

## Public Land Management Practices

Canadian Municipal Land Management Practices					
City/ Region	Land Trans- actions	Land Development – Greenfield Industrial	Land Development – Greenfield Residential	Strategic Redevelopment	Comprehensive Land Management Program?
City of Calgary AB	✓	<ul style="list-style-type: none"> <li>Support local economic development</li> <li>Serviced land supply</li> </ul>		<p><b>RE&amp;DS (City BU)</b> Redevelopment City Business Unit-TOD and strategic sites incl. The Bridges, Midfield, Anderson TOD,</p> <p><b>Calgary Municipal Land Corporation (CMLC)</b> Redevelopment and investment in The Rivers District (East Village and East Victoria Park), David D. Oughton School site.</p>	<p><i>Partial – evolving</i></p> <p><b>Corporate Land Management Framework (2015)</b> (for the stewardship of City lands)</p> <ul style="list-style-type: none"> <li><b>Vision</b> - City-owned lands are recognized as valuable assets that support the services The City of Calgary provides to citizens. Responsible land stewardship and decision making will be achieved through collaborative and consistent land management policies, practices and standards.</li> <li><b>Governance</b> – collaborative and corporate oversight and decision-making</li> <li><b>Operating Standards</b> to guide land management</li> <li><b>Guiding Principles</b> – Land management decisions will:               <ol style="list-style-type: none"> <li>1. Address citizen service level expectations without compromising the ability to meet future service needs in a manner that is respectful and deliberate.</li> <li>2. Balance current economic, environmental and social benefits and overall goals and objectives of The Corporation.</li> <li>3. Work across The Corporation to achieve land management decisions that are collaborative and integrated.</li> <li>4. Respond to changing economic, environmental and social factors over time and will be improved through periodic monitoring, measuring and transparent reporting.</li> <li>5. Consistently follow clearly defined decision-making criteria and processes in a fair, equitable and timely manner.</li> </ol> </li> </ul> <p><b>Industrial Land Strategy – for the development of City-owned lands (2013)</b></p> <ul style="list-style-type: none"> <li><b>Vision</b> – Lead in the creation of sustainable industrial parks that support economic development in Calgary and maximize the long-term benefits for all Calgarians.</li> <li><b>Guiding Principles</b> <ol style="list-style-type: none"> <li>1. Support local economic development</li> <li>2. Achieve Corporate objectives</li> <li>3. Operate within our financial capacities</li> <li>4. Foster a fair and transparent business environment</li> <li>5. Attract the right business</li> </ol> </li> <li>10-year action plan to deliver industrial land development services</li> </ul>

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City of Lethbridge AB	✓	<ul style="list-style-type: none"> <li>Support economic development</li> <li>Land Banking</li> <li>Land supply (10 years)</li> <li></li> </ul>	<ul style="list-style-type: none"> <li>Land Banking</li> <li>Land Supply (10 years)</li> <li>Create attractive and efficient neighbourhoods</li> <li>Compete to keep lot prices down</li> <li>Capture incremental value for public</li> </ul>		<b>City Involvement in Land Development (1977) - Framework</b> <ol style="list-style-type: none"> <li>Land banking and land ownership</li> <li>Development of City-owned land for urban use</li> <li>The control of land use and development of both public and private land through zoning and development control</li> </ol>
City of Edmonton AB	✓	<ul style="list-style-type: none"> <li>Support economic development</li> <li>Serviced land supply</li> <li>Streamline approvals</li> <li>Remove obstacles</li> <li>Build infrastructure</li> <li>Maintain industrial data</li> </ul>	Enterprise Land Development (ELD) - City business unit that has developed new residential communities to ensure lot supply for small builders, innovation and affordability through self-sustaining operations.	Civic Property Services BU - Leverages vacant land (incl. surplus school sites) to deliver Council strategic direction.  EELD - redevelopment of strategic City sites e.g. Blatchford (Municipal Airport redev't), Ft. Road Station (TOD).	<i>Comprehensive Strategy currently in development</i>  <b>Land Governance Model (2018)</b> <ul style="list-style-type: none"> <li>Proposing breaking up Enterprise Land Dev't (ELD) and Municipal Lands</li> <li>Set up new Reserve Account for Acquiring Municipal Lands</li> <li>Differentiate dividends paid by both programs (ELD and Municipal Lands)</li> </ul> <b>City of Edmonton Land Management Guidelines (2018)</b> Overriding Principle to guide decisions and dispute resolution: <i>"Land is a Corporate Asset"</i> .
City of Surrey BC	✓	<ul style="list-style-type: none"> <li>New jobs and economic growth</li> <li>Implement broader corporate planning policies and environmental and other conditions</li> </ul>	<ul style="list-style-type: none"> <li>Limited Infill residential development of surplus lots</li> </ul>	<b>Surrey City Development Corporation(SCDC)</b> Industrial, Residential, Mixed use projects e.g. Surrey City Centre, Campbell Hts. Industrial Park	<b>SCDC Mandate:</b> <ol style="list-style-type: none"> <li>To develop land for financial profit and the betterment of the City of Surrey.</li> <li>To build an income producing real estate portfolio.</li> <li>To advance City's financial, social, economic and community objectives.</li> </ol> <ul style="list-style-type: none"> <li>City has a partnering agreement, which align City goals to SCDC</li> <li>Acts as catalyst and facilitator to accelerate beneficial development</li> <li>Partners with private sectors on real estate development projects</li> <li>Provides consulting advice to City to achieve its visions</li> </ul>

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		<ul style="list-style-type: none"> <li>Financial considerations of the project</li> </ul>			<ul style="list-style-type: none"> <li>Provides annual dividend to City of Surrey</li> </ul>
City of Vancouver BC	✓			Vancouver Affordable Housing Endowment Fund positions City land for non-market housing. It includes acquisition and assembly of new sites.	<p><b>Property Endowment Fund (PEF) Strategy</b> (1975)– long-term strategy for the City's real estate investment portfolio.</p> <p><b>Purpose:</b> To preserve and increase the real value of PEF assets and increase the Fund's ownership of strategic sites</p> <p><b>Goal:</b> To manage PEF assets in such a way to preserve their real value and generate a reasonable economic return. In addition, where it is possible without jeopardizing either the real value of the Fund or the reasonable return on its assets, to support the City's public objectives.</p> <p><b>Objectives to:</b></p> <ul style="list-style-type: none"> <li>Manage and develop Fund's holdings to generate reasonable economic return</li> <li>Buy and sell land to assemble a land inventory that offers the best opportunity to preserve and where possible increase the real value of the PEF assets</li> <li>Support the City's public objectives</li> <li>Develop a program to accomplish the conversion of non-strategic holdings to strategic ones</li> </ul> <p><b>Priorities:</b> In making decisions, the financial criteria must first be met, however, where possible, preference will be given to opportunities that also meet public criteria.</p> <p><b>Strategic Sites</b> defined as: Sites that possess best opportunity to achieve either the PEF financial objectives, or both financial and public objectives.</p>
City of Saskatoon SK	✓	<p>Saskatoon Lands (Devt Corp)</p> <ul style="list-style-type: none"> <li>Land Supply</li> </ul>	<p>Saskatoon Lands (Devt Corp)</p> <ul style="list-style-type: none"> <li>Land Supply</li> </ul>	Sells City owned parcels with conditions to deliver specific City	<p><b>Saskatoon Land</b> (Development Corporation) operates one of the largest, self-financed municipal land development programs in Canada.</p> <p>Core Mandate</p>

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City of Saskatoon( cont'd)		<ul style="list-style-type: none"> <li>Design innovation and leadership in new growth</li> <li>Provide competitive ROI on investments</li> <li>Finance other civic projects</li> </ul>	<ul style="list-style-type: none"> <li>Design innovation and leadership in new growth</li> <li>Provide competitive ROI on investments</li> <li>Finance other civic projects</li> </ul>	objectives - residential, affordable housing units, mixed use, environmental remediation, etc. Uses RFP process for larger, strategic sites.	Develops new residential communities and serviced industrial parks
City of Toronto ON	✓			<p><b>CreateTO</b> – has two corporate arms via service agreements to deliver specific real estate solutions:</p> <p><b>Build Toronto</b> - Develops commercial properties</p> <p><b>Toronto Port Lands Company</b> - Manages real estate assets and promotes revitalization in Toronto's Port Lands.</p>	<p><i>Strategy in progress</i> – launched City-wide Real Estate transformations in 2018 to address diverse governance structures, program objectives, investment lands processes, data and technology, skills and expertise among 24 City agencies and corporations involved in real estate activities.</p> <p><b>CreateTO</b> – a City Board established to act on behalf of Council to manage the City's real estate portfolio, develop City buildings and lands for municipal purposes and deliver client focused real estate solutions to City divisions, agencies and corporations.</p> <ul style="list-style-type: none"> <li>Provides centralized real estate and facilities management to ensure the effective use and management of an 8000-property portfolio.</li> <li>To adopt a Corporate Real Estate Strategy in 2019 to provide a city-wide approach for the delivery of real estate services and promote a balance of community and economic benefits.</li> </ul> <p><b>Corporate Asset Management Policy</b> (May 2019)</p> <ul style="list-style-type: none"> <li>Includes "land and land improvements"</li> <li>Take an evidence-based approach</li> <li>Considers whole City needs and decisions will not occur in isolation from other City goals – Strategic Plan, Official Plan, Long-term Financial Plan, Climate Mitigation Strategy, Resilience Strategy, Master Plans, Service Plans</li> <li>Requirement for a Land-specific Asset Management Plan</li> </ul>

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City of Hamilton ON	✓				<b>Real Estate Portfolio Management</b> <ul style="list-style-type: none"> <li>to rationalize municipal assets</li> <li>dispose of non-core municipal assets</li> <li>Long-term land leases</li> </ul> <i>See also their 2004 comprehensive real estate study below</i>
Regional Mun. of Ottawa ON	✓			<b>Ottawa Community Lands Development Corporation</b> - implement Council directed land development and sale of strategic land parcels, incl. TOD on new LRT lines.	<i>In development</i>  <b>Corporate Real Estate Office (CREO)</b> Disposal of Real Property – Policy/Procedures – <ul style="list-style-type: none"> <li>All City-owned land is a corporate asset, not an asset of individual Department</li> <li>Land disposed of at current market value</li> <li>Seeks to use City land to achieve other corporate initiatives, including the objectives of strategic and Official Plans, affordable housing, environmental and easement protection.</li> </ul> <b>Ottawa Community Lands Development Corporation</b> <ul style="list-style-type: none"> <li>To obtain "optimal value" pertaining to financial and non-financial (municipal objectives)</li> </ul>
Halifax Regional Mun. NS	✓			May redevelops high value property, and may act as land developer or partnering.	<b>Administrative Order 50 Disposal of Surplus Real Property (2013)</b> Identifies surplus land as follows, with differing processes to dispose: <ul style="list-style-type: none"> <li>Economic Development – maximize value, attract targeted industry and employment, community regeneration</li> <li>Extraordinary Property – historic or legal distinctions with extraordinary processes to allow disposal</li> <li>Community Interest Properties</li> <li>Ordinary Sale – achieving market value through a variety of tactics</li> <li>Remnant – negotiation with abutting property owner</li> </ul>

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Agency	Other Public Land Organizations
<b>Government of Canada Treasury Board</b>	<p>Maintains a comprehensive suite of Policies and Frameworks to guide full range of land and land management issues - pertains to all Federal Departments requiring real property (including land)</p> <p><b>Policy on Management of Real Property (2006, as amended)</b></p> <p><b>Objective</b> The objective of this policy is to ensure real property is managed in a sustainable and financially responsible manner, throughout its life cycle, to support the cost-effective and efficient delivery of government programs.</p> <p><b>Expected Results</b> The expected results of this policy and its associated directive and standards are:</p> <ul style="list-style-type: none"> <li>• effective and efficient management that enables program outcomes and serves broader government objectives.</li> <li>• financially responsible management that maximizes the long-term economic advantage to the Crown and provides best value to the Canadian taxpayer.</li> <li>• barrier-free access and use of federal real property and services that ensures inclusiveness and non-discrimination.</li> <li>• cultural and environmental stewardship that contributes to the preservation and protection of our heritage and the environment.</li> <li>• fair, open and transparent transactions that ensure equitable treatment.</li> <li>• respects market value principles.</li> </ul>
<b>Canada Lands Company (Crown Corporation)</b>	<p><b>Canada Lands Company</b> helps federal government departments and agencies deal with surplus strategic real estate. When properties are no longer required for program purposes by the federal government, they are acquired by Canada Lands Company and related carrying costs for the government are eliminated. Canada Lands Company also generates substantial community and financial value for the Government of Canada through the sale of properties.</p> <p><b>Providing Value to Canadians policy</b> Canada Lands Company obtains the optimal value in the sale of its assets by balancing financial returns and community benefits. Price is not the sole determinant and is only one criterion in determining optimal value.</p> <p>In all of the Company's transactions, it strives to:</p> <ul style="list-style-type: none"> <li>• be equitable and transparent.</li> <li>• encourage the use of competitive processes.</li> <li>• select reputable purchasers that are well-qualified in their respective areas of expertise.</li> <li>• require that employees of the Company conduct their sales activities in a manner consistent with the Company's ethics and values.</li> <li>• keep appropriate and adequate records of the selection process.</li> </ul>
<b>Province of Ontario Ministry of Natural Resources</b>	<p><b>Strategic Direction of Management of Ontario Crown Lands (1993)</b> Provides context on Why? and How? the Province of Ontario will manage its public lands</p> <p><b>Mission:</b></p> <ul style="list-style-type: none"> <li>• Protect Province's title to land to safeguard environment, support social and economic development.</li> <li>• Support needs of clients – increasing process efficiencies and information.</li> <li>• Remain leaders in land management.</li> </ul>

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	<p><b>Goal for Managing Crown Lands</b></p> <ul style="list-style-type: none"> <li>to contribute to Ontario's environmental, social and economic well-being by providing for orderly use and sustainable development of Crown land.</li> </ul> <p><b>Guiding Principles</b></p> <ul style="list-style-type: none"> <li>A healthy natural environment and ecosystem integrity are essential co-requisites to sustainable development and prosperity; they must be regarded as overriding priorities.</li> <li>The needs of both present and future generations must be provided for.</li> <li>Land is the base for many renewable and non-renewable natural resources and must be "managed" with due regard for all resource objectives, including those for aquatic environments, through an ecosystem approach to stewardship.</li> <li>As a limited resource, land has intrinsic value; Crown Land is no less valuable than private land.</li> <li>Sound planning is vital; it must be based on the best available information and involve the widest possible range of expertise and perspectives.</li> <li>The public, interest groups and stakeholders must be actively involved in Crown Land use planning and decision-making.</li> <li>All clients must be treated fairly; principles and processes behind land management decisions must be open and understandable to all.</li> <li>Consistent with the "Statement of Political Relationship" (between Aboriginal governments in Ontario and the provincial government, August 1991), management activities must accommodate Crown Land and natural resources co-management arrangements and support Ontario's recognition of the inherent right of First Nations to self-government</li> </ul>

## Public Land Management Practices

### Research - Municipal Land Management Best Practices

<p><b>City of Hamilton ON</b></p>	<p><b>Real Estate Portfolio Management Strategy (2004)</b> – Metropolitan Knowledge International (MKI), in association with Chapple Consulting Services, and McCallum Sather Architects, Inc.</p> <ul style="list-style-type: none"> <li>This Study was undertaken to deal with the management of a significant real estate portfolio resulting from the amalgamation of The City of Hamilton with The Region of Hamilton-Wentworth.</li> </ul> <p><b>Principles:</b></p> <ol style="list-style-type: none"> <li>1. Real property assets will be used and managed cost effectively;</li> <li>2. Surplus property will be sold unless there is a compelling reason to retain it, including public interest considerations.</li> <li>3. City will have regard to the current and future needs of City departments, taking into account all relevant policy and financial considerations.</li> <li>4. City will acquire real property only in support of municipal programs</li> <li>5. Responsibility for City of Hamilton real estate matters rests with the Corporate Buildings and Real Estate Division.</li> <li>6. Except where Council specifies otherwise, all City of Hamilton real property transactions, including leases, will be based on fair market value</li> <li>7. The Real Estate section will maintain a database of the properties owned and leased by the City of Hamilton, which shall be accessible to the public in accordance with the Municipal Act.</li> <li>8. Every three years, The City will prepare a Real Estate Management Plan to review its real estate portfolio to stay abreast of changing needs.</li> <li>9. Procedures will be developed to ensure consistency in the way the City handles all property acquisitions, disposals, and leasing.</li> </ol>
<p><b>City of San Diego, CA</b></p>	<p><b>Best Practices Methodology for Real Assets Department (2007)- Grubb &amp; Ellis Company</b></p> <ul style="list-style-type: none"> <li>Review completed for City to provide a best practice review and methodology based on government and private sector real estate organizations.</li> </ul> <p><b>Recommended approach:</b></p> <p><b>Processes</b> – focusing on portfolio performance, operating portfolio planning, customer service</p> <ul style="list-style-type: none"> <li>Develop an overall Portfolio Plan to provide a framework for real estate decision-making, by portfolio: <ul style="list-style-type: none"> <li>City's property and occupancy strategy</li> <li>Income-producing property</li> </ul> </li> <li>Info gathering to drive good decision-making and continuous improvement</li> </ul> <p><b>People</b></p> <ul style="list-style-type: none"> <li>commitment to people through training in business processes, new technology, and professional real estate techniques</li> <li>Commit people resources to "portfolio management" - to develop consolidated portfolio plan and monitor property performance and market activity.</li> </ul> <p><b>Performance Measures</b></p> <ul style="list-style-type: none"> <li>Standard Real Estate performance measures (Rates of Return, market comparison, etc.) in formats that support portfolio analysis</li> <li>Measures relating to execution (response times, unresolved transactions, accuracy and completion of property records)</li> <li>Managing transition to new business model. (schedules, implementation, successful transactions)</li> </ul> <p><b>Technology</b> –</p> <ul style="list-style-type: none"> <li>Need systems to keep and track data that supports portfolio monitoring, performance measures, project tracking and property agents/portfolio analysts</li> <li>System that has lease admin, portfolio management and project management</li> </ul> <p><b>Authority</b></p> <ul style="list-style-type: none"> <li>Appropriate authority delegated to complete transactions – from customer service perspective and portfolio performance</li> <li>Batched approvals – Council approve a portfolio plan rather than individual transactions with annual reporting</li> <li>Authority within a box – Admin to execute plans that comply with Portfolio Plan</li> <li>Management by exception – Council focus should be on anomalous transactions (magnitude or complexity) and monitoring flow of routine transactions.</li> </ul>