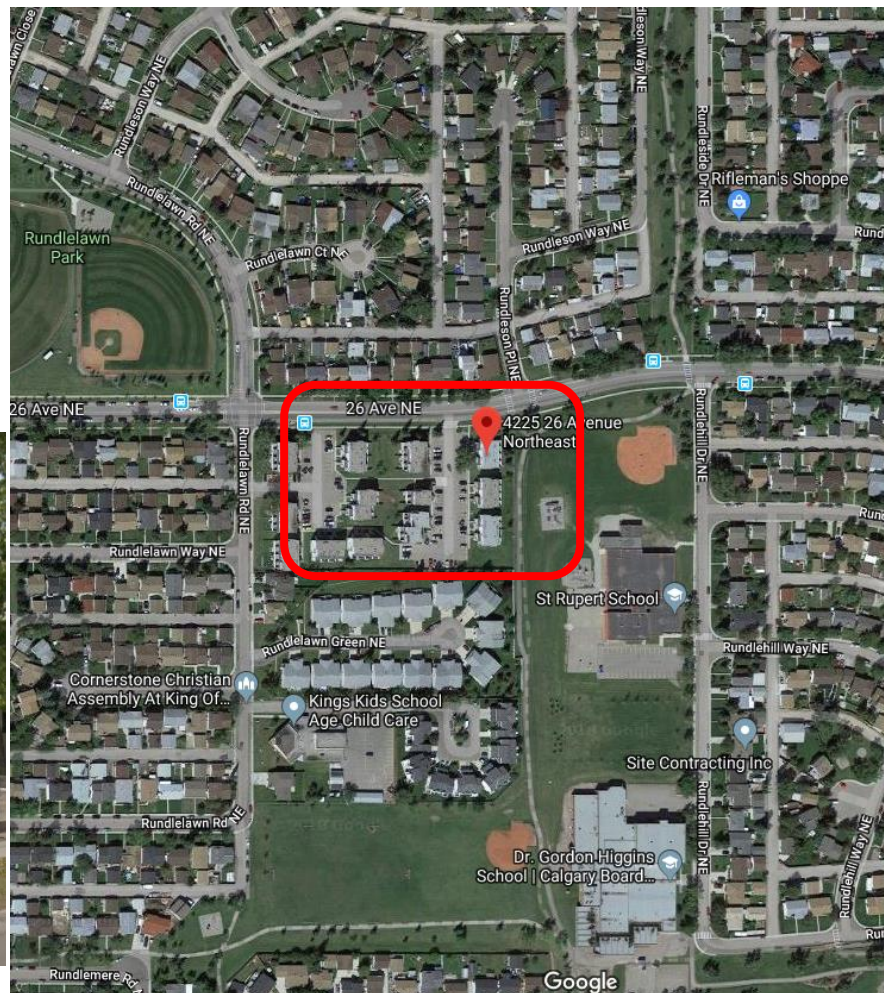
## Rundle - Confidential #3

Program: **Redevelopment** Program

Address: 4225 26 AVE NE

Building Type: Multi Storey Building

Total Number of units: **145 units**



One Calgary Report to  
Regular Meeting of Council  
2018 November 14

## One Calgary 2019-2022 Service Plans and Budgets

### EXECUTIVE SUMMARY

Calgary is a great place to make a living and a great place to make a life. This year, *The Economist* ranked Calgary the best city to live in North America, and the fourth best city in the world. While this is an incredible testament to the attractiveness of our city, Calgary is in a period of economic recovery and there remain challenges and opportunities to improve quality of life in 2019-2022 and beyond. This report seeks Council approval of the 2019-2022 Service Plans and Budgets, which together form the path that The City of Calgary will take over the next four years to further Council's direction and "make life better every day" for Calgarians.

Responding to Council direction in a financially restrained environment required new ways of working together, which has centred around the service-based and collaborative approach of One Calgary. As a result, the proposed plans and budgets deliver on all Citizen Priorities and Council Directives and fall within the indicative rates set by Council and the available capital funding capacity. These results will be delivered through a total capital investment of \$5.2 billion in 2019-2023+ (\$2.1 billion in previously approved capital and \$3.1 billion in proposed new capital) and a proposed annual operating investment of approximately \$4.5 billion (by 2022). To maintain our strong financial position through the economic recovery, the proposed plans and budgets also include \$40 million in anticipated efficiencies, plus a commitment to achieve a further \$60 million for a total of \$100 million in efficiency savings in 2019-2022.

For Council's consideration, this report also presents options for additional capital and operating investment beyond what is currently included in the proposed plans and budgets. These options are in response to Council feedback at the 2018 September 04-25 service plan previews and the 2018 October 11 Special Meeting of Council.

### ADMINISTRATION RECOMMENDATION:

That Council:

1. Approve and adopt the 2019-2022 Service Plans and Budgets including the associated operating and capital budgets, as identified in Attachment 1.
2. Provide direction for the investment options contained in Attachment 2.
3. For the proposed user fees and utility rates in Attachment 3:
  - a. Approve the user fee and rate changes in Attachments 3A – 3Q; and
  - b. Give three readings to each of the bylaws in Attachments 3R – 3AB.
4. Approve carry-forwards from 2018 to 2019 of unspent one-time expenditure budget for Economic Development and Policy Coordination (up to \$1.361 million) in Civic Partners (Program #449) and Council Innovation Fund (up to \$2.002 million) in Corporate Costs (Program #861) to Economic Development & Tourism and Corporate Costs respectively.
5. Approve funding of up to \$44 million for 2019-2022 from the Budget Savings Account for one-time budget if required.

### PREVIOUS COUNCIL DIRECTION / POLICY

Embedded throughout the plans and budgets are strategies in response to previous Council direction, from long-term plans and policies to specific Council direction on individual services or initiatives, and ultimately driven by the Citizen Priorities and Council Directives for 2019-2022.

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

**One Calgary 2019-2022 Service Plans and Budgets**

---

In the development of the proposed plans and budgets, service owners considered how to make progress in 2019-2022 towards meeting The City's long-term goals, as set out in a number of Council-approved plans and policies. The key long-term plans that guided strategies in 2019-2022 have been noted in the "What Council has directed" section of each plan and budget.

Council provided clear direction on priorities for the next four years through the 2019-2022 Citizen Priorities and Council Directives (C2018-0201). These priorities and directives were the driving force behind how Administration prioritized strategies and investments. Administration's proposed response to each of the Council Directives is outlined in the Strategy section of Attachment 1, and is embedded throughout the plans and budgets.

At the individual service level, Council also provided direction on specific initiatives to be addressed in the 2019-2022 cycle. Attachment 7 provides a summary of Council and Committee direction that formally referred items to be considered as part of the One Calgary deliberations, as well as Administration's response to that direction. All items on this list have either been addressed through the proposed plans and budgets, or are on track to be addressed through other mechanisms.

Over the past few years, Council provided direction on the parameters and approach to develop the 2019-2022 Service Plans and Budgets, including but not limited to the Strategic Plan Principles, indicative rates, Capital Infrastructure Investment Principles, and the overall direction to move to a service-based approach. This previous direction has steered and shaped the One Calgary process, and is summarized in Attachment 8 for information.

On 2018 October 11 (C2018-1149), Council directed Administration "to include in the 2018 November 14 One Calgary report to Council advice on potential additional investments and financing required in regard to the issues identified on Page 2 of Attachment 2 to C2018-1149, or, if information is not yet available for any of the issues, a status update and date when the information will be provided." This information is included in this report in Attachment 2.

Finally, Council directed Administration in a motion arising on 2018 September 25 to bring a report on the financial sustainability of Heritage Park to the 2018 November 14 One Calgary Council meeting. This has been addressed through this report in Attachment 5.

**BACKGROUND**

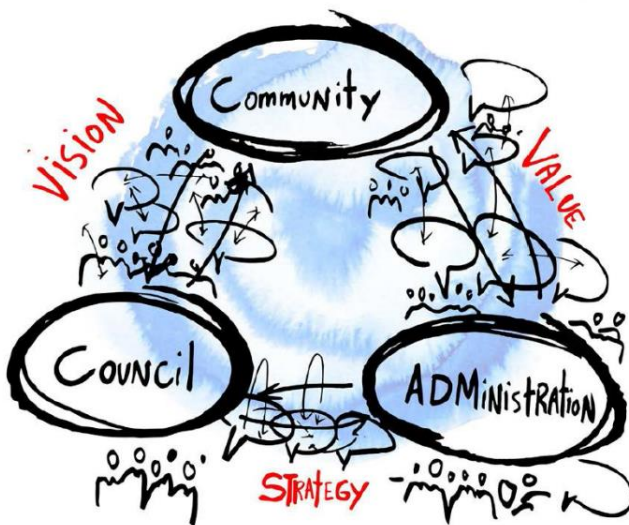
The 2019-2022 Service Plans and Budgets are the fifth multi-year business planning and budgeting cycle for The City of Calgary, as per Council Policy (CFO004). Multi-year planning and budgeting is a leading practice among municipalities – it provides a longer view on service delivery, more certainty about future direction, and is a more efficient and effective process.

Since moving to the multi-year approach in 2006, One Calgary represents the biggest change to our planning and budgeting process. For the first time, The City's plans and budgets are presented by each of The City's 61 services, instead of by department and business unit. This will make it clearer to Council and citizens the services The City provides, how much those services cost, and how tax dollars are being invested to deliver value.

One Calgary Report to  
Regular Meeting of Council  
2018 November 14

## One Calgary 2019-2022 Service Plans and Budgets

“Three Conversations, One Calgary” was the foundation for the development of the proposed 2019-2022 Service Plans and Budgets. The three conversations, as illustrated below, outline the relationship between the Community and Council (**Vision**), Council and Administration (**Strategy**), and Community and Administration (**Value**).



Input from the Community was critically important to determine The City’s focus for 2019-2022. One Calgary involved multiple touchpoints with citizens, as summarized in the “Stakeholder Engagement, Research and Communication” section of this report, and in Attachment 4.

The One Calgary process also included more frequent touchpoints with Council than in previous cycles to shape the 2019-2022 Service Plans and Budgets, including the following:

- **2017 November/December:** Strategic conversations to understand community aspirations (including key themes heard on the campaign trail), and articulate Citizen Priorities for 2019-2022.
- **2018 January/February:** Approval of 2019-2022 Council Directives, which outline specific areas of focus within the Citizen Priorities. Council also approved the “Three Conversations, One Calgary” framework to guide the creation of the plans and budgets.
- **2018 March:** Discussion about Calgary’s current financial situation and outlook, including the constrained capital environment and Preliminary Resilience Framework, and approval of the Capital Infrastructure Investment Principles.
- **2018 April/May/June (financial means):** Setting the financial envelope through indicative tax rates, indicative utility rates, and long-term tax support rates for user fees. Council also approved the Strategic Plan Principles, received results from engagement with citizens and businesses, and discussed the new capital investment process.
- **2018 July:** Deeper conversations about The City’s financial situation and potential strategies for balancing desired results with financial realities (including the constrained capital environment), as well as new community growth decisions and funding.



**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

**One Calgary 2019-2022 Service Plans and Budgets**

- **2018 September:** Service plan previews of all 61 services at seven Council and Committee meetings, which included an opportunity for public input. Administration validated key themes with Council, including options identified through this process for potential additional investment.
- **2018 October:** Final update prior to finalizing the proposed plans and budgets, including a preview of proposed operating and capital budgets by service as well as further refinement of the options for additional investment (see Attachment 2 for an update on these investment options).

These ongoing conversations with the Community and Council enabled Administration to propose plans and budgets that are better aligned with expectations.

**INVESTIGATION: ALTERNATIVES AND ANALYSIS**

**1. Context: Where We Are Today**

Over the past five years, Calgary faced many stresses and shocks that created new social, environmental and economic challenges for our city. The economic recession of 2015 and 2016 saw an increase in unemployment rates and a decline in population growth rates. While this impacted all Calgarians, the recession hit some groups harder than others, making it even more important to support Calgarians experiencing vulnerabilities. The recession was felt acutely in the downtown core – where office vacancy rates increased and the market value of downtown office properties decreased – and the resulting tax shift is putting pressure on property owners across the city. Consistent with other cities faced with recessions, Calgary also saw a corresponding increase in property crime rates and person crime incidents. A number of extreme weather events, including the 2013 flood and the 2014 “Snowtember” event, brought additional financial challenges and highlighted the need to focus on climate resilience.

To support Calgarians through these difficulties, The City of Calgary as an organization faced challenges itself. There is continued pressure to provide the same or better quality of service and be resilient to further stresses and shocks facing our city, while maintaining affordability of services and reducing costs. Further, The City is currently working in a constrained capital environment, in large part due to reduced grant funding at the provincial level.

Throughout this period, Calgarians and The City of Calgary as an organization have shown resilience in the face of these challenges. Calgary is in a period of economic recovery and, in 2018, *The Economist* ranked Calgary the best city to live in North America and the fourth best city in the world. We continue to be a fortunate and growing city, seeing new investment and revitalization in our established communities and continued growth in the new and developing areas of our city. The City remains in a fortunate capital funding situation compared to many other municipalities and is still making significant investment in the community. Further, a majority of Calgarians (77%) say they are satisfied with the overall level and quality of services and programs provided by The City of Calgary (2018 Citizen Satisfaction Survey).

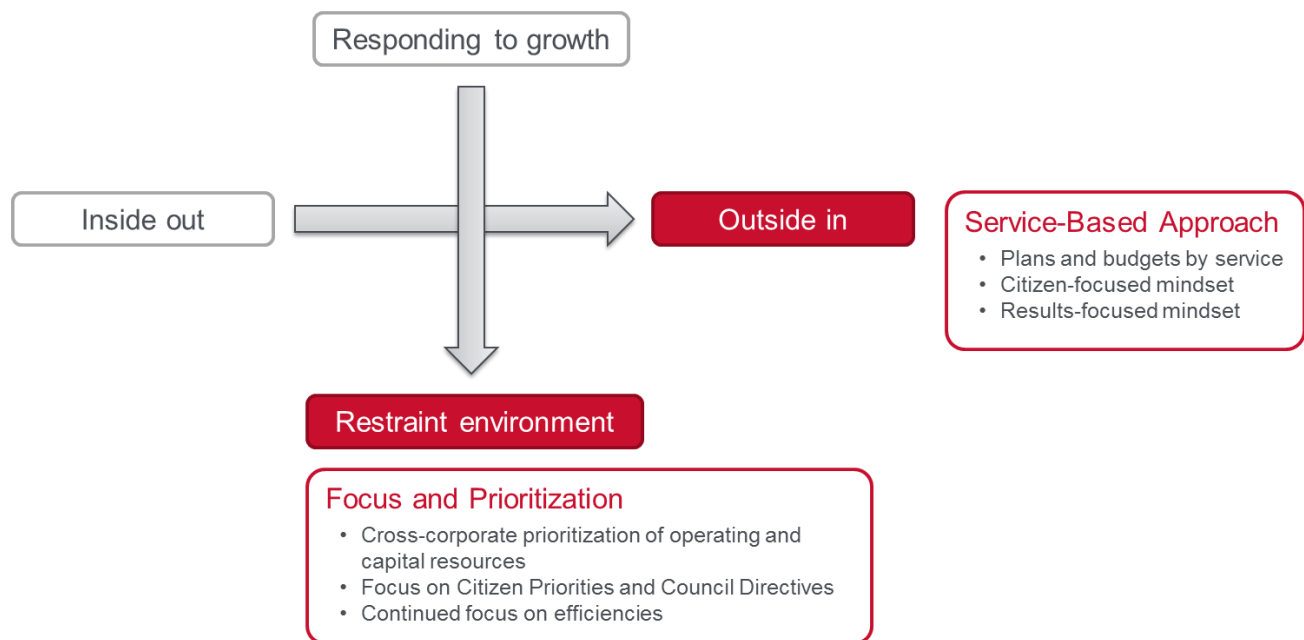


One Calgary Report to  
Regular Meeting of Council  
2018 November 14

## One Calgary 2019-2022 Service Plans and Budgets

### 2. A New Approach: One Calgary

Continuing to respond to these challenges in a financially restrained environment required a new way of working together, which has centred around the service-based approach of One Calgary, and a cross-corporate approach to prioritizing limited resources. One Calgary provided an opportunity to advance our new corporate culture of “One City, One Voice” and our shared values of individual responsibility and collective accountability. One Calgary falls at the intersection of two transformational changes:



#### a. Service-Based Approach

Calgarians have told us they want to know more about The City’s services and how we are investing tax dollars. In the most recent 2018 Citizen Satisfaction Survey results, we saw that 94% of citizens are interested in knowing how property tax dollars are invested (up from 92% in 2017), while only 60% feel The City does a good job of providing this information. Service-based plans and budgets are a key strategy to “turn the curve” on this feedback from citizens. By presenting our plans and budgets by service, we will be able to better communicate to the public where tax dollars are going and the value of that investment. The service plans and budgets were prepared specifically to provide both Council and citizens a better view of how The City’s actions directly and indirectly impact quality of life on a daily basis.

This is about more than just aligning our plans and budgets differently. Focusing on service delivery means placing citizens, customers, communities and businesses at the forefront of our plans and actions. It means focusing on results (i.e. “how well are we doing?” and “is anyone better off?”) rather than processes and outputs. It’s about shifting away from siloed thinking, to a unified culture (One City, One Voice) aligned around service delivery. This mindset influenced the strategies, performance measures and budgets found in the proposed plans and budgets, and we will continue to pursue this broader cultural shift in 2019-2022 and beyond.

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

## **One Calgary 2019-2022 Service Plans and Budgets**

### **b. Focus and Prioritization**

One Calgary involved more cross-corporate coordination than any previous planning and budgeting cycle. To maximize limited resources, Administration implemented new corporate prioritization processes for capital and operating budgets. These processes were led by two new cross-corporate groups (Infrastructure Calgary and the Service Leaders' Forum), who worked in tandem to ensure an integrated approach to our capital and operating budgets.

To prioritize capital resources, Infrastructure Calgary shifted the organization from departmental capital envelopes to a corporate view of The City's infrastructure investment and introduced a capital investment management process to facilitate capital planning and execution. All capital requests for 2019-2022 were aligned to services and evaluated against corporate prioritization criteria. This approach optimizes The City's investment, especially in a constrained capital environment, adds organizational resilience, and increases value to citizens.

To prioritize operating resources and recommend service levels that best reflect Council's direction, the Service Leaders' Forum oversaw an in-depth scenario-planning exercise that shifted the organization from departmental operating budget envelopes to a corporate view of service priorities. All service owners were asked to start by assuming that budgets were held at the 2018 base level and analyse what it would mean for service levels. Higher and lower funding scenarios for each service were also considered. The operating cost of capital was integrated into this process to ensure The City is able to sustain its capital investments.

The scenario approach included identifying service levels that could be reduced or service offerings that could be discontinued in areas that would have minimal impact on citizens or achievement of Council Directives. It also included finding efficiencies, an ongoing area of corporate emphasis. Administration has identified \$40 million in anticipated efficiencies in the proposed operating budget and is committed to finding an additional \$60 million in 2019-2022. Where these "least harm" approaches alone could not yield sufficient savings, services identified reductions that could be made and the performance impacts that would result. "Least harm" and other service reduction strategies are outlined in the "What we propose to do less of" section of each plan and budget.

As well as addressing the challenge of the restrained financial environment, this intentional approach enabled Administration to reallocate some existing investments to other services, and make informed recommendations about where to invest the remaining capacity (between the 2018 starting point and the indicative tax rate approved by Council), maximizing our ability to further Council's direction for 2019-2022.

### **3. Council's Direction for 2019-2022 (Vision and Strategy)**

Achieving service value for Calgarians requires balancing service quality and results with the financial realities and affordability of City services. The proposed plans and budgets reflect Council's direction on what is most important to achieve in 2019-2022 (through Citizen Priorities and Council Directives), and guidance on the financial means to achieve those results (through indicative tax rates, indicative utility rates and long-term tax support rates for user fees).

One Calgary Report to  
Regular Meeting of Council  
2018 November 14

ISC: UNRESTRICTED  
C2018-1158

## **One Calgary 2019-2022 Service Plans and Budgets**

As the representatives of all Calgarians, Council listened to what is most important to citizens and articulated a 2019-2022 vision through five Citizen Priorities:

- **A Prosperous City:** Calgary continues to grow as a magnet for talent, a place where there is opportunity for all, and strives to be the best place in Canada to start and grow a business.
- **A City of Safe & Inspiring Neighbourhoods:** Every Calgarian lives in a safe, mixed and inclusive neighbourhood, and has the right and opportunity to participate in civic life. All neighbourhoods are desirable and have equitable public investments.
- **A City That Moves:** Calgary's transportation network offers a variety of convenient, affordable, accessible and efficient transportation choices. It supports the safe and quick movement of people and goods throughout the city, and provides services enabling Calgarians and businesses to benefit from connectivity within the city, throughout the region, and around the globe.
- **A Healthy & Green City:** Calgary is a leader in caring about the health of the environment and promotes resilient neighbourhoods where residents connect with one another and can live active, healthy lifestyles.
- **A Well-Run City:** Calgary has a modern and efficient municipal government that is focused on resilience and continuous improvement to make life better every day for Calgarians by learning from citizens, partners, and others.

Council further articulated areas of focus within each of these five priorities through the Council Directives. Together, this direction and leadership from Council provides the focus for 2019-2022, which is reflected in the proposed plans and budgets for all 61 City services.

### **4. Proposed 2019-2022 Service Plans and Budgets**

#### **a. Service Plans and Budgets**

The proposed plans and budgets deliver on all Citizen Priorities and Council Directives and fall within the financial means set by Council and the available capital funding. In Attachment 1, a summary of how Administration is proposing to respond to Citizen Priorities is included in the Executive Summary, and plans to respond to Council Directives are summarized in the Strategy section. Ultimately, the information outlined in each of the 61 plans and budgets in Attachment 1 provide the full picture of how Administration is proposing to further Council's direction in 2019-2022.

Overall, these results are proposed to be delivered through a total capital investment of \$5.2 billion in 2019-2023+ (\$2.1 billion in previously approved capital and \$3.1 billion in proposed new capital), and a proposed annual operating investment that reaches approximately \$4.5 billion by 2022. Presented below are the total capital and operating investments aligned by Citizen Priority, as well as the total investment in our Enabling Services and Corporate Programs that are foundational to deliver on all Citizen Priorities.

One Calgary Report to  
Regular Meeting of Council  
2018 November 14

ISC: UNRESTRICTED  
C2018-1158

## One Calgary 2019-2022 Service Plans and Budgets

**Table 1: Total Proposed Operating and Capital Investments by Citizen Priority (\$millions)**

Citizen Priority	Operating					Capital	Operating & Capital
	2019	2020	2021	2022	Total <sup>1</sup>	Total <sup>1</sup>	Total <sup>1</sup>
A Prosperous City	256	254	256	260	1,026	534	1,560
A City of Safe & Inspiring Neighbourhoods	941	956	979	992	3,867	366	4,233
A City That Moves	684	732	745	767	2,928	1,622	4,550
A Healthy & Green City	1,140	1,185	1,230	1,263	4,818	2,022	6,840
A Well-Run City	103	104	106	103	415	31	446
<b>Total Citizen Priorities</b>	<b>3,124</b>	<b>3,231</b>	<b>3,316</b>	<b>3,385</b>	<b>13,054</b>	<b>4,575</b>	<b>17,629</b>
Enabling Services	294	307	317	322	1,240	608	1,848
Corporate Programs	677	715	754	811	2,958	-	2,958
<b>Grand Total<sup>1</sup></b>	<b>4,094</b>	<b>4,252</b>	<b>4,388</b>	<b>4,518</b>	<b>17,252</b>	<b>5,183</b>	<b>22,435</b>

(1) Totals may not add due to rounding. Includes one-time budget requests (see Table 2).

Embedded in Table 1 are investments specifically to enable growth and change. These investments are in new communities, actively developing communities and established areas of the city. In 2019-2022, The City is targeting service investments in fourteen new communities – this includes capital investments of \$325 million and direct incremental operating investments of \$7.4 million for Streets, Water Treatment & Supply, Wastewater Collection & Treatment, Stormwater Management, and Fire & Emergency Response.

There are 27 actively developing communities in Calgary and The City is targeting capital investments of \$121 million and direct incremental operating investments of \$35 million to deliver services that support the continued growth of these communities. The services include Parks & Open Spaces, Public Transit, Sidewalks & Pathways, Streets, Parking, Bylaw Education & Compliance, Fire & Emergency Response, and Police Services.

The targeted investment for established areas is a total capital investment of \$60 million in previously and newly proposed capital to deliver services that support growth and change, including Streets and Sidewalks & Pathways. This targeted investment is in addition to other proposed capital and operating budgets that support established areas. In 2019-2022, Administration will continue to develop an integrated growth and change strategy with focus on

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

## **One Calgary 2019-2022 Service Plans and Budgets**

---

established areas and industrial areas. Any further investment recommendations for established areas and industrial areas will be brought forward for Council's consideration, providing Council the opportunity to direct additional investment, if required, through the mid-cycle adjustments.

The total capital investment in 2019-2022, while still significant, is more constrained than in past cycles, in large part due to more fiscal restraint at the provincial level that is reducing grant funding significantly. This has meant that capital investment has been restricted predominantly to projects which have been defined by Administration to be essential.

As summary highlights, Administration is proposing significant targeted operating investments (at least \$10 million in base operating funding over the four-year period) in each of the following areas, as part of the proposed 2019-2022 Service Plans and Budgets:

- Public Transit (including Specialized Transit)
- Streets
- Police Services
- Facility Management
- Sidewalks & Pathways
- Affordable Housing

These targeted operating investments include investments in the actively developing communities and the new communities.

The realities of a restrained financial environment mean that the targeted investments in the above areas are possible in part due to lower levels of investment in other services. In the proposed plans and budgets, almost half of The City's services received either minimal or no additional base funding, or had base budgets reduced. The approach used by Administration to guide such investment redistributions is described in detail on page 6 above.

Included in the proposed plans and budgets is a total of \$82.5 million in one-time budget requests for operating expenditures over 2019-2022, as shown in Table 2 below.

**Table 2: One-time budget requests (\$millions)**

	2019	2020	2021	2022	Total
<b>One-time requests (included in Table 1)</b>	21.1	28.6	18.1	14.7	82.5

One-time budget requests are driven by several factors such as higher maintenance costs required due to constrained capital funding, customary one-time initiatives, identifying and implementing efficiency strategies to reduce reliance on tax rate increases, and to understand the impacts of the changing economic environment.

Within the one-time budget requests are initiatives that may require ongoing investments in future years but one-time budget is proposed to allow strategies to be developed to determine the appropriate level of investments required. For example, the one-time budget

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

**One Calgary 2019-2022 Service Plans and Budgets**

recommendation includes \$9 million for Snow and Ice Control for the 2019 and 2020 winter season in addition to the already approved \$9 million for the 2018 and 2019 winter seasons. This investment will provide two winter seasons of enhanced service for Sidewalks & Pathways. Following two seasons, an effectiveness review will be conducted to provide Council with recommendations for future service changes which may require permanent operating funding to deliver the required service level.

**b. Funding the Service Plans and Budgets**

**Funding the proposed 2019-2023+ capital budget**

The City of Calgary funds its capital investments through a combination of external (e.g. grants) and internal sources (e.g. Pay-As-You-Go, reserves). To prioritize at the corporate level, funding was applied to projects beginning with the most restrictive. This allowed more flexible funding to be applied to projects that were not eligible for other funding sources. The proposed capital budget includes the previously-approved budget for Green Line. It does not include any capital budget for the material unfunded items that have been identified to Council (PFC2018-1238).

The funding to support the capital investment in the fourteen new communities is a combination of a dedicated property tax increase of 0.75 per cent in 2019, a water utility increase of up to 0.50 per cent per year (2019-2022), up to \$4 million from the Fiscal Stability Reserve (FSR) in 2022 and off-site levies. The capital investments in the actively developing communities are funded from a combination of a dedicated property tax increase of 1.40 per cent in 2019 and 0.40 per cent for each of 2020-2022 as well as off-site levies. The funding to support the established areas capital investments is from the Municipal Sustainability Initiative grants, the Lifecycle Maintenance and Upgrade Reserve and the Reserve for Future Capital.

**Funding the proposed 2019-2022 operating budget**

The City of Calgary has a limited number of revenue sources with which to fund its operations. The single largest non-tax revenue is the sale of goods and services, of which approximately 58% is from Utilities, 15% from Public Transit, and 10% from Waste & Recycling. Other funding sources include franchise fees, investment income, contributions from operating reserves, licenses, permits and fines. Less than half of The City's revenue comes from property taxes, which are determined by Council.

**i. Property taxes**

The proposed property tax rate increases for 2019-2022 fall within the indicative tax rate approved by Council on 2018 April 25, coming in at the top of the approved range for all four years. This includes funding to support the direct incremental operating expenditures in new communities (0.75% property tax increase) and in actively developing communities (0.4% property tax increase).

The property tax rate increases resulting from the proposed service plans and budgets for the next four years are shown in Table 3. The monthly impact to the typical household averages around \$5.00 in each year.

One Calgary Report to  
Regular Meeting of Council  
2018 November 14

## One Calgary 2019-2022 Service Plans and Budgets

**Table 3: Proposed property tax rate increase and estimated monthly impact on a typical household**

	2019	2020	2021	2022
Indicative tax rate increase (approved in April 2018 <sup>1</sup> )	2.95-3.45%	2.5%-3.0%		
<b>Proposed property tax rate increase</b>	<b>3.45%</b>	<b>3.00%</b>	<b>3.00%</b>	<b>3.00%</b>
<i>Tax rate without growth<sup>2</sup></i>	1.30%	2.60%	2.60%	2.60%
<i>Actively Developing Community Growth</i>	1.40%	0.40%	0.40%	0.40%
<i>New Community Growth</i>	0.75%	-	-	-
Estimated monthly impact of proposed property tax rate increase (based on 2018 assessment of \$480,000)	\$5.40	\$4.85	\$5.00	\$5.15

1. The range (0.45% - 0.75%) for New Communities was approved in April 2018, with the final rate approved at 0.75% in July 2018.
2. The Tax rate without growth includes a reduction of 1.3% in 2019 due to the change in Waste & Recycling Services financial policy.

### ii. User Fees and Utility Rates

In addition to funding through property tax, some services make a direct charge for service, which is called a user fee. All proposed user fees are set in accordance with the User Fees and Subsidies Policy (CFO010), which considers the full costs for providing the good or service, market demand and the extent of public benefit derived from the good or service. As outlined in Attachment 3, most user fees will average a zero to four per cent annual increase over the 2019-2022 cycle. This range of increase is to keep pace with inflation and inflationary pressures, and varies by service.

To continue supporting development and business during a period of economic recovery, Development Approvals, Building Safety and Business Licensing have frozen rates for 2019 and 2020. The following services have fee increases that are greater than four per cent: Streets, Taxation, Property Assessment, Fire & Emergency Response, Fire Inspections & Enforcement, and Public Transit. The largest increases are for: False Alarm Fees to increase deterrence, Street Use Fees to better reflect the importance and value of maintaining mobility, and several types of Fire Inspection Fees to recover costs.

Also outlined in Attachment 3, utility rate increases for Water Treatment & Supply, Wastewater Collection & Treatment, and Stormwater Management are recommended in accordance with Council-approved financial policies specific to these services, as well as within or below the indicative rate range approved by Council for each service. Rates for the self-supported programs in Waste & Recycling are recommended in accordance with the Council-approved transition plan for the Waste & Recycling financial model as well as within the indicative rate range approved by Council for each program.

Recommendation 3 seeks Council's approval of the proposed user fees and utility rates.

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

**One Calgary 2019-2022 Service Plans and Budgets**

---

iii. One-Time Budget Requests

As noted above, one-time budget requests total \$82.5 million over the four-year period (Table 2). Administration is recommending that instead of funding one-time budget through the Fiscal Stability Reserve (FSR) which is traditionally where it is funded from, a different funding strategy (articulated below) is undertaken to manage potential one-time budget requests that may require ongoing investments. This will also preserve the FSR as a contingency funding source for operational emergencies, urgent or contingency capital expenditures, and to compensate for unplanned revenue reductions with significant financial impacts as approved by Council.

On October 11, 2018 (C2018-1149), Administration presented to Council an update of where the proposed service plans and budgets were within the indicative tax rate range that Council had previously approved. There was indication that in the later years of the cycle, there was some capacity within the rate range that yield approximately \$28 million in annual base funding by 2022, or \$44 million cumulative over the period.

Administration is proposing to use the capacity within the indicative tax rate to fund a portion of the one-time budget requests to allow the ability in future years to establish permanent funding for initiatives that requires this type of investment.

Approximately \$6 million of one-time budget requests have an identified funding source. The remaining one-time budget requests are recommended to be funded through realizing further efficiency savings in 2019-2022. Through the 2015-2018 plan and budget cycle, the Budget Savings Account (BSA) reserve was established to encourage intentional savings, innovation, and efficiencies. As part of Administration's planned saving strategies, it is recommended that a target of \$40 million in efficiencies is found in addition to the already committed amount of \$60 million to offset the one-time budget requests not funded by the indicative tax rate and potential on-going impacts (i.e. manage any "bow waves"). Based on this strategy, the funding of the one-time budget requests would be:

- Property tax capacity - \$44.0 million
- Other reserves - \$6.2 million
- Efficiencies and savings - \$32.3 million

More tools and techniques are needed to ensure we meet our efficiency targets in 2019-2022, because easily identified efficiencies have already been realized. To ensure success, the Corporate Strategy for Efficiency and Effectiveness will therefore be updated and expanded. The refreshed strategy will include a greater focus on service scope reviews, and on energizing the front line to make service improvement part of our culture at every level.

Due to timing of when efficiency savings can be realized and when the one-time expenditures are required, it is recommended that the BSA is used up to \$44 million to bridge any financing required (Recommendation 5) with a commitment from Administration to continue to contribute intentional savings to the BSA throughout the next four years.



One Calgary Report to  
Regular Meeting of Council  
2018 November 14

ISC: UNRESTRICTED  
C2018-1158

## One Calgary 2019-2022 Service Plans and Budgets

### iv. One-Time Carry Forwards

The Multi-Year Business Planning and Budgeting Policy (CFO004) does not allow carry forwards of one-time funding from one cycle to the next. Administration recommends in Recommendation 4 that Council allow an exception to this policy in order to carry forward the unspent one-time expenditure budget of:

- up to \$1.361 million for Economic Development and Policy Coordination in Civic Partners (Program #449); and
- up to \$2.002 million for Council Innovation Fund in Corporate Costs from 2018 to 2019.

These carry forwards are needed to complete the initiatives approved by Council in these areas.

### c. Complementary information

Finally, this report includes additional information and details to support Council's decision on the proposed 2019-2022 Service Plans and Budgets:

- Attachment 4 provides a summary of the most recent One Calgary citizen engagement and research conducted in October 2018, which is provided as information for Council to consider during their deliberations on the plans and budgets. Overall, the findings from this latest round of engagement and research confirm what we heard from citizens about services and service value over the past year.
- Attachment 5 provides an update on the Heritage Park Society's financial sustainability, in response to the Motion Arising on 2018 September 25 (C2018-1080). As part of the Economic Development & Tourism plan and budget (pages 117-124 of Attachment 1), Administration is recommending a capital investment of \$2.3 million and an operating investment of \$3.6 million by 2022 for the Heritage Park Society. Heritage Park is also included in the Investment Options in Attachment 2, as part of the Civic Partners item.
- Attachment 6 provides a summary of accessibility-related strategies that will be undertaken in 2019-2022, in response to a question raised at the 2018 October 11 Special Meeting of Council. While developing the plans and budgets, facilitated workshops with service owners were held to collaborate and identify ways accessibility efforts could continue to improve and advance. The work proposed in 2019-2022 builds off the significant advancements related to accessibility made in 2015-2018, which are also summarized in the attachment.
- Attachment 7 provides a summary of Council and Committee direction that formally referred items to be considered as part of the One Calgary deliberations, as well as Administration's response to that direction. All items on this list have either been addressed through the proposed plans and budgets, or are on track to be addressed through other mechanisms.
- Attachment 9 provides supplemental and background information on the 2019-2022 operating and capital budgets. Included are the assumptions in preparation of the budget as well as consolidation of service and departmental budget information. Also included is

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

## **One Calgary 2019-2022 Service Plans and Budgets**

information on the financial policies governing the preparation of the budget and the structure of The City's financial operations.

- Attachment 10 includes summary business cases for proposed capital investments to provide additional details or clarification on the proposed investment. Please note these are attached directly in the electronic agenda and are not being reproduced on paper.

Recommendation 1 seeks Council's approval and adoption of the plans and budgets contained in Attachment 1, including the funding sources and strategies outlined above. These plans and budgets have been prepared through the collective effort of hundreds of employees across the organization, and the service owner commitment to the proposed plans and budgets is demonstrated on pages 74-75 of Attachment 1.

### **5. Additional Investment Options**

On 2018 October 11 (C2018-1149), Administration summarized a number of items that Council identified for further discussion and potential additional investment beyond what is currently accommodated in the proposed plans and budgets. Council directed Administration to provide further analysis on these issues during the presentation of the 2019-2022 Service Plans and Budgets. Administration has separated these issues into four categories:

#### **1. Included, with additional funding proposed, in the revised plans and budgets subsequent to 2018 October 11:**

- 1.1. Affordable Housing
- 1.2. Civic Partners (Vivo)
- 1.3. Integrated Civic Facilities Plan
- 1.4. Main Streets
- 1.5. Wheelchair accessible taxis

#### **2. For Council consideration with capital budget implications:**

- 2.1. Affordable Housing
- 2.2. Arts & Culture
- 2.3. Better citizen engagement
- 2.4. Civic Partners
- 2.5. Maintain/Enhance Tree Canopy
- 2.6. Missing links
  - 2.6.1. Sidewalks & Pathways
  - 2.6.2. Streets
- 2.7. Pedestrian Strategy

Council is being asked which, if any, in this category should be funded within the capital budget. Approximately \$43 million in capital funding is available to allocate to potential capital projects in this category.

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

**One Calgary 2019-2022 Service Plans and Budgets**

---

**3. For Council consideration with operating budget implications:**

- 3.1. Arts & Culture - Festival and events subsidy, and Calgary Arts Development Authority
- 3.2. Better citizen engagement
- 3.3. Civic Partners (including Calgary Economic Development)
- 3.4. Crime prevention through social development and environmental design
- 3.5. Sustainable funding for low income transit

Council is being asked which, if any, in this category should be funded within the operating budget. There is no current capacity under the indicative rates approved by Council to allocate additional funding to address operating issues in this category, based on Administration's proposed budget which is based on a tax rate increase at the top of the approved range.

**4. No additional budget recommended at this time:**

- 4.1. Acceleration of improved corporate capacity and capability for an integrated new community, established area and industrial area strategy
- 4.2. Crime prevention through policing
- 4.3. Infrastructure gap
- 4.4. Maintain 4 car trains
- 4.5. Snow and Ice Control

These are critical issues that are addressed to some degree within the proposed strategies in the proposed plans and budgets. Administration has further reviewed the items in this category based on Council's feedback and concluded there is sufficient investment being made in each of these areas for 2019-2022, given the need to balance service needs and financial capacity.

Attachment 2 provides more detailed information on each of these issues, including investment cases for issues in categories 2 and 3. Recommendation 2 seeks direction from Council on these issues.

**6. Next Steps**

Now that the proposed 2019-2022 Service Plans and Budgets have been tabled for Council, the focus shifts to Council's deliberations and approvals. The key next steps to conclude the service plans and budgets process are as follows:

<b>Timeline</b>	<b>Key Activities</b>
<b>Public Release:</b> November 14	<ul style="list-style-type: none"> <li>• This report and attachments (including the proposed 2019-2022 Service Plans and Budgets) are presented at the 2018 November 14 Regular Meeting of Council and made available on Calgary.ca.</li> <li>• Following an overview presentation, Administration is proposing that Council recess to 2018 November 26.</li> <li>• Following the Council Meeting on 2018 November 14, a media availability will be held to answer inquiries regarding the proposed plans and budgets.</li> </ul>

One Calgary Report to  
Regular Meeting of Council  
2018 November 14

ISC: UNRESTRICTED  
C2018-1158

### One Calgary 2019-2022 Service Plans and Budgets

<b>Orientation, Inquiries and Feedback:</b> November 14 to 25	<ul style="list-style-type: none"> <li>• All Council members are invited to attend a drop-in session on November 21 or 22 with members of the One Calgary team to get support in navigating the Service Plans and Budgets and to ask questions of clarification.</li> <li>• FAQs about the proposed plans and budgets will be available for the public on <a href="http://Calgary.ca">Calgary.ca</a>, including an option to add questions to the list of FAQs via 3-1-1 if their questions are not reflected.</li> <li>• Between November 14 and 21, citizens are also invited to submit written feedback on the proposed plans and budgets, which will be compiled and provided to Council before the start of deliberations on November 26. Instructions for how to submit written feedback are available at <a href="http://Calgary.ca/yourservices">Calgary.ca/yourservices</a>.</li> </ul>
<b>Council Discussion and Deliberations:</b> November 26 to 30	<ul style="list-style-type: none"> <li>• Council deliberations on the proposed 2019-2022 Service Plans and Budgets are scheduled from November 26 to 30.</li> <li>• The first day of deliberations (November 26) will start with a public hearing, where members of the public are invited to present their feedback to Council in person.</li> <li>• Following Council discussion and deliberation, Council approves and adopts the 2019-2022 Service Plans and Budgets, with amendments as needed.</li> </ul>
<b>Communication of Approved Plans and Budgets:</b> December 2018 to Q1 2019	<ul style="list-style-type: none"> <li>• Following Council's approval, Administration will update the 2019-2022 Service Plans and Budgets to reflect any amendments made by Council, including a public communication campaign from late 2018 December to 2018 mid-January.</li> <li>• Information on the final plans and budgets will be built out in a user-friendly way on <a href="http://Calgary.ca">Calgary.ca</a> and promoted to citizens, including an updated "tax calculator" by service.</li> </ul>
<b>Approval of the Property Tax Bylaw:</b> April 2019	<ul style="list-style-type: none"> <li>• In order to levy property taxes, Council will need to pass the Property Tax Bylaw. This will be prepared and brought to Council once the provincial property tax requisition is identified through the provincial budget.</li> </ul>

Once the plans and budgets are approved, 2019-2022 is about delivering on Citizen Priorities and Council Directives. The plans and budgets are not static – they are living documents that will adapt with Calgary's changing needs. As part of this process, there are opportunities to bring forward adjustments in response to changing circumstances, stresses and shocks (economic, demographic, and financial), and maintain the integrity of four-year plans and budgets. As in previous cycles, there will also be a more significant mid-cycle review after two years, which will include a check-in with citizens and an update on emerging issues and trends.

In accordance with Council policy (CFO004), mid-year and year-end accountability reports will provide an update on the status of all Citizen Priorities and Council Directives, major service initiatives, key accomplishments, budget performance and upcoming challenges. Amendments

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

**ISC: UNRESTRICTED  
C2018-1158**

## **One Calgary 2019-2022 Service Plans and Budgets**

to the policy itself (which was approved in 2005 and previously amended in 2008 and 2012) and the Budget Reporting Policies (CFO006, which took effect in November 2016), will be brought forward together for Council approval in 2019 Q1. The City also prepares a Corporate Annual Report and Audited Financial Statements, as required by the Municipal Government Act. It includes a high-level review of accomplishments, as well as annual Financial Statements and the external Auditor's Report.

### **Stakeholder Engagement, Research and Communication**

Public input is a critical part in determining The City's focus for each four-year business plan and budget cycle. To maximize resources, One Calgary leveraged existing research and engagement data, and supplemented any gaps with targeted activities. The One Calgary research and engagement strategy included multiple touchpoints with citizens over the course of 2018, which ensured the current priorities of citizens were at the forefront of The City's proposed service plans and budgets for 2019-2022.

A report of research and engagement insights was presented to Council on 2018 October 11 (C2018-1150) to provide a roll-up of all research and engagement conducted in the last year. This roll-up summarized key citizen insights regarding City service delivery, as well as their overall aspirations and concerns. At a high level, the citizen engagement and research results revealed the following key themes:

- Overall, satisfaction with City services is high, despite concerns with the economy.
- Key priority areas for citizens include: public safety, ease of transportation, affordable housing and services, as well as investment in infrastructure and community, parks and urban forestry, recreational activities, streets and sidewalks, city planning, and neighbourhood support and development.
- Businesses want City services and policies to support, not impede their sustainability and growth, and businesses tend to be more critical of City services overall.
- There is growing interest in social services like Affordable Housing and Specialized Transit.
- Citizens and businesses alike want opportunities to provide meaningful input on City initiatives.
- Citizens want open, efficient and effective City services.
- Citizens are split between increasing taxes to maintain or expand services, and cutting services to maintain or reduce taxes.

Additional public engagement was held throughout October to further validate these themes. We asked citizens about the City services where they want us to invest more, less, or the same. This latest round of citizen focus groups and online and in-person engagement confirms what we heard about services and service value through our research and engagement over the past year. What we heard through the October engagement is summarized in Attachment 4 for Council's consideration prior to deliberations.

One Calgary Report to  
Regular Meeting of Council  
2018 November 14

ISC: UNRESTRICTED  
C2018-1158

## **One Calgary 2019-2022 Service Plans and Budgets**

---

### **Strategic Alignment**

The proposed 2019-2022 service plans and budgets include strategies that advance Council policy, Citizen Priorities and Council Directives, and contribute to multiple directives where similar outcomes are sought. Included in Attachment 1 are highlights that demonstrate key strategies to respond to Citizen Priorities and Council Directives in 2019-2022.

The One Calgary program implements The City's "Three Conversations, One Calgary" framework and follows Council's Strategic Plan Principles (PFC2018-0445). The program directly addresses the commitment to service-based plans and budgets and contributes to Council's Five Guidelines to Administration approved by Council on 2018 February 28: integrated service delivery, engaged leadership, trust and confidence, investment and value, and cooperative alliances (C2018-0201).

### **Social, Environmental, Economic (External)**

Social, environmental and economic guidance is provided through City policies, Citizen Priorities and Council Directives, all of which guide Administration in developing and proposing the 2019-2022 service plans and budgets.

### **Financial Capacity**

#### ***Current and Future Operating Budget:***

To deliver the services and results outlined in the 61 service plans and budgets, the proposed total operating budget for 2019-2022 is an annual investment of \$4.5 billion by 2022. This falls within the indicative tax rates set by Council in 2018 April. Attachment 2 provides some options where Council may consider additional operating investments, which would be over and above the currently proposed budget and tax rate.

Section 247 of the Municipal Government Act, as modified by The City of Calgary Charter Regulation, requires Council to "adopt" an annual budget in order to pass a property tax bylaw. The modifications in the Charter now allow The City to adopt all four years of the budget cycle in advance.

The proposed 2019-2022 operating budget is balanced, based on the property tax rate increases included in the Taxation Program. Any changes that Council directs through its review of service plans and budgets will necessitate a change in the tax revenue figures and resulting tax rate increase in order to maintain a balanced position.

#### ***Current and Future Capital Budget:***

While The City remains in a fortunate capital funding situation compared to many other municipalities, and a significant investment will be made in the community, capital funding is more constrained for the upcoming cycle. Given the constraints, the focus of the 2019-2022 capital budget requests is on identifying and optimizing funding for essential capital investments needed to meet legal, regulatory, health and safety requirements, critical infrastructure, critical asset mitigation and minimize service delivery costs.

The capital environment for the 2019-2022 cycle is different than past cycles – funding sources are more constrained yet demand for capital remains high. There is a significant gap between available funding and the capital requested by services. To ensure The City is allocating funding

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

**ISC: UNRESTRICTED  
C2018-1158**

## **One Calgary 2019-2022 Service Plans and Budgets**

to the most essential investments, business cases were evaluated according to corporate investment criteria. Infrastructure Calgary prioritized all capital requests and then used an allocation process to optimize restricted sources and effectively utilize the 2019-2022 funding capacity. The total proposed capital budget for 2019-2023+ is \$5.2 billion. In addition, Attachment 2 provides some options where Council may consider additional capital investments with approximately \$43 million funding available to allocate to the potential capital projects.

### **Risk Assessment**

The City manages risk through the Integrated Risk Management Policy (CC011) and Program. Consideration of risk has been integrated throughout the development of the proposed 2019-2022 Service Plans and Budgets. This includes identifying, reviewing and analyzing the top risks to each service.

The proposed service plans and budgets (Attachment 1) contain information related to risk in the following sections: Calgary's key community indicators, which is an overview of social and demographic trends The City is watching (pages 21 to 27), The City's financial position and the potential risks that may impact it (pages 52 to 60), within the service pages under the heading of "What we are watching" which notes potential risks to each service, and in the One Calgary Journey (pages 631 to 644) which explains more of the risk management process.

The City of Calgary has 16 Principal Corporate Risks as outlined in the recent mid-year risk report to the Audit Committee and Council (AC2018-0911). These are strategic risks that have an impact or implications across the organization.

Throughout the development of the 2019-2022 Service Plans and Budgets, a rigorous risk assessment was applied to identify any Principal Corporate Risks expected to be impacted. It was determined that there are three Principal Corporate Risks with a potential increase in risk profile that we need to monitor:

- Reputation Risk
- Operations, Process Risk
- Legal and Compliance Risk

At the more granular level, the 2019-2022 Service Plans and Budgets are projected to increase exposure to certain new, or existing, risks, and there are also measures intended to reduce The City's risk exposure. The City will monitor and manage these changes to its risk profile and adjust its response strategies as needed.

For example, there is the potential for an increase in pressure on The City's Capacity for Change Risk due to the increase in volume, velocity, and complexity of change. However, once these strategies are in place, many are designed specifically to mitigate or reduce risks to The City over time, which can lead to a net reduction to The City's risk profile.

The overall increase in The City's risk profile is modest. Current risk management strategies and processes in place are therefore expected to be able to cope with this increase. The City deploys a robust, evidence-based risk management system that involves: regular bottom-up, top-down review of The City's risks, assigning risk owners who oversee the management and reporting of key risk, as well as a consistent and clear framework for managing risks. The City's

**One Calgary Report to  
Regular Meeting of Council  
2018 November 14**

**One Calgary 2019-2022 Service Plans and Budgets**

---

regular, biannual risk reviews therefore provide the mechanism to identify and adjust our risk management strategies as necessary. The annual adjustments process provides a mechanism to fine-tune plans and budgets in response to factors such as emerging performance results and unforeseen changes in economic forecasts, or provincial or federal budgets.

**REASON(S) FOR RECOMMENDATION(S):**

This report has five recommendations:

1. This recommendation is to seek Council's approval of the proposed 2019-2022 Service Plans and Budgets. For clarity, Attachment 1 highlights the specific items within each service plan and budget that require Council approval, which includes operating and capital budgets as well as performance measures. This recommendation also seeks formal adoption of the operating and capital budgets, as required through the Municipal Government Act.
2. This recommendation seeks Council's direction on options for additional investment, as identified through the September 04-25 service plan previews and the 2018 October 11 Special Meeting of Council. Council direction on these items would be incorporated into the plans and budgets accordingly.
3. This recommendation seeks approval of user fee and rate changes for 2019-2022. As part of this, the utility rates are approved through approval of the associated utility rate bylaws.
4. This recommendation seeks Council approval to carry forward one-time funding in two specific areas. This approval is required as an exception to the Multi-Year Business Planning and Budgeting Policy (CFO004), which does not allow carry-forwards of one-time funding from one cycle to the next.
5. This recommendation allows Administration to use the Budget Savings Account instead of the interest from the Fiscal Stability Reserve to fund one-time costs if necessary.

**ATTACHMENT(S)**

1. Proposed 2019-2022 Service Plans and Budgets
2. Investment Options
3. User Fee and Rate Changes
4. Results of October Citizen Engagement and Research
5. Heritage Park Financial Update
6. Accessibility Update
7. One Calgary Council and Committee Referred Items
8. Previous Council Direction on One Calgary
9. Supplemental Budget Information
10. Summary Business Cases for Proposed Capital Investments (*provided electronically only*)



## **Benefits of Affordable Housing**

### **Why is The City building affordable housing?**

In Calgary, 84,000 households are earning less than \$60,000 annually and paying more than 30% on shelter. This means nearly 1 in 5 Calgary households are struggling with shelter costs and 42,000 households are at risk of becoming homeless due to spending more than 50% of their gross income on shelter costs.

Currently, only 3.6% of all housing in Calgary is non-market housing; this is nearly half the national average in urban centres.

The City's goal is to increase the supply of affordable housing to ensure people at all income levels can live and work in our city.

### **How does affordable housing benefit the community?**

At its most fundamental level, affordable housing is about people. Access to safe and stable housing helps create inclusive communities and adds to the overall health, prosperity and safety of our city.

People in affordable housing have greater chances to find and keep jobs, to learn and build skills, and be active participants in their communities.

Affordable housing also helps boost the local economy by increasing the purchasing power of residents and by attracting employers with the promise of a stable workforce.

Keeping vulnerable residents off the streets also helps to reduce demand and pressure on emergency services, hospitals and correction facilities. Providing housing for one homeless person has been shown to save taxpayers \$34,000 annually.

### **How is the City addressing the ongoing need for affordable housing in Calgary?**

The City has developed a Corporate Affordable Housing Strategy that defines a new 10-year strategic direction for the City of Calgary and will guide us in creating safe, affordable homes.

There is widespread consensus that the primary challenge facing Calgary's affordable housing sector is a lack of housing supply and this is why increasing the supply of new units is one of The City's top priorities.

In addition to building new City affordable housing units, we are also supporting and increasing the capacity of other housing providers and developers to build new units by making City land available at below market cost, offering grants and incentive programs to get the Calgary community building and streamlining the development permit process.



## Risk Assessment

The following risk areas represent **current** and **important** key risks to the Portfolio success that have been identified in the current financial risk assessment. This reflects a risk assessment at a point in time and will evolve with the types of financing sources and as risk mitigation strategies are employed and certain risks may evolve, emerge or be eliminated.

Each risk area includes related risks that will be assessed for likelihood, impact, and severity. Risks with higher potential likelihood and severity require monitoring in order to drive responses; and development of risk mitigation strategies with the project team.

Risk Area	Risk Area Description	Key Current Risk Response(s)
Capital Budget Overruns	<p>Affordability of the Portfolio could be impacted by scope and schedule changes and cost uncertainty by sequentially executing large contracts before the full Program cost is known.</p> <p>The Portfolio budget is based on a fixed amount of funding to deliver a defined project scope. The City is liable for funding any capital budget overruns or costs associated with material changes to project scope.</p> <p>Material costs (lumber) may have increase due to impacts of the pandemic.</p>	<ul style="list-style-type: none"> <li>Detailed financial assessment of cost estimation forecasts and project schedule.</li> <li>Integration of key financial stakeholders into funding and financing discussions, budget development and financial/ commercial decisions.</li> </ul>
Capital Funding Timing and Shortfalls	<p>The affordability of the Portfolio will depend on the timing and amount of funding and financing, which may be inherently linked to timing of executing agreements, the project expenditure profile and schedule. Delays from current expectations in timing or amount of committed funding received could result in additional City of Calgary debt financing.</p> <p>If funding or financing is not forthcoming when anticipated, The City could experience project schedule delays and impact the revenue service date or scope. Full funding must be aligned before a project can be undertaken.</p>	<ul style="list-style-type: none"> <li>Routine assessments of the impact of changes to the funding profile.</li> <li>Ongoing engagement with the funding partners to ensure the terms do not inhibit The City from delivering the Program and attracting quality proponents</li> <li>Work collaboratively with the funding partners to ensure terms and commitments of the funding agreements are met and final federal Treasury Board approval is received to release funding commitments</li> </ul>
Financing Costs	<p>City debt issuance is over multiple construction periods for a Portfolio of affordable housing projects, which may impact the affordability of the Portfolio given the exposure to interest rate fluctuations.</p>	<ul style="list-style-type: none"> <li>Maintain and update detailed forecasts of The City and third-party debt issuance through the planning and execution process.</li> <li>Monitor market interest rates, market conditions and available financing structures.</li> <li>Maximize the use of available fixed rate financing structures where possible.</li> </ul>

Risk Area	Risk Area Description	Key Current Risk Response(s)
		<ul style="list-style-type: none"> <li>Assess the different funding streams (i.e. the National Housing Strategy, Canada Mortgage and Housing Corporation such as the National Housing Co-Investment Fund for both new construction and repair and renewals, the Affordable Housing Innovation Fund, Rental Construction Financing, and Rapid Housing Initiative, etc). These programs offer grants, low-cost loans, forgivable loans or a combination to advance the National Housing Strategy's federal initiatives</li> </ul>
Calgary Housing Company's capacity to meet obligations	Insufficient revenues from affordable housing to repay the loans or adhere to the terms and conditions (e.g. reserve requirements) associated with financing sources.	<ul style="list-style-type: none"> <li>Execution of a credit agreement.</li> <li>The Credit Agreement to service the debt between The City and Calhome Properties Ltd. if applicable, will provide legal and financial mitigation measures in relation to the liability and administration of the loan.</li> <li>Ongoing assessment of the operational forecasts for these affordable housing to ensure the revenues support the financing.</li> <li>Calgary Housing will need to modify the existing Corporate Housing Reserve or create new housing reserve to ensure funds are clearly accounted for. The reserve would need to be established prior to completion of the projects and start generation of revenue.</li> </ul>
Canada Mortgage and Housing Corporation Funding	The City is unable to meet the terms and conditions of Canada Mortgage and Housing Corporation funding, including but not limited to accessibility, environment, affordability, debt service or reserve requirements during the term of the funding.	<ul style="list-style-type: none"> <li>Ongoing engagement with the Canada Mortgage and Housing Corporation to ensure the terms do not inhibit The City from delivering the Portfolio.</li> <li>Work collaboratively with the Canada Mortgage and Housing Corporation to ensure the mutually agreement upon terms and commitments are achievable prior to executing definitive agreements.</li> <li>Agreements will be executed between Calhome Properties Ltd. to perform The City's operational obligations with respect to the Portfolio pursuant to the terms and operational obligations and conditions of the loans.</li> <li>In the event of prepayment, source financing through the Province.</li> </ul>

Risk Area	Risk Area Description	Key Current Risk Response(s)
Financing Availability	The City's ability to borrow from the Province, Canada Mortgage and Housing Corporation or other federal crown corporations and access their available financing structures could change during the design and construction period of the Portfolio.	<ul style="list-style-type: none"><li>• Ongoing engagement with the funding partners to assess the availability of various funding or financing sources.</li></ul>



Chief Financial Officer's Report to  
Priorities and Finance Committee  
2020 May 18

ISC: UNRESTRICTED  
PFC2021-0442  
Page 1 of 2

## 2021 Assessment and Tax Circumstances Report 1

### RECOMMENDATION(S):

That the Priorities and Finance Committee recommend that Council, under the authority of section 347 of the *Municipal Government Act (MGA)*:

1. Cancel property and Business Improvement Area taxes as listed in Attachment 2; and
2. Cancel municipal property taxes for the qualifying non-profit organizations as listed in Attachment 3.

### HIGHLIGHTS

- Council approval is required to cancel taxes accrued on individual tax accounts.
- What does this mean for Calgarians? It ensures that property taxes are cancelled if they were levied incorrectly and also benefits certain non-profit organizations.
- Why does it matter? This report cancels \$409,464.61 in property taxes overall.
- This overall total includes \$248,430.06 in tax cancellations related to prior years' assessment rolls and \$161,034.55 due to the *Non-Profit Tax Mitigation Policy*.
- This report includes the applicable 2018-2020 taxes accrued on property accounts that meet Administration's criteria for prior year tax cancellation.
- In some cases, tax cancellations address properties that were taxed in error due to issues such as timing of information receipt, incorrect data, and technical/human error.
- This report also includes 2019-2020 municipal property taxes for non-profit organizations that applied and qualified for tax cancellations under the *Non-Profit Tax Mitigation Policy*.
- This report is presented to Council twice annually, most recently on 2020 November 2.
- Strategic Alignment to Council's Citizen Priorities: A well-run city
- Background and Previous Council Direction is included as Attachment 1.

### DISCUSSION

#### Tax Cancellations Related to Prior Years' Assessment Rolls (Attachment 2)

Administration cannot amend the assessment roll or cancel taxes for previous years. This report brings previous year's taxes to Council that Administration recommends for cancellation. The recommended cancellations would cancel or reduce both the municipal and provincial property taxes. Upon cancellation, the provincial portion of the property tax is a cost to The City until it is recovered next year through the provincial property tax rate calculation. If Council chooses not to support the recommendation, the tax liabilities and amounts owed will remain as originally billed.

#### Exempt Organizations and the *Non-Profit Tax Mitigation Policy* (Attachment 3)

Non-profit organizations that provide public facilities are generally exempt from property tax through the *Municipal Government Act (MGA)* and the *Community Organization Property Tax Exemption Regulation (COPTER)*. Property tax exemptions require the property and/or facility be used for an exempt purpose. Exemptions based on use do not apply to properties and/or facilities while under construction. To address this issue Council adopted the *Non-Profit Tax Mitigation Policy (Policy)* to cancel the property taxes of non-profit organizations that paid tax during the construction period of their facility and whose subsequent use of the property met the criteria for property tax exemption. The recommended adjustments due to the *Policy* would cancel or reduce only the municipal property taxes in each organization's account. If Council chooses not to support the recommendation, the tax liabilities and amounts paid will remain as originally billed.

**Chief Financial Officer's Report to  
Priorities and Finance Committee  
2020 May 18**

**ISC: UNRESTRICTED  
PFC2021-0442  
Page 2 of 2**

**2021 Assessment and Tax Circumstances Report 1**

---

**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

**IMPLICATIONS**

**Social**

Non-profit organizations can receive tax cancellations for properties under construction.

**Environmental**

Not Applicable.

**Economic**

The taxpayers and non-profit organizations listed in this report will receive tax cancellations.

**Service and Financial Implications**

**Existing operating funding - one-time**

\$409,464.61

Finance has confirmed, after the first of two reports for 2021, a total of \$248,430.06 out of the \$1,000,000 budget for Attachment 2 and a total of \$161,034.55 out of the \$1,000,000 budget for Attachment 3 is committed. At this time, no adjustments to future budget allocations are required.

**RISK**

Property owners face a financial risk if this report is not brought forward as refunds wouldn't get issued for assessment errors and non-profit organizations wouldn't get tax cancellations they are expecting via the *Policy*.

**ATTACHMENT(S)**

1. Previous Council Direction, Background
2. List of Tax Cancellations Related to Prior Years' Assessment Rolls
3. List of Tax Cancellations Related to the Non-Profit Tax Mitigation Policy

**Department Circulation**

General Manager/Director	Department	Approve/Consult/Inform
Carla Male	Chief Financial Officer's Department	Approve
Eddie Lee	Chief Financial Officer's Department	Approve
Katie Black	Community Services	Inform



## Background

---

### **Tax Cancellations Related to Prior Years' Assessment Rolls**

Section 305 of the MGA allows corrections or amendments to the property assessment roll during the current tax year. A current year amendment to an individual assessment triggers a corresponding adjustment to the current year taxes for that account.

Property owners have a responsibility to inform the municipality of assessment errors or changes to their property in a timely manner in order for Administration to make the relevant changes to the property assessment accounts within the current taxation year. This self-reporting is encouraged every year before the end of the 67-day Customer Review Period that follows each assessment notice mailing although self-reporting is accepted year-round. Administration does not have the ability to alter property assessment rolls of prior years.

Inaccuracies in assessment rolls may result from a number of factors, including but not limited to operational considerations associated with year-end assessment roll production, timing of communication between business units, and incorrect data or mailing address information.

Generally, valid cancellation requests are for tax amounts that were levied as a result of the following circumstances:

- an incorrect issuance of a property assessment
- a property assessment correction error
- a tax exemption processing error
- year-end timing and/or systems issues

Administration uses the following criteria to determine if the circumstances and corresponding property or Business Improvement Area tax amounts should be brought forward to Council in this biannual report:

- typically, the inaccuracy was reported within two years of the occurrence; and
- Assessment was advised of the inaccuracy within the year the inaccuracy occurred, but the correction was either not processed or incorrectly processed; or,
- the taxpayer was not aware and/or was not notified of the change in assessment and was unable to bring the inaccuracy to the assessor's attention within the Customer Review Period; or,
- the property or Business Improvement Area assessment account was set up in error, and the assessment notice was sent to the wrong party; or,
- another City department(s) was notified by the taxpayer of a change to the business and Assessment was not notified during the applicable taxation year.

The recommended adjustments to the property tax accounts due to assessment roll corrections would cancel or reduce both the municipal and provincial property taxes. Upon cancellation, the provincial portion of the property tax is a cost to The City until it is recovered next year through the provincial property tax rate calculation.

Any tax cancellations in this report supported by Council will be funded through the tax cancellation budget. If Council chooses not to support the recommendation, the tax liabilities and amounts owed will remain as originally billed.

Individual requests for prior years' tax cancellation that met these criteria are listed in Attachment 2.

### **Exempt Organizations and the Non-Profit Tax Mitigation Policy**

At the 2014 December 15 Regular Meeting of Council, through C2014-0919, Council adopted the *Non-Profit Tax Mitigation Policy* to cancel the property taxes of non-profit organizations that paid tax during the construction period of their facility and whose subsequent use of the property met the criteria for property tax exemption. The *Policy* is administered using the Assessment and Tax Circumstances Report for administrative efficiency.

Property tax exemptions are governed by the MGA and the *Community Organization Property Tax Exemption Regulation* (COPTER). Provisions in the legislation differ based on the use of the property and the nature of the organization which holds it. One of the differences is the tax treatment of non-profit-held property that is not in use because of construction or renovation. Property held by specific entities such as public institutions (e.g. hospitals, public colleges and universities) is exempt from property tax when it is under construction/renovation. Property that is held by non-profit organizations and societies and is to be used for an approved activity (e.g. places of worship, chambers of commerce, food banks, and under certain conditions, arts and cultural activities) is not property tax exempt until it is actually in use for these purposes. To be considered for municipal property tax cancellation under the *Policy*, organizations must attain property tax exemption for the property under the provincial legislation. Until the property is completed and occupied, and being used for the exempt purpose, applicants pay municipal and provincial property taxes.

The *Policy* ensures that tax cancellations for properties and/or facilities that are under construction are conducted in an equitable and consistent manner through an open and transparent process. The following criteria are used to determine if the circumstances and corresponding municipal property tax amounts should be brought forward to Council:

- From the *Policy*
  - a building permit for the site was issued after the date established in the *Policy*; and
  - the organization has filed the necessary application form to request tax cancellation under the *Policy* to Assessment; and
  - upon completion and occupancy, the organization has filed an application for property tax exemption under the MGA or COPTER to Assessment and the application has been approved.
- Additional Considerations
  - the property and/or facility construction has been completed; and
  - the property and/or facility is occupied by the organization and is being used for an exemptible purpose

The non-profit organization must meet all the above criteria to qualify for a tax cancellation under the *Policy*. Then up to four years of the municipal taxes paid over the construction period are subject to retroactive cancellation. The value of the cancellation amount is based on the municipal tax levied during the eligible period the property was under construction and is retroactive to the organization attaining property tax exemption under provincial legislation. The eligible period begins the year that the required application is submitted to Assessment. If the application is submitted the same year the building permit is issued, the period begins as of the date the permit is issued. If the application is submitted at any point thereafter, the eligible period begins January 01 of the year in which the application is received by Assessment. The period ends either four years from the date that the eligible period begins or when the property becomes exempt from taxation, whichever is earlier. The recommended adjustments due to the *Policy* would cancel or reduce only the municipal property taxes in each organization's account. If Council chooses not to support the recommendation, the tax liabilities and amounts paid will remain as originally billed. The individual tax amounts to be cancelled for each of the qualifying Non-Profit Tax Mitigation applicants are listed in Attachment 2.

## Previous Council Direction

This is a routine report that is presented to Council twice per year.

### Assessment and Tax Circumstances Report Timeline

DATE	DIRECTION	DESCRIPTION
5/31/2021	Forthcoming	2021 Assessment and Tax Circumstances Report #1 Combined Meeting of Council
5/18/2021	Forthcoming	2021 Assessment and Tax Circumstances Report #1 Priorities and Finance Committee
11/2/2020	Motion Carried	2020 Assessment and Tax Circumstances Report #2 Combined Meeting of Council
10/13/2020	Motion Carried	2020 Assessment and Tax Circumstances Report #2 Priorities and Finance Committee
5/25/2020	Motion Carried	2020 Assessment and Tax Circumstances Report #1 Combined Meeting of Council
5/5/2020	Motion Carried	2020 Assessment and Tax Circumstances Report #1 Priorities and Finance Committee
Numerous	NA	Multiple Assessment and Tax Circumstances Reports Throughout the years many Assessment and Tax Circumstances Reports have gone to Council and Committee.
12/15/2014	Motion Carried	Non-Profit Tax Mitigation Policy At the 2014 December 15 Regular Meeting of Council, through C2014-0919, Council adopted the Non-Profit Tax Mitigation Policy to cancel the property taxes of non-profit organizations that paid tax during the construction period of their facility and whose subsequent use of the property met the criteria for property tax exemption.

## Bylaws, Regulations, Council Policies

The following are excerpts of the relevant Bylaws, Regulations, and Council Policies

### Community Organization Property Tax Exemption Regulation (COPTER) Excerpt of Section 15

#### Day cares, museums and other facilities

**15** A non-profit organization that holds property on which any of the following facilities are operated may apply to the municipality within whose area the property is located for an exemption from taxation:

- (a) a facility used for sports or recreation to the extent that the facility is not used in the operation of a professional sports franchise;
- (b) a facility used for fairs or exhibitions, including agricultural exhibitions;
- (c) a facility used for the arts or a museum;
- ...
- (e) a facility used by a linguistic organization if
  - (i) the use of the property by the general public is actively encouraged, and
  - (ii) a sign is prominently posted in the facility indicating the hours that the whole or part of the facility is accessible to the public;
- (f) a facility used by an ethno-cultural association for sports, recreation or education or for charitable or other benevolent purposes if
  - (i) the use of the property by the general public is actively encouraged, and
  - (ii) a sign is prominently posted in the facility indicating the hours that the whole or part of the facility is accessible to the public;
- (g) a facility in a municipality operated and used by an organization for a charitable or benevolent purpose where the majority of the organization's beneficiaries do not reside in the municipality;
- (h) a facility used as a thrift shop;
- (i) a facility used as a sheltered workshop;
- (j) a facility operated and used by a chamber of commerce;
- (k) a facility used for a charitable or benevolent purpose that is for the benefit of the general public if
  - (i) the charitable or benevolent purpose for which the facility is primarily used is a purpose that benefits the general public in the municipality in which the facility is located, and
  - (ii) the resources of the non-profit organization that holds the facility are devoted chiefly to the charitable or benevolent purpose for which the facility is used.

AR 281/98 s15;283/2003;182/2008;77/2010

**Municipal Government Act (MGA) Excerpt of Section 305****Correction of roll**

**305(1)** If it is discovered that there is an error, omission or misdescription in any of the information shown on the assessment roll,

- (a) the assessor may correct the assessment roll for the current year only, and
- (b) on correcting the roll, an amended assessment notice must be prepared and sent to the assessed person.

**(1.1)** Where an assessor corrects the assessment roll in respect of an assessment about which a complaint has been made, the assessor must send to the assessment review board or the Municipal Government Board, as the case may be, no later than the time required by the regulations,

- (a) a copy of the amended assessment notice, and
- (b) a statement containing the following information:
  - (i) the reason for which the assessment roll was corrected;
  - (ii) what correction was made;
  - (iii) how the correction affected the amount of the assessment.

**(1.2)** Where the assessor sends a copy of an amended assessment notice under subsection (1.1) before the date of the hearing in respect of the complaint,

- (a) the complaint is cancelled,
- (b) the complainant's complaint fees must be returned, and
- (c) the complainant has a new right of complaint in respect of the amended assessment notice.

**(2)** If it is discovered that no assessment has been prepared for a property and the property is not listed in section 298, an assessment for the current year only must be prepared and an assessment notice must be prepared and sent to the assessed person.

**(3)** If exempt property becomes taxable or taxable property becomes exempt under section 364.1, 364.2 or 368, the assessment roll must be corrected for the current year only and an amended assessment notice must be prepared and sent to the assessed person.

**(3.1)** If the collection of tax on property is deferred under section 364.1 or 364.2 or a deferral under one of those sections is cancelled, the assessment roll must be corrected and an amended assessment notice must be prepared and sent to the assessed person.

**(4)** The date of every entry made on the assessment roll under this section or section 477 or 517 must be shown on the roll.

**(5), (6)** Repealed 2016 c24 s37.

RSA 2000 cM- 26 s305;2002 c19 s8;2009 c29 s7;  
2015 c8 s43;2016 c24 s37;2017 c13 s1(24);2019 c6 s

**Report to Minister**

**305.1** If an assessment roll is corrected under section 305 or changed under section 477 or 517, the municipality must, in the form and within the time prescribed by the regulations, report the correction or change, as the case may be, to the Minister.

2002 c19 s9

**Municipal Government Act (MGA) Excerpt of Section 347****Cancellation, reduction, refund or deferral of taxes**

**347(1)** If a council considers it equitable to do so, it may, generally or with respect to a particular taxable property or business or a class of taxable property or business, do one or more of the following, with or without conditions:

- (a) cancel or reduce tax arrears;
- (b) cancel or refund all or part of a tax;
- (c) defer the collection of a tax.

**(2)** A council may phase in a tax increase or decrease resulting from the preparation of any new assessment.

1994 cM 26.1 s347

***Municipal Government Act (MGA) Excerpt of Section 362*****Exemptions for Government, churches and other bodies****362(1)** The following are exempt from taxation under this Division:

...

(k) property held by a religious body and used chiefly for divine service, public worship or religious education and any parcel of land that is held by the religious body and used only as a parking area in connection with those purposes;

(l) property consisting of any of the following:

(i) a parcel of land, to a maximum of 10 hectares, that is used as a cemetery as defined in the Cemeteries Act;

(ii) any additional land that has been conveyed by the owner of the cemetery to individuals to be used as burial sites;

(iii) any improvement on land described in subclause (i) or (ii) that is used for burial purposes;

(m) property held by

(i) a foundation constituted under the Senior Citizens Housing Act, RSA 1980 cS- 13, before July 1, 1994, or

(ii) a management body established under the Alberta Housing Act, and used to provide senior citizens with lodge accommodation as defined in the Alberta Housing Act;

(n) property that is

...

(ii) held by a non-profit organization and used solely for community games, sports, athletics or recreation for the benefit of the general public,

(iii) used for a charitable or benevolent purpose that is for the benefit of the general public, and owned by

(A) the Crown in right of Alberta or Canada, a municipality or any other body that is exempt from taxation under this Division and held by a non-profit organization, or

(B) by a non-profit organization,

(iv) held by a non-profit organization and used to provide senior citizens with lodge accommodation as defined in the Alberta Housing Act, or

(v) held by and used in connection with a society as defined in the Agricultural Societies Act or with a community association as defined in the regulations, and that meets the qualifications and conditions in the regulations and any other property that is described and that meets the qualifications and conditions in the regulations;

(o) property

(i) owned by a municipality and used solely for the operation of an airport by the municipality, or

(ii) held under a lease, licence or permit from a municipality and used solely for the operation of an airport by the lessee, licensee or permittee;

...

RSA 2000 cM- 26 s362;2003 cP- 19.5 s142;2012 cE- 0.3 s279;  
2017 c13 s1(35);2018 c19 s71

***Non-Profit Tax Mitigation Policy*****Policy Title:** Non-Profit Tax Mitigation**Policy Number:** PDA002**Report Number:** C2014-0919**Approved by:** Council**Effective Date:** 2014 December 15**Business Unit:** Assessment**COUNCIL POLICY****BACKGROUND**

1. Non-profit organizations that provide public facilities are generally exempt from property tax through the Municipal Government Act (RSA 2000, c M-26) (MGA) and the Community Organization Property Tax Exemption Regulation (AR281/98) (COPTER). These property tax exemptions require that property and/or facility is actually used for an exempt purpose. Taking direction from a 2008 Court of Queen's Bench decision (Edmonton (City) v. North Pointe Community Church, 2008 ABQB 110), exemptions based on use do not generally apply to properties and/or facilities that are under construction and not actually in use for an exempt purpose.
2. Prior to this policy, Council provided tax relief for the affected non-profit organizations through its tax cancellation powers under section 347 of the MGA on a case by case basis.

**PURPOSE**

3. This policy will ensure that tax cancellations for properties and/or facilities that are under construction in Calgary are conducted in an equitable and consistent manner through an open and transparent process.
4. This policy will:
  - a. guide how Council addresses the issue of property taxes for a non-profit organization that holds a property and/or facility under construction in Calgary and is not exempt from taxation by using its tax cancellation powers in section 347 of the MGA;
  - b. set out the eligibility criteria that qualifies a non-profit organization for a tax cancellation under the policy; and,
  - c. set out the procedure through which tax cancellations are administered.
5. The policy does not limit Council's discretion in exercising its section 347 powers under the MGA.

**APPLICABILITY**

6. This policy applies to properties and/or facilities that qualify under the following sections in the MGA and COPTER, where "use" has been interpreted by the Court of Queen's Bench not to include the construction period of the property and/or facility:
  - a. Sections 362(1)(k-m), 362(1)(n)(ii)-(iv), and 362(o) of the MGA, and
  - b. Sections 15(a)-(c) and 15(e)-(k) of the COPTER

**DEFINITIONS**

7. In this Council Policy:
  - a. "Building Permit" means a permit issued under the Calgary Building Permit Bylaw 64M94 and defined in the Alberta Building Code 2014.

**POLICY**

8. For up to four years, Council will consider cancelling the municipal taxes for non-profit organizations that hold a property and/or facility that is under construction in Calgary when all of the following criteria have been met:
  - a. A building permit for the site has been issued;
  - b. The non-profit organization has filed the necessary application forms to qualify for the tax cancellation under this policy to Assessment; and,
  - c. Upon completion and occupancy of the facility, the organization has filed an application for property tax exemption under the MGA or COPTER to Assessment and the application has been approved.
9. Transition Program
  - a. Notwithstanding section 11(a)(iii), to aid with transition, this policy will apply to projects that would have qualified had the program been in place on 2013 January 01, so long as an application for cancellation under this section is filed by 2015 December 31.

**PROCEDURE**

10. Applications for tax cancellation and property and business tax exemption are available directly from Assessment and from calgary.ca and must be submitted to Assessment for consideration.
11. Timing
  - a. Cancellation Period
    - i. The cancellation period begins when a building permit has been issued so long as an application for cancellation has been filed within the same calendar year.
    - ii. The cancellation period ends either 4 years from the date of that the cancellation period begins or when the subject property becomes exempt from taxation, whichever is earlier.
    - iii. If an application is filed in a calendar year following the issuance of a building permit, then the cancellation period will begin on January 1 of the year in which an application is submitted.
  - b. Cancellation Timing
    - i. Applications will be reviewed by Assessment and those properties and/or facilities that qualify for tax cancellation under this policy will be placed on the semi-annual Assessment and Tax Circumstances Report as soon as possible after qualification.

**AMENDMENTS**

2016 October 13 - Minor revision relates to the update of Alberta Building Code 2006 to Alberta Building Code 2014, which defines "Building Permit" for the purposes of this Council policy



## List of Tax Cancellations Related to Prior Years' Assessment Rolls

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
<b><u>PROPERTY TAX CANCELLATIONS</u></b>				
<b>2018</b>				
<b>1</b>	073986127	#126 6220 17 AV SE	\$55.39	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
<b>2</b>	073987307	#242 6220 17 AV SE	\$57.61	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
<b>2019</b>				
<b>3</b>	034102905	3419 EDMONTON TR NE	\$14,654.84	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.
<b>4</b>	073986127	#126 6220 17 AV SE	\$136.41	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
<b>5</b>	073986168	#128 6220 17 AV SE	\$117.44	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
6	073987307	#242 6220 17 AV SE	\$110.59	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
7	090089335	447 42 AV SE	\$3,105.06	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.
8	091013938	1155 42 AV SE	\$528.52	Category I: The property owner was not aware and/or was not notified of the change in assessment and so was unable to bring the error to the assessor's attention within the Customer Review Period.
<b>2020</b>				
9	059076802	219 19 ST NW	\$22,706.54	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.
10	067044107	180/200 839 5 AV SW	\$13,561.78	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
11	073986127	#126 6220 17 AV SE	\$139.69	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
12	073986168	#128 6220 17 AV SE	\$125.62	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
13	073986747	#214 6220 17 AV SE	\$76.23	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
14	073988289	#291 6220 17 AV SE	\$102.76	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
15	120980305	16 2787 86 AV SE	\$112.49	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.
16	121002307	2437 83 AV SE	\$220.43	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
17	121002364	156 RIVERCREST CRESCENT SE	\$101.28	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
18	133001909	2500 107 AV SE	\$486.77	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
19	180077604	218, 8120 BEDDINGTON BV NE	\$1,177.16	Category I: The property owner was not aware and/or was not notified of the change in assessment and so was unable to bring the error to the assessor's attention within the Customer Review Period.
20	200558971	201, 2577 BRIDLECREST WY SW	\$4,195.37	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
21	200682904	475 210 AV SW	\$338.89	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
22	202138426	2130 21 AV SW	\$110.55	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.
23	202336061	210, 240 MIDPARK WY SE	\$4,119.12	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
24	202336061	211, 240 MIDPARK WY SE	\$11,867.56	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
25	202584124	120 SKYVIEW RANCH DR NE	\$147,737.97	Category I: The property owner was not aware and/or was not notified of the change in assessment and so was unable to bring the error to the assessor's attention within the Customer Review Period.
26	202601027	278 CRESTMONT DR SW	\$498.35	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.
27	202652863	45 CITYSIDE WAY NE	\$2,576.39	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.
28	202669925	7300 178 AV SE	\$233.19	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
29	202697884	16808 72 ST SE	\$1,242.41	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
30	202719563	18007 88 ST SE	\$2,633.91	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
31	202759643	20606 56 ST SE	\$6,128.62	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
32	202759650	20607 56 ST SE	\$6,919.90	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
33	543981369	93 BURROUGHS PL NE	\$14.56	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
<b><u>BUSINESS IMPROVEMENT AREA TAX CANCELLATIONS</u></b>				
<b>2020</b>				
34	640078	# 410, 110 12 AV SW	\$21.60	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.
35	640078	# 410, 110 12 AV SW	\$ 525.70	Category II: The Assessment Business Unit was advised within the Customer Review Period in the year the assessment error occurred but failed to process the correction.

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
36	13323571	124 1011 9 AV SE	\$545.44	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
37	14019897	#203, 227 10 ST NW	\$180.36	Category I: The property owner was not aware and/or was not notified of the change in assessment and so was unable to bring the error to the assessor's attention within the Customer Review Period.
38	15149024	2024 4 ST SW	\$963.56	Category IV: Another City department(s) was notified by the taxpayer of a change to the business and the Assessment business unit was not notified accordingly during the applicable taxation year to correct the assessment.
			<b>\$248,430.06</b>	<b>Total Tax Cancellation</b>





## List of Tax Cancellations Related to Non-Profit Tax Mitigation Policy

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
<b><u>PROPERTY TAX CANCELLATIONS</u></b>				
<b>2019</b>				
<b>1</b>	067068106	1009 7 AV SW	\$5,317.89	<p>The municipal property tax cancellation is for the Islamic Information Society of Calgary. It meets the criteria for property tax exemption under Municipal Government Act section 362(1)(k) Religious Activities.</p> <p>The cancellation is from September 18, 2019 to December 31, 2019 and is for the same account as line item 3 below.</p>
<b>2020</b>				
<b>2</b>	040023004	101/102, 7930 Bowness RD NW	\$423.85	<p>The municipal property tax cancellation is for the Children's Cottage Society. It meets the criteria for property tax exemption under Community Organization Property Tax Exemption Regulation R.281/98(S.15(k)) Charitable/Benevolent inside.</p> <p>The cancellation is from August 12, 2020 to October 26, 2020.</p>
<b>3</b>	067068106	1009 7 AV SW	\$11,788.34	<p>The municipal property tax cancellation is for the Islamic Information Society of Calgary. It meets the criteria for property tax exemption under Municipal Government Act section 362(1)(k) Religious Activities.</p> <p>The cancellation is from January 1, 2020 to October 14, 2020 and</p>

				is for the same account as line item 1 above.
Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
4	072051204	1721 42 ST SE	\$5,446.15	<p>The municipal property tax cancellation is for the Thien Hau Temple and Cultural Association Calgary. It meets the criteria for property tax exemption under Municipal Government Act section 362(1)(k) Religious Activities.</p> <p>The cancellation is from January 1, 2020 to September 28, 2020.</p>
5	200206910	105, 334 11 AV SE	\$7,235.38	<p>The municipal property tax cancellation is for the Trinity Place Foundation. It meets the criteria for property tax exemption under Community Organization Property Tax Exemption Regulation R.281/98 (S.15(k)) Charitable / Benevolent inside.</p> <p>The cancellation is from January 10, 2020 to May 31, 2020.</p>
6	201362324	170, 15 Royal Vista WY NW	\$1,110.54	<p>The municipal property tax cancellation is for the Glacier Ridge Church. It meets the criteria for property tax exemption under Municipal Government Act section 362(1)(k) Religious Activities.</p> <p>The cancellation is from January 1, 2020 to February 29, 2020.</p>
7	202513131	253 Smith ST NW	\$33,871.51	<p>The municipal property tax cancellation is for the Brenda Strafford Foundation Ltd. It meets the criteria for property tax exemption under Municipal Government Act section 362(1)(h) Nursing Homes Act.</p> <p>The cancellation is from January 1, 2020 to July 12, 2020.</p>

Issue #	Roll Number	Account Address	Tax Cancellation (\$)	Reason
8	202565826	933 5 AV SW	\$91,226.15	<p>The municipal property tax cancellation is for the Homespace Society. It meets the criteria for property tax exemption under Municipal Government Act section 362(1)(n)(iii)(B) Charitable-Non-Profit Owned.</p> <p>The cancellation is from January 1, 2020 to December 31, 2020.</p>
9	202566048	344 14 ST NW	\$3,052.91	<p>The municipal property tax cancellation is for the Homespace Society. It meets the criteria for property tax exemption under Municipal Government Act section 362(1)(n)(iii)(B) Charitable-Non-Profit Owned.</p> <p>The cancellation is from January 1, 2020 to October 31, 2020.</p>
10	202686580	3725 10 AV SE	\$1,561.83	<p>The municipal property tax cancellation is for the Homespace Society. It meets the criteria for property tax exemption under Municipal Government Act section 362(1)(n)(iii)(B) Charitable-Non-Profit Owned.</p> <p>The cancellation is from January 1, 2020 to October 25, 2020.</p>
			<b>\$161,034.55</b>	<b>Total Tax Cancellation</b>



## **Online Advertising – Public Works Notices, Property Tax Sale and Annual Report**

### **RECOMMENDATIONS:**

That the Priorities and Finance Committee recommend that Council:

1. Forward this report (PFC2021-0503) to the 2021 June 21 Combined Council Meeting to the Public Hearing portion of the Agenda;
2. Give three reading to the proposed Charter bylaw (Attachment 1) to authorize online posting of public works notices and property tax sale advertisements; and
3. Direct Administration to discontinue newspaper advertising for the annual report.

### **HIGHLIGHTS**

- Administration is seeking Council approval to transition from municipal newspaper advertising to advertising on calgary.ca for public works, property tax sale and annual report that will reduce costs and improve effectiveness of public notification practices.
- What does this mean to Calgarians? Calgarians will see such advertisements on calgary.ca.
- Why does this matter? With the internet's exponential growth in the last decades and with The City of Calgary website, calgary.ca, being established as the primary source for City information, the municipal website has become the most effective medium for delivering public notices at a reduced cost.
- Out of the three proposed changes in this report, changes to advertising of public works and property tax sale require a bylaw approval under the Calgary Charter.
- There is no previous Council direction regarding this report.
- Strategic Alignment to Council's Citizen Priorities: A well-run city

### **DISCUSSION**

#### **Public Works Affecting Land**

Construction of public works/structures is an ongoing part of normal operations of every municipality. The *Municipal Government Act* ("MGA") requires municipalities to advertise completion of every public project and allows abutting property owners to seek compensation, in case of permanent reduction in value of their land ("injurious affection"), as a result of the existence of such new works/structures.

Section 534 of the MGA requires that notices of completion of construction or erection of a public work or structure must be delivered by mail, within one year, to every owner of abutting land together with a public notice in a municipal newspaper. Both methods provide information on completed public works, date of completion and outline owners' rights to claim compensation in case of injurious affection to the owner's land.

Administration currently identifies completed public projects semi-annually and provides the following public notices: notification to abutting property owners via direct mail, public notice in the Calgary Herald, along with a public notice on calgary.ca (not required by the MGA).

As impacted property owners typically represent less than one per cent of the Calgary population at each round of notifications, direct mail is the most effective communication strategy in this case. Advertising of public works in a municipal newspaper provides additional transparency about the existence of this process and establishes when claims must be

## **Online Advertising - Public Works Notices, Property Tax Sale and Annual Report**

---

submitted in accordance with the MGA. However, newspaper advertising is a less effective medium in comparison to The City of Calgary's webpage, for the following reasons: "flash-like" advertising in municipal newspaper lacks permanency, it appears in one print of the Calgary Herald semi-annually which creates limited exposure. Storing the same information on The City of Calgary webpage allows it to be internet-searchable and remain live for a longer period of time as costs are not at play to limit required exposure. General information about property owners' rights to compensation remains static on The City of Calgary webpage as supplementary information to a specific public notice about completed public projects which changes with each round of notifications.

Administration recommends that the MGA-required advertising in a municipal newspaper be discontinued for public works and replaced with a digital public notice on The City of Calgary webpage. The date of publication on The City's webpage would replace the date of publication in the newspaper for the purposes of establishing when claims must be submitted.

### **Property Tax Sale**

Each year, properties with more than three years outstanding tax arrears are offered for sale by The City of Calgary, in accordance with the MGA. Sales are held as a public auction, with funds received used to recover outstanding taxes owed by the owners to the municipality. This process is commonly referred to as a "property tax sale".

Section 421(1) of the MGA contains advertising requirements for public auctions for the sale of parcels of land and section 436.12(1) outlines advertising requirements for public auctions for the sale of designated manufactured homes. Both require advertising in a municipal newspaper and, for the sale of parcels of land, additional advertising in the Alberta Gazette is required.

Administration currently publishes public notices for both types of sale in the Calgary Herald and the Alberta Gazette, along with a public notice on calgary.ca (not required by the MGA).

The City of Calgary makes every effort to arrange collection of outstanding taxes and remove the properties from the tax sale list during a long engagement process with the property owners and mortgage companies. Typically, only a dozen properties remain on the sale list when it reaches the stage of a public auction (compared to hundreds of properties owing taxes at the beginning of such engagement).

Advertising of the property tax sale is intended to draw buyers to the public auction. It also marks a formal point in the tax recovery process, which is regulated under the MGA.

Currently required newspaper advertising is a high cost initiative with a low return. Additional challenges associated with newspaper advertising are related to declining subscription and readership with the newspaper publications and subscription cost being a barrier to see the advertisement. Newspaper deadlines for making changes to the advertised property tax sale list are also less flexible when compared to advertising on calgary.ca. That results in situations where properties who have paid their tax and should have been removed still get advertised in the newspaper.

Administration recommends discontinuing municipal newspaper advertising for both sale of parcels of land and designated manufactured homes and replace it with advertising on calgary.ca. Together with existing advertising in the Alberta Gazette it provides sufficient formal notice of this process.

## **Online Advertising - Public Works Notices, Property Tax Sale and Annual Report**

---

### **Annual Report**

The annual report is part of The City's commitment to providing effective governance, increased accountability, transparency, and a well-run city. It provides a comprehensive view of the year's consolidated financial statements highlighting The City's commitment to prudent cost management, savings and positive operating cash flows.

Section 276(3) of the MGA requires The City to disclose its financial statements publicly. It states that a municipality "must make its financial statements, or a summary of them, and the auditor's report of the financial statements available to the public in the manner the council considers appropriate by May 1 of the year following the year for which the financial statements have been prepared".

The current release process for the annual report includes the following awareness tactics on April 30 of each year:

- Posting of the annual report to [calgary.ca/annualreport](https://calgary.ca/annualreport)
- Social media post directing viewers to the web posting
- News release sent out to media outlets
- News release posted to [newsroom.calgary.ca](https://newsroom.calgary.ca)
- Briefing note sent to Council, Councillor Assistants, City communicators and the Executive Leadership Team – which outlines the details of the report, key messages, FAQs and report link, and can be shared with constituents.
- Supply print copies of the annual report to all Calgary Public Library locations
- Full page Calgary Herald advertisement

The current newspaper advertisement is a high cost initiative with a low return. The 2019 Calgary Herald Annual Report advertisement cost was approximately \$8,000, excluding design costs.

The newspaper advertisement is only in the printed Calgary Herald. Therefore, it is only viewable to physical copy subscribers and purchasers of the specific paper, on the specific date of the advertisement placement. The free online version of the Calgary Herald does not include the advertisement. This creates a cost barrier for those looking for the information.

Administration proposes to cease the newspaper advertisement as the other aforementioned tactics create adequate public awareness and information accessibility.

Primary reasons behind the recommendations in all three situations are based on the analysis of the effectiveness of existing public notification/advertising methods in addition to costs savings.

It should be noted that currently the page [calgary.ca/publicnotices](https://calgary.ca/publicnotices) is used only for advertising of development permits. It would be beneficial if, eventually, all public notices reside on the [calgary.ca/publicnotices](https://calgary.ca/publicnotices) webpage. This would increase inbound traffic to that webpage and result in greater exposure for all public notices.

The Customer Service & Communications (CSC) business unit reviewed this report and found that its recommendations are aligned with the amended Public Notice and Legal Advertising Policy.

## **Online Advertising - Public Works Notices, Property Tax Sale and Annual Report**

### **STAKEHOLDER ENGAGEMENT AND COMMUNICATION (EXTERNAL)**

☒ Public Communication or Engagement was not required

### **IMPLICATIONS**

#### **Social**

For all three initiatives the removal of the required print advertisement will have little to no negative social impact. Online access is available for free at Calgary libraries across the city. In addition to the library, as part of the Bridging Digital Inequity program The City is working with community partners to improve digital equity in our neighbourhoods. With the removal of the expensive Calgary Herald advertisement, alternative means will be used to further the social reach, resulting in positive social implications beyond the print realm.

#### **Environmental**

There will be positive environmental implications due to the reduced need for print ads, potential reducing the size of the publication required. Less ink, less paper and less energy required.

#### **Economic**

Not Applicable.

#### **Service and Financial Implications**

#### **Cost savings**

Recommended transition from advertising in a municipal newspaper to advertising on calgary.ca for public works, property tax sale and annual report will save over \$20,000 annually (\$6,000 for public works, \$5,000 for property tax sale, \$8,000 for the annual report and over \$1,000 in design costs).

### **RISK**

If the recommendations are not approved, The City will continue to incur newspaper advertising costs and cost savings will not be realized.

### **ATTACHMENT**

1. Attach 1 – Proposed Bylaw XXH2021

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform
Chris Arthurs	DCMO	Approve
Carla Male	CFO	Approve



**PROPOSED TEXT OF A CHARTER BYLAW TO AUTHORIZE ONLINE ADVERTISING  
OF PUBLIC WORKS NOTICES AND SALE OF LAND/MANUFACTURED HOMES TO  
RECOVER TAXES**

**WHEREAS** the section 4 of the City of Calgary Charter, 2018 Regulation, AR 40/2018 (the “Charter”) modifies the *Municipal Government Act*, R.S.A. 2000, c. M-26, (the “Act”) as it is to be read for the purposes of being applied to the City of Calgary;

**AND WHEREAS** subsection 4(28.1) of the Charter adds section 606.2 to the Act;

**AND WHEREAS** section 606.2 states that Council may by bylaw modify any or all of the advertising requirements set out in subsections 421(1), 436.12(1) and 534(2) of the Act;

**AND WHEREAS** Part 10, Division 8 (Recovery of Taxes Related to Land) of the Act requires a municipality to conduct a public auction of land to recover tax arrears and subsection 421(1) requires the municipality to advertise such an auction;

**AND WHEREAS** Part 10, Division 8.1 (Recovery of Taxes Related to Designated Manufactured Homes) contains similar provisions including subsection 436.12(1) regarding the recovery of tax arrears in respect of designated manufactured homes;

**AND WHEREAS** subsection 534(2) requires a municipality to, within one year after construction or erection of a public work or structure is completed, place in a newspaper circulating in the municipality, a notice that (a) identifies the public work or structure, (b) gives the date of completion, and (c) states that claims for compensation under section 534 must be received within 60 days after the notice is published in the newspaper;

**AND WHEREAS** pursuant to subsection 9(1) of the Charter, Council must, before giving second reading to a proposed bylaw under the authority provided by section 4 of the Charter, hold a public hearing in respect of the proposed bylaw in accordance with section 230 of the Act, after giving notice of it in accordance with section 606 of the Act.

**AND WHEREAS** this Bylaw has been advertised in accordance with section 606 and a public hearing has been held in accordance with section 230:

**NOW, THEREFORE, THE COUNCIL OF THE CITY OF CALGARY ENACTS AS  
FOLLOWS:**

**Short Title**

1. This Bylaw may be cited as the “Online Advertising of Public Works Notices and Tax Recovery Sales Charter Bylaw”.

## Definitions

2. In this Bylaw:
  - (a) “*Act*” means the *Municipal Government Act*, R.S.A. 2000, c. M-26;
  - (b) “*City*” means the municipal corporation of The City of Calgary;

## Advertising of Public Auctions of Land

3.
  - (1) Despite subsection 421(1) of the *Act*, the *City* may advertise a public auction held pursuant to Part 10, Division 8 - Recovery of Taxes Related to Land by posting a notice of the auction on the *City*’s website not less than 10 days before the date on which the public auction is to be held.
  - (2) Subsections 421(2), (3) and (4) of the *Act* apply to a notice posted pursuant to subsection (1).

## Advertising of Public Auctions of Designated Manufactured Homes

4.
  - (1) Despite subsection 436.12(1) of the *Act*, the *City* may advertise a public auction held pursuant to Part 10, Division 8.1 - Recovery of Taxes Related to Designated Manufactured Homes by posting a notice of the auction on the *City*’s website not less than 10 days before the date on which the public auction is to be held.
  - (2) Subsections 436.12(2) and (3) of the *Act* apply to a notice posted pursuant to subsection (1).

## Section 534 Notice

5. Despite subsection 534(2) of the *Act*, within one year after the construction or erection of a public work or structure is completed, as signified by the construction completion certificate, the *City* must deliver or mail to every owner of land that abuts land on which the public work or structure is situated, and post on the *City*’s website, a notice that:
  - (a) identifies the public work or structure,
  - (b) gives the date of completion, and
  - (c) states that claims for compensation under this section must be received within 60 days after the notice is posted on the *City*’s website.

## Coming into force

6. This Bylaw comes into force upon being published on the *City*’s website in accordance with section 10 of the City of Calgary Charter, 2018 Regulation, AR 40/2018.

**City Manager's Office Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0781  
Page 1 of 4**

## **Administrative Penalties System Program Update**

### **RECOMMENDATION:**

That the Priorities and Finance Committee recommend that Council defer development of an Administrative Penalties Bylaw, and other related and necessary bylaw amendments, for presentation at public hearing to no later than Q2 2022.

### **HIGHLIGHTS**

- In 2018, The City of Calgary (The City) Charter Regulation came into force, granting The City authority to establish an Administrative Penalties System (APS) program to address parking and transit fare evasion matters.
- A pause in implementation of the APS program, due to lack of clarity of the implications of Phase three of the Alberta Justice Transformation Initiative (JTI), will ensure that The City's resources to modernize the administration and adjudication of bylaw offences are aligned with the Province's justice reform initiatives.
- What does this mean to Calgarians? Pausing this work will help preserve City resources and allow prioritization of other work in the short term, ensuring that services that are developed and delivered represent good value for Calgarians.
- Why does it matter? The province is in the process of implementing a provincial tribunal system to lessen the burden upon the court system. The scope and financial model of this new system is not yet defined in relation to bylaw offences. To ensure prudent identification of any resulting service gaps for municipal bylaw charges and a solid comparative financial analysis to be complete further details from the province need to be understood.
- At its 2020 December 14 Combined Meeting, Council approved deferral of the Administrative Penalties Bylaw to 2021 June 30 (C2020-1430).
- Strategic Alignment to Council's Citizen Priorities: A well-run city
- Background and Previous Council Direction is included as Attachment 1.

### **DISCUSSION**

In 2018, The City of Calgary Charter Regulation came into force, granting The City authority to establish an APS Program to address parking and transit fare evasion matters.

In 2020 July, Council approved implementation of an APS system (PFC2020-0625), and funding for certain start-up costs through the Council Innovation Fund (PFC2020-0738). The business recommendation for an APS demonstrated that an APS would provide advantages over the current court-based process for challenging alleged bylaw offences, including more convenient and timely access to justice for Calgarians, and a more efficient and less costly adjudicative regime.

At almost the same time, the Province proceeded with justice reforms by passing Bill 21, the Alberta *Provincial Administrative Penalties Act* (2020 July 23). The JTI will divert the adjudication of a broad number of non-criminal matters from Traffic Court to a provincial tribunal. Phase one of the JTI was implemented in late 2020, with the

### **Administrative Penalties System Program Update**

diversion of impaired driving-related contraventions of the *Traffic Safety Act* (TSA). Phase two of the JTI is anticipated to divert additional TSA matters to the provincial tribunal by the end of 2021. All remaining offences (including municipal bylaws) presently processed by provincial traffic court division are to be addressed by the province after the full implementation of phase two.

The APS Program has made progress on implementation through five different work streams: developing technical systems and integrations, establishing a penalties appeal board, establishing legal authorities (at its 2020 December 14 Combined Meeting, Council approved deferral of the Administrative Penalties Bylaw to 2021 June 30), strengthening provincial partnerships and adopting parking and transit fare evasion matters into the APS. Notable progress to date includes near completion of a detailed business process review, completion of public engagement and substantial progress on bylaw development.

Further progress on the APS Program is dependent on strengthening collaboration with the Province to advance technical and data sharing matters. Requests to the Province for support and access to technical resources to advance this work have not produced results to date.

On 2021 April 15, City Manager Duckworth sent the Deputy Minister of Justice a letter inquiring about the Province's intentions with respect to the scope of Phase three of the JTI, to identify whether there is alignment with The City's APS Program, or whether The City should work with the Province to transition bylaw enforcement appeals to the provincial tribunal, and if so what the role and contribution of the City of Calgary might be.

Although proceeding with implementation of an APS for The City would yield better access to justice for the public, better respond to the needs of marginalized populations and minimize risks to City revenue, diversion of bylaw enforcement appeals to a provincial tribunal may cost The City less, as APS start-up costs and annual operational funding for a municipal tribunal would not be required.

Regardless of whether or not there is a pause on APS Program implementation, the APS Program will need to continue to support the work of Calgary Community Standards to identify and align support for bylaw enforcement appeals with the implications of JTI, as it is clear that these matters will have a new adjudicative forum starting no later than 2023. This work will continue to require ongoing collaboration and contributions across the Corporation, including from Calgary Community Standards, the Calgary Police Service, Law, City Clerk's, as well as Intergovernmental Affairs and Corporate Strategy.

The Executive Leadership Team was provided with a briefing signalling Administration's intention to propose a deferral in APS program implementation to Council.

## **Administrative Penalties System Program Update**

### **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

### **IMPLICATIONS**

#### **Social**

Not applicable.

#### **Environmental**

Not applicable.

#### **Economic**

Not applicable.

### **Service and Financial Implications**

No anticipated financial impact

There are no operating budget requests associated with this report. If Council approves the recommendations, spending on facilities and systems development will pause, and the resources working on implementation of an APS Program will be assigned to other priorities, pending further communication from provincial officials and direction from Council.

### **RISK**

Until there is greater clarity about the Province's intentions with respect to Phase three of the JTI, there are risks in continuing to expend valuable City resources on APS implementation, if there is a possibility that a provincial tribunal adjudicating bylaw enforcement appeals may be operated and funded by the Province.

Pausing implementation will disrupt resourcing of the APS Program's work and impact the timelines upon which an APS Program could be launched. Resuming APS Program implementation would likely be dependent on the responsiveness of the Province and availability of technical and subject matter resources, but everything that can be done to preserve the state of the APS Program's work and availability of resources in the interim, is being done.

City Manager's Office Report to  
Priorities and Finance Committee  
2021 May 18

ISC: UNRESTRICTED  
PFC2021-0781  
Page 4 of 4

### **Administrative Penalties System Program Update**

#### **ATTACHMENT**

1. Previous Council Direction, Background

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform
Jill Floen	City Solicitor	Consult

## Previous Council Direction

---

DATE	REPORT NUMBER	DIRECTION/DESCRIPTION
2020 July 20	PFC2020-0625	<b>Administrative Penalties System Business Recommendation</b> Council approved implementation of the Administrative Penalties System (APS) to divert adjudication of parking and transit fare evasion matters from the provincial Traffic Court to a municipal tribunal, and directed Administration to bring forward an Administrative Penalties Bylaw (and other related amending bylaws) to a public hearing before the end of 2020.
2020 July 20	PFC2020-0738	<b>Council Innovation Fund – Administrative Penalties System Start Up Costs</b> Council approved \$275,000 through the Council Innovation Fund to fund start up facilities, communication and engagement costs for the Administrative Penalties System.
2020 December 14	C2020-1430	<b>Administrative Penalties Bylaw Deferral</b> Council deferred the Administrative Penalties Bylaw, which was due before 2020 December 31, to no later than 2021 June 30.





**Green Line Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0774  
Page 1 of 4**

## **Green Line Board Q1 2021 Report**

---

### **RECOMMENDATION(S):**

The Green Line Board recommends that the Priorities and Finance Committee receive this report for the Corporate Record.

### **HIGHLIGHTS**

- This is the first quarterly report by The Green Line Board, as required in the Green Line Board Bylaw and Terms of Reference.
- What does this mean to Calgarians? Reporting quarterly allows Calgarians to be informed on the progress and governance being undertaken for the Green Line LRT project.
- Why does this matter? This shows that the largest publicly funded project in Calgary's history is being well managed and will contribute to confidence in the project.
- The rolled up quarterly performance of the Green Line Project is shown on the Quarterly KPI Dashboard, see Attachment 2.
- The February and March Monthly Project Reports are Attachments 3 and 4 respectively. There is no report for January 2021.
- The Green Line Project is proceeding in areas that are unaffected by the provincial review. The areas of concern are schedule, cost and stakeholder relations as shown by the overall Red KPI Status on the Dashboard.
- The Green Line Board Bylaw and Terms of Reference was amended on 2021 May 3 that confirmed the requirement of quarterly reports by The Board to Council (Priorities and Finance Committee).
- Strategic Alignment to Council's Citizen Priorities: A well-run city
- Background and Previous Council Direction is included as Attachment 1.

### **DISCUSSION**

**Overall:** Work with the province to address the recommendations brought forward through their project review is nearing completion. The teams are working collaboratively to address items including procurement and contract strategy, cost and risk.

LRV procurement is underway and the Segment 1 LRT RFP remains paused.

Segment 2 Functional Plan design, planning and engagement has concluded for the Beltline, Downtown/Eau Claire, Bow River Bridge and Centre Street. The functional plan will be brought to Green Line Committee on 2021 May 19.

Most of the scope for the Enabling Works projects are being closed-out.

#### **Functional Updates:**

- Safety is going well and issues caused by the pandemic are well managed. Green Line has a strong safety culture.
- Environmental is baselining data for contaminated sites, biophysical and fisheries, trees, noise, greenhouse gases and soils.

**Green Line Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0774  
Page 2 of 4**

## **Green Line Board Q1 2021 Report**

---

- Schedule is heavily dependent on the procurement and contracting strategies which are impacted by the provincial review.
- Cost is focused on concerns related to escalation and schedule risk.
- Quality is defining contract requirements and supporting the closeout of Enabling Works.
- Commercial team conducted a confidential market sounding with 24 builder/designers, tunnel companies and lenders.

**Financial Update:** \$16.4 million spent in 2021 with an overall spend of \$634 million to date.

**Board Update:** The Board has organized into 4 committees: Governance and HR; Planning; Budget and Risk; and Recruitment. The Board met for onboarding sessions throughout January and February with the first official Board Meeting on 2021 March 8.

**Next steps:**

- The award of the downtown utility relocation Construction Manager contract.
- Opportunities are being identified to further reduce the risk of the main contract.
- Schedule to be revised and baselined following the completion of the provincial review.
- The estimate is being revised and updated based on current escalation estimates.

## **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

Work with the province to address their review recommendations is progressing well, however ongoing uncertainty continues to impact other project stakeholders. There is both a lack of confidence in the project and lack of clarity in schedules and timelines (when will construction begin, when will my community or business be impacted, when will Green Line be built). Upcoming final inform phase of engagement activities in April will provide an opportunity for broader public communication and to share a project update with Calgarians.

During the month of March, stakeholder outreach and engagement occurred through general communications, enquiry responses, direct stakeholder outreach and virtual meetings. An in-person walk with the Business Insights Panel was also organized with their input being used to inform the draft objectives of Green Line's business support program.

Ongoing stakeholder communications continues with businesses currently operating in proximity to Green Line Enabling Works construction in the communities of Ramsay, Highfield, Ogden and South Hill.

All 311 service requests have been addressed and closed.

See Attachment 4 (Appendix 2).

## **IMPLICATIONS**

### **Social**

## **Green Line Board Q1 2021 Report**

---

Green Line will improve life for many Calgarians including:

- A more accessible city – in 2028, 68,000 people will live within walking distance of rail-based services via Green Line LRT, which will provide access to over 900 community, educational, social service, recreational, or commercial activity centres can be reached using the Green Line LRT
- Connecting people to jobs and businesses to business to catalyze economic development – in 2028, nearly 200,000 jobs will be within walking distance of the Green Line LRT
- A safer and healthier city- over its first 30 years, the Green Line will take cars off the road and lead to 2,300 fewer collisions and 1.6 million km more walked per year
- Meeting the needs of daily travel for work and play – Stage 1 will serve 55,000-65,000 transit users a day in 2028 with a fast, frequent, reliable and direct transit service
- Needed capacity for today and tomorrow – Stage 1 will provide capacity to meet demand and provide customers an exceptional customer service with opportunities to expand capacity without significant expenditure into the future

Faster travel times for Calgarians – travelers who use the Green Line will save up to 20-25 minutes, while auto users will benefit from an up to 10% journey time reduction due to decongestion.

### **Environmental**

Green Line will reduce emissions to mitigate climate change and provide cleaner air – by taking cars off the road, Stage 1 will save up to 30,000 tons of Greenhouse Gas emissions a year in support of municipal, provincial, and federal environmental goals.

### **Economic**

The Green Line LRT construction will generate jobs and support economic development – 12,000 direct and 8,000 supporting jobs are forecast to be developed by Stage 1 alone

The project fosters Transit Oriented Development (TOD) and shaping Calgary's growth – direct connection to six high priority Transit Oriented Development (TOD) areas including future potential for over 1 million square feet of new residential development and 160,000 square feet of new office and retail space.

### **Service and Financial Implications**

#### **Existing operating funding - one-time**

The Green Line Program is a \$5.5 billion total program for Stage 1. This report has no additional financial impact. Please see Attachments 3 and 4 for more details on financials.

### **RISK**

Project currently has a high amount of risk and uncertainty and below are some of the primary risk items for the program right now. There is a detailed risk register and risk management strategies that are regularly reviewed and updated by the team.

**Green Line Report to  
Priorities and Finance Committee  
2021 May 18**

**ISC: UNRESTRICTED  
PFC2021-0774  
Page 4 of 4**

**Green Line Board Q1 2021 Report**

---

- Finalization of the provincial review which will confirm the funding, updates to the funding agreement and the path forward.
- Vacancies within the leadership team and recruitment is underway to fill these positions.
- Competitive pressure in the marketplace in Canada creates limited available capacity for the proponent expertise required. Procurement strategies are under development to address this risk.
- Time delays and anticipated cost escalation result in increased budget pressure. Further refinement of cost estimates and risk understanding is underway to address these risks.
- Continued delays in moving the program forward has eroded stakeholder confidence. Green Line is in regular communication with stakeholders to provide updated information as it becomes available.

**ATTACHMENT(S)**

1. Previous Council Direction, Background
2. Quarterly KPI Dashboard
3. Green Line Board February Report
4. Green Line Board March Report

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform
Michael Thompson	Green Line, General Manager	Approve
Lisa Adamo	Green Line, Commercial Director	Consult
Sheryl McMullen	Green Line, Business Services Director	Consult
Wendy Tynan	Green Line, Stakeholder Relations Director	Consult

# Background

The Green Line Board was established to insure proper governance for the successful delivery of the Green Line Program. As set out in the Green Line Board Bylaw and Terms of Reference under item 7 (frequency of reporting), The Board shall report on the Program to the Priorities and Finance Committee on a quarterly basis, and more frequently as required by extraordinary circumstances or at the discretion of the Board.

## Previous Council Direction

Below is previous Council Direction for Green Line Governance and Board related items only. There are significant Council Direction for the Green Line Program.

DATE	REPORT NUMBER	DIRECTION/DESCRIPTION
05/03/2021	C2021-0652	Green Line Board Give three readings to the proposed bylaw amendments.
12/14/2020	C2020-1432	Green Line Update Council approved recommended Green Line Board Chair and members
7/20/2020	GC2020-0072	Green Line Board  Gave three readings to the Green Line Board Bylaw and Terms of Reference, appointed the City Manager as a member of the Board and directed Administration to hire an external search firm to identify and recommend candidates for appointment to the Green Line Board
2/21/2020	GC2020-0244	Green Line Q4 2019 Update  Meeting was cancelled due to COVID-19 pandemic.
3/16/2020	GC2020-0246	Green Line - Project Readiness Report  This report included information about the project readiness included a finding by the TRC members that the then current form of Program governance was ineffective for the delivery of a mega-program. In address this, one of the Green Line Program Team's 2020 goals was to secure Council approval for a final governance model, ensure that the governance model was fully operational and retain and recruit senior leadership and staff members with the right level of expertise who excel in a project environment.
12/17/2019	GC2019-1594	Technical and Risk Committee (TRC) Governance Review (Verbal)  TRC Chair Fairbairn provided a verbal report to the members of the Green Line Committee outlining the TRC's analysis of

		enhancements required to Green Line Program Governance. The Committee received his presentation for the Corporate Record.
9/18/2019	TT2019-1073	<p>Green Line Q3 2019 Update</p> <p>Members of the Technical and Risk Committee (TRC) TRC were selected and reported under the risk section of the report. Administration was directed to have TRC report quarterly. The Terms of Reference were included as Attachment 2 and indicate that the TRC's work is divided into two modules, module 1 focusing on the independent review of specific work elements as defined in report TT2019-0811 and module 2 focusing on preventative risk management.</p>
7/29/2019	TT2019-0811	<p>Green Line Q2 2019 Update</p> <p>Council approved the Technical and Risk Committee (TRC) recommendations for administration to have TRC do an independent review of the suitability and adequacy of the governance and resourcing of the Project and report to the SPC on Transportation &amp; Transit Committee on their review.</p>

## Bylaws, Regulations, Council Policies

**Bylaw Number 21M202 BEING A BYLAW OF THE CITY OF CALGARY TO ESTABLISH THE GREEN LINE BOARD AS A COMMITTEE OF COUNCIL**

### Quarterly KPI Dashboard

	Quarter	Overall Program	Enabling Works	LRVs	Segment 1	Segment 2	Owner Activities	Comments
Health & Safety	January	-	-	-	-	-	-	No Report in January
	February			N/A	N/A	N/A		On Plan
	March			N/A	N/A	N/A		Green Line safety continues to be well managed through COVID pandemic with no associated safety incidents.
Environmental	January	-	-	-	-	-	-	No Report in January
	February			N/A				Focused on Segment 2 requirements.
	March			N/A				Baseline environmental data collection for contaminated sites, biophysical, fisheries, trees, and noise is progressing well.
Stakeholder Relations	January	-	-	-	-	-	-	No Report in January
	February			N/A				Overall red due to effect of Provincial Review.
	March			N/A				Overall red due to uncertainty of provincial review impacting how stakeholders view the project.
Schedule	January	-	-	-	-	-	-	No Report in January
	February				N/A	N/A		Overall red due to unknown timeline of the provincial review. Segment 1 & 2 schedule unknown until completion of provincial review.
	March				N/A	N/A		Program is delayed pending the completion of the provincial review and program schedule will be updated afterward. Enabling works delayed but is not impacting the schedule.
Cost	January	-	-	-	-	-	-	No Report in January
	February				N/A	N/A		Overall red due to unknown costs of current delay, updated costs to be calculated following completion of review. Segment 1 & 2 costs are N/A awaiting completion of review.
	March				N/A	N/A		Overall red due to unknown implications of future anticipated cost escalation. Segment 1 & 2 costs are N/A awaiting completion of review. Owner's Activities red due to increased cost of schedule delay.
Quality	January	-	-	-	-	-	-	No Report in January
	February				N/A	N/A		Segment 1 and 2 will be updated once the construction DBFs are under construction.
	March							Program quality plan in development with expected issue in April 2021.







## Green Line LRT

### Green Line Program February 2021 Progress Report



## Green Line Program February 2021 Progress Report

## 1 Executive Summary

## Project Status Dashboard

	Overall Program	Enabling Works	LRVs	Segment 1	Segment 2	Owner Activities	Comments
Health & Safety							
Environmental			N/A				Continue to focus on Segment 2 requirements.
Stakeholder Relations			N/A				Overall red due to effect of Provincial Review.
Schedule				N/A	N/A		Overall red due to unknown timeline of the provincial review. Segment 1 & 2 schedule unknown until completion of provincial review.
Cost				N/A	N/A		Overall red due to unknown costs of current delay, updated costs to be calculated following completion of review. Segment 1 & 2 costs are N/A awaiting completion of review.
Quality				N/A	N/A		Segment 1 and 2 will be updated once the construction DBF's are under construction.

<b>LEGEND*:</b>	On Plan		At Risk		Off Plan		Not Started		Not Applicable	N/A
-----------------	---------	--	---------	--	----------	--	-------------	--	----------------	-----

\*Definition of legend for the dashboard in Appendix 1



## Green Line Program February 2021 Progress Report

Overall - Work with the province to address the recommendations brought forward through their project review continues to progress. The teams are working collaboratively to address many of the items raised including alignment, ridership, the impact of COVID, constructability, costs and risk. Confidential market sounding with 24 builder/designers, tunnel companies and lenders has begun and will be concluded in March 2021.

The downtown utility relocation Construction Manager RFP has closed, and evaluation has begun. A recommendation will be brought forward to the Green Line Board in March 2021. LRV procurement is underway and the Segment 1 LRT RFP remains paused.

Segment 2 Functional Plan design, planning and engagement continues for the Beltline, Downtown/Eau Claire, Bow River Bridge and Centre Street.

Health & Safety – The Project is on plan with safety management system compliance. There is a minor lag in mandatory training for safety excellence certification due to in-person training risks (pandemic precautions) for first aid and leadership. Review of contractor site specific safety plans prior to commencement of field work and maintaining monthly safety inspections and Green Line Joint OH&S inspection and meetings are all on track.

Environmental - Work continued this month on the development of a Segment 1 and Segment 2 life of project budget and work plan; contaminated sites risk and potential remediation activities pre-construction; and the continuation of specific multi-disciplinary baseline environmental activities for Segment 2.

Stakeholder Relations - The uncertainty by the provincial review continues to impact stakeholders. There is both a lack of confidence in the project and lack of clarity in schedules and timelines (when will construction begin, when will my community or business be impacted, when will Green Line be built).

Schedule - Procurement strategy and contracting is a key driver for the schedule and remains an outstanding item with the province. The team continues to work with the Province through their review.

Cost - The Program cost estimate is currently under revision. Segment 1 procurement is currently paused. Segment 2 and Owner Activities are undergoing estimate updates and work is underway to evaluate the risks associated with the delayed schedule as well as the current escalation being experienced due to COVID 19.

Quality - The focus for the Overall Program has been ensuring quality requirements are included in the final documentation for Segment 2 Enabling Works CM Utilities Relocation. The Program Quality Management Plan will be issued for review in advance of the Program Management Plan. Quality Management is supporting closeout of Segment 1 Enabling works records and development of Segment 2 CM Utilities project quality management plan.



## Green Line Program February 2021 Progress Report

### Financial Summary

Category	Total Committed Costs	Expenditures Project to Date	Expenditures Project to Date Previous Month	Expenditures for 2021 to Date	2021 Spending Plan
Owner's Costs	\$ 55,138,205	\$ 53,771,089	\$ 52,561,237	\$ 2,063,556	TBD
Land	\$ 219,128,885	\$ 219,066,461	\$ 219,077,426	\$ 1,222,166	TBD
Design & Engineering	\$ 275,776,219	\$ 212,021,542	\$ 209,098,564	\$ 5,721,168	TBD
Construction	\$ 161,662,719	\$ 143,357,839	\$ 140,932,794	\$ 1,698,914	TBD
<b>TOTAL</b>	<b>\$ 711,706,028</b>	<b>\$ 628,216,931</b>	<b>\$ 621,670,021</b>	<b>\$ 10,705,804</b>	<b>TBD</b>

Owner's Costs: Include City of Calgary Staff Time, Communications, Software, and General Corporate Overheads and Inter-Business Unit costs.

Design & Engineering: Includes all Owner's Engineer costs as well as general Project Consultants.

Construction: Includes Enabling Works.

Committed Costs present issues PO values only for design & engineering/construction. Land and Owner's costs are incurred to date only.

2021 Green Line Forecast is in progress.

### Milestone Schedule

Milestone schedule to be included after completion of provincial review.

### Risk Management

Project currently has a high amount of risk and uncertainty and below are some of the primary risk items for the program right now. There is a detailed risk register and risk management strategies that are regularly reviewed and updated by the team.

- Finalization of the provincial review which will confirm the funding, updates to the funding agreement and the path forward.
- Vacancies within the leadership team and recruitment is underway to fill these positions.
- Competitive pressure in the marketplace in Canada creates limited available capacity for the expertise required. Procurement strategies are under development to address this risk.
- Time delays and anticipated cost escalation result in increased budget pressure. Further refinement of cost estimates and risk understanding is underway to address these risks.



## Green Line Program February 2021 Progress Report

- Continued delays in moving the program forward has eroded stakeholder confidence. Green Line is in regular communication with stakeholders to provide updated information as it becomes available.

## Project Highlights

Project	Summary of Status this Month	Next Month
Overall Program	Work with the province to address the recommendations brought forward through their project review continues to progress. The review is creating uncertainty which is impacting many aspects of the project.	Work with the province to resolve outstanding items raised during their review.
Enabling Works	<p><b>Segment 1:</b> Projects are on track for completion by July 2021 with project closeout underway where applicable.</p> <p><b>Segment 2:</b> Preparation for Downtown Utilities relocations underway.</p>	<p><b>Segment 1:</b> Finalize next steps for 78<sup>th</sup> Avenue Overpass construction.</p> <p><b>Segment 2:</b> Utility Relocations CM contract negotiations with highest rated proponent.</p>
LRV	The LRV procurement is proceeding as scheduled, with award of a contract planned in the fall of 2021.	Proceed as per schedule.
Segment 1	Segment 1 is currently paused so that the City can work collaboratively with the Province to address concerns raised.	Work to complete provincial review.
Segment 2	Completing remaining work on the functional design and updating the functional report. Engagement with stakeholders continued.	The concept design for the interface of the Green Line and the river's edge in Eau Claire will be progressed.
Owners Activities	Work is underway to recruit for key positions including CEO, COO, Delivery Director and Technical Director. Board set-up activities continue in support of all Committees and the Board itself.	Recruitment to continue for key positions.



## Green Line Program February 2021 Progress Report

## Appendix 1 –Dashboard Legends

### Executive Summary

	On Plan	At Risk	Off Plan
<b>Health and Safety</b>	<p>Zero (Lost Time Injury) LTIs or</p> <p>Scheduled monthly site inspections completed with &lt; 2 missed or</p> <p>Joint OH&amp;S committee meetings and inspections on track or</p> <p>Green Line COR Internal Maintenance Audit completed with minor findings or</p> <p>All mandatory training complete</p>	<p>One LTI or</p> <p>≤5 scheduled site inspection not completed or</p> <p>Missed a Joint OH&amp;S committee meeting or inspection or</p> <p>Green Line COR Internal Maintenance Audit completed with major findings or</p> <p>&lt;90% mandatory training not completed</p>	<p>More than one LTI or</p> <p>&gt;5 scheduled site inspections not completed or</p> <p>Multiple Joint OH&amp;S committee meetings or inspection not completed or</p> <p>Green Line COR Internal Maintenance Audit failed or</p> <p>Less than 75% mandatory training complete</p>
<b>Environmental</b>	<p>Overall environmental requirements are progressing as defined and work plans and budgets are being accurately managed</p>	<p>Specific environmental management subjects are being addressed and progressing; reliance on other project disciplines, information and inputs to complete the work may cause temporary delays</p>	<p>Failing to meet contractually required environmental obligations causing delays and complications for the Contractor and/or Owner</p>
<b>Stakeholder Relations</b>	<p>Minimal risk of reputational damage or</p> <p>Localized stakeholder issues</p>	<p>Moderate risk of reputational damage or</p> <p>Multiple stakeholder issues that require urgent action</p>	<p>Severe risk of reputational damage or</p> <p>Major risk with funding partners</p>
<b>Schedule</b>	<p>SPI (Schedule Performance Index) ≥ 1.0 or</p>	<p>SPI 0.9-0.99 or</p>	<p>SPI &lt;0.9 or</p>



## Green Line Program February 2021 Progress Report

	No change to critical activities/milestones	Delay of critical milestones by less than 4 weeks	Critical activities delayed by more than 4 weeks
<b>Cost</b>	Cost Performance Index (CPI) $\geq 1.0$ or Costs forecast within the budget excluding retained contingency	CPI 0.95-0.99 or Costs forecast to be over budget and $<30\%$ retained contingency	CPI $< 0.95$ or Cost forecast to be $>$ budget + 30 % retained contingency
<b>Quality</b>	Quality requirements adequate/defined or in progress or Audits performed per plan with no/minor findings or NCR identification and resolution are with expectations	Quality requirements not adequate/defined in at least one area or Audits performed per plan with one or more major findings or NCR identification and resolution are not trending downward	Quality requirements not adequate/defined in multiple areas or Audits not performed or performed with many major findings or Significant non-conformance with contract terms







## Green Line LRT

### Green Line Program Board March 2021 Progress Report



## Green Line Board March 2021 Progress Report

## 1. Executive Summary

## Project Status Dashboard

	Overall Program	Enabling Works	LRVs	Segment 1	Segment 2	Owner Activities	Comments
Health & Safety			N/A	N/A	N/A		Green Line safety continues to be well managed through COVID pandemic with associated safety incidents.
Environmental			N/A				Baseline environmental data collection for contaminated sites, biophysical, fisheries, trees, and noise is progressing well.
Stakeholder Relations			N/A				Overall red due to uncertainty of provincial review impacting how stakeholders view the project.
Schedule				N/A	N/A		Program is delayed pending the completion of the provincial review and program schedule will be updated afterward. Enabling works delayed but is not impacting the schedule.
Cost				N/A	N/A		Overall red due to unknown implications of future anticipated cost escalation. Segment 1 & 2 costs are N/A awaiting completion of review. Owner's Activities red due to increased cost of schedule delay.



## Green Line Board March 2021 Progress Report

Quality							Program quality plan in development with expected issue in April 2021.
---------	--	--	--	--	--	--	--

<b>LEGEND*:</b>	On Plan		At Risk		Off Plan		Not Started		Not Applicable	N/A
-----------------	---------	--	---------	--	----------	--	-------------	--	----------------	-----

\*Definition of legend for the dashboard in Appendix 1

**Overall** - Work with the province to address the recommendations brought forward through their project review continues to progress. The teams are working collaboratively to address many of the items raised including procurement and contract strategy, cost and risk. Confidential market sounding with 24 builder/designers, tunnel companies and lenders concluded.

The award of the downtown utility relocation Construction Manager procurement is anticipated in April. LRV procurement is underway and the Segment 1 LRT RFP remains paused.

Segment 2 Functional Plan design, planning and engagement continues for the Beltline, Downtown/Eau Claire, Bow River Bridge and Centre Street. The functional plan will be brought to Green Line Committee in May 2021.

**Health & Safety** – The Project is on plan with safety management system compliance. There is a lag in mandatory training for safety excellence certification due to in-person training risks (pandemic precautions) for first aid and leadership. Review of contractor site specific safety plans prior to commencement of field work and maintaining monthly safety inspections and Green Line Joint OH&S inspection and meetings are all on track. Continue auditing City, Consultant and Contractor compliance to respective Safety Management Systems and performance.

**Environmental** - The overall Environmental Management program for Green Line Segment 1 and Segment 2 remains on plan this month with the main focus on Segment 2 activities. Segment 2 activities include specific baseline environmental discipline work for: contaminated sites, biophysical and fisheries assessments, tree surveys, noise assessments, Green House Gases/Climate Lens and Resilience, the Envision Sustainability program and other Permits, Licenses and Approvals support work. Discussions regarding contaminated sites Phase 2 assessments and clean up/ remediation work for Segment 1 in advance of construction continue. Final discussions with Alberta Environment regarding Green Line Soil Management Guidelines are underway.

**Stakeholder Relations** – Work with the province to address their review recommendations is progressing well, however ongoing uncertainty continues to impact other project stakeholders. There is both a lack of confidence in the project and lack of clarity in schedules and timelines (when will construction begin, when will my community or business be impacted, when will Green Line be built). Upcoming final inform phase of engagement activities in April will provide an opportunity for broader public communication and to share a project update with Calgarians.



## Green Line Board March 2021 Progress Report

**Schedule** - Procurement strategy and contracting is a key driver for the schedule and remains an outstanding item with the province. The team continues to work with the province through their review. The ongoing Enabling Works program is delayed in some areas but hasn't affected the overall program schedule. This work is nearing completion in Segment 1.

**Cost** - The Program cost estimate is currently under revision. Segment 1 procurement is currently paused and delay of the program will affect cost. Segment 2 and Owner Activities are undergoing estimate updates. Work is underway to evaluate the cost risks associated with the delayed schedule and the current escalation being experienced due to COVID. Owner's Activities are red due to costs being incurred while the schedule is on hold.

**Quality** - The focus for Quality Management is quality oversight on Segment 1 Enabling Works contracts and ensuring quality requirements are defined in agreements including Segment 2 Enabling Works CM Utilities Relocation. Quality Management is supporting the closeout of Segment 1 Enabling works records for completed packages, review of records requirements and quality performance data. The Green Line Program Quality Management Plan will be issued in April for review in advance of the Program Management Plan. A Green Line Project Quality Plan is under development for Segment 2 CM Utilities Relocation project.

## Financial Summary for March 2021

Category	Total Committed Costs	Expenditures Project to Date	Expenditures Project to Date Previous Month	Expenditures for 2021 to Date	2021 Spending Plan
Owner's Costs	\$ 55,499,448	\$ 55,340,320	\$ 53,771,089	\$ 3,632,787	TBD
Land	\$ 219,151,714	\$ 219,094,654	\$ 219,066,461	\$ 1,250,359	TBD
Design & Engineering	\$ 277,084,331	\$ 214,834,864	\$ 212,021,542	\$ 8,534,490	TBD
Construction	\$ 172,215,011	\$ 144,606,437	\$ 143,357,839	\$ 2,947,513	TBD
<b>TOTAL</b>	<b>\$ 723,950,504</b>	<b>\$ 633,876,274</b>	<b>\$ 628,216,931</b>	<b>\$ 16,365,149</b>	<b>TBD</b>

Owner's Costs: Include City of Calgary Staff Time, Communications, Software, and General Corporate Overheads and Inter-Business Unit costs.

Design & Engineering: Includes all Owner's Engineer costs as well as general Project Consultants.

Construction: Includes Enabling Works.

Committed Costs present issues PO values only for design & engineering/construction. Land and Owner's costs are incurred to date only.

2021 Green Line Forecast is in progress.



## Green Line Board March 2021 Progress Report

### Milestone Schedule

Milestone schedule to be included after completion of provincial review.

### Risk Management

Project currently has a high amount of risk and uncertainty and below are some of the primary risk items for the program right now. There is a detailed risk register and risk management strategies that are regularly reviewed and updated by the team.

- Finalization of the provincial review which will confirm the funding, updates to the funding agreement and the path forward.
- Vacancies within the leadership team and recruitment is underway to fill these positions.
- Competitive pressure in the marketplace in Canada creates limited available capacity for the proponent expertise required. Procurement strategies are under development to address this risk.
- Time delays and anticipated cost escalation result in increased budget pressure. Further refinement of cost estimates and risk understanding is underway to address these risks.
- Continued delays in moving the program forward has eroded stakeholder confidence. Green Line is in regular communication with stakeholders to provide updated information as it becomes available.

### Project Highlights

Project	Summary of Status this Month	Next Month
Overall Program	Work with the province to address the recommendations brought forward through their project review continues to progress. The review is creating uncertainty which is impacting many aspects of the project.	Work with the province to resolve outstanding items raised during their review.
Enabling Works	<b>Segment 1:</b> Four (4) projects are on track for completion by July 2021 with project closeout underway where applicable. Identified opportunities for some additional early works that can be completed to de-risk main contract.	<b>Segment 1:</b> Finalize next steps for 78 <sup>th</sup> Avenue Overpass construction. Obtain approval and initiate additional early works on Segment 1.



## Green Line Board March 2021 Progress Report

	<b>Segment 2:</b> Design for Downtown Utilities relocations and contract negotiations for CM contract underway.	<b>Segment 2:</b> Utility Relocations CM contract award anticipated in April.
LRV	The LRV procurement is proceeding as scheduled, with award of a contract planned in the fall of 2021.	Proceed per schedule.
Segment 1	Segment 1 is currently paused to allow The City to work collaboratively with the province to address concerns raised.	Work to complete provincial review.
Segment 2	Completing remaining work on the functional design and updating the functional report. Engagement with stakeholders continued.	Final stakeholder engagement "Inform" sessions will be conducted for the functional plan.
Owners Activities	Work is underway to recruit for key positions including Chief Executive Officer (CEO), Chief Operating Officer (COO), Delivery Director, Technical Director, Director of Business Services and Senior Commercial Manager. Board set-up activities continue in support of all Committees and the Board itself.	Recruitment to continue for key positions.

## 2. Health and Safety

	Overall Program	Enabling Works	LRVs	Segment 1	Segment 2	Owner Activities	Comments
<b>Current Period</b>			N/A	N/A	N/A		Green Line safety continues to be well managed through COVID pandemic with associated safety incidents.
<b>Last Period</b>			N/A	N/A	N/A		On Plan



## Green Line Board March 2021 Progress Report

<b>LEGEND*:</b>	On Plan		At Risk		Off Plan		Not Started		Not Applicable	N/A
-----------------	---------	--	---------	--	----------	--	-------------	--	----------------	-----

\*Definition of legend for the dashboard in Appendix 1

### Key accomplishments/status

Continued auditing City, Consultant and Contractor compliance to respective Safety Management Systems and performance.

**Culture:** The Green Line safety culture is excellent and continually improving as the safety KPIs show in Overall Safety Metrics below. No Enabling Works were stopped due to suspected or actual positive COVID cases. Protocols for self-health checks prior to going to the office or out to construction sites combined with temperature checks upon arrival at site have worked well with additional on site and in-office protocols to keep COVID out of Green Line work areas.

**The March Safety Focus** was on workplace Hazard Assessment & Controls. Hazards may be of physical, ergonomic, chemical, biological and/or psychological in nature. Emphasized to look for hazards, assess the hazards to know and manage the risks.

In addition, the Alberta OH&S March eNewsletter was forwarded and discussed with all Green Line personnel which shared new and updated resources on workplace masking requirements/enforcement, reporting COVID incidents to Alberta OH&S and the personal safety implications around shifting to Daylight Savings Time on March 14.

**Construction:** Safety oversight and rail safety support on CN Track 'n Tunnel project. Safety oversight and mentoring City Engineer in Training (EIT) on Thurber geotechnical drilling on Segment 2 was completed this month.

**Contracts:** Segment 2 - Reviewed CM bidder safety management systems. Participated in development CM contract resourcing and work plan.

### Upcoming deliverables/activities and Major Milestones

**Construction:** Safety oversight of P002 CN Track 'n Tunnel construction and hydrovac work along Segment 2 in downtown area.

**Contracts:** Review Site Specific Safety Plans for South Hill paving work adjacent to Chemtron property. Provide safety review support for CM contract in preparation for spring work start.

### Overall Program Metrics

The following chart contains the recorded incidents for the 12-month rolling average.

Note that no Lost Time Incidents (LTI) nor Medical Aid Incidents (MA) have occurred in the past 12 months which is why the TRIFR and LTIFR numbers at the bottom of this section are all zeros.



## Green Line Board March 2021 Progress Report

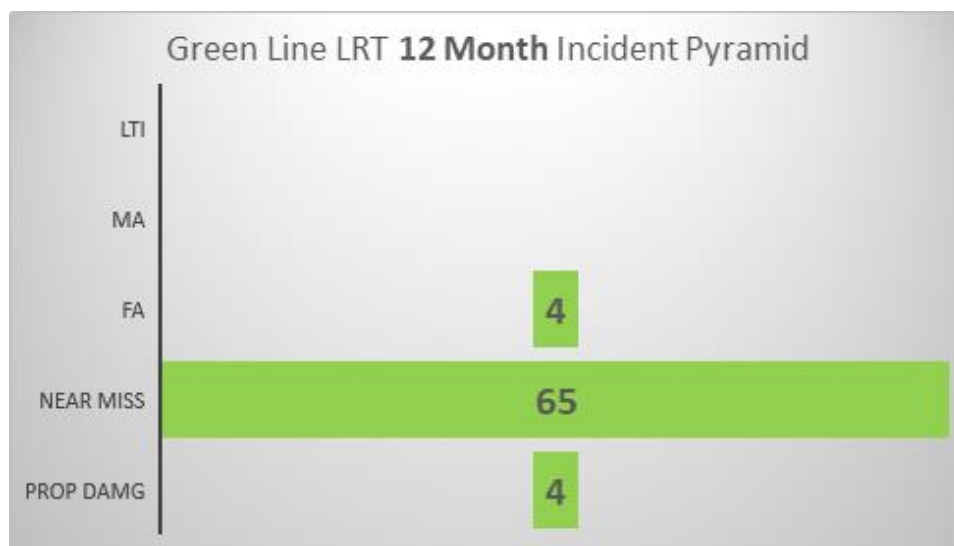


Table 1: Overview of Safety Metrics for the Program

Metric	Current Month	YTD Incidents	Days since Last incident
Lost Time Incident	0	0	696
Medical Aids	0	0	369
First Aids	0	0	159
Property Damage/ Theft Incidents	1	1	11
Near Misses	4	16	12

Table 2: Lost Time Incidents for Reporting Month Details

Date of Injury	Site/Employer	Lost Time Days	Area of Injury	Incident Description
YYYY/MM/DD	N/A			

There have been no lost time incidents nor medical aids year to date on the Green Line program.

Table 3: Green Line Safety Statistics

Performance Indicator		GL City Staff	Contractors	GL City Staff & Contractors
TRIFR: Total Recordable Injury Frequency Rate (MA +LTI)	per 200,000 hrs			
	per 1,000,000 hrs			





Green Line Board March 2021 Progress Report

LTIFR: Lost Time Injury Frequency Rate	per 200,000 hrs			
	per 1,000,000 hrs			

*\* Statistics are based on 12 month rolling period March 31, 2020 to March 31, 2021*

<b>LEGEND*:</b>	On Plan		At Risk		Off Plan		Not Started		Not Applicable	N/A
-----------------	---------	--	---------	--	----------	--	-------------	--	----------------	-----

*\*Definition of legend for the dashboard in Appendix 1*



## Green Line Board March 2021 Progress Report

## Appendix 1 –Dashboards Legends

	On Plan	At Risk	Off Plan
<b>Health and Safety</b>	Zero LTIs or Scheduled monthly site inspections completed with < 2 missed or Joint OH&S committee meetings and inspections on track or GL COR Internal Maintenance Audit completed with minor findings or all mandatory training complete	One LTI or ≤5 scheduled site inspection not completed or missed a Joint OH&S committee meeting or inspection or GL COR Internal Maintenance Audit completed with major findings or <90% mandatory training not completed	More than one LTI or >5 scheduled site inspections not completed or multiple Joint OH&S committee meetings or inspection not completed or GL COR Internal Maintenance Audit failed or less than 75% mandatory training complete
<b>TRIFR: Total Recordable Injury Frequency Rate (MA +LTI)</b>	Per 200,000 hrs  <0.12  Per 1,000,000 hrs  <0.60	Per 200,000 hrs  ≥0.12  Per 1,000,000 hrs  ≥0.60	Per 200,000 hrs  >0.30  Per 1,000,000 hrs  <1.50
<b>LTIFR: Lost Time Injury Frequency Rate</b>	Per 200,000 hrs  <0.00  Per 1,000,000 hrs  <0.00	Per 200,000 hrs  ≥0.00  Per 1,000,000 hrs  ≥0.00	Per 200,000 hrs  >0.13  Per 1,000,000 hrs  <0.65
<b>Environmental</b>	Overall environmental requirements are progressing as defined and work plans and budgets are being accurately managed	Specific environmental management subjects are being addressed and progressing; reliance on other project disciplines, information and inputs to complete the work may cause temporary delays	Failing to meet contractually required environmental obligations causing delays and complications for the Contractor and/or Owner



## Green Line Board March 2021 Progress Report

<b>Stakeholder Relations</b>	Minimal risk of reputational damage or Localized stakeholder issues	Moderate risk of reputational damage or Multiple stakeholder issues that require urgent action	Severe risk of reputational damage or Major risk with funding partners
<b>Schedule</b>	SPI $\geq$ 1.0 or No change to critical activities/milestones	SPI 0.9-0.99 or Delay of critical milestones by less than 4 weeks	SPI $<$ 0.9 or Critical activities delayed by more than 4 weeks
<b>Cost</b>	CPI $\geq$ 1.0 or Costs forecast within the budget excluding retained contingency	CPI 0.95-0.99 or Costs forecast to be over budget and $<$ 30% retained contingency	CPI $<$ 0.95 or Cost forecast to be $>$ budget + 30 % retained contingency
<b>Quality</b>	Quality requirements adequate/defined or in progress or Audits performed per plan with no/minor findings or NCR identification and resolution are with expectations	Quality requirements not adequate/defined in at least one area or Audits performed per plan with one or more major findings or NCR identification and resolution are not trending downward	Quality requirements not adequate/defined in multiple areas or Audits not performed or performed with many major findings or Significant non-conformance with contract terms



## Green Line Board March 2021 Progress Report

# Appendix 2 –Stakeholder Engagement Activities

## Summary

During the month of March, stakeholder outreach and engagement occurred through general communications, enquiry responses, direct stakeholder outreach and virtual meetings. An in-person walk with the Business Insights Panel was also organized with their input being used to inform the draft objectives of Green Line's business support program.

Ongoing stakeholder communications continues with businesses currently operating in proximity to Green Line Enabling Works construction in the communities of Ramsay, Highfield, Ogden and South Hill.

All 311 service requests have been addressed and closed.

## Stakeholder Events / Outreach

Event	Purpose	Date/Time	Method	Attendance
Business Insights Walk	To gather local business insights	2021/03/11	Site Walk	BIP members from Ramsay and Inglewood
Meeting with Crescent Heights Community Association (CHCA)	To discuss issues and ideas related to mobility.	2021/03/11	Virtual meeting	CHCA
Women in Development (industry presentation)	Long term vision, future development potential and ways that we can support development industry	2021/03/16	Virtual presentation	Women in Development group
Meeting with CHCA and Crescent Heights Village BIA (CHVBIA)	To present Streetscape Master Plan	2021/03/25	Virtual meeting	CHCA and CHVBIA
Business Insights Panel Meeting	To inform draft objectives for business support program and discuss upcoming business engagement	2021/03/30	Virtual meeting	BIP panel members
Bow River LRT bridge Stakeholder Working Group (SWG)	To share information regarding environmental planning and regulations,	2021/03/03	Virtual meeting	SWG members



## Green Line Board March 2021 Progress Report

	as well as noise and vibration considerations.			
--	--	--	--	--

### Stakeholder Enquiries / 311 Service Requests

Type	Themes	Quantity
311 Service Requests	<ul style="list-style-type: none"> <li>– Property impact enquiry</li> <li>– Procurement</li> <li>– Construction timing/future impacts</li> <li>– Planning feedback/enquiry</li> <li>– Property maintenance</li> </ul>	12 service requests
GL Enquiries/Comments	<ul style="list-style-type: none"> <li>– Crescent Heights (station location, area concerns)</li> <li>– Funding</li> <li>– Procurement</li> <li>– Construction Staging</li> <li>– Transit</li> <li>– Project support</li> </ul>	8 emails





**Report Number:** PFC2021-0691

**Meeting:** Priorities & Finance Committee

**Meeting Date:** 2021 May 18

## NOTICE OF MOTION

**RE:** 2021 Property Tax Cancellation for Calgary Housing Company Properties

**Sponsoring Councillor(s):** Councillor Druh Farrell

---

WHEREAS property tax exemptions in the Province of Alberta are governed by the Municipal Government Act (MGA) and ancillary regulations;

AND WHEREAS each Alberta municipality administers property tax exemptions in its jurisdiction within this legislative framework as part of the process of maintaining the municipality's property assessment roll;

AND WHEREAS Calgary Housing Company (CHC) operates as a non-profit corporation wholly-owned by The City of Calgary;

AND WHEREAS the MGA does not provide a property tax exemption for all CHC-owned properties;

AND WHEREAS, in 2017, 2018, 2019 and 2020, Council passed Notices of Motion to cancel the total municipal property taxes incurred by CHC in those respective years;

AND WHEREAS, in 2021, CHC will be levied property taxes of \$2,173,917.24, consisting of municipal property taxes of \$1,415,588.36 and provincial property taxes of \$758,328.88, which CHC will be obligated to pay;

AND WHEREAS, through its authority under section 347 of the MGA, Council can cancel property taxes for a particular property when it considers it equitable to do so;

NOW THEREFORE BE IT RESOLVED that the 2021 property taxes for CHC properties be cancelled for the municipal portion of \$1,415,588.36, representing the 12 months in 2021;

AND FURTHER BE IT RESOLVED that City Council request that the Mayor write a letter to the Government of Alberta requesting that the provincial requisition portion of the property taxes on CHC properties be cancelled for the 2021 tax year, with City Administration following through on this request with the Ministry of Seniors and Housing;

AND FURTHER BE IT RESOLVED that City Council continue to advocate for MGA reforms to exempt CHC properties from both municipal and provincial property taxes, working through Intergovernmental Affairs, the Alberta Urban Municipalities Association, and other avenues.





## NOTICE OF MOTION CHECKLIST

The checklist is a tool intended to support the sponsor(s) of a Notice of Motion. The items listed below are important considerations when crafting and submitting a Notice of Motion. It is also intended to support other Members of Council, as the same considerations are important when reaching a decision on a Notice of Motion.

The checklist is therefore an opportunity for the sponsor(s) to:

- consider what advice might be helpful to them in formulating their proposal; and
- share key points about the advice received with their Council colleagues, to inform their deliberations.

This document is recommended to be provided to City Clerks alongside every Notice of Motion and will become part of the Corporate record. It is at the discretion of the sponsor(s) to decide with whom to consult and what information to include.

Title of the Motion: **2021 Property Tax Cancellation for Calgary Housing Company Properties**

There are two classifications of a Notice of Motion (Check the one that applies):

☒

Regular

☐

Urgent (Include details in Urgency Rationale box below)

☐

Is this Notice of Motion Confidential? (Include details in Procedural box below)

Financial and Other Resource Capacity
Council passes annual property tax cancellations for Calgary Housing Company properties. This is supported by City Administration and is factored into budget considerations.
Legal / Legislative
The Municipal Government Act (MGA) provides Council with the authority to cancel property taxes when it is considered equitable to do so. The current MGA necessitates yearly cancellations, though this Notice of Motion reaffirms direction to advocate for MGA reform to explicitly exempt Calgary Housing Company properties from municipal and provincial property taxes, ideally eliminating this yearly request.

Technical Content
Not applicable.
Procedural (Including reasons for confidentiality)
Not applicable.
Other Considerations
This Notice of Motion was prepared in collaboration with Calgary Housing Company and Assessment.
Urgency Rationale
Not applicable.



Report Number: PFC2021-0776

Meeting: Priorities &amp; Finance Committee

Meeting Date: 2021 May 18

## NOTICE OF MOTION

### RE: 2021 TAX CANCELLATION FOR SILVERA FOR SENIORS' PROPERTIES UNDER CONSTRUCTION

**Sponsoring Councillor(s):** Councillor Ward Sutherland

---

WHEREAS property tax exemptions in the Province of Alberta are governed by the *Municipal Government Act* (MGA) and ancillary regulations;

AND WHEREAS each Alberta municipality administers property tax exemptions in its jurisdiction within this legislative framework as part of the process of maintaining the municipality's property assessment roll;

AND WHEREAS to qualify for property tax exemption for seniors housing under MGA section 362(1)(m)(ii) there is a requirement that there be actual operational use of the property for the exempt purpose, and not an intended use such as a construction stage towards future operations;

AND WHEREAS Silvera for Seniors (Silvera) owns the properties with the addresses 2000 5000 50 AV SW and 1000 5000 50 AV SW (The Properties) which were in 2014 and years prior, included as part of a property exempt from taxation under MGA section 362(1)(m)(ii), pursuant to Silvera's use of the property as seniors housing;

AND WHEREAS Silvera's use and operation of The Properties ceased in 2014 when the Glamorgan building was demolished for Silvera's construction of the new Glamorgan Seniors Affordable Campus which will include both a lodge to support the Lodge program and two self-contained apartment buildings;

AND WHEREAS Silvera's intent is to construct low income seniors housing on the Properties that once operational will be eligible for exemption under MGA section 362(1)(m)(ii), pursuant to Silvera's use of the properties as seniors' lodge accommodation as defined by the *Alberta Housing Act*;

AND WHEREAS the Properties will be in the planning and/or constructing stages throughout 2021 and thus is not eligible for a 2021 property tax exemption because the use requirement in MGA section 362(1)(m)(ii) is not being met;

AND WHEREAS the Properties are not yet eligible for the City of Calgary's Non-Profit Tax Mitigation Program as the construction will not be completed within the program's required four year timeframe;

AND WHEREAS Silvera is a designated a "management body" under the *Alberta Housing Act*, operates in Calgary, and provides Lodge housing under a Ministerial Order under the Ministry of Seniors and Housing, signed by both Silvera and The City of Calgary wherein The City may be requisitioned by Silvera for annual operating and capital deficits for the provision of Lodge Program and amounts necessary to establish or continue a reserve related to Lodge program;

AND WHEREAS The City has allocated operating and capital funding to Silvera through the One Calgary budget process from 2019 to 2022 for the Lodge Program in lieu of the requisition;

AND WHEREAS Silvera's liability for property taxes for The Properties since 2015 have been cancelled by Council through Notices of Motion with provincial and municipal taxes both cancelled in 2015 and 2016, and the municipal portion cancelled from 2017 to 2020;

AND WHEREAS Silvera will be levied property taxes for 2021 totalling \$29,161.12 for The Properties including \$18,988.83 in municipal property taxes and \$10,172.29 in provincial property taxes;

AND WHEREAS through its authority under section 347 of the MGA, Council can cancel property taxes for a particular property when it considers equitable to do so;

NOW THEREFORE BE IT RESOLVED THAT the 2021 Municipal portion of the property taxes for roll numbers 202762597 and 202798450 be cancelled for all of 2021 in the amounts of \$12,096.95 and \$6,891.89.

AND FURTHER BE IT RESOLVED that The City of Calgary request the Mayor to write a letter to the Ministers of Education and Municipal Affairs requesting that The Province cancel the Provincial requisition portion of the property taxes on The Property for the 2021 tax year.

## NOTICE OF MOTION CHECKLIST

The checklist is a tool intended to support the sponsor(s) of a Notice of Motion. The items listed below are important considerations when crafting and submitting a Notice of Motion. It is also intended to support other Members of Council, as the same considerations are important when reaching a decision on a Notice of Motion.

The checklist is therefore an opportunity for the sponsor(s) to:

- consider what advice might be helpful to them in formulating their proposal; and
- share key points about the advice received with their Council colleagues, to inform their deliberations.

This document is recommended to be provided to City Clerks alongside every Notice of Motion and will become part of the Corporate record. It is at the discretion of the sponsor(s) to decide with whom to consult and what information to include.

Title of the Motion: **2021 TAX CANCELLATION FOR SILVERA FOR SENIORS' PROPERTIES UNDER CONSTRUCTION**

There are two classifications of a Notice of Motion (Check the one that applies):

☒

Regular

☐

Urgent (Include details in Urgency Rationale box below)

☐

Is this Notice of Motion Confidential? (Include details in Procedural box below)

Financial and Other Resource Capacity
Council has approved similar property tax exemptions for Silvera for Seniors in previous years when they had properties under construction with a future use for seniors affordable housing.
Legal / Legislative
The Municipal Government Act (MGA) provides Council with the authority to cancel property taxes when it is considered equitable to do so. The current MGA necessitates yearly cancellations.

Technical Content
<ul style="list-style-type: none"><li>- Silvera for Seniors is a registered charity</li><li>- The property is currently under construction and upon completion will be operated as affordable housing for low income seniors.</li><li>- City Council adopted a similar Notice of Motion in previous years</li></ul>
Procedural (Including reasons for confidentiality)
Not applicable
Other Considerations
This Notice of Motion was prepared in collaboration with Silvera for Seniors, Affordable Housing and Assessment.
Urgency Rationale
Not applicable